

ANNUAL SURVEY REPORT: MOLDOVA

3rd Wave (Spring 2018)

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

June 2018

**#
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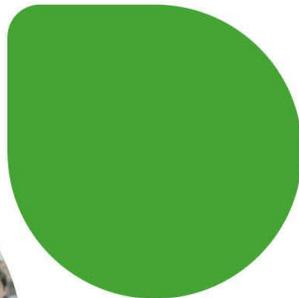
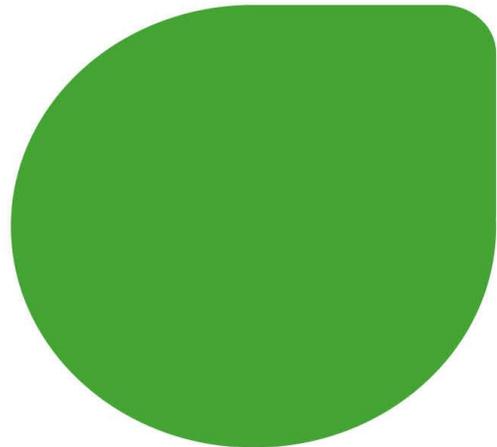
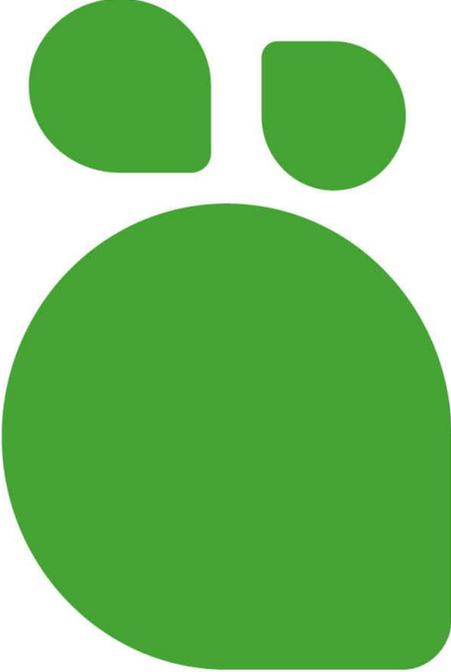


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*The surveys have been carried out in the six Eastern Partner countries by ACT LLC
and their network partners*

1. Background

Between March and April 2018, a third wave of annual surveys was carried out across the six Eastern Partner countries (Armenia, Azerbaijan, Belarus, Georgia, the Republic of Moldova and Ukraine). The research was conducted within the framework of the EU-funded ‘OPEN Neighbourhood — Communicating for a stronger partnership: connecting with citizens across the Eastern Neighbourhood’ (‘**EU NEIGHBOURS east**’) project.

The ‘**EU NEIGHBOURS east**’ project aims to increase the understanding of EU support in the Eastern Partner (EaP) countries through improved communication. The **overall objective** of the project is to contribute to the improvement of public perception of the EU, as well as to a better understanding of European policies and their impact through the regional and bilateral EU support and cooperation programmes in the EaP countries.

The project develops information and communication materials, carries out awareness-raising and information campaigns, and assesses the perception of the EU and its support through opinion polling and media monitoring.

The purpose of the annual surveys is to investigate the opinion and the level of information that citizens of the EaP countries have on the EU in general and, in particular, on EU-funded cooperation and development programmes/projects. In order to monitor changes over time, the surveys are being carried out annually from 2016 until 2019.

This document presents the results of the **3rd wave of annual surveys** (spring 2018) conducted in **Moldova**¹ and covers the following broad topics:

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

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

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

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

2. Research methodology in brief

The survey was conducted in March 2018, following the same methodology adopted in the previous rounds of data collection (spring 2017 and 2016): 1,000 face-to-face interviews were carried out and respondents were randomly selected according to the sampling strategy described below. In order to estimate the characteristics of the target population (i.e. general population aged 15 and over and living in the country), the sampling weights were calculated by applying a specifically designed estimation procedure.

Sampling strategy

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

In the first stage, the sample was composed of 30 units (cities/towns) and stratified by unit size, expressed in terms of population, level of urbanisation and geographical area. Three groups of settlements² and three areas³ were used for a total of nine strata. Within each stratum, three or four sample units were randomly selected, with the probability of their selection proportional to their size. A compromise between an equal allocation and a proportional allocation was applied in order to distribute the secondary sampling units (1,000 individuals) by strata. In each selected settlement, a minimum of 20 interviews were carried out. The additional interviews that were carried out were distributed proportionally to the PSU's size.

The second-stage sample was also stratified. In this case, gender and age⁴ were considered for a total of six strata. In each selected settlement, secondary sampling units were distributed proportionally among strata.

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

Estimation phase

An estimation procedure was carried out in order to estimate the characteristics of the target population from the survey respondents. The technique used for the construction of the survey estimator (i.e. sampling weights) was based on the predictive approach to regression estimator. In particular, a calibration estimator was built based on the general category of model-assisted estimators (Deville and Särndal 1992). The procedure included the computation of a sampling design weight for each sampled respondent by calculating the inclusion probability of both primary and secondary sampling units (i.e. settlements and individuals) and the calibration of the sampling design weights to known population totals. The calibration variables were the same as those used in the previous wave (settlement size, gender, age, employment status, geographical area, education level, religious faith and mother tongue).

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

³ Geographical areas: 1) Centre (Chişinău, Dubăsari, Glodeni, Nisporeni, Telenesti, Criuleni, Călărăsi, Străseni, Ungheni, Orhei); 2) North (Soldănesti, Donduseni, Rezina, Ocnita, Riscani, Briceni, Edinet, Drochia, Floresti, Fălesti, Singerei, Soroca, Bălţi); 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; 3) 55 or more years.

⁵ This technique is based on very precise instructions for the interviewers. First, a starting point should be selected for each cluster. Second, it is necessary to define a step. A step can be defined according to the size of the cluster. The third important consideration is the movement route. Each interviewer should have detailed instructions on how to follow the route in rural settlements and urban areas. Each interviewer should begin from the starting point, according to the predefined step size and route, and contact a total predefined number of households.

3. Survey findings

3.1. Executive summary

General perceptions of the EU

- Nearly half of Moldovan citizens (48%) have a positive image of the European Union (EU), 34% feel neutral about it and 14% hold a negative view. Compared to 2017, positive perceptions have increased by 5 percentage points and a decrease in shares of both ‘neutral’ and ‘negative’ Moldovans has been recorded (down 5% and 3% respectively).
- Like in 2017, most Moldovans tend to ‘strongly’ or ‘very strongly’ associate all values with the EU. In fact, three quarters of the population associate the EU with human rights (78%), economic prosperity (76%), individual freedom (75%), freedom of speech (74%), rule of law (72%) and democracy (72%). Lack of corruption, despite scoring the lowest association with the EU (50%), is in fact Moldovans’ priority at a personal level.
- The European Union is the most trusted foreign institution, with 64% of the population tending to trust it – an increase of 10 percentage points since 2017. NATO has the lowest level of trust (30%), with 53% of Moldovans oriented towards not trusting it.

EU relations with Moldova and awareness of EU financial support

- Trust towards the EU is mirrored by the appreciation of the relations between Moldova and the EU. Three quarters of Moldovans (up 6% since 2017) describe them as ‘fairly good’ (66%) or ‘very good’ (8%).
- Nearly all citizens are also well-aware of the financial support provided by the EU to Moldova (87%, up 8% since 2017). Accordingly, the share of Moldovans who do not know whether the EU supports their country is very small, at only 9% of citizens.
- Compared to 2017, there has been a large increase (up 18%) in the share of people who consider the EU’s financial support effective, which is currently at 55%. However, the knowledge of specific EU-funded programmes has decreased slightly (down 7% since 2017) and currently 45% of citizens know about them. The most well-known programmes relate to the field of infrastructure development projects (61%). Education, health/medicine and agricultural/rural development programmes were mentioned by between 39% and 31% of citizens.
- When assessing the benefits stemming from the EU’s support, Moldovans mainly cited the positive effects on infrastructure (56%), trade (53%), access to more products and services (53%), education (52%) and the health care system (51%), and their appreciation is overall more positive than in 2017. Fighting corruption is again among the areas that have benefitted least from EU support (30%) and 44% of citizens would expect a greater involvement of the European Union to tackle the issue.

Media usage as sources of information

- As in 2017, television and ‘word of mouth’ are the most popular sources of information in Moldova – only 9% and 20% respectively never use them. Internet is used by three quarters of citizens and 35% of the population always rely on it. Social media and the radio are used by around 55% of the population, the press by slightly less than half (45%) and the official EU website by 25% of Moldovans, with most of them sometimes accessing it.
- Around 60% of Moldovans frequently access the Internet or social media and 32% traditional media only, whereas only 8% of the population do not rely on any media. Like in 2017, the circulation of national media in Russian and in Romanian is very similar as around 85% of Moldovans rely on them.

Around 70% of Moldovans also rely on foreign media in Russian, while both national and foreign media in other languages are used more rarely (31% and 28% respectively).

Sources of information about the EU

- Three quarters of Moldovans say they have seen or heard information about the EU in the last three months. This figure has increased since 2017 (up 8%) and its value is very similar to that recorded in 2016. Most of the population feel that the EU is presented positively in national media (56%).
- Passive exposure stems mostly from television (72%); over 55% of citizens who heard or saw information about the EU did so through the Internet and 16% through social media. ‘Word of mouth’, radio, print press and the official EU website were cited by 23%, 16%, 7% and 5% of the population respectively.
- Compared to 2017, both frequent and sporadic access to information on the EU has recorded an increase (from 21% to 31% for frequent access and from 21% to 30% for sporadic access). Moldovans prefer to search for information about the EU in their national language (75%) and only 20% look for information in Russian. English is even less frequently used, by 5% of the population.
- Compared to 2017, generic searches (29%, down 11%) have been replaced by more specific queries on economic news (46%, up 15%). Other most searched topics are social and political news (34%), the EU’s relations with Moldova (34%) and the lifestyle in EU Member States (33%). One in four citizens also searched for opportunities offered by the European Union (25%) and education and cultural programmes (22%), whereas around one in ten searched for Moldova’s relations with EaP countries (11%).
- The assessment of the quality of information is rather less positive than in 2017. Still, over 90% of citizens rate it ‘very’ or ‘quite positively’ in terms of its accessibility (90%), user-friendliness (90%) and comprehensiveness (94%), and around three quarters find it reliable (74%) and trustworthy (75%).

View of Moldova’s current situation

- The share of Moldovans who tend to trust national, regional and local institutions is extremely low and has been at around the same level since 2016. In fact, 84% of Moldovans openly distrust the parliament, 81% the political parties, 73% the government and 59% regional and local authorities. The only institution trusted by most of the population is the religious authority (70%, up 4% since 2017).
- Accordingly, 81% of Moldovans are ‘dissatisfied’ with the way democracy works in their country, of which 29% are ‘not at all satisfied’. Compared to 2017, citizens acknowledge only modest progress in the path towards democratic governance. Corruption and poor governance continue to be the most problematic areas, with 83% and 75% of the population respectively convinced that these are issues for Moldova. The only element that the majority of the population feel applies to their country is gender equality (64%).
- Like in 2017, Moldovans are more optimistic about their personal future (70%) than the future of their country (50%). However, a slight improvement in attitudes was recorded (up 7% for the future of their country and up 5% for their personal future).
- As in 2017, Moldovans are mostly concerned about low salaries and pensions (49%) and corruption (48%). Around 40% are also worried about low living standards and poverty (40%) and unemployment (37%). Compared to last year, more Moldovans cited migration (30%, up 12% since 2017) and the economic crisis (30%, up 10% since 2017).

Profiling attitudes towards the EU: positive versus neutral

- Moldovans with a positive view of the EU account for nearly half of the population (48%). Their most peculiar trait is that nearly all are native Romanian speakers (95%). They also tend to be slightly more concentrated among the younger and most educated groups, and particularly among residents of the centre of the country. On the other hand, neutral Moldovans, who account for 34% of the population, are more concentrated among native speakers of Russian and other languages, males, older individuals and citizens with a low-to-medium level of education. As for geographical residence, they are clearly more likely to live in the north of the country.
- EU supporters are more likely to be actively and passively exposed to information about the EU. In fact, nearly all had seen or heard information about the EU in the three months preceding the survey (85%) and 45% look for/access information on the EU frequently or very frequently – the corresponding figures in the neutral population stand at 71% and 21% respectively.
- If searching for EU-related information, nearly all EU supporters do so in their national language (85%), whereas 70% of neutral citizens rely frequently on media in Russian. Neutral citizens are also less likely to rely on media in another foreign language (14% versus 22% respectively) and new media (61% versus 68%) than EU supporters.
- A neutral image of the EU is linked to a lower level of confidence in all foreign institutions – except the Eurasian Economic Union (EEU) – than EU supporters and even the overall population. Only 53% of neutral citizens trust the EU (89% for EU supporters), 33% trust the United Nations (UN; 57%), 18% trust NATO (47%), and 52% the EEU (29%). In addition, 71% of neutral citizens describe the relations between Moldova and the EU as ‘good’, 87% acknowledge EU support to their country and only 46% rate it as effective (the figures are 91%, 95% and 69% respectively for EU supporters).
- When it comes to the assessment of common beliefs, EU supporters tend to share a much stronger and more positive vision of the EU than neutrally oriented citizens. In fact, between 68% and 83% of individuals with a positive image of the EU ‘strongly’ or ‘somewhat’ agree with all the proposed statements (versus between 43% and 54% for neutral citizens).
- Neutral individuals are also less optimistic than EU supporters and the overall population, with 48% openly pessimistic about Moldova’s future and 34% about their personal future (41% and 16% respectively for EU supporters). Compared to EU supporters, they seem more concerned about low salaries and pensions, low living standards and poverty, the economic crisis and high prices and taxes.

3.2. Perceptions of the European Union

Nearly half of Moldovan citizens (48%) have a positive image of the European Union (EU), 34% feel neutral about it and 14% hold a negative view. Compared to 2017, positive perceptions have increased by 5 percentage points and a decrease in both shares of neutral and negative Moldovans (down 5% and 3% respectively) was recorded. The levels of trust in the EU (64%) are also at their highest since 2016, as well as the appreciation of the relations between the EU and Moldova (74%). Nearly all citizens are well-aware of the financial support provided by the EU (87%) and Moldovans particularly appreciate the positive effects on infrastructure (56%), trade (53%), access to more products and services (53%), education (52%) and the healthcare system (51%). Corruption is again among the areas that are seen to have benefitted least from the EU's support, and 44% of citizens would request a greater involvement of the EU to tackle the issue.

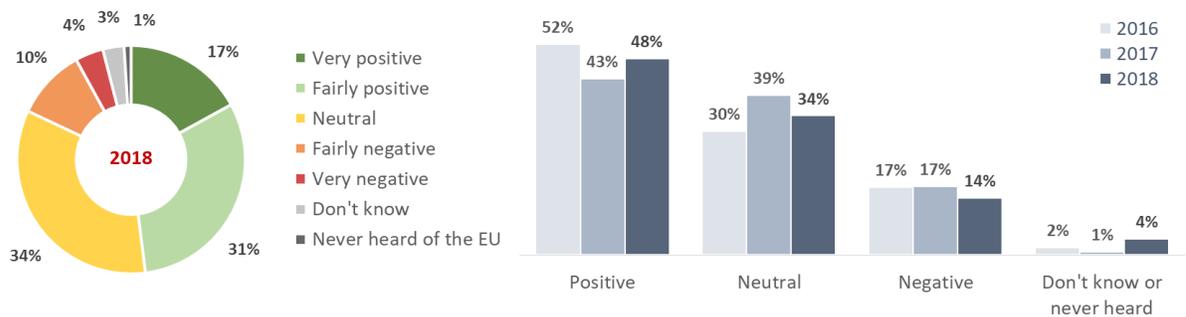
This section looks at how Moldovan citizens perceive the EU's image and their opinion on the benefits of the EU's financial support, also compared with the role of other foreign institutions.

3.2.1. General perceptions of the EU

Nearly half of Moldovan citizens (48%) have a positive image of the European Union (EU), 34% feel neutral about it and 14% hold a negative view. Compared to 2017, positive perceptions have increased by 5 percentage points and a decrease in shares of both neutral and negative Moldovans has been recorded (down 5% and 3% respectively).

Significant differences were found within most socio-demographic groups, and younger citizens (61%), highly educated individuals (75%) and residents of the centre of the country (62%) are all more positive towards the EU than their socio-demographic counterparts. Native Romanian speakers are also more positive (58%) than citizens who have Russian as their mother tongue (18%); the latter are equally split between neutral and negative views (42% and 38%).⁶

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



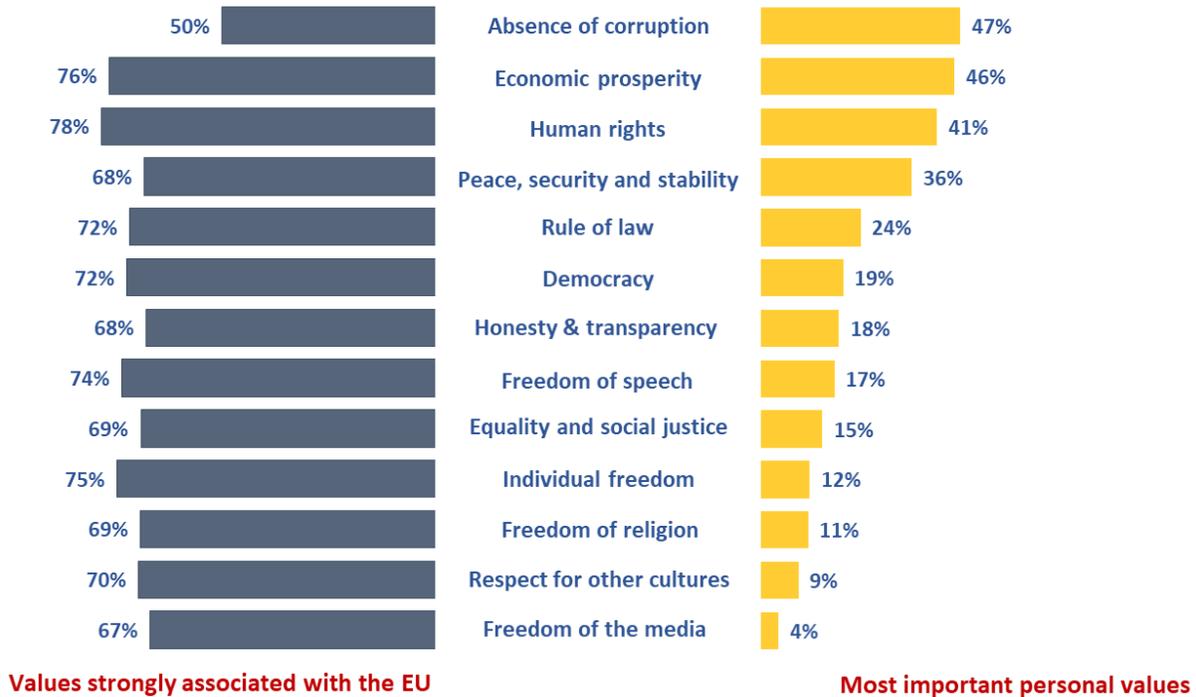
Like in 2017, most Moldovans tend to ‘strongly’ or ‘very strongly’ associate all values with the EU, except for the absence of corruption. In fact, three quarters of the population associate the EU with human rights (78%), economic prosperity (76%), individual freedom (75%), freedom of speech (74%), rule of law (72%) and democracy (72%). It is also interesting to note that, although it scored the lowest association with the EU (50%), absence of corruption is in fact Moldovans’ priority at a personal level. Nearly half of the population (47%) placed it among the three most important values. Among personal values, economic prosperity (46%), human rights (41%), peace, security and stability (36%) and rule of law (24%) were also cited by relevant

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

shares of the population. All other elements have a relatively lower ranking, with less than 10% of Moldovans citing respect for other cultures (9%) and freedom of the media (4%).⁷

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

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

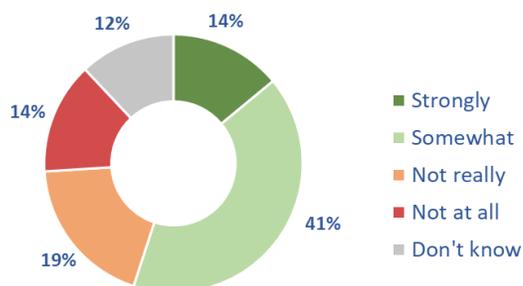


Moldovans are also quite confident that ‘the EU fosters the preservation of traditional values in [their] society’.⁸ Over half of Moldovans ‘strongly’ (14%) or ‘somewhat’ (41%) agree with the above statement, a third are ‘not really’ (19%) or ‘not at all’ (14%) convinced by it and only 12% do not have a definite opinion on the issue.

⁷ More details are provided in Annex – Table 2.

⁸ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the Union is perceived by citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not really’, ‘not at all’, or ‘don’t know’): ‘the EU fosters the preservation of traditional values in our society’, ‘the EU provides tangible benefits to citizens in their everyday lives’, ‘the EU is committed to fighting corruption’, ‘the EU is an independent actor in foreign relations’ and ‘integration with the EU increases the country’s security and stability’.

FIGURE 3 – ‘The EU fosters the preservation of traditional values in our society’.
To what extent do you agree with this statement about the EU?
(Percentages refer to Moldovans who have heard about the EU)



Perceptions of the EU were also assessed through an open-ended question, whereby respondents were asked to name the first issues that came to their mind when thinking of the EU. One in three Moldovans did not answer the question, because it was too hard to answer (33%). Positive opinions were mostly recorded, the most common being economic prosperity/high standards of living (24%). The concept of the EU was also linked to a general feeling of confidence in the future/optimism by 9% of the population, with another 4% mentioning great opportunities for personal growth/development and rule of law/human rights and equality and 2% good working conditions. As for negative perceptions, 4% felt they could not trust the EU, 2% were afraid they will lose sovereignty, another 2% mentioned moral decline, while 1% explicitly stated that they are “more for Russia”.

Moldova is a member of several international organisations, including the UN. It is developing closer political and economic ties with the EU and is an observer to the EEU. Moldova is not a member of NATO. Among these, the European Union is the most trusted foreign institution, with 64% of the population tending to trust it – an increase of 10 percentage points since 2017. NATO has the lowest level of trust (30%), with 53% of Moldovans oriented towards not trusting it.

Quite predictably, the level of trust in the EU is highly linked to the citizens’ mother tongue. Romanian speakers are in fact much more likely to trust the European Union as compared to Russian speakers (74% versus 31%). The level of trust also increases with the level of education and decreases according to age: 77% of highly-educated individuals tend to trust the EU, compared to 60% of Moldovans with a low-to-medium level of education; meanwhile, 76% of younger Moldovans tend to trust the EU, compared to 60% in the 34-55 age bracket and 51% of those older than 55. The European Union is also particularly trusted by residents of the centre of the country (72%), where Chişinău, the capital city, is located.⁹

⁹ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 3.

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

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

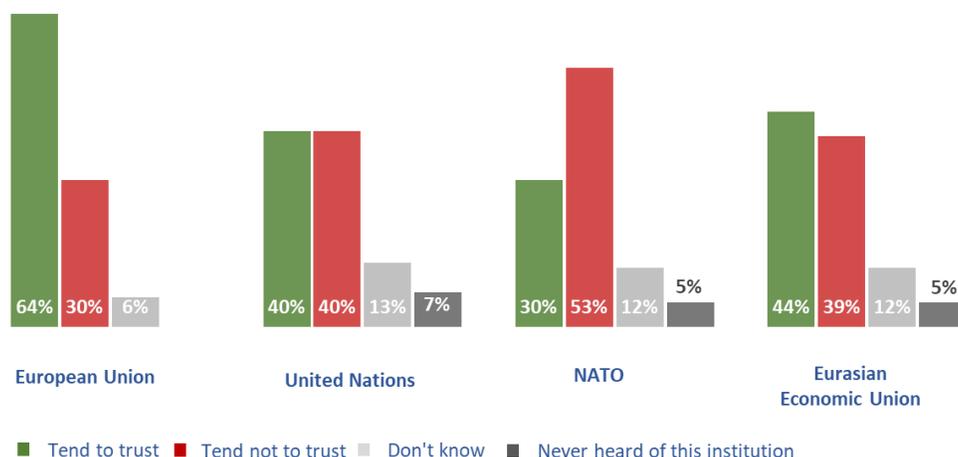
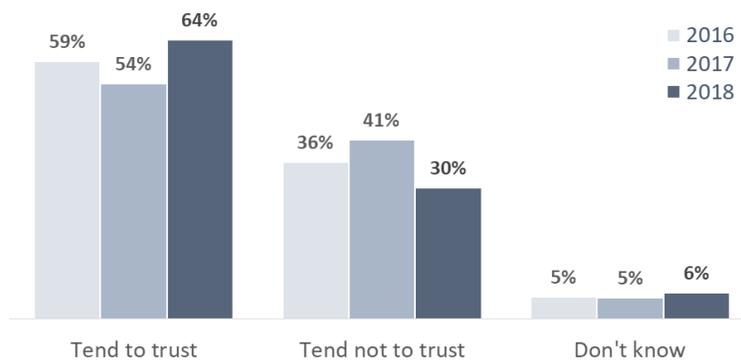


FIGURE 5 – Trust towards the EU (Q2.11)

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



3.2.2. EU relations with Moldova and awareness of EU financial support

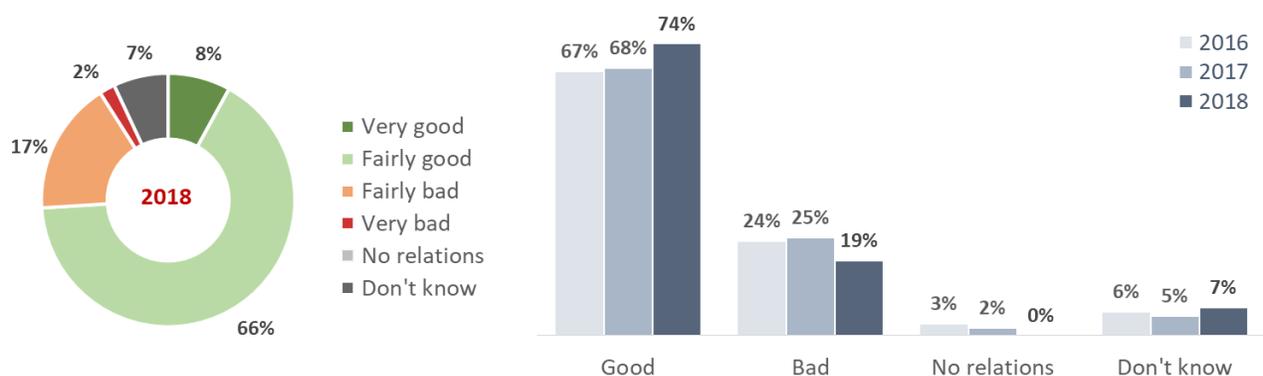
Trust towards the EU is mirrored by the opinion on the relations between Moldova and the EU. Three quarters of Moldovans (up 6 percentage points since 2017) describe them as ‘fairly good’ (66%) or ‘very good’ (8%). Currently, 19% of individuals rate the relations as ‘bad’ (25% last year), while only 7% answered ‘don’t know’ or ascertained no relations between Moldova and the EU.

Those who were most critical were again found among citizens who have Russian as their mother tongue (41% versus 11% of native Romanian speakers). Older residents (25%), individuals with a low-to-medium level of education (23%) and residents of northern and southern parts of the country (23% and 27% respectively) were also slightly more likely to negatively assess the relations between the EU and their country than their socio-demographic counterparts.¹⁰

¹⁰ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 4.

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

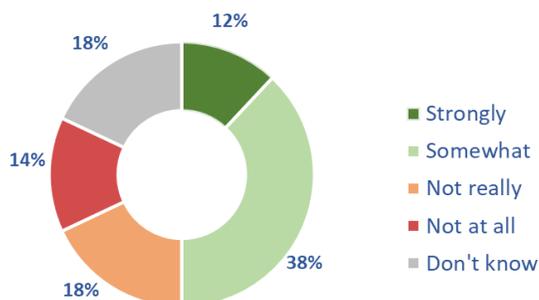
(Percentages refer to Moldovans who have heard of the EU)



Half of Moldovans (50%) perceive the EU as an independent actor in foreign relations, with around a third 'not really' (18%) or 'not at all' (14%) agreeing with the statement. It should also be noted that nearly one in five citizens did not have a definite opinion on this question.

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

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

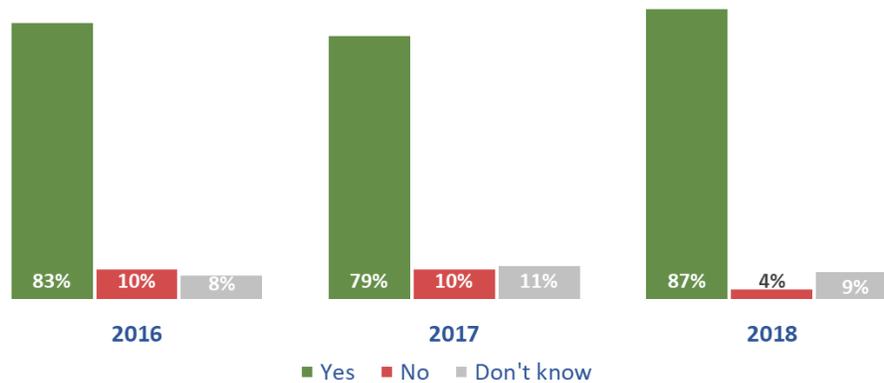


Nearly all citizens are well-aware of the financial support provided by the EU to Moldova (87%, up 8% since 2017). The share of Moldovans who do not know whether the EU supports their country is small: only 9% of citizens. Lower levels of awareness are concentrated among older citizens (13%) and individuals with a lower level of education (13%). Native Romanian speakers are more likely to be aware of the EU's support than native Russian speakers (92% and 85% respectively).¹¹

¹¹ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 5.

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

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

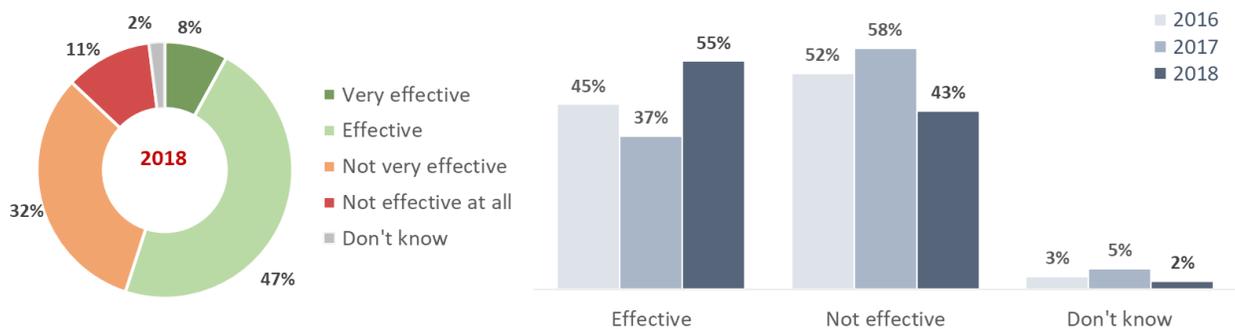


Compared to 2017, there has been a large increase (up 18 percentage points) in the share of people who consider the EU's financial support effective, which is currently at 55%. Around 40% of citizens (43%) believe that the support is not effective and only 2% of citizens did not provide a definite answer.

Females (47%), older individuals (50%), highly educated (45%) and employed citizens (48%), and residents of the capital city (48%) are, on average, more critical than their socio-demographic counterparts. However, the greatest divide is again a language one, and three quarters of native Russian speakers consider the EU's support as ineffective (versus 37% of citizens who have Romanian as their mother tongue). Accordingly, residents of the northern parts of the country (which host a larger number of ethnic Russians and Russian speakers) are on average more negative (54%) than residents of other parts of the country (36% of residents of the centre and 45% of southern residents).¹²

FIGURE 9 – How effective do you think the support has been? (Q2.5.1)

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



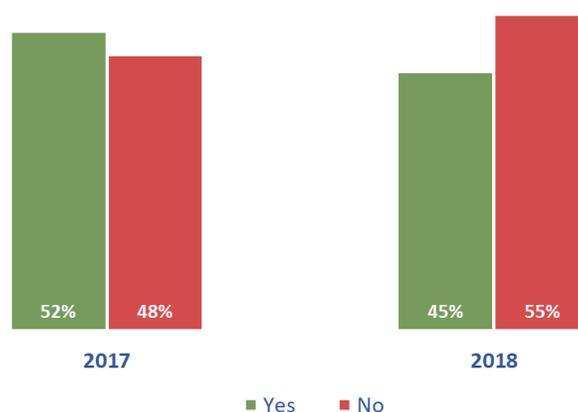
The knowledge of EU-funded programmes in Moldova has decreased since 2017 and, currently, less than half of those who are aware of the EU's financial support know about specific programmes (45%, down 7% since 2017). Men are more informed than women on the subject (49% versus 41%), native Romanian speakers more than native Russian speakers (48% versus 35%) and, in general, residents of the centre and the east more than residents of the north of the country (46% and 51% versus 37%). However, the greatest divide is in levels of education: over 70% of highly educated citizens know of specific programmes, versus 40% of those with a low-to-medium level of education.¹³

¹² More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 6.

¹³ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 7.

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

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

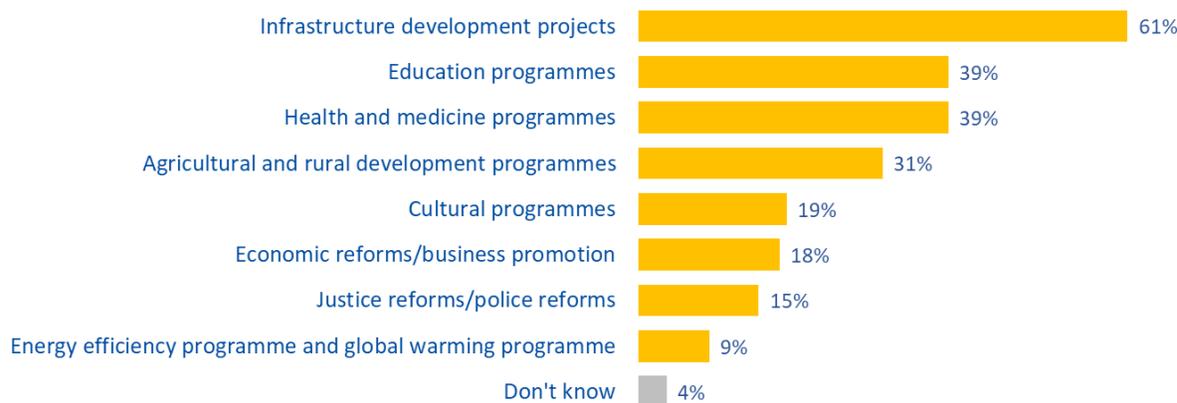


As in 2017, the most well-known EU-financed programmes relate to the field of infrastructure development projects (61%). Educational programmes, followed by health and medicine programmes and agricultural and rural development programmes, were mentioned by between 31% and 39% of citizens who were aware of the EU’s financial support. Around one in five citizens also mentioned cultural programmes (19%) and economic reform/business promotion (18%), whereas the EU’s support to energy efficiency/global warming programmes was cited by less than one in ten citizens (9%).

Around 7% of Moldovans have personally been (or know someone who has been) involved in recent EU-funded projects.

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

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

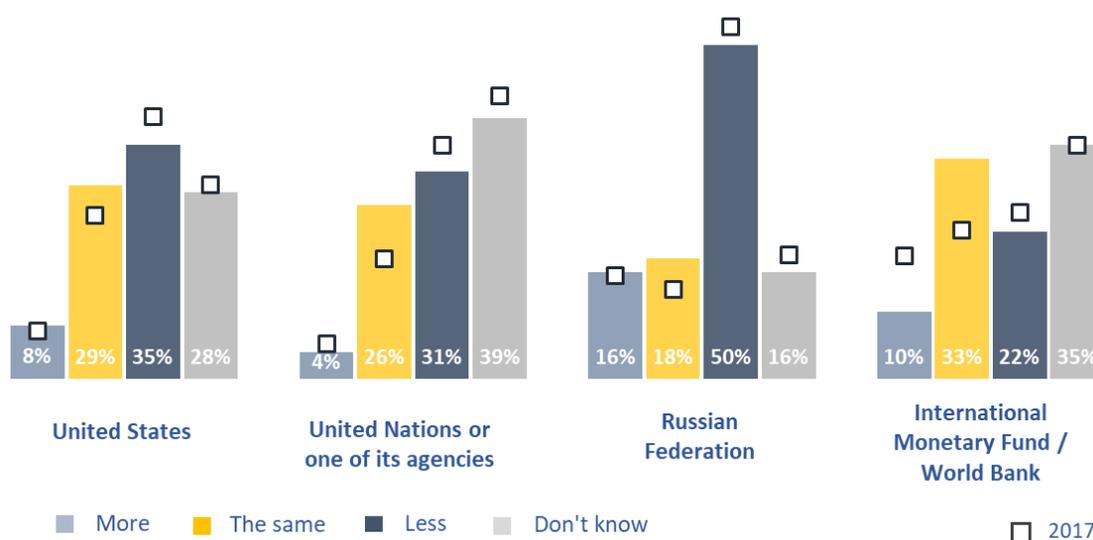


A majority of citizens is convinced that the European Union financially sustains their country to ‘the same’ or ‘a greater extent’ than the International Monetary Fund/World Bank (55%), the United Nations and its agencies (57%), the United States of America (64%) and the Russian Federation (68%).

Among the four institutions, the Russian Federation is perceived as a smaller donor to Moldova than the EU by 50% of citizens. The level of confidence in answering this question was also very high, considering that only 16% of Moldovans had no definite opinion on the issue. The levels of ‘don’t know’ responses for other institutions were 28% (United States), 35% (the International Monetary Fund/World Bank) and 39% (the United Nations and its agencies) respectively.

FIGURE 12 – As far as you know, for each of the following international institutions, would you say that it provides more, the same, or less financial support to your country than the European Union? (Q2.7)

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

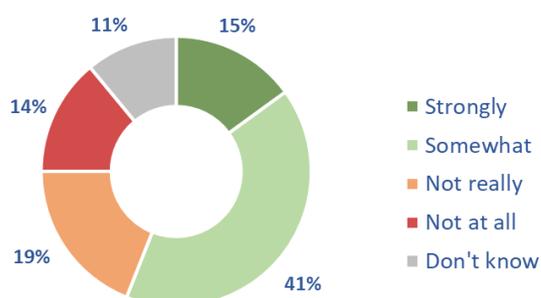


Accordingly, most Moldovans ‘strongly’ (15%) or ‘somewhat’ (41%) agree that the EU provides tangible benefits to citizens in everyday life. Very negative reactions to the statement were recorded for 14% of the population, and around the same percentage did not provide a definite answer to the question (11%).

FIGURE 13 – ‘The EU provides tangible benefits to citizens in their everyday lives’.

To what extent do you agree with this statement about the EU?

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



When assessing the benefits stemming from the EU’s support, Moldovans mainly cited the positive effects on infrastructure (56%), trade (53%), access to more products and services (53%), education (52%) and the healthcare system (51%), and their appreciation is overall more positive than it was in 2017 (40%, 35%, 40%, 35% and 31% respectively). More citizens also acknowledged the positive effects on other areas, with 30% of citizens (compared to 12% in 2017) associating the EU with less corruption.¹⁴

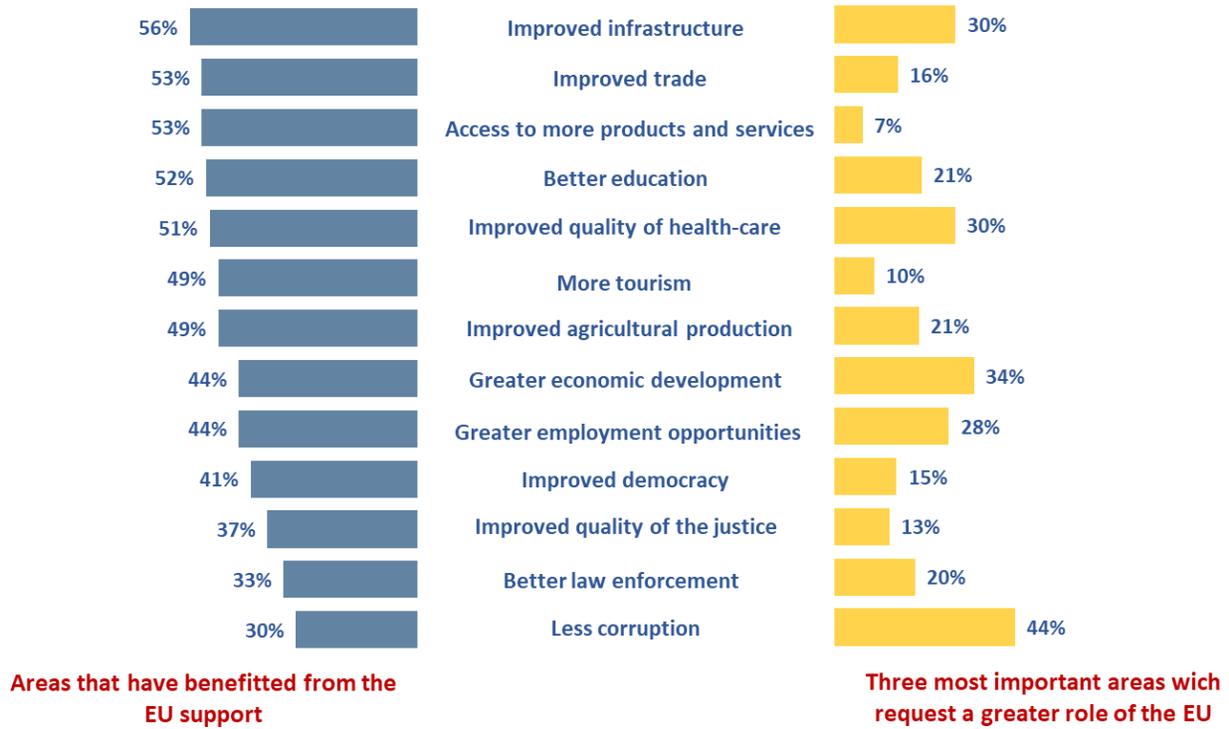
In line with this finding, 44% of citizens believe the EU should play a greater role in reducing corruption. Between one in five and one in three Moldovans also believe that the EU should play a greater role in supporting economic development (34%), improving infrastructure and the quality of the healthcare system

¹⁴ Respondents were asked to name and rank the three most important areas in which the EU should play a greater role.

(each 30%), sustaining employment opportunities (28%), agricultural production (21%), the education sector (21%) and law enforcement (20%).¹⁵

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

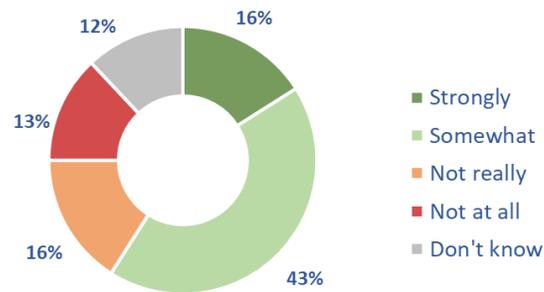
(Percentages refer to Moldovans who have heard of the EU)



When asked directly if the EU is committed to fighting corruption, nearly 60% of Moldovans ‘strongly’ (16%) or ‘fairly’ (43%) agree, versus nearly a third of the population who do not support the statement (29%). This finding suggests that, even if Moldovans would favour more support from the EU in tackling corruption, they do acknowledge the EU’s commitment in this regard. The level of ‘don’t know’ responses was also quite low, with only one in ten citizens not answering the question (12%).

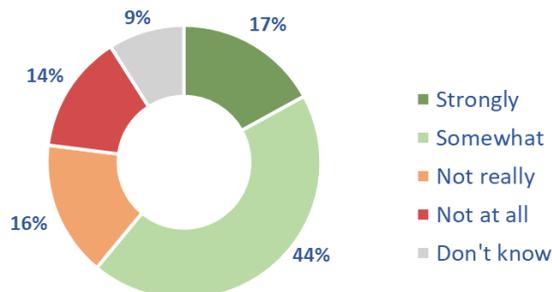
¹⁵ More details are provided in Annex – Tables 8 and 9.

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



Around 60% of Moldovans are also convinced that integration with the EU increases the country's security and stability (61%), which is a very important finding considering that 36% of the population rated security and stability among their top three personal values.

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



3.3. Sources of information on the EU

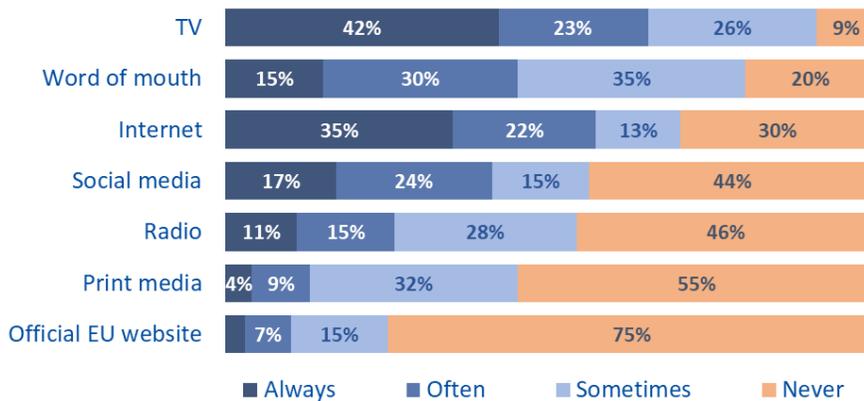
Three quarters of Moldovans say that they have seen or heard information about the EU in the last three months (75%, an increase of 8% since last year) and the representation of the EU in national media is, overall, positive (56%). Compared to 2017, frequent and sporadic access to information on the EU has also recorded an increase of around 10%, with the topic interesting nearly a third of citizens (31%). Television and ‘word of mouth’ continue to be the most popular source of information (respectively, only 9% and 20% of citizens never rely on these sources). Nevertheless, frequent usage of the Internet is quite widespread (57%). Active searches for EU-related information are also more likely to happen via the Internet (73%) compared to television (53%). Overall, 30% of Moldovans have used EU informational websites at least once (+10% compared to 2017).

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

3.3.1. Media usage as sources of information

Like in 2017, television is the most popular media channel in Moldova – 42% of the population ‘always’ watch it, 23% ‘often’ and 26% ‘sometimes’. The second most commonly used source of information is ‘word of mouth’ (from neighbours, friends, colleagues, etc.), as stated by 80% of the population. However, although most individuals tend to use it ‘often’ and ‘sometimes’, only 15% ‘always’ rely on it. Internet is used by three quarters of citizens and 35% of the population always rely on it. Social media and the radio are used by around 60% of the population, print media by slightly less than half (45%) and the official EU website by 25% of Moldovans, with most of them only accessing it ‘sometimes’.

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



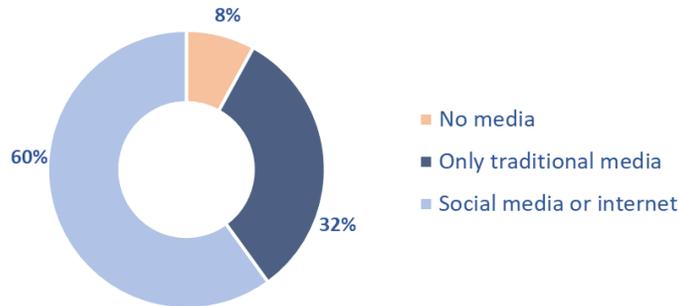
The breakdown of frequent users of traditional media only, new media and no media is shown in Figure 18.¹⁶ Most Moldovans frequently access the Internet or social media (60%), 32% traditional media only (this notably includes TV), while only 8% of the population do not rely on any media.

Frequent usage of new media decreases with age (85% for younger individuals, 66% for the middle age bracket and 18% for older individuals) and increases with the level of education and employment status: 83% of highly educated and 68% of employed citizens frequently access the Internet or social media, versus 51% of citizens with low-to-medium levels of education and 56% of unemployed people. Men (62%) and native Romanian speakers (62%) are also more likely to rely frequently on new media than women (58%) and native

¹⁶ The first includes all individuals who ‘always or often’ use traditional media only (such as television, radio and print media); the second group includes all individuals who ‘always’ or ‘often’ use either the Internet (including the official EU website) or social media; while the last group includes all individuals, who do not ‘always’ or ‘often’ use any of the surveyed media.

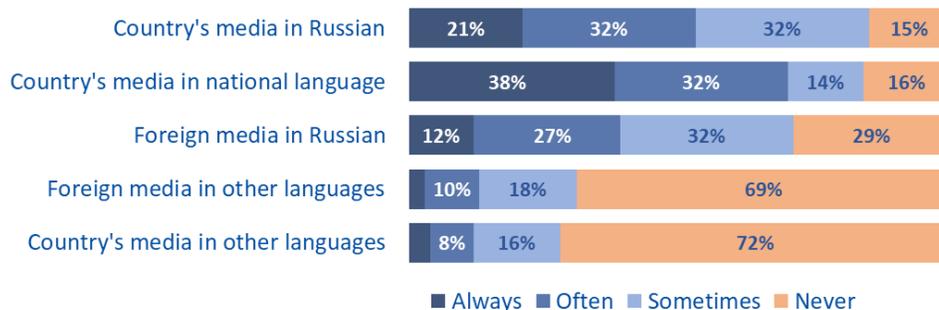
Russian speakers (55%). Conversely, frequent users of traditional media only were mostly found among older individuals (73%). Citizens living in the southern parts of the country are much more likely not to use any media frequently, compared to residents of the centre and north (14% versus 6% and 4% respectively).¹⁷

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



Like in 2017, the circulation of national media in Russian and in Romanian is very similar, with around 85% of Moldovans relying on the country’s media in both languages. However, citizens are more likely to always access media in their national language (38%), whereas the usage of media in Russian is more sporadic – only 21% always rely on such sources. Around 60% of Moldovans also rely on foreign media in Russian,¹⁸ while both national and foreign media in other languages are used more rarely (31% and 28% respectively).

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



Compared to 2017, the habit of relying upon media in Romanian has seen an increase of 5 percentage points from 65% to 70% – surpassing the share of frequent users of Russian media (58%, down 12% since 2017). Details are provided in figure 20, which shows how frequently media in Moldovan, Russian and other foreign languages are used, irrespective of whether the medium is national or foreign, among the population.¹⁹ One in five citizens also frequently rely on media in other foreign languages.

It’s clear that native Romanian speakers are the most likely to rely frequently on media in their national language (83% versus 33% of native Russian speakers), although half of them are also frequent users of Russian media. Highly educated citizens and residents of the centre of the country are also more likely to rely

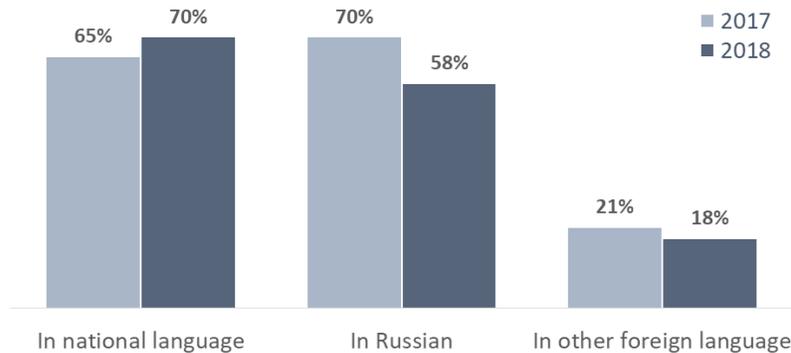
¹⁷ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 10.

¹⁸ The role of Russian TV channels in Moldova is quite significant. As in Armenia and Belarus, these channels are freely available through terrestrial transmitters or through the so-called ‘hybrid channels’. In addition, they are also available on different local broadcasters and on cable television services. To various extents, they are among the most popular media resources and national broadcasters strive to provide an alternative to Russian TV channels and reduce their impact. See: Monitoring of Russian channels by MEMO 98, Final report, 2015. http://www.csdialogue.eu/sites/default/files/monitoring_report_executive_summary.pdf

¹⁹ Frequent users of media in Moldovan are defined as all individuals who ‘always’ or ‘often’ use media in the national language; those who ‘always’ or ‘often’ use the country’s or foreign media in Russian are seen as frequent users of media in Russian. Finally, frequent users of media in foreign languages are those who ‘always’ or ‘often’ use the country’s or foreign media in other languages. The frequent use of media in one language is not exclusive, in the sense that individuals might also access media in other languages.

on media in Romanian (82% and 80% respectively) than individuals with a low-to-medium level of education (59%) than citizens living in the north and the south of the country (68% and 56% respectively). Frequent usage of media in foreign languages other than Russian is particularly widespread in the capital city, where 41% of citizens rely on such sources.²⁰

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



National media in Romanian, the Internet and television appear to be the most trusted sources of information in the country (54%, 53% and 52% respectively). Around 40% trust national media in Russian, word of mouth and foreign media in Russian (44%, 43% and 38% respectively). Otherwise, trust levels towards different media are quite low, with a high number of citizens undecided about the credibility of such sources of information. Only 30% of Moldovans trust the radio (and 28% did not provide a definite answer), 36% trust social media (27% did not answer), 27% trust print media (31% did not answer), 22% trust the official EU website (45% did not answer), 22% trust foreign media in other languages (31% did not answer) and 21% national media in other foreign languages (32% did not answer). This finding is most likely related to the lower usage of such sources.²¹

3.3.2. Sources of information about the EU

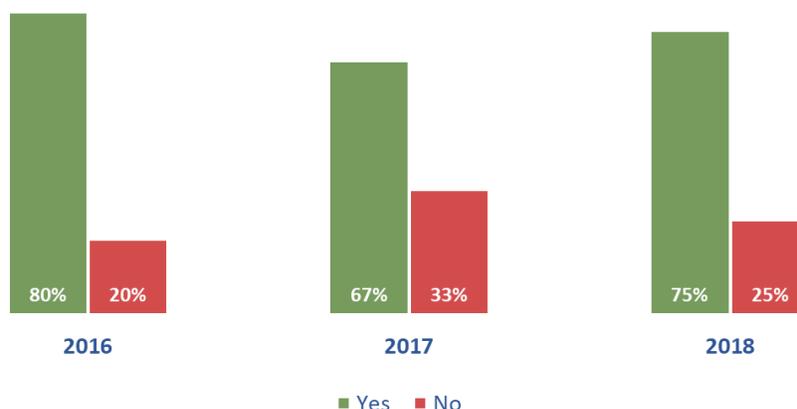
Three quarters of Moldovans say they have seen or heard information about the EU in the last three months (75%). This indicator has increased since 2017 (up 8%) and its value is very similar to that recorded in 2016. As in 2017, passive exposure to EU-related information is mostly linked with education, and 91% of highly educated citizens had heard about the EU in the three months preceding the survey versus 65% of citizens with a low-to-medium level of education. At geographical level, residents of the northern parts of the country have been less exposed to EU-related information, with 35% of citizens not having heard about the EU, compared to 22% and 20% of residents of the centre and the south of the country respectively.²²

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

²¹ More details are provided in Annex – Table 12.

²² More details on exposure to information about the EU and socio-demographic characteristics are provided in Annex – Table 13.

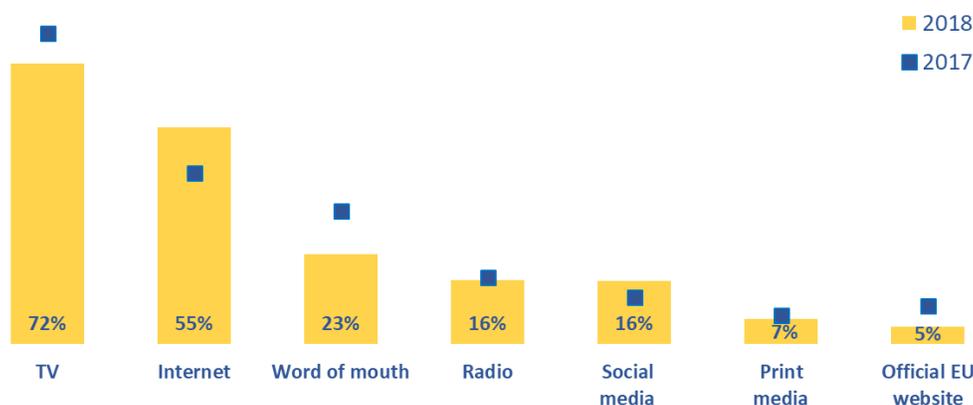
FIGURE 21 – Have you seen or heard any information about the EU in the last three months? (Q3.2)
(Percentages refer to Moldovans who have heard of the EU)



As expected, passive exposure stems mostly from television (72%). Over half of Moldovans who heard or saw information about the EU did so through the Internet (55%) and 16% through social media. Word of mouth as a source of information was cited by 23% of the population, the radio by 16%, print press by 7% and the official EU website by 5% of the population.

FIGURE 22 – Where or from whom have you seen or heard information about the EU in the last three months? (Q3.2.1, multiple answers possible)

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

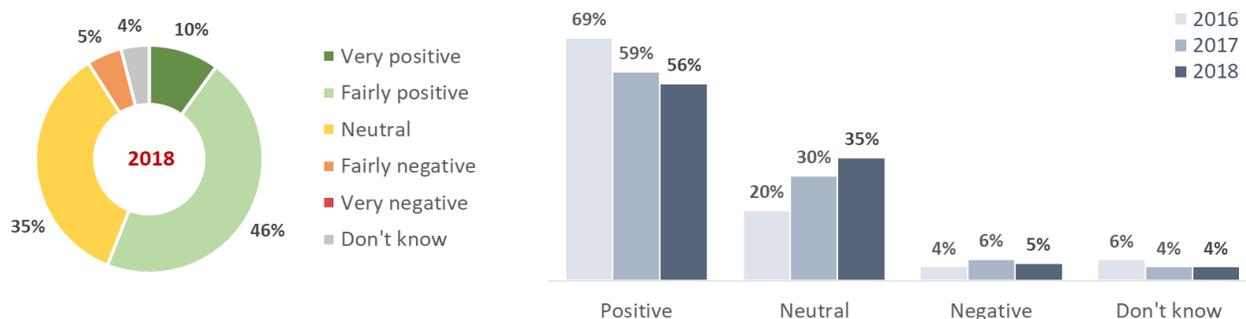


Among those who had heard about the EU, 56% felt that national media presented the European Union positively (10% 'very positively', 46% 'fairly positively'). Only a slight decrease of 3 percentage points was recorded compared to last year; however, positive views have greatly decreased since 2016 (down 13%) in favour of a more neutral representation (35%, up 15%). Citizens with a lower level of education (40%), native Russian speakers (42%), northern residents (45%) and capital city residents (42%) generally have a more neutral view than their socio-demographic counterparts.²³

²³ For the distribution according to the main socio-demographic characteristics, see Table 14 in Annex.

FIGURE 23 – In general, how would you say the EU was presented in the national media? (Q3.3)

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



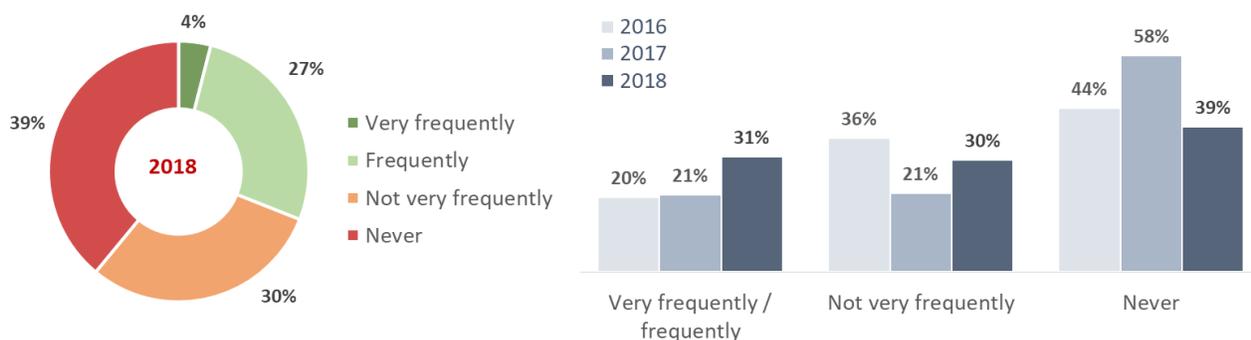
According to 58% of the population, the information which they read, watch or access online helps them to have a better understanding of the European Union, either ‘fairly’ (51%) or ‘very much’ (7%). However, 36% find the information ‘not at all’ (8%) or ‘not very’ useful (28%).

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

Compared to 2017, both frequent and sporadic access to information on the EU has recorded an increase (from 21% to 31% for frequent access and from 21% to 30% for sporadic access). Active exposure is more common among capital city residents (80%), younger citizens (71%) and particularly individuals with a high level of education (85%). Native Russian speakers are less likely to look for information frequently (16%), while 36% of native Moldovan speakers tend to do so. Older citizens, residents of medium-sized settlements and of the north of the country are the least exposed, with between 55% and 60% of the population never accessing/searching for EU-related information.²⁴

FIGURE 24 – How often do you look for/access information on the EU? (Q3.1)

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



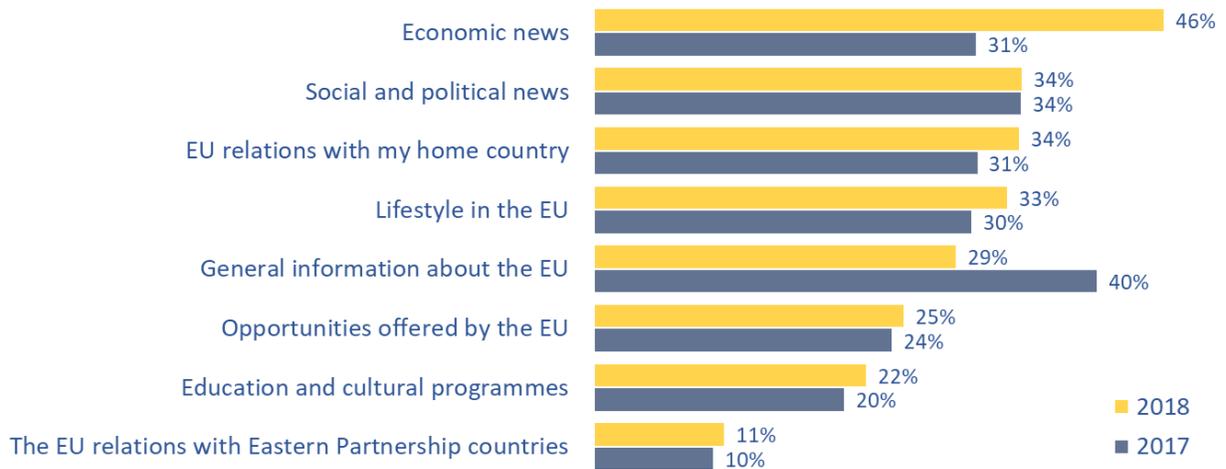
Moldovans prefer to search for information about the EU in their national language (75%) and only 20% look for information in Russian. English is even less frequently used, by 5% of the population.

Compared to 2017, generic searches (29%, down 11%) have been replaced by more specific queries on economic news (46%, up 15%). The other most searched topics are similar to those recorded in 2017, as social and political news (34%), EU relations with Moldova (34%) and the lifestyle in EU Member States (33%) are the target of most enquiries. One in four citizens also searched for opportunities offered by the Union (25%) and educational and cultural programmes (22%), whereas around one in ten were interested in

²⁴ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 15.

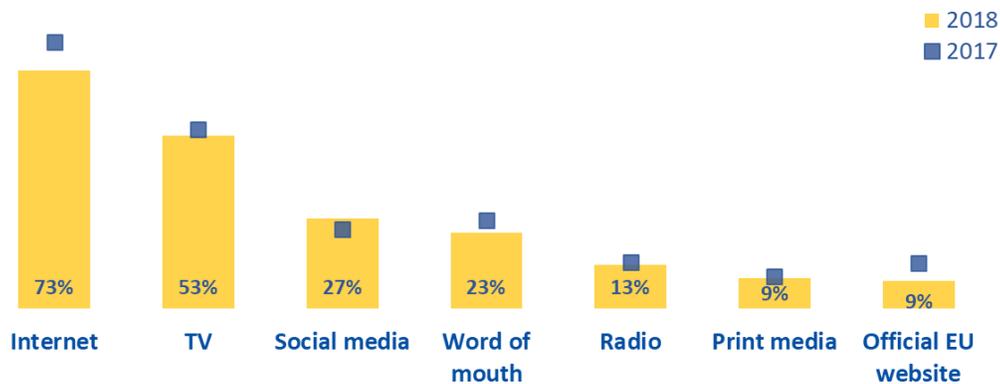
knowing more about the EU's relations with Eastern Partner countries (11%). This finding is consistent with 2017.

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



Like in 2017, those actively searching for/accessing information mostly rely on the Internet (73%) and around half on television channels (53%). Around one in four active searchers also tend to rely on social media and word of mouth (27% and 23% respectively), while radio, print media and the official EU website are on average used less frequently (between 9% and 13% each).

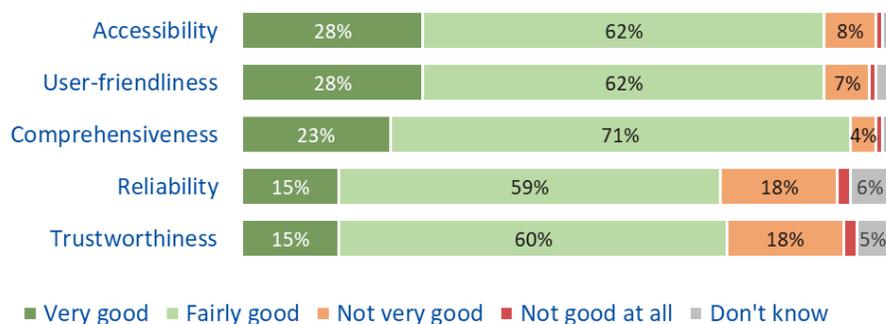
FIGURE 26 – Where do you go to find information about the EU? (Q3.1.4, multiple answers possible)
(Percentages refer to Moldovans who have looked for/accessed information on the EU)



The assessment of the quality of information is slightly less positive than in 2017. Still, over 90% of citizens rate it 'very' or 'quite' positively in terms of its accessibility (90%), user-friendliness (90%), and comprehensiveness (94%). Around three quarters of citizens also find it reliable (74%) and trustworthy (75%).

FIGURE 27 – How would you rate the information in terms of...? (Q3.1.5)

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



Overall, 30% of Moldovans have used EU informational websites²⁵ at least once (up 10% compared to 2017). The Facebook profile of the European Union is the most accessed among all EU websites (27% of the population); nevertheless, the websites of EU projects and EU institutions were also accessed by their fair share of citizens (12% each). Twitter pages, the EU Delegation website and the 'EU NEIGHBOURS east' website were accessed by 9%, 4% and 6% respectively.

²⁵ This refers to EU institutions' websites; the EU Delegation website; EU projects' websites; the 'EU NEIGHBOURS east' website; EU Twitter and EU Facebook pages.

3.4. View of Moldova’s current situation and future expectations

The proportion of Moldovans who tend to trust national, regional and local institutions is extremely low and has remained at around the same level since 2016. In fact, 84% of Moldovans openly distrust the parliament, 81% the political parties, 73% the government and 59% regional and local authorities. The only institution trusted by the majority of the population is the religious authority (70%, up 4% since 2017).

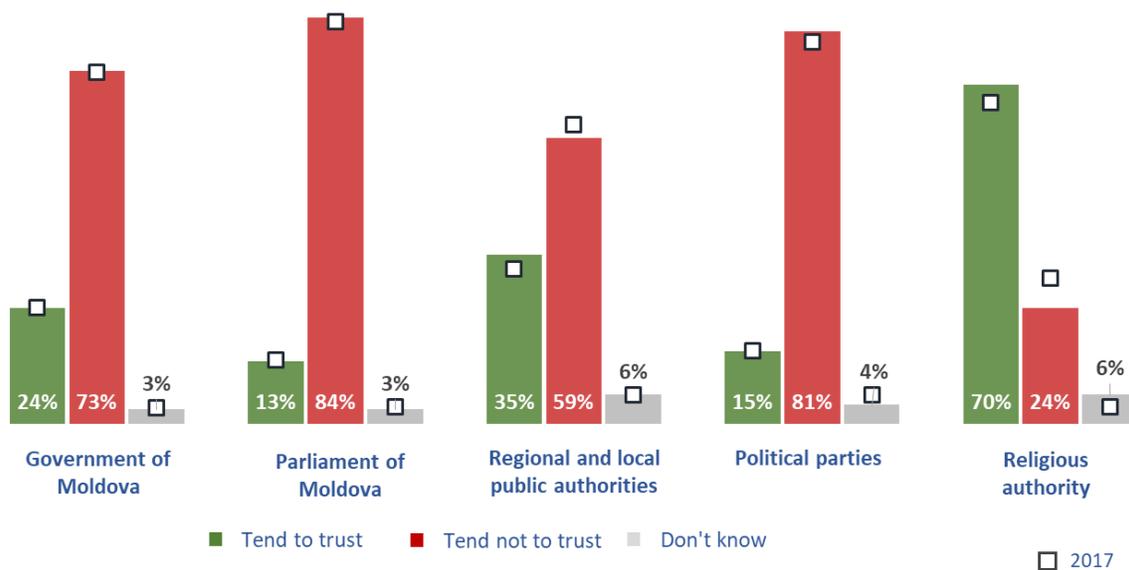
Corruption and poor governance continue to be the most problematic areas for 83% and 75% of the population respectively, and gender equality is the only element that the majority feel applies to their country (64% of citizens). Citizens continue to be more optimistic towards their personal future (70%) than the future of their country (50%), with 48% of citizens openly pessimistic about the future of Moldova.

This section presents an assessment of Moldova’s current and future situation regarding the current functioning of democracy and the most pressing problems.

3.4.1. View of Moldova’s current situation

The share of Moldovans who tend to trust national, regional and local institutions is extremely low and has remained at around the same level over the past three years. In fact, 84% of Moldovans openly distrust the parliament, 81% the political parties, 73% the government and 59% regional and local authorities. The only institution trusted by the majority of the population is the religious authority (70%, up 4% since 2017).

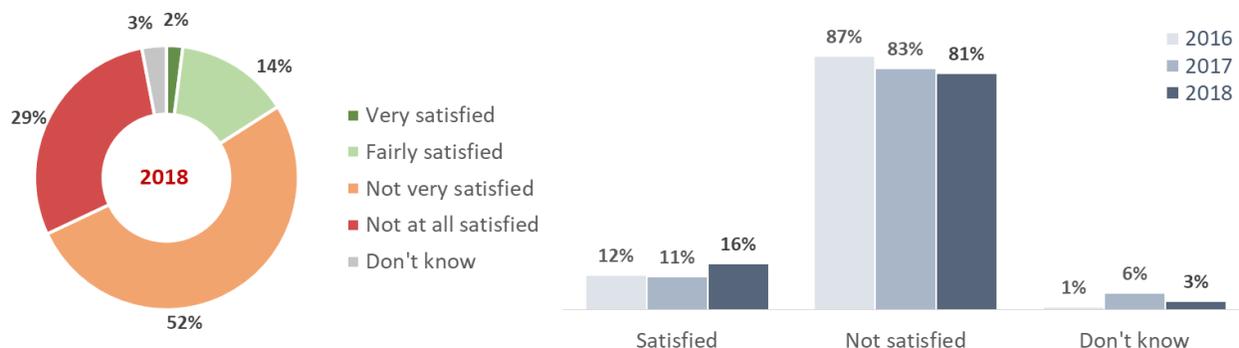
FIGURE 28 – Please tell us your level of trust in the following institutions (Q4.1)



Accordingly, 81% of Moldovans are ‘dissatisfied’ with the way democracy works in their country (83% in 2017), of which 29% are ‘not at all’ satisfied. No great differences were ascertained among socio-demographic groups, and only residents of the southern parts of the country seem slightly more satisfied (28%), whereas northern residents are overall the least satisfied (8% satisfaction level).²⁶

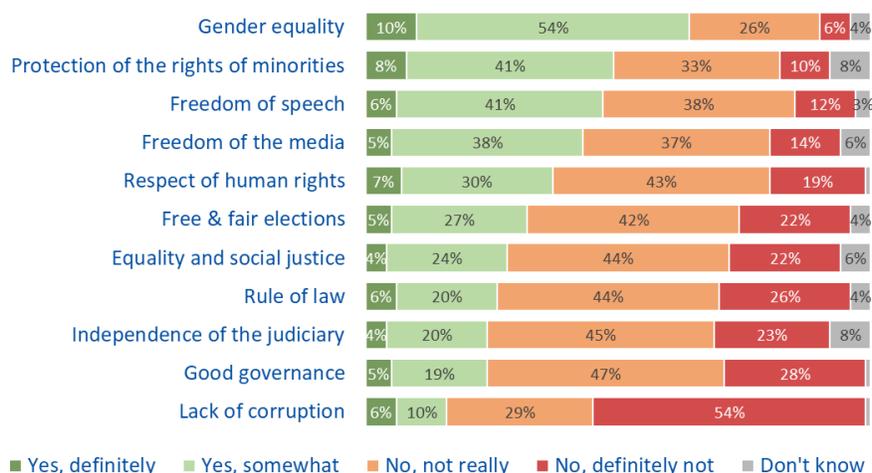
²⁶ More details on satisfaction with democracy and socio-demographic characteristics are provided in Annex – Table 16.

FIGURE 29 – On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Moldova? (Q4.3)



The hierarchy of the elements that Moldovans believe apply to their country is largely consistent with last year’s findings, as citizens this year acknowledged only modest progress in the path towards democratic governance. Corruption and poor governance continue to be the most problematic areas, with 83% and 75% of the population respectively convinced that they do not apply to Moldova. As in 2017, the only element that the majority of the population feel applies to their country is gender equality (64%), although protection of the rights of minorities (49%) and freedom of speech (47%) came very close to the 50% threshold.

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



3.4.2. Future expectations

Like in 2017, Moldovans are more optimistic about their personal future (70%) than the future of their country (50%). However, a slight improvement in attitudes was recorded (up 7% for the future of their country and up 5% for their personal future). Over 85% of younger individuals are optimistic about their personal future (versus 71% and 46% of individuals in the middle and oldest age brackets respectively). Native Moldovan speakers are also more positively disposed towards their personal future than native Russian speakers (74% versus 58% respectively). The groups least optimistic about the future of Moldova are older individuals and those living in the north of the country (37% and 40% respectively).²⁷

²⁷ More details on optimism regarding citizens’ personal future and the country’s future and socio-demographic characteristics are provided in Annex – Tables 17 and 18.

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

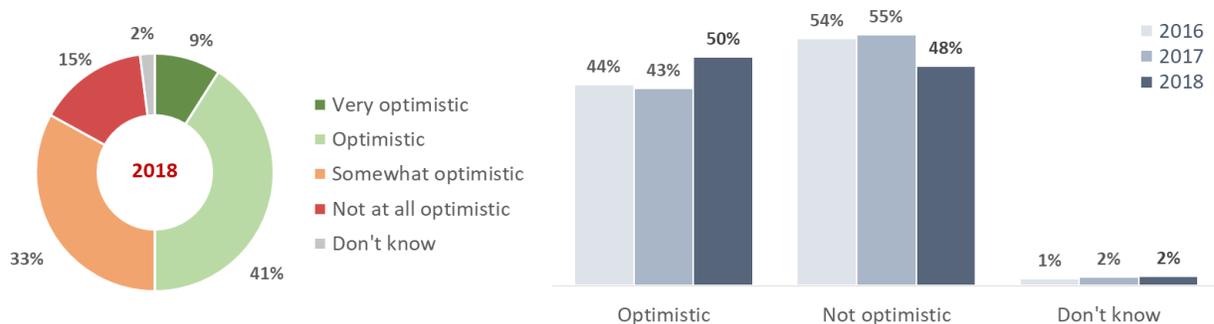
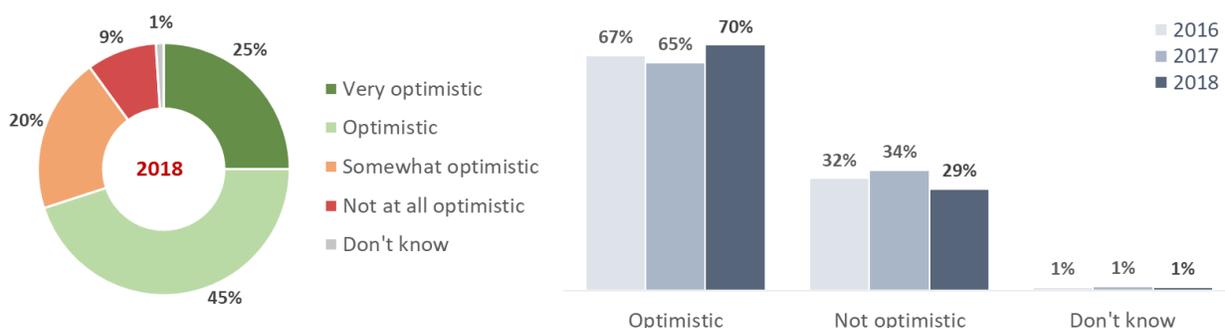
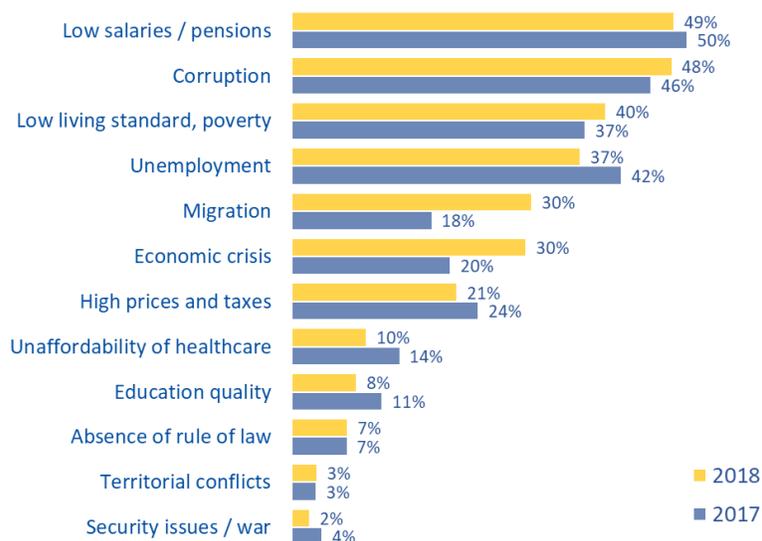


FIGURE 32 – How optimistic are you about your personal future? (Q4.6)



As in 2017, Moldovans are mostly concerned about low salaries and pensions (49%) and corruption (48%). Around 40% are also worried about low living standards and poverty (40%) and unemployment (37%). Compared to last year, more Moldovans cited migration (30%, up 12% since 2017) and the economic crisis (30%, up 10% since 2017). Territorial conflicts and security issues/war are less of a concern for the population, as only 3% and 2% respectively mentioned them among the most pressing problems currently faced by their country.

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



3.5. Profiling attitudes towards the EU: positive versus neutral

Moldovans with a positive view of the EU account for nearly half of the population (48%). Their most interesting trait is that nearly all are native Romanian speakers (95%), whereas neutral Moldovans, who account for 34% of the population, are more concentrated among native speakers of Russian and other languages (26%). EU supporters also tend to be younger, highly educated, and live in the centre of the country, while neutrally oriented citizens are more likely to be male, older, with a low-to-medium level of education and live in the north of the country. EU supporters are more likely to be actively and passively exposed to information about the EU, rely on media in Romanian, media in other foreign languages and/or new media than neutral individuals. They share a higher level of confidence in all foreign institutions – except the EEU – and a much stronger and more positive vision of the Union than neutrally oriented citizens. Accordingly, their vision of their personal futures and, particularly, of Moldova’s future is more optimistic.

In this section, the attitude of Moldovans towards the EU has been analysed according to two main profiles: individuals who have a positive image of the EU and those who are neutral towards it.²⁸

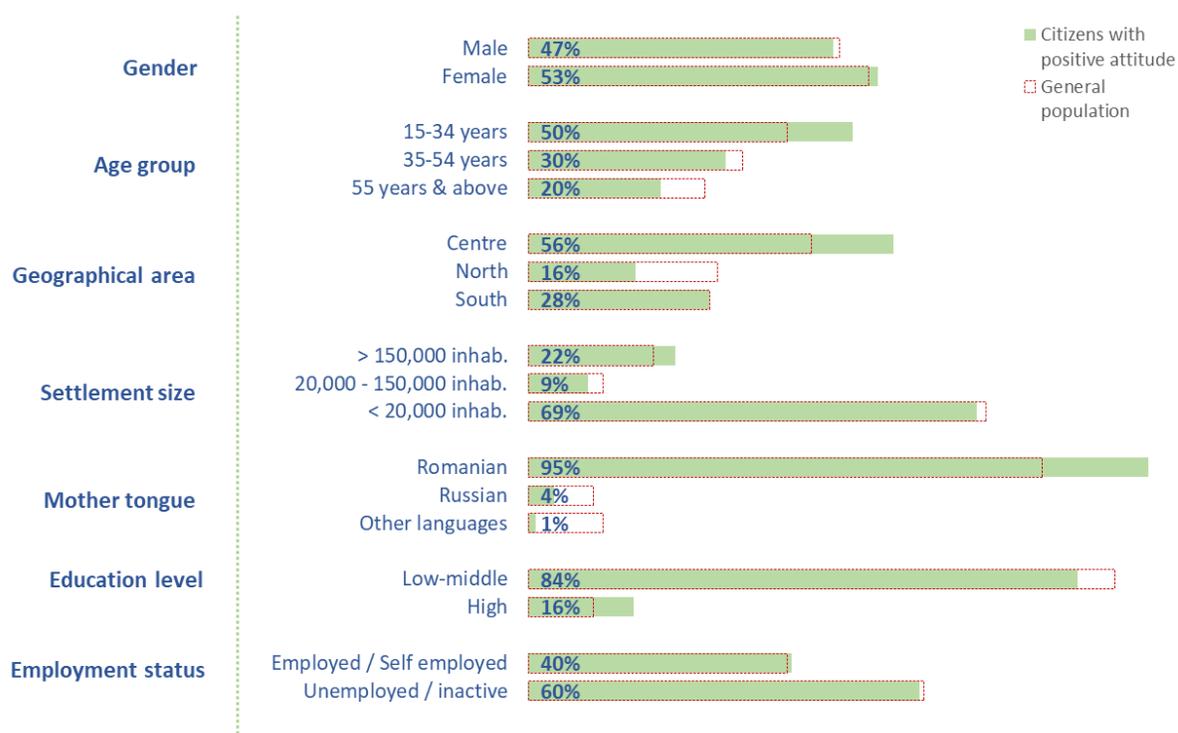
Attitudes were profiled against a comprehensive set of indicators, starting with the main socio-demographic characteristics, followed by passive and active exposure to EU-related information (including main language used and subjects of interest), assessment of the relationship between Moldova and the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

3.5.1. Positive attitudes

Moldovans with a positive view of the EU account for nearly half of the population (48%). Their most peculiar trait is that nearly all are native Romanian speakers (95%). Compared to the overall population, they are more concentrated among the youngest age group (50% are aged between 15 and 34) and most educated group (16% have a high level of education). Moldovans with a positive view of the EU are also more likely to live in the centre of the country (56% versus 43%) than the overall population. No significant difference was recorded in terms of gender and employment status; 53% of EU supporters are female and 60% are unemployed/inactive.

²⁸ Individuals that were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

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

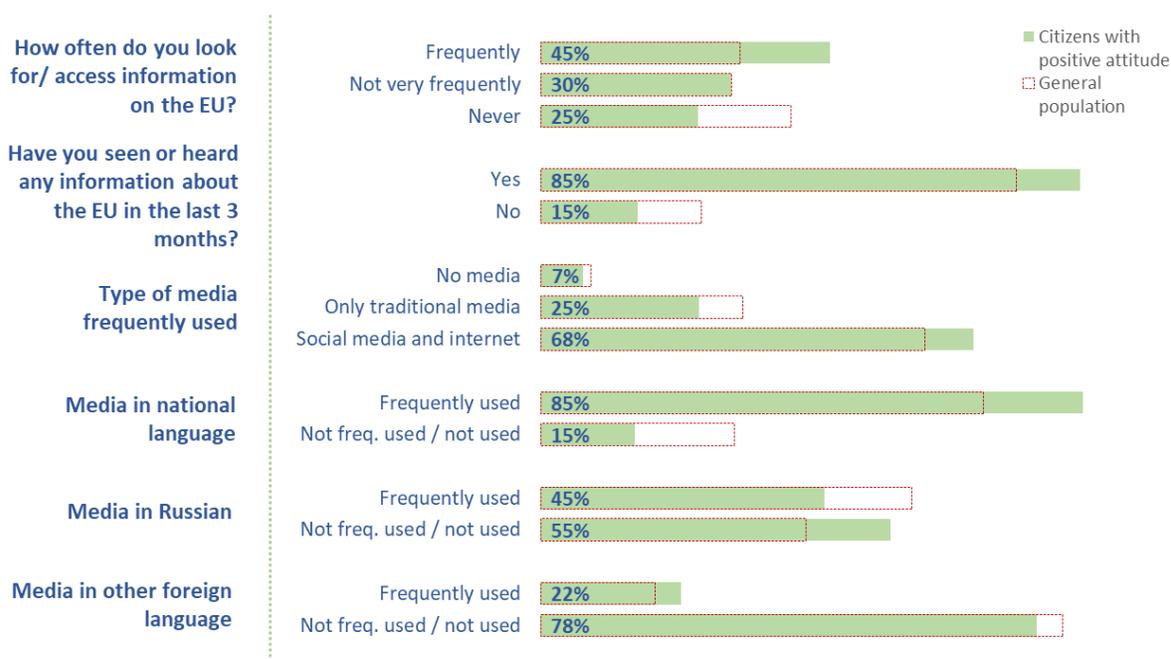


EU supporters are more likely to be actively and passively exposed to information about the EU. In fact, nearly all had seen or heard information about the EU in the three months preceding the survey (85%) and nearly half looked for/accessed information on the EU frequently or very frequently (45%) – the corresponding figures of passive and active exposure in the general population stand at 75% and 31% respectively.

If searching for EU-related information, EU supporters prefer to do so in their national language (85%), which is expected, considering that nearly all are native Romanian speakers. Among frequent searchers, 22% also rely on media in other foreign languages (18% among the general population). EU supporters are keener users of new media – 68% frequently use the Internet and social media (compared to 60% of the general population), showing a higher penetration rate.

As for their interests, most of them search for economic news (43%), lifestyle in the EU (35%), the EU's relations with Moldova (35%) and general information on the EU (33%).

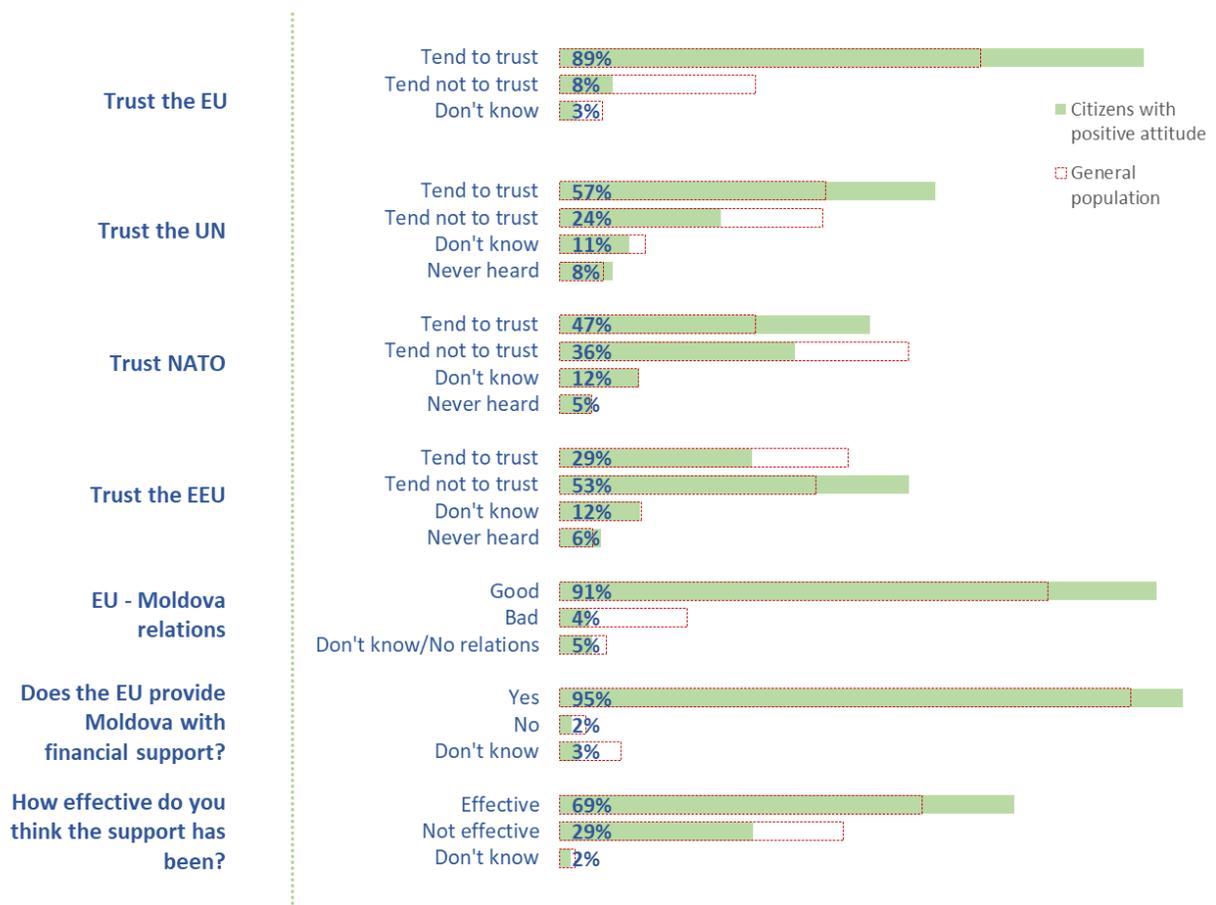
FIGURE 35 – Exposure to information about the EU and media usage among Moldovans with a positive image of the EU



A positive image of the EU is linked to a higher level of confidence in the EU and in all foreign institutions except the EEU. In fact, most EU supporters do not trust the EEU (53% versus 39% among the overall population), whereas 89% trust the EU (versus 64% among the overall population), 57% trust the United Nations (40% among the overall population) and 47% trust NATO (30% among the overall population).

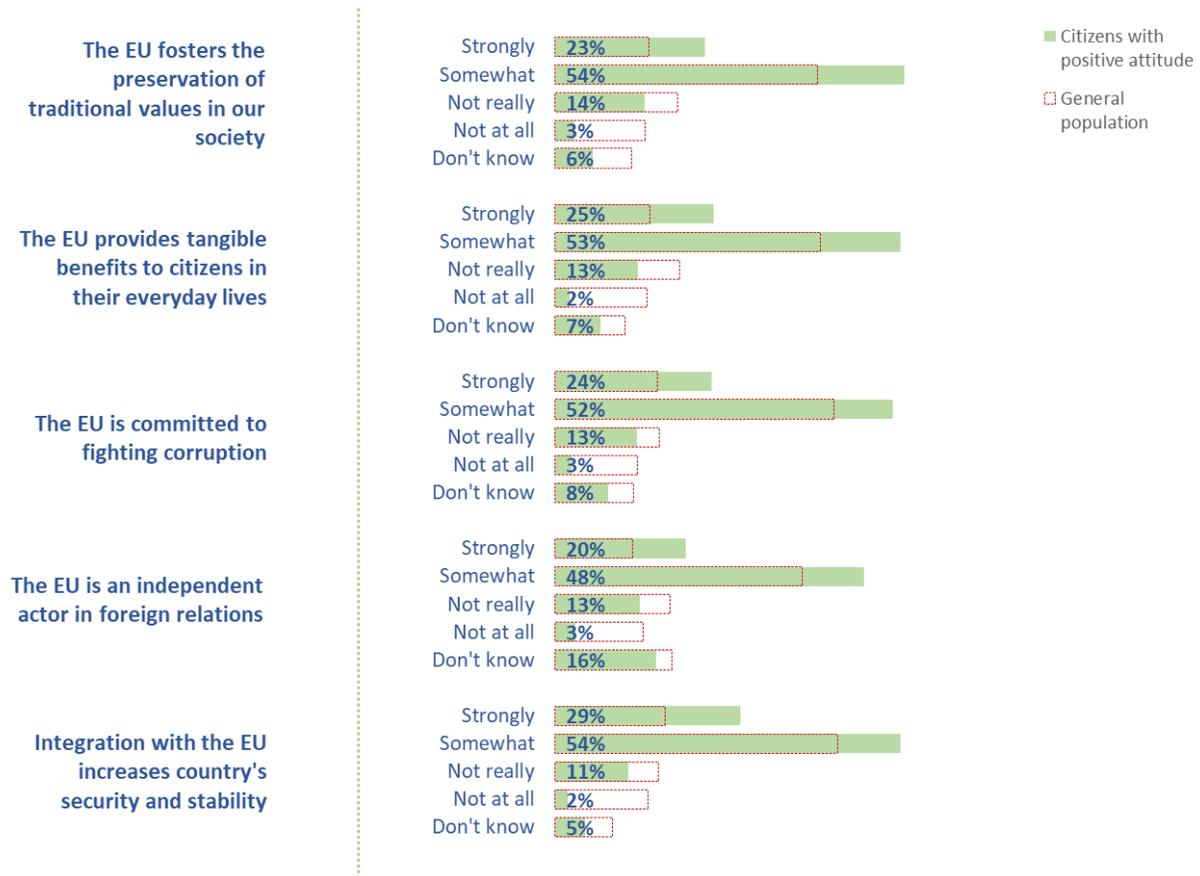
In addition, 91% of all positively oriented individuals have a positive image of the relations between Moldova and the EU (versus 74% among the overall population), 95% acknowledge the EU's financial support (87% among the overall population) and 69% rate it as effective (55% among the overall population).

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



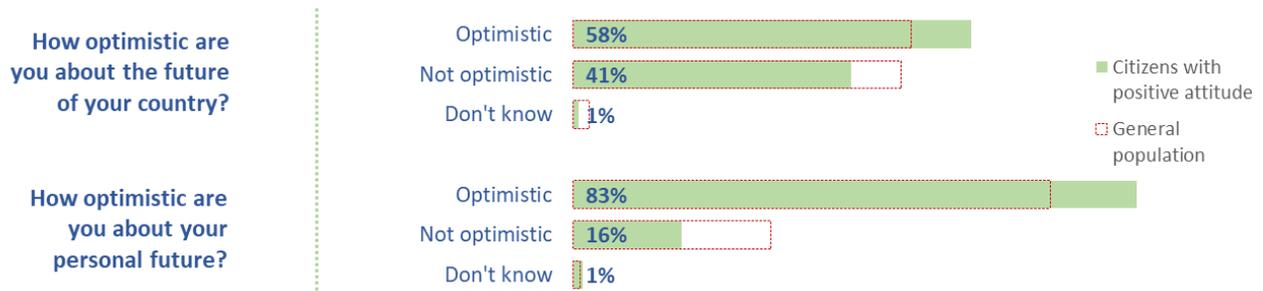
When it comes to the assessment of common beliefs, EU supporters tend to share a much stronger and more positive view of the EU than the general population. In fact, 83% of individuals with a positive image of the EU ‘strongly’ or ‘somewhat’ agree that ‘integration with the EU increases the country's security and stability’. Around three quarters of EU supporters are also convinced that ‘the EU is committed to fighting corruption’ (76%), ‘the EU fosters the preservation of traditional values in our society’ (77%) and that ‘it provides tangible benefits to citizens in their everyday lives’ (78%). In addition, over two thirds (68%) also believe that “it is an independent actor in foreign relations”.

FIGURE 37 – Common beliefs of Moldovans with a positive image of the EU



A more optimistic attitude, both at a personal level and regarding the country's future, is clearly linked with a positive image of the EU. In fact, 58% of EU supporters feel positive about Moldova's future and 83% about their own prospects. Nevertheless, 58% are worried about corruption (their most pressing concern) and 42% about unemployment – considerably more than among the overall population (48% and 37% respectively). EU supporters are also slightly more worried about migration, the quality of education and the absence of rule of law (32%, 11% and 9% respectively).

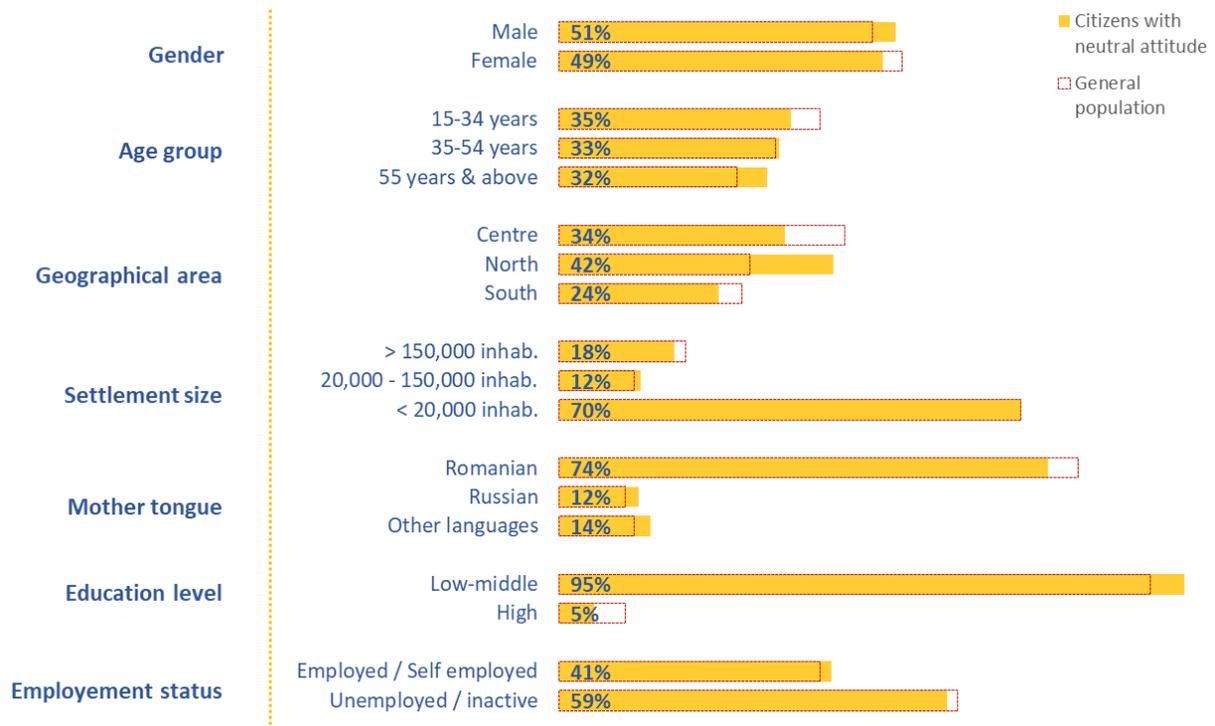
FIGURE 38 – View of the future among Moldovans with a positive image of the EU



3.5.2. Neutral attitudes

Moldovans with a neutral view of the EU account for around a third of the population (34%). Again, their most interesting trait is that one in four are native speakers of Russian (12%) and other languages (14%) (versus 5% of EU supporters). Compared to EU supporters, they are also slightly more likely to be male (51%), older (32% are over 55) and to have a low-to-medium level of education (95%). As for geographical residence, they are more likely to live in the north of the country (42%), whereas only a third are found in the centre (34%). No significant difference was recorded in terms of employment status and settlement size; 70% of citizens holding a neutral stance live in smaller settlements and 59% are unemployed/inactive.

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

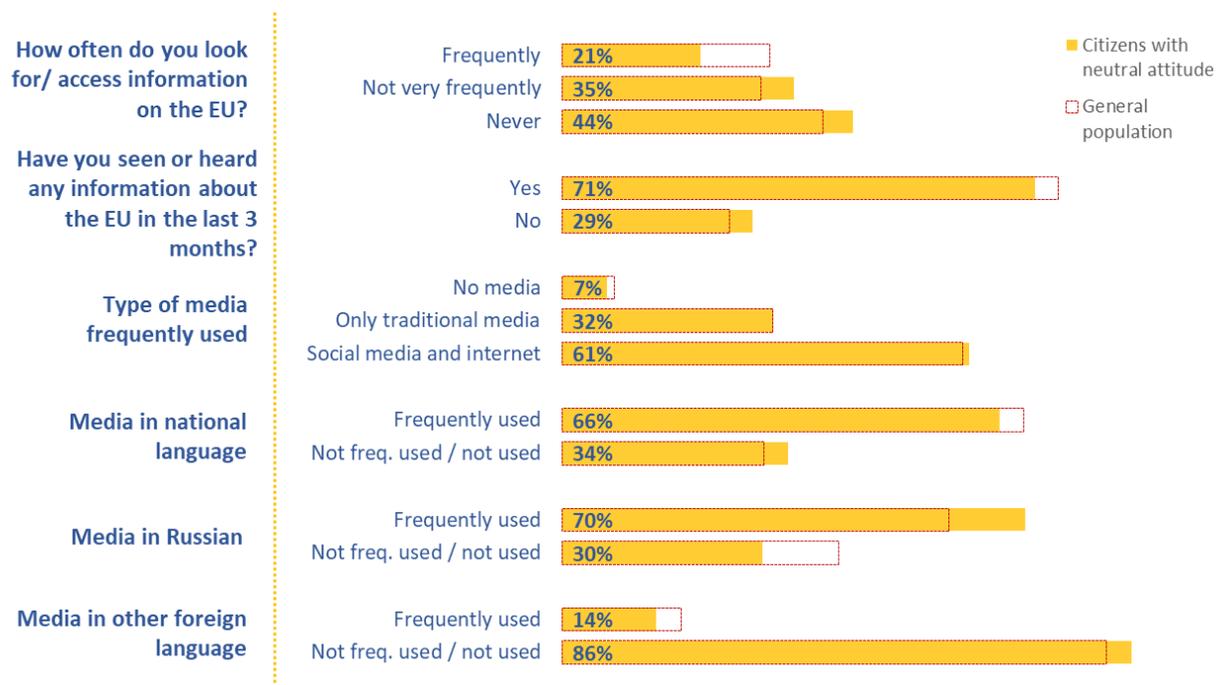


Neutrality is characterised by a lower exposure to EU-related information compared to EU supporters: 71% of those with a neutral stance towards the EU had heard information about the EU in the three months preceding the survey and 56% had accessed/searched for EU-related information (85% and 75% respectively among citizens with a positive image of the EU).

Holders of a neutral view are also more likely to rely only on traditional media (32%) and less likely to be frequent users of new media (61%) than EU supporters. As for language, 70% rely frequently on media in Russian – which is to be expected, considering that 12% are native Russian speakers. They are also less keen users of media in Romanian (66%) and other foreign languages (14%).

Compared to EU supporters, neutral citizens are more interested in economic news (51%) and less interested in general information about the EU (22%) and educational and cultural programmes (14%). Despite being more neutral towards the EU and the process of integration, a third searched for information about relations between the EU and their home country (34%) and one in ten about relations with other EaP countries (10%) – just like EU supporters.

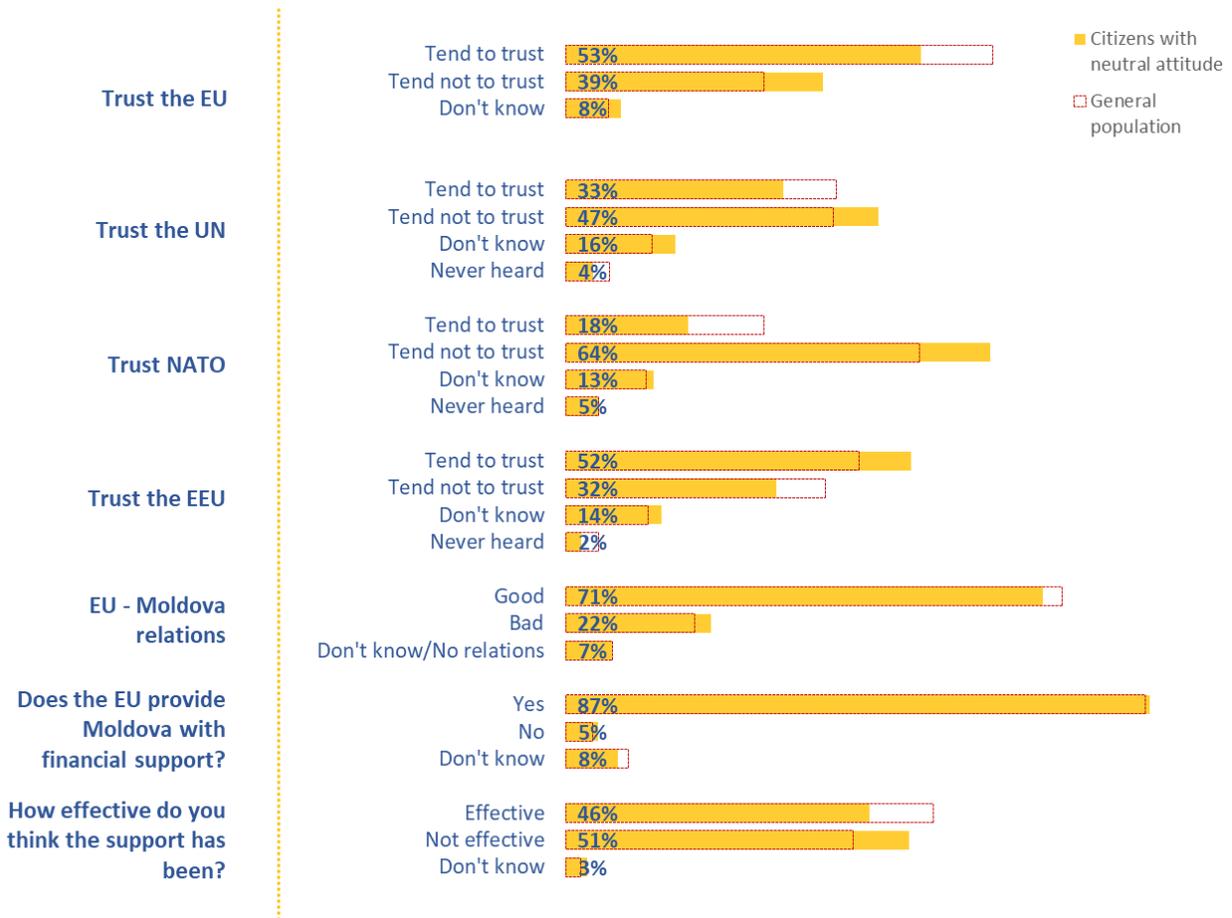
FIGURE 40 – Exposure to information about the EU and media usage among Moldovans with a neutral image of the EU



Neutrality is linked with lower levels of trust in all foreign institutions – except for the EEU – compared to EU supporters and the overall population. In fact, only the European Union is trusted by the majority of neutral citizens (53%), whereas most do not trust the United Nations (47%, with 20% who answered that they do not know or have never heard of the UN) or, in particular, NATO (64%, with again 18% answering that they do not know or have never heard of the institution). On the other hand, most of the population trusts the EEU (52%).

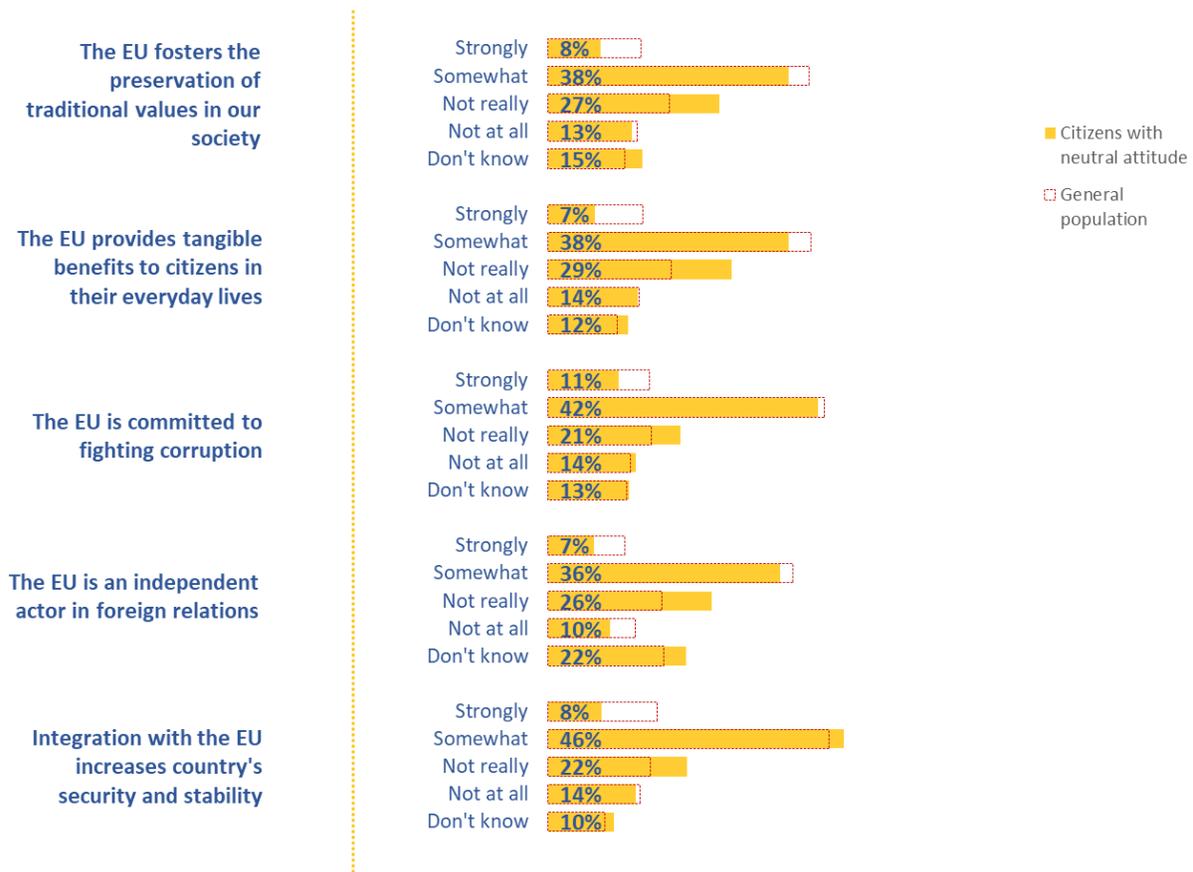
The assessment of EU-Moldova relations and of the EU’s financial support is again less positive: 71% of neutral citizens would describe the relations between Moldova and the EU as ‘good’, 87% acknowledge the EU’s financial support and 46% consider it to be effective.

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



When it comes to the assessment of common beliefs, individuals with a neutral image of the EU are again less positive than both EU supporters and the general population. The highest share of approval was recorded for the statements that ‘integration with the EU increases the country's security and stability’ (54%) and ‘the EU is committed to fighting corruption’ (53%). Like for EU supporters, the statement that ‘the EU is an independent actor in foreign relations’ gathered the lowest level of approval (43%).

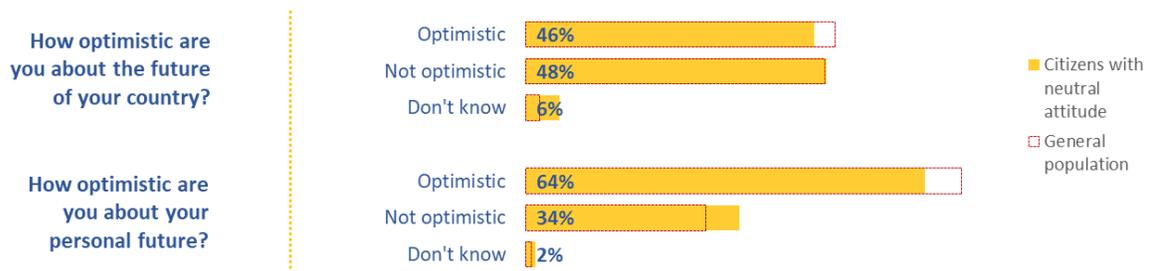
FIGURE 42 – Common beliefs of Moldovans with a neutral image of the EU



Neutral individuals are also less optimistic than EU supporters and the overall population, with 48% openly pessimistic about Moldova’s future and 34% about their personal future.

Compared to EU supporters, individuals with a neutral stance seem more concerned about low salaries and pensions (52%, their utmost concern), low living standards and poverty (44%), the economic crisis (34%), and high prices and taxes (21%). These issues, which seem to have a more immediate effect on the everyday lives of individuals, may well reflect real difficulties they are encountering in their daily life, thus accounting for both their greater pessimism and their more indifferent view towards the EU. In addition, it should be noted that 45% of individuals with a neutral stance towards the EU are worried about corruption.

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



5. Annex

TABLE 1 – Perception of the EU

Q2.1. Do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union?						
		Positive	Neutral	Negative	Don't know / Never heard of the EU	Total
Settlement size	Capital	56%	31%	10%	3%	100%
	Between 20,000 and 150,000 inhabitants	39%	37%	15%	9%	100%
	Less than 20,000 inhabitants	48%	34%	15%	3%	100%
Gender	Male	48%	37%	13%	2%	100%
	Female	49%	32%	14%	5%	100%
Age group	15-34 years	61%	30%	8%	1%	100%
	35-54 years	45%	35%	15%	5%	100%
	55 years & above	36%	39%	20%	5%	100%
Education level	Low/medium level	40%	36%	19%	5%	100%
	High level	75%	17%	6%	2%	100%
Employment status	Employed / Self-employed	49%	35%	15%	1%	100%
	Unemployed or temporarily not working / inactive	48%	33%	14%	5%	100%
Mother tongue	Romanian	58%	32%	6%	4%	100%
	Russian	18%	42%	37%	3%	100%
Geographical area	Centre	62%	27%	8%	3%	100%
	North	28%	49%	18%	5%	100%
	South	48%	30%	20%	2%	100%
Total		48%	34%	14%	4%	100%

TABLE 2 – Values associated with the EU

Q2.3. To what extent does the European Union represent the following values for you?						
	Very strong	Strong	Weak	Very weak	Don't know	Total
Human rights	27%	51%	12%	5%	5%	100%
Economic prosperity	23%	53%	12%	5%	7%	100%
Individual freedom	23%	52%	14%	5%	6%	100%
Freedom of speech	21%	53%	15%	6%	5%	100%
Democracy	25%	47%	13%	7%	8%	100%
Rule of law	24%	48%	14%	5%	9%	100%
Respect for other cultures, minorities	19%	51%	16%	6%	8%	100%
Freedom of religion	18%	51%	12%	4%	15%	100%
Equality and social justice	19%	50%	17%	7%	7%	100%
Peace, security and stability	20%	48%	18%	9%	5%	100%
Honesty & transparency	17%	51%	17%	7%	8%	100%
Freedom of the media	17%	50%	17%	6%	10%	100%
Absence of corruption	14%	36%	30%	13%	7%	100%

Percentages refer to Moldovans who have heard about the EU

TABLE 3 – Trust towards the European Union

Q2.11. I would like to ask you a question about how much trust you have in the EU					
		Tend to trust	Tend not to trust	Don't know	Total
Settlement size	Capital	66%	28%	6%	100%
	Between 20,000 and 150,000 inhabitants	63%	34%	3%	100%
	Less than 20,000 inhabitants	63%	30%	7%	100%
Gender	Male	66%	26%	8%	100%
	Female	62%	33%	5%	100%
Age group	15-34 years	76%	19%	5%	100%
	35-54 years	60%	31%	9%	100%
	55 years & above	51%	44%	5%	100%
Education level	Low/medium level	60%	36%	4%	100%
	High level	77%	15%	8%	100%
Employment status	Employed / Self-employed	65%	29%	6%	100%
	Unemployed or temporarily not working / inactive	64%	30%	6%	100%
Mother tongue	Romanian	74%	21%	5%	100%
	Russian	31%	49%	20%	100%
Geographical area	Centre	72%	21%	7%	100%
	North	55%	39%	6%	100%
	South	61%	33%	6%	100%
Total		64%	30%	6%	100%

Percentages refer to Moldovans who have heard about the EU

TABLE 4 – Relations between the EU and Moldova

Q2.4. In general, how would you describe the relations that the European Union has with Moldova?					
		Good	Bad	Don't know/No relations	Total
Settlement size	Capital	76%	17%	7%	100%
	Between 20,000 and 150,000 inhabitants	80%	18%	2%	100%
	Less than 20,000 inhabitants	73%	20%	7%	100%
Gender	Male	73%	22%	5%	100%
	Female	76%	17%	7%	100%
Age group	15-34 years	77%	17%	6%	100%
	35-54 years	77%	18%	5%	100%
	55 years & above	67%	25%	8%	100%
Education level	Low/medium level	72%	23%	5%	100%
	High level	82%	14%	4%	100%
Employment status	Employed / Self-employed	72%	23%	5%	100%
	Unemployed or temporarily not working / inactive	76%	17%	7%	100%
Mother tongue	Romanian	83%	11%	6%	100%
	Russian	51%	41%	8%	100%
Geographical area	Centre	79%	12%	9%	100%
	North	75%	23%	2%	100%
	South	67%	27%	6%	100%
Total		74%	19%	7%	100%

Percentages refer to Moldovans who have heard about the EU

TABLE 5 – Provision of financial support by the EU

Q2.5. As far as you know, does the European Union provide Moldova with financial support?					
		Yes	No	Don't know	Total
Settlement size	Capital	85%	5%	10%	100%
	Between 20,000 and 150,000 inhabitants	85%	4%	11%	100%
	Less than 20,000 inhabitants	88%	4%	8%	100%
Gender	Male	87%	4%	9%	100%
	Female	87%	4%	9%	100%
Age group	15-34 years	91%	2%	7%	100%
	35-54 years	86%	5%	9%	100%
	55 years & above	81%	6%	13%	100%
Education level	Low/medium level	81%	6%	13%	100%
	High level	93%	2%	5%	100%
Employment status	Employed / Self-employed	88%	5%	7%	100%
	Unemployed or temporarily not working / inactive	86%	4%	10%	100%
Mother tongue	Romanian	92%	2%	6%	100%
	Russian	85%	4%	11%	100%
Geographical area	Centre	89%	4%	7%	100%
	North	88%	2%	10%	100%
	South	83%	6%	11%	100%
Total		87%	4%	9%	100%

Percentages refer to Moldovans who have heard about the EU

TABLE 6 – Effectiveness of the support

Q2.5.1. How effective do you think the support has been?					
		Effective	Not effective	Don't know	Total
Settlement size	Capital	49%	48%	3%	100%
	Between 20,000 and 150,000 inhabitants	55%	44%	1%	100%
	Less than 20,000 inhabitants	56%	42%	2%	100%
Gender	Male	57%	40%	3%	100%
	Female	52%	47%	1%	100%
Age group	15-34 years	58%	41%	1%	100%
	35-54 years	55%	41%	4%	100%
	55 years & above	48%	50%	2%	100%
Education level	Low/medium level	60%	38%	2%	100%
	High level	52%	45%	3%	100%
Employment status	Employed / Self-employed	50%	48%	2%	100%
	Unemployed or temporarily not working / inactive	58%	40%	2%	100%
Mother tongue	Romanian	61%	37%	2%	100%
	Russian	21%	75%	4%	100%
Geographical area	Centre	61%	36%	3%	100%
	North	44%	54%	2%	100%
	South	54%	45%	1%	100%
Total		55%	43%	2%	100%

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

TABLE 7 – Programmes financed by the EU

Q2.6. Do you know of any specific programmes financed by the European Union in Moldova?		Yes	No	Total
Settlement size	Capital	40%	60%	100%
	Between 20,000 and 150,000 inhabitants	37%	63%	100%
	Less than 20,000 inhabitants	47%	53%	100%
Gender	Male	49%	51%	100%
	Female	41%	59%	100%
Age group	15-34 years	41%	59%	100%
	35-54 years	50%	50%	100%
	55 years & above	44%	56%	100%
Education level	Low/medium level	40%	60%	100%
	High level	71%	29%	100%
Employment status	Employed / Self-employed	47%	53%	100%
	Unemployed or temporarily not working / inactive	44%	56%	100%
Mother tongue	Romanian	48%	52%	100%
	Russian	35%	65%	100%
Geographical area	Centre	46%	54%	100%
	North	37%	63%	100%
	South	51%	49%	100%
Total		45%	55%	100%

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

TABLE 8 – Benefits from current EU support

Q2.8. To what extent would you say that Moldova has benefitted from the current European Union support in the following areas?	Very much	Fairly	Not very much	Not at all	Don't know	Total
Improved infrastructure	12%	44%	29%	10%	5%	100%
Improved trade	9%	44%	28%	10%	9%	100%
Access to more products and services	8%	45%	28%	11%	8%	100%
Better education	8%	44%	28%	12%	8%	100%
Improved quality of healthcare system	9%	42%	29%	14%	6%	100%
More tourism	9%	40%	34%	10%	7%	100%
Improved agricultural production	8%	41%	31%	12%	8%	100%
Greater economic development	6%	38%	32%	15%	9%	100%
Greater employment opportunities	9%	35%	32%	19%	5%	100%
Improved democracy	7%	34%	32%	15%	12%	100%
Improved quality of the justice system	6%	31%	32%	17%	14%	100%
Better law enforcement	8%	25%	35%	22%	10%	100%
Less corruption	6%	24%	30%	30%	10%	100%

Percentages refer to Moldovans who have heard about the EU

TABLE 9 – Areas in which the EU should play a greater role

Q2.9. Please tell us in which sectors you think the European Union should play a greater role		
	The specific item was selected as the first most important area	The specific item was selected as the first or second or third most important area
Reduce corruption	19%	44%
Improve infrastructure	11%	30%
Create greater employment opportunities	11%	28%
Improve quality of healthcare system	10%	30%
Promote economic development	9%	34%
Promote better education	8%	21%
Improve trade	6%	16%
Improve agricultural production	5%	21%
Improve quality of the justice system	5%	13%
Improve democracy	4%	15%
Promote better law enforcement	4%	20%
Increase tourism	3%	10%
Promote access to more products and services	2%	7%

Percentages refer to Moldovans who have heard about the EU

TABLE 10 – Type of media frequently used as source of information

		Type of media frequently used as source of information (Q3.8)				Word of mouth used as source of information (Q3.8)
		No media	Only traditional media	Social media or the Internet	Total	
Settlement size	Capital	5%	27%	68%	100%	54%
	Between 20,000 and 150,000 inhabitants	7%	25%	68%	100%	37%
	Less than 20,000 inhabitants	9%	34%	57%	100%	43%
Gender	Male	8%	30%	62%	100%	44%
	Female	8%	34%	58%	100%	44%
Age group	15-34 years	8%	7%	85%	100%	42%
	35-54 years	7%	27%	66%	100%	45%
	55 years & above	9%	73%	18%	100%	48%
Education level	Low/medium level	10%	39%	51%	100%	47%
	High level	7%	10%	83%	100%	41%
Employment status	Employed / Self-employed	7%	25%	68%	100%	44%
	Unemployed or temporarily not working / inactive	8%	36%	56%	100%	45%
Mother tongue	Romanian	8%	30%	62%	100%	42%
	Russian	6%	39%	55%	100%	55%
Geographical area	Centre	6%	31%	63%	100%	41%
	North	4%	37%	59%	100%	47%
	South	14%	28%	58%	100%	46%
Total		8%	32%	60%	100%	44%

TABLE 11 – Frequent usage of media in national language, Russian and other languages

		Individuals that always or often use media		
		In national language	In Russian	In other foreign language
Settlement size	Capital	71%	58%	41%
	Between 20,000 and 150,000 inhabitants	71%	66%	10%
	Less than 20,000 inhabitants	69%	57%	13%
Gender	Male	70%	62%	20%
	Female	69%	55%	16%
Age group	15-34 years	74%	52%	25%
	35-54 years	73%	63%	17%
	55 years & above	60%	62%	9%
Education level	Low/medium level	59%	62%	15%
	High level	82%	52%	29%
Employment status	Employed / Self-employed	71%	56%	20%
	Unemployed or temporarily not working / inactive	69%	60%	17%
Mother tongue	Romanian	83%	50%	17%
	Russian	33%	83%	23%
Geographical area	Centre	80%	53%	25%
	North	68%	71%	13%
	South	56%	53%	13%
Total		70%	58%	18%

TABLE 12 – Trust towards different types of media

Q3.9. & Q3.10. Which is your level of trust for the following media as a source of information?				
	Tend to trust	Tend not to trust	Don't know	Total
Official EU website	22%	33%	45%	100%
Television	52%	42%	6%	100%
Radio	30%	42%	28%	100%
Print media	27%	42%	31%	100%
Social media	36%	37%	27%	100%
Internet	53%	28%	19%	100%
Word of mouth	43%	42%	15%	100%
Country's media in national language	54%	37%	9%	100%
Country's media in Russian	44%	48%	8%	100%
Country's media in other languages	21%	47%	32%	100%
Foreign media in Russian	38%	47%	15%	100%
Foreign media in other languages	22%	47%	31%	100%

TABLE 13 – Exposure to information about the EU

Q3.2. Have you seen or heard any information about the EU in the last three months?				
		Yes	No	Total
Settlement size	Capital	78%	22%	100%
	Between 20,000 and 150,000 inhabitants	79%	21%	100%
	Less than 20,000 inhabitants	73%	27%	100%
Gender	Male	72%	28%	100%
	Female	77%	23%	100%
Age group	15-34 years	79%	21%	100%
	35-54 years	73%	27%	100%
	55 years & above	71%	29%	100%
Education level	Low/medium level	65%	35%	100%
	High level	91%	9%	100%
Employment status	Employed / Self-employed	74%	26%	100%
	Unemployed or temporarily not working / inactive	75%	25%	100%
Mother tongue	Romanian	78%	22%	100%
	Russian	77%	23%	100%
Geographical area	Centre	78%	22%	100%
	North	65%	35%	100%
	South	80%	20%	100%
Total		75%	25%	100%

Percentages refer to Moldovans who have heard about the EU

TABLE 14 – Representation of the EU in the national media

Q3.3. In general, how would you say the EU was presented in the national media?						
		Positive	Neutral	Negative	Don't know	Total
Settlement size	Capital	55%	42%	0%	3%	100%
	Between 20,000 and 150,000 inhabitants	66%	28%	2%	4%	100%
	Less than 20,000 inhabitants	54%	34%	7%	5%	100%
Gender	Male	54%	36%	7%	3%	100%
	Female	57%	34%	4%	5%	100%
Age group	15-34 years	63%	31%	5%	1%	100%
	35-54 years	54%	38%	5%	3%	100%
	55 years & above	47%	38%	7%	8%	100%
Education level	Low/medium level	48%	40%	8%	4%	100%
	High level	68%	24%	4%	4%	100%
Employment status	Employed / Self-employed	57%	35%	6%	2%	100%
	Unemployed or temporarily not working / inactive	54%	35%	5%	6%	100%
Mother tongue	Romanian	60%	33%	3%	4%	100%
	Russian	51%	42%	5%	2%	100%
Geographical area	Centre	58%	36%	3%	3%	100%
	North	44%	45%	6%	5%	100%
	South	63%	23%	9%	5%	100%
Total		56%	35%	5%	4%	100%

Percentages refer to Moldovans who have heard about the EU

TABLE 15 – Accessing information about the EU

Q3.1. How often do you look for/access information on the EU?					
		Frequently	Not very frequently	Never	Total
Settlement size	Capital	41%	39%	20%	100%
	Between 20,000 and 150,000 inhabitants	20%	21%	59%	100%
	Less than 20,000 inhabitants	30%	28%	42%	100%
Gender	Male	34%	30%	36%	100%
	Female	29%	29%	42%	100%
Age group	15-34 years	37%	34%	29%	100%
	35-54 years	33%	29%	38%	100%
	55 years & above	22%	24%	54%	100%
Education level	Low/medium level	25%	26%	49%	100%
	High level	51%	34%	15%	100%
Employment status	Employed / Self-employed	35%	29%	36%	100%
	Unemployed or temporarily not working / inactive	29%	30%	41%	100%
Mother tongue	Romanian	36%	30%	34%	100%
	Russian	16%	44%	40%	100%
Geographical area	Centre	34%	32%	34%	100%
	North	20%	25%	55%	100%
	South	38%	30%	32%	100%
Total		31%	30%	39%	100%

Percentages refer to Moldovans who have heard about the EU

TABLE 16 – Satisfaction with democracy in Moldova

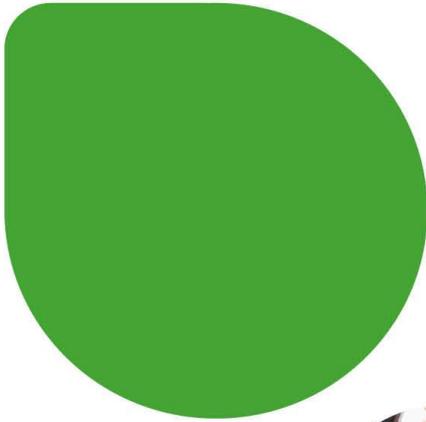
Q4.3. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Moldova?					
		Satisfied	Not satisfied	Don't know	Total
Settlement size	Capital	14%	85%	1%	100%
	Between 20,000 and 150,000 inhabitants	17%	78%	5%	100%
	Less than 20,000 inhabitants	17%	79%	4%	100%
Gender	Male	18%	80%	2%	100%
	Female	15%	81%	4%	100%
Age group	15-34 years	20%	77%	3%	100%
	35-54 years	11%	85%	4%	100%
	55 years & above	17%	81%	2%	100%
Education level	Low/medium level	18%	78%	4%	100%
	High level	19%	81%	0%	100%
Employment status	Employed / Self-employed	13%	86%	1%	100%
	Unemployed or temporarily not working / inactive	18%	77%	5%	100%
Mother tongue	Romanian	18%	79%	3%	100%
	Russian	11%	84%	5%	100%
Geographical area	Centre	15%	83%	2%	100%
	North	8%	86%	6%	100%
	South	28%	71%	1%	100%
Total		16%	81%	3%	100%

TABLE 17 – 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	Capital	43%	56%	1%	100%
	Between 20,000 and 150,000 inhabitants	45%	55%	0%	100%
	Less than 20,000 inhabitants	52%	45%	3%	100%
Gender	Male	50%	48%	2%	100%
	Female	49%	48%	3%	100%
Age group	15-34 years	54%	45%	1%	100%
	35-54 years	55%	40%	5%	100%
	55 years & above	37%	62%	1%	100%
Education level	Low/medium level	45%	52%	3%	100%
	High level	44%	55%	1%	100%
Employment status	Employed / Self-employed	51%	46%	3%	100%
	Unemployed or temporarily not working / inactive	49%	50%	1%	100%
Mother tongue	Romanian	52%	45%	3%	100%
	Russian	45%	55%	0%	100%
Geographical area	Centre	51%	47%	2%	100%
	North	40%	57%	3%	100%
	South	58%	41%	1%	100%
Total		50%	48%	2%	100%

TABLE 18 – Optimism regarding personal future

Q4.6. How optimistic are you about your personal future?					
		Optimistic	Pessimistic	Don't know	Total
Settlement size	Capital	62%	37%	1%	100%
	Between 20,000 and 150,000 inhabitants	70%	30%	0%	100%
	Less than 20,000 inhabitants	72%	26%	2%	100%
Gender	Male	70%	30%	0%	100%
	Female	70%	27%	3%	100%
Age group	15-34 years	86%	13%	1%	100%
	35-54 years	71%	27%	2%	100%
	55 years & above	46%	53%	1%	100%
Education level	Low/medium level	63%	36%	1%	100%
	High level	71%	28%	1%	100%
Employment status	Employed / Self-employed	71%	27%	2%	100%
	Unemployed or temporarily not working / inactive	69%	29%	2%	100%
Mother tongue	Romanian	74%	25%	1%	100%
	Russian	58%	38%	4%	100%
Geographical area	Centre	72%	26%	2%	100%
	North	58%	41%	1%	100%
	South	79%	20%	1%	100%
Total		70%	29%	1%	100%



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