

**ANNUAL SURVEY REPORT:
REPUBLIC OF MOLDOVA**

4th Wave (Spring 2019)

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

MAY 2019

**#
STRONGER
TOGETHER**

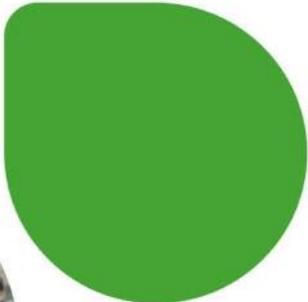
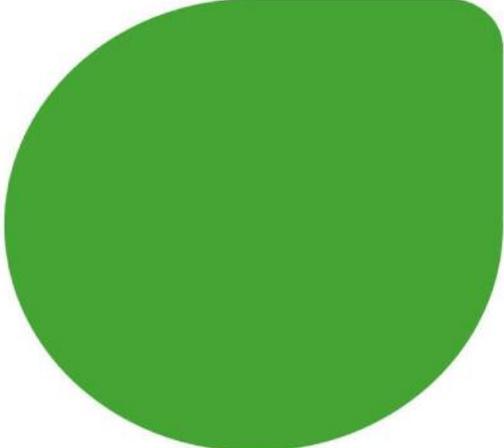
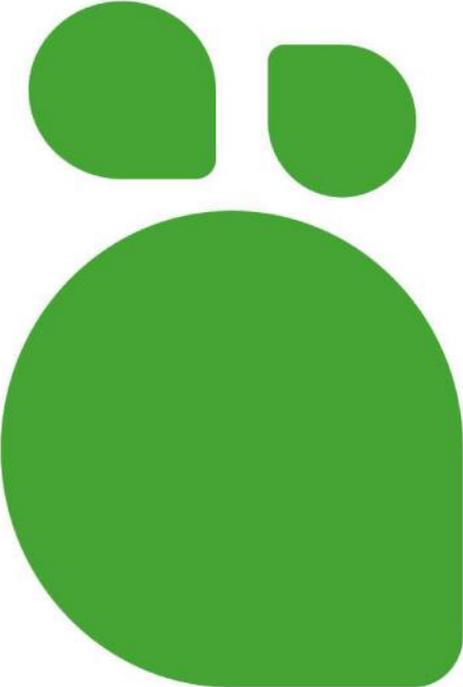


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*The surveys have been carried out in the six Eastern Partner countries by ACT LLC
and their network partners*

1. Background

Between February and March 2019, 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 public diplomacy, 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 **4th wave of annual surveys** (spring 2019) conducted in **Moldova**¹ and is organized around four main sections:

- **General perceptions of the EU**
This section looks at how citizens perceive the EU's image, the relationship between their country and the EU, their awareness of the EU's financial support and their opinion of its benefits, as well as their level of trust towards the EU, also compared with the role of other foreign institutions. During the third wave, a new set of questions that touched upon perceived myths about the EU, was also added, in order to gather greater insights on how the EU is perceived by citizens.
- **Sources of information**
This section looks at the main sources of information in the country, both in the national language and other foreign languages. Specific focus is placed on EU-related information, programmes financed by the EU and its institutional communication instruments.
- **Country evaluation and future expectations**
This section provides an assessment of how citizens view their country's and their personal future. Specific focus is placed on current functioning of democracy and most pressing concerns.
- **Profiling attitudes towards the EU**
This section is dedicated to profiling citizens with a positive and a neutral stance towards the EU. Attitudes are profiled against a comprehensive set of indicators, such as the main socio-demographic characteristics, passive and active exposure to EU-related information, awareness and effectiveness of EU's financial support, level of trust towards the EU and other foreign institutions, perceptions of the country's and personal future and main concerns, and common beliefs about the EU.

All sections, together with an analysis of the results of the 4th wave of the survey, also provide comparisons between the findings of the 2018, 2017 and 2016 surveys where relevant.

¹ A similar report has been produced for each Eastern partner country. In addition, a macro-area/regional overview report that compares the results across the region is available.

2. Research methodology in brief

The survey was conducted in February - March 2019, following the same methodology adopted in the previous rounds of data collection (spring 2018, 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, Călăraşi, Străşeni, Ungheni, Orhei); 2) North (Soldăneşti, Donduseni, Rezina, Ocnita, Riscani, Briceni, Edinet, Drochia, Floresti, Fălești, Singerei, Sorooca, Bălți); 3) South (Basarabasca, 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

- **Over half of Moldovan citizens (55%) have a positive image of the European Union (EU)**, 33% feel neutral about it and 10% hold a negative view. **Compared to 2018, positive perceptions have increased by 7 percentage points** mainly at the expenses of negative and uninformed views (down 4% and 2% respectively).
- As in previous waves, **most Moldovans continue to ‘strongly’ or ‘very strongly’ associate all values with the EU**. In fact, over three quarters of the population associate the EU with ‘economic prosperity’ (82%), ‘human rights’ (79%), ‘freedom of speech’ (78%), ‘freedom of religion’ (77%), and ‘respect for other cultures’ (76%). All other values follow quite close – except for ‘absence of corruption’ which scored the lowest association with the EU (57%) but it is primary shared as a priority at a personal level for Moldovans and more so compared to 2018 (up 6 percentage points).
- **The European Union is the most trusted foreign institution, with 65% of the population tending to trust it** – and no significant change since 2018. NATO has the lowest level of trust (30%), with 55% of Moldovans oriented towards not trusting it.

EU relations with Moldova and awareness of EU financial support

- **Nearly 70% of Moldovans describe the relations between their country and the EU as ‘fairly good’** (60%) or ‘very good’ (8%); 27% of individuals rate the relations as ‘bad’, while only 5% answered ‘don’t know’ or were unaware of any relations between Moldova and the EU. Compared to 2018, a slight decrease in positive perceptions was observed (down 6%).
- **Nearly all citizens are also well aware of the financial support provided by the EU to Moldova (85%)**. Accordingly, the share of Moldovans who do not know whether the EU supports their country is very low – only 8% of citizens.
- **Currently 53% of Moldovans aware of the EU’s financial support consider it as ‘effective’ and 59% know about specific EU-funded programmes (up 14% since 2018)**. The most well-known programmes relate to the fields of ‘infrastructure development’ (61%) and ‘education’ (37%), possibly due to the continued participation in Horizon 2020, Erasmus+ and the Mobility Partnership Programme.
- Nearly one in two Moldovans cited the positive effects of EU financial support on ‘infrastructure’ (48%), ‘tourism’ (48%), ‘education’ (48%) and ‘access to more products and services’ (46%). However, their appreciation is slightly less positive than in 2018. The rating on ‘corruption’ and ‘improvement of quality of the justice system’ was particularly negative with only 23% and 29% of citizens acknowledging the benefits of EU support.

Media usage as sources of information

- **Television continues to be the most popular source of information in Moldova** – only one in ten citizens ‘never’ watches it – **followed by ‘word of mouth’** – around one in four citizens ‘never’ relies on it – and Internet – 26% ‘never’ accesses it. Usage frequencies of different information sources are however very different and, if only frequent or very frequent usage is considered, 65% of Moldovans ‘frequently’ access the Internet or social media, versus 28% who rely on traditional media only.
- **Compared to 2018, there has been a slight decrease in the circulation of national media in Russian (78%, down 6%) in favour of that of media in Romanian (89%, up 4%)**. The gap between

the two is even more pronounced if habitual usage is considered, with **43% of Moldovans always accessing media in their national language** versus 26% always using national media in Russian.

Sources of information about the EU

- **Nearly 80% of Moldovans said that they had seen or heard information about the EU in the three months preceding the survey (79%).** This figure has increased since 2017 (up 12%) and its value is back at 2016 levels. **55% of the population feel that the EU is presented positively in national media.**
- Passive exposure stems mostly from television (69%) and the Internet (59%). ‘Word of mouth’ was cited by 29% of the population, and social media by 17% of Moldovans. 5% of Moldovans who heard or saw information about the EU did so through the official EU website, just like in 2018.
- Around one third of citizens access information on the EU either ‘frequently’ or ‘very frequently’ (29%) – just like in 2018. Yet sporadic access has increased from 30% to 39%. **Moldovans prefer to search for information about the EU in their national language (71%)** and only 24% look for information in Russian. English is even less frequently used, by 5% of the population.
- ‘Economic news’ (25%, down 21%) has witnessed a big drop in interest and currently ‘active’ citizens are mainly interested in ‘the lifestyle in the EU’ (40%), ‘social and political news’ (35%), ‘general information on the EU’ (33%) and ‘the EU relations with Moldova’ (32%). One in four ‘active’ citizens also searched for ‘opportunities offered by the European Union’ and ‘educational and cultural programmes’. Only 4% were interested in ‘the EU’s relations with Eastern Partner countries’ – it was 11% in 2018.
- **95% of citizens rated the quality of the EU related information as ‘user-friendly’, ‘accessible’ and ‘comprehensive’.** Opinions were only slightly less positive in terms of ‘reliability’ and ‘trustworthiness’, with around 80% of citizens satisfied.

View of Moldova’s current situation

- As in previous waves, **the share of Moldovans who trust their country institutions is extremely low.** Yet, an increase in trust towards the Government (28%, up 4%) and, particularly, the Parliament (22%, up 9%) was observed, reflecting the somewhat more positive expectations in the newly elected body. 79% of Moldovans openly distrust the political parties and 67% the regional and local authorities. **The only institution trusted by the majority of the population is the religious authority (61%).**
- Accordingly, **76% of Moldovans are dissatisfied with the way democracy works in their country** (down 5% from 2018), reflecting a slightly more positive view presumably linked to newly held elections. The hierarchy of the elements that Moldovans believe apply to their country is largely consistent with the past, and progress towards democratic reforms and governance appears to have overall stalled. Corruption, independence of the judiciary and poor governance continue to be the most problematic areas, with over 74% of the population convinced that they do not apply to Moldova.
- Moldovans continue to be much more optimistic towards their personal future (72%) than the future of their country (49%). Their primary concerns are ‘low salaries and pensions’ (54%) and ‘corruption’ (47%). Around one third of citizens are also worried about ‘unemployment’ (34%) and ‘low living standards and poverty’ (33%); and around one quarter about ‘migration’ (29%) and ‘high prices and taxes’ (25%).

Profiling attitudes towards the EU: positive versus neutral

- **Moldovans with a positive view of the EU account for slightly over half of the population (55%, up 7% since 2018).** Their most characteristic feature is that **nearly all are native Romanian speakers (90%).** They also tend to be slightly more concentrated among residents of the centre of the country (49%) and most educated group (14%). On the other hand, **neutral Moldovans, who account for 33% of the population, are more concentrated among native speakers of**

Russian (15%) and **other languages** (17%) – such as Ukrainian, Gagauz language and Bulgarian – males (51%), older individuals (30%) and citizens with a lower level of education (93%). They are also more likely to live in the south (31%) or the north of the country (28%).

- EU supporters are more likely to be actively and passively exposed to information about the EU. In fact, 87% had seen or heard information about the EU in the three months preceding the survey and 42% had looked for/accessed information on the EU ‘frequently’ or ‘very frequently’ – the corresponding figures in the neutral population stand at 71% and 13% respectively.
- **If searching for EU-related information, nearly all EU supporters do so in their national language (79%), whereas 64% of neutral citizens rely frequently on media in Russian.** Neutral citizens are also less likely to rely on media in another foreign language (11% versus 25% respectively) and new media (58% versus 71%) than EU supporters.
- A positive image of the EU is definitely linked to a higher level of confidence in the EU versus the EEU. In fact, **88% of EU supporters trust the EU and only 24% the EEU** – the corresponding figures for the neutral population are 42% and 48% respectively. Despite being more critical in their opinions of the relations between the EU and their country and the effectiveness of EU financial support, 81% of neutrally oriented citizens are well aware of it.
- When it comes to common beliefs, neutral individuals seem to be quite influenced by the pro-Russian media they are keener to rely on. In fact, only around one in ten citizens with a neutral stance ‘strongly’ agrees with all the proposed statements, whereas around 40% are ‘not really’ or ‘not at all’ agreeing with them (it is around 25% and 15% respectively for EU supporters).
- Neutral individuals are also slightly less optimistic than EU supporters, with 52% openly pessimistic towards Moldova’s future and 29% towards their personal future (45% and 21% respectively for EU supporters). Their primary concern is ‘corruption’ – just like EU supporters. Yet, neutral individuals seem more concerned about ‘unemployment’ (36%), ‘high prices and taxes’ (27%) and ‘the unaffordability of the healthcare’ (44%). These issues may well reflect the difficulties they are encountering in their daily life, thus accounting for both their greater pessimism and more indifferent view of the EU.

3.2. Perceptions of the European Union

Over half of Moldovan citizens (55%) have a positive image of the European Union (EU), 33% feel neutral about it and 10% hold a negative view. Compared to 2018, positive perceptions have increased by 7 percentage points mainly at the expenses of negative and uninformed views (down 6% altogether). As newly held elections have confirmed, the country appears to be split between pro-Western and pro-Russian views with very significant differences according to mother-tongue. In fact, most native Romanian speakers (63%) are positive towards the EU, whereas three quarters of citizens who have Russian as their mother tongue are either neutral (52%) or negative (22%). Nevertheless, the EU continues to be the most trusted international institution (65%), with 85% of citizens well aware of its financial support to Moldova. Citizens particularly appreciate the positive effects on infrastructure (48%), tourism (48%), education (48%) and access to more products and services (46%). Corruption is the area that has least benefitted from the EU's support, and one in two 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 international institutions.

3.2.1. General perceptions of the EU

Over half of Moldovan citizens (55%) have a positive image of the European Union (EU), 33% feel neutral about it and 10% hold a negative view. Compared to 2018, positive perceptions have increased by 7 percentage points mainly at the expenses of negative and uninformed views (down 4% and 2% respectively).

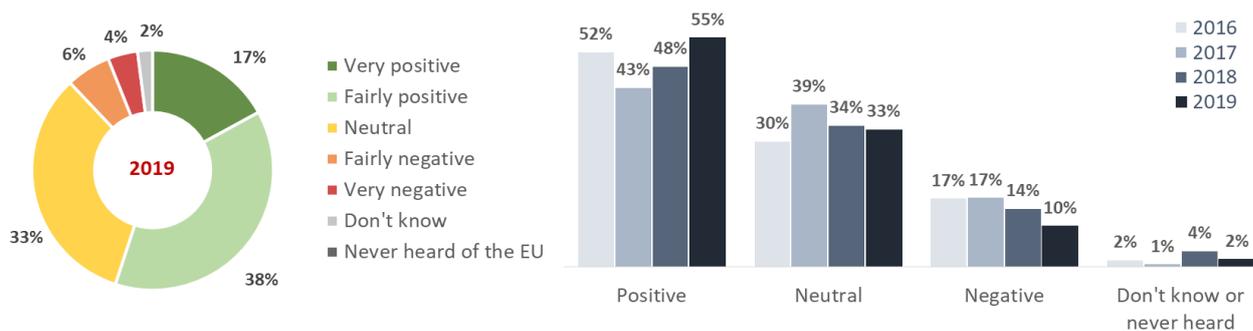
As newly held elections have confirmed⁶, the country appears to be split between pro-Western and pro-Russian views with very significant differences according to mother-tongue and geographical residence. In fact, most native Romanian speakers (63%) are positive towards the EU whereas three quarters of citizens who have Russian as their mother tongue are either neutral (52%) or negative (22%). The same discrepancy was observed between residents of the centre of the country – where Chişinău, the capital city is located – and citizens who live in other areas, such as the north – which hosts a large number of ethnic Russians and Ukrainians – and the south – where most Bulgarians and Gagauz can be found, which are in fact Russian speakers⁷. Accordingly, 63% of individuals living in the centre have a positive image of the European Union versus 49% and 50% of those living respectively in the north and in the south. In these areas, citizens are much more likely to feel negatively disposed towards the European Union – 10% and 18% respectively versus 5% for residents of the centre. Highly educated (75%) and younger citizens (59%) too tend to be more positive towards the EU than their socio-demographic counterparts⁸.

⁶ The results of the election were inconclusive, with no party taking a definite majority. The Socialist Party leads and holds 35 seats in the 101-member parliament; the ex-ruler Democratic Party has 30 now mandates, while the ACUM (Now) bloc - consisting of two aligned parties (the Dignity and Truth Platform – DA and the Action and Solidarity Party – PAS) - has 26 seats. The Socialists are pro-Russia; the Democrats are considered pro-West but have looked to balance East-West relations; whereas ACUM (Now) is considered pro-European Union.

⁷ See the results of the 2014 census at http://www.statistica.md/public/files/Recensamint/Recensamint_pop_2014/Rezultate/Harti/Etnie.jpg

⁸ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 1.

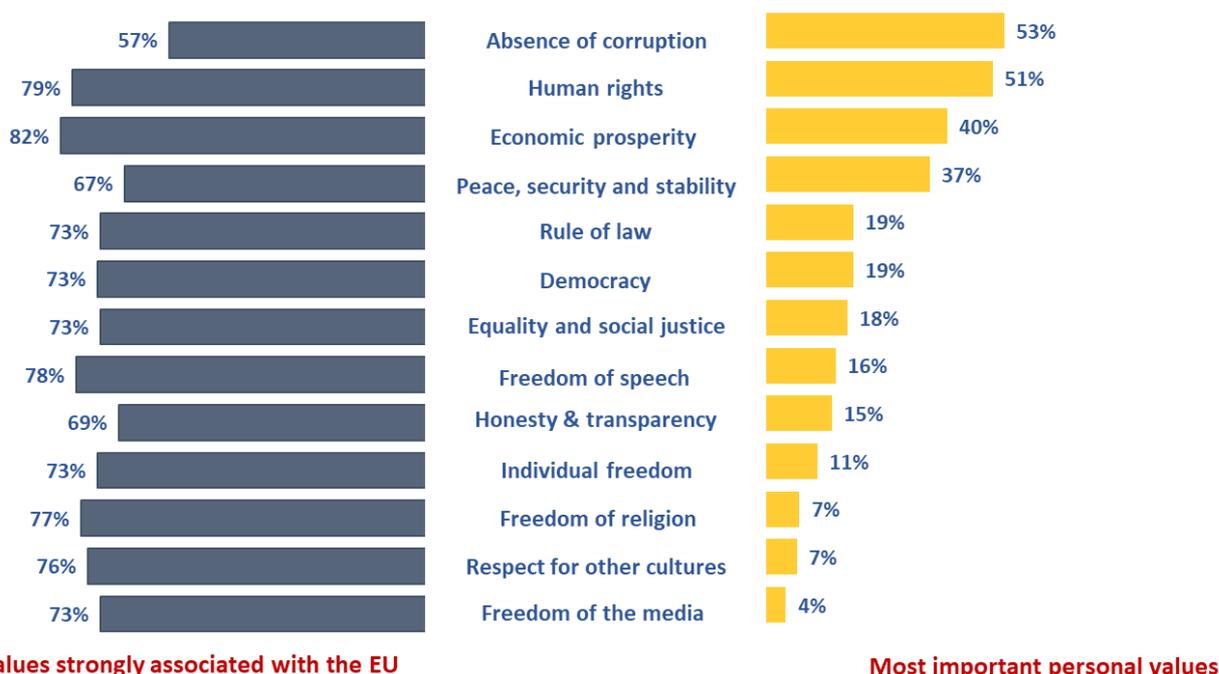
FIGURE 1 – Do you have a ‘very positive’, ‘fairly positive’, ‘neutral’, ‘fairly negative’ or ‘very negative’ image of the European Union? (Q2.1)



Nevertheless, like in previous waves, most Moldovans continue to strongly or very strongly associate all values with the EU. In fact, over three quarters of the population associate the EU with ‘economic prosperity’ (82%, the strongest association), ‘human rights’ (79%), ‘freedom of speech’ (78%), ‘freedom of religion’ (77%), and ‘respect for other cultures’ (76%). All other values follow quite close – except for ‘absence of corruption’ which scored the lowest association with the EU (57%) but it is a primary shared priority at a personal level for Moldovans and more so compared to 2018 (up 6 percentage points) possibly due to recent scandals as well as the adoption of the law on voluntary tax declarations⁹. Other important personal values are ‘human rights’ (51%), ‘economic prosperity’ (40%) and ‘peace, security and stability’ (37%). It may be worth noting that the conflict over the Transnistria region is still not yet resolved though ‘frozen’¹⁰.

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)

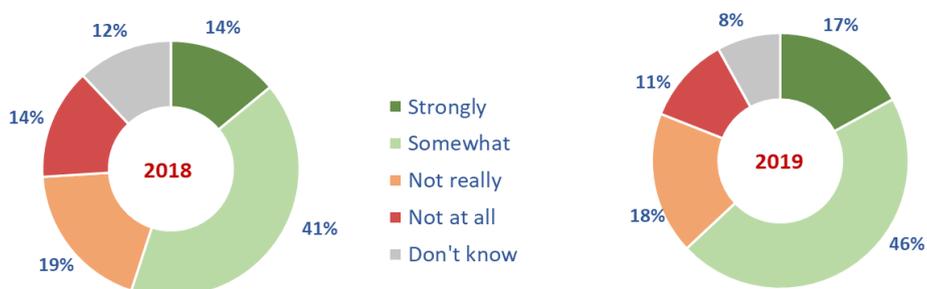


⁹ Not only there has been a series of recent corruption scandals in politics, but in July 2018, the Moldovan parliament adopted a new law on voluntary tax declarations, which allowed individuals to declare all undeclared or previously miss-declared assets and revenues, levying a symbolic 3% taxation on these assets. The law was largely perceived as a legitimisation of corruption and theft and it followed a series of highly controversial actions adopted by the Moldovan authorities contrary to the country’s anti-money laundering and anti-corruption commitments. Eastern Partnership Index 2017, Charting Progress in European Integration, Democratic Reforms, and Sustainable Development Eastern Partnership Civil Society Forum, 2018, <https://eap-csf.eu/eastern-partnership-index/>

¹⁰ More details are provided in Annex – Table 2.

Moldovans are also more confident that ‘the EU fosters the preservation of traditional values in their society’¹¹. Over 60% of Moldovans ‘strongly’ (17%) or ‘somewhat’ (46%) agree with the above statement. Only 8% do not have a definite opinion on the issue, while 18% are ‘not really’ and 11% ‘not at all’ convinced by it.

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. Despite the high degree of awareness about the European Union (all citizens know what the EU is and nearly 80% have heard about it in the three months before the survey), one in five citizens found the question ‘too hard to answer’. Positive associations were prevalent, the most common being ‘economic prosperity/high standards of living’ (32%, up 8 percentage points). The notion of the EU was also linked to ‘development/progress’ (4%), ‘freedom’ (3%) and ‘confidence in the future/optimism’ (3%). However, 8% of individuals felt ‘they could not trust the EU’ and 1% mentioned ‘the fear of losing sovereignty’ and ‘chaos/instability’.

Republic of Moldova is a member of a number of international organisations, including the UN. It is in a special Association Agreement with EU and an observer to the EEU. Despite joining NATO’s Partnership for Peace 25 years ago, Republic of Moldova is not a member of NATO¹². Among these, **the European Union is the most trusted international institution, with 65% of the population tending to trust it** – a finding consistent with last year. NATO has the lowest level of trust (30%), with 55% of Moldovans oriented towards not trusting it.

As previously noted, **the level of trust in the EU is highly linked to the citizens’ mother tongue**: three quarters of Romanian speakers (74%) trust the European Union versus 41% of Russian speakers. The latter are also less likely to answer the question (13% versus 4% answered ‘don’t know’). Residents of the north of the country are overall more sceptic (34%) than those living in the south (29%) and the centre (27%); whereas highly-educated individuals (80%), younger citizens (70%) and females (68%) are keener to trust the EU than their socio-demographic counterparts¹³.

¹¹ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European 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’.

¹² The issue of NATO membership is complicated by the unresolved territorial conflict over Transnistria with Russia.

¹³ 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)

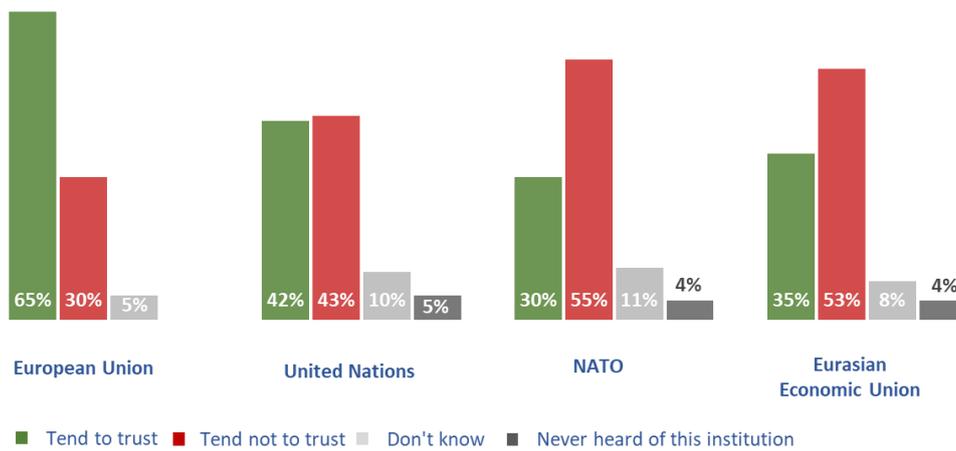
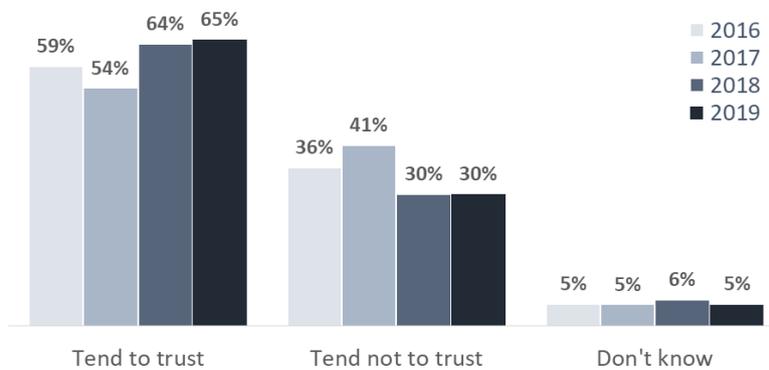


FIGURE 5 – Trust towards the EU (Q2.11)
 (Percentages refer to Moldovans who have heard of the EU)



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

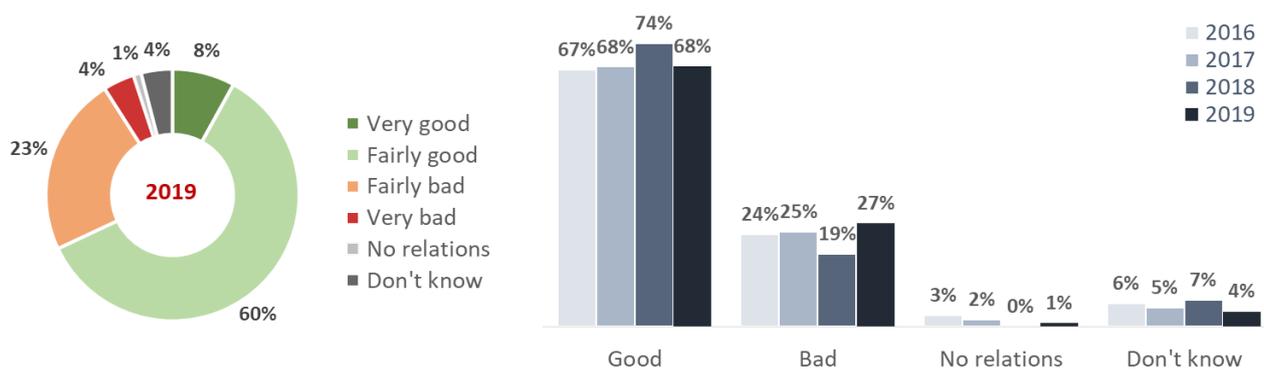
Nearly 70% of Moldovans describe the relations between their country and the EU as ‘fairly good’ (60%) or ‘very good’ (8%); 27% of individuals rate the relations as ‘bad’, while only 5% answered ‘don’t know’ or ascertained no relations between Moldova and the EU. Compared to 2018, a slight decrease in positive perceptions was observed (down 6%).

Once again, mother tongue, geographical residence and education seem to be the most characterising factors. 59% of citizens who have Russian as their mother tongue (versus 72% of native Romanian speakers); 62% of residents of northern parts of the country (versus around 70% of those living elsewhere) and 66% of individuals with a low-to-medium level of education (versus 72% of highly educated citizens) positively rated the relations between the EU and their country¹⁴.

¹⁴ 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)



Nearly 60% of Moldovans (59%) perceive the EU as ‘an independent actor in foreign relations’, with around a quarter ‘not really’ (15%) or ‘not at all’ (10%) agreeing with the statement. Overall it is a more positive opinion compared to 2018 (up 9 percentage points)¹⁵.

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)



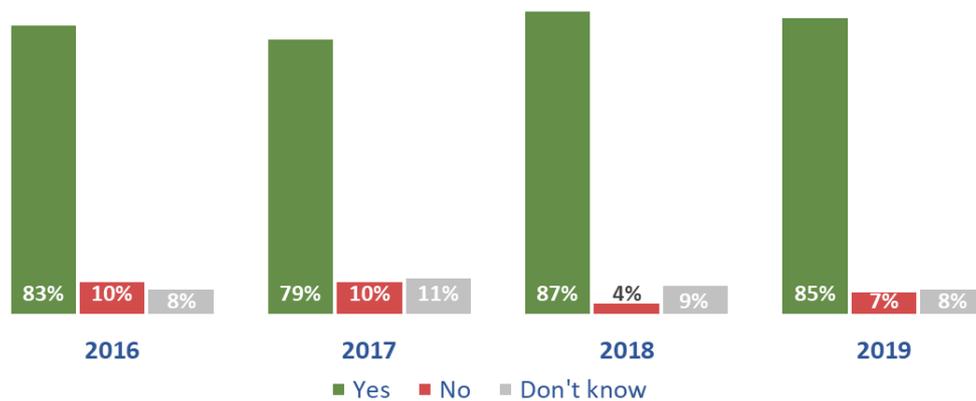
A very high percentage of citizens are well aware of the financial support provided by the EU to the Republic of Moldova (85%). Lower levels of awareness are concentrated only among native Russian speakers (66%), residents of middle-sized settlements (78%) and individuals with a lower level of education (79%). Over 90% of residents of the south of the country are aware of the EU’s financial support (91%)¹⁶.

¹⁵ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European 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’.

¹⁶ 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)

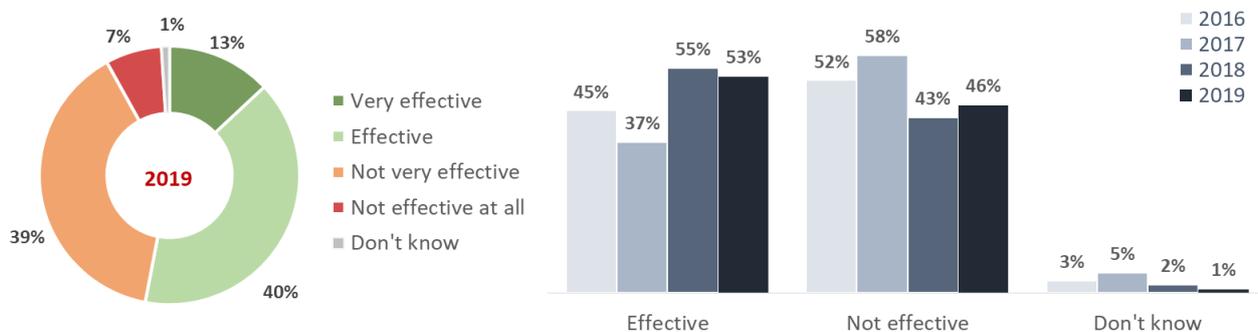


Compared to 2018, there has been no change in the share of people aware of the EU’s financial support who consider it as ‘effective’, which is currently at 53%. 46% of citizens believe that the support is ‘not effective’ and only 1% of citizens did not provide a definite answer.

As expected, native Russian speakers are the most critical and as much as 57% of them consider the EU’s support as ‘ineffective’ (versus 42% of citizens who have Romanian as their mother tongue). Similar figures were also found for middle aged individuals (56%); whereas residents of middle-sized settlements (67%) and the north of the country (59%) – which are less likely to be aware of EU support than their socio-demographic counterparts – are however more likely to evaluate it positively¹⁷.

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)



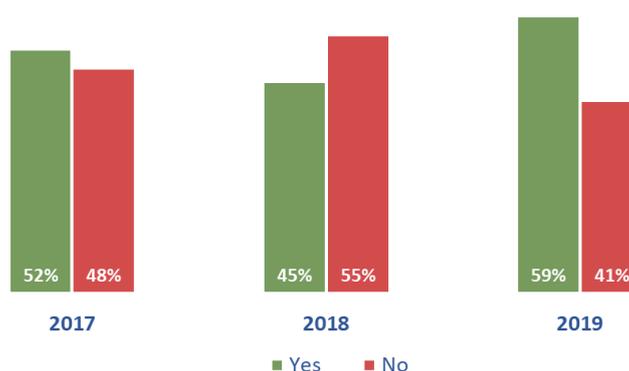
The knowledge of EU-funded programmes in Moldova has increased since 2018 and, currently, 59% of those who are aware of the EU’s financial support know about specific programmes (up 14 percentage points). Native Romanian speakers are more informed on the subject than native Russian speakers (61% versus 49%) and, in general, residents of the north and the south of the country compared to than residents of the centre (70% and 67% versus 47%). Males are also slightly more informed than females (62% versus 57%), though the greatest divide is in levels of education: three quarters of highly educated citizens know of specific programmes, versus 49% of those with a lower level of education¹⁸.

¹⁷ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 6.

¹⁸ 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)

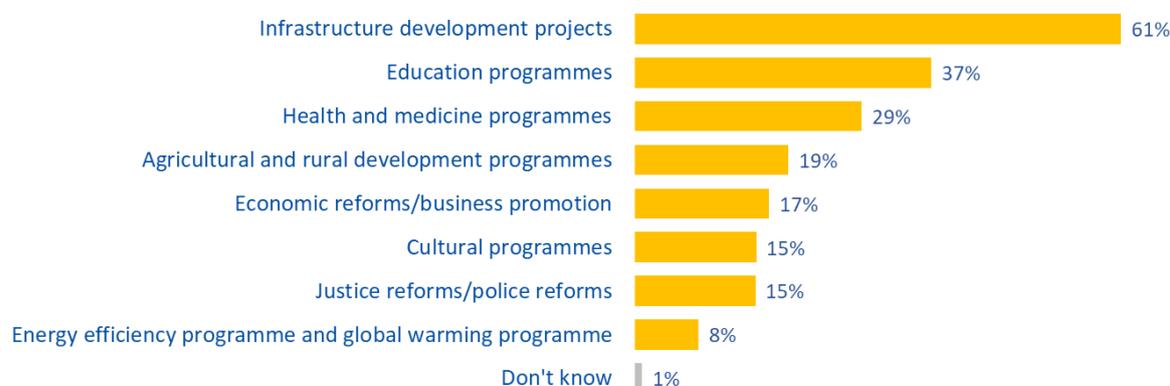


As in 2018, the most well-known EU-financed programmes relate to the field of ‘infrastructure development projects’ (61%). ‘Educational programmes’ were mentioned by 37% of citizens, which may be an attestation of the continued participation in Horizon 2020, Erasmus+ and Mobility Partnership Programme. Around one in three individuals also know about programmes in the area of ‘health and medicine’ (29%), and around one in five cited programmes in the field of ‘agricultural and rural development’ (19%), ‘economic reform/business promotion’ (17%), ‘culture’ (15%) and ‘justice/police reforms’ (15%).

Around 11% of Moldovans have personally been (or know someone who has been) involved in recent EU-funded projects (up 4% since 2018).

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

(Percentages refer to Moldovans who were aware of programmes financed by the EU)

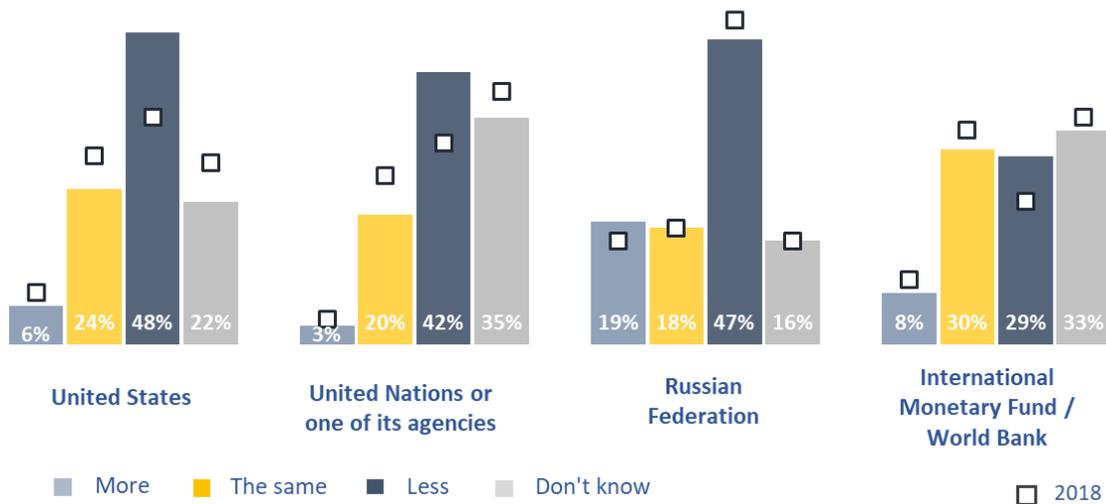


Moldovans are well aware of EU financial support: as a result over 40% are convinced that the European Union financially sustains their country the same or more than the International Monetary Fund/World Bank (59%), the United Nations and its agencies (62%), the Russian Federation (65%) and the United States of America (72%).

In fact, the Russian Federation is perceived as a greater donor to Moldova than the EU by only one in five citizens (19%). The level of confidence in answering this question was also quite high, considering that only 16% of Moldovans did not know how to answer the question. The levels of ‘don’t know’ responses for other institutions were higher and respectively 22% for the United States, 33% for the International Monetary Fund/World Bank and 35% for the United Nations and its agencies.

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, 66% of citizens ‘strongly’ (21%) or ‘somewhat’ (45%) agree that the EU provides tangible benefits to citizens in everyday life (up 10% since 2018)¹⁹. Very negative reactions to the statement were recorded for 10% of the population, and only 6% did not provide a definite answer to the question.

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)



With regard to the benefits stemming from the EU’s support, nearly one in two Moldovans cited the positive effects on ‘infrastructure’ (48%), ‘tourism’ (48%), ‘education’ (48%) and ‘access to more products and services’ (46%). However, their appreciation is slightly less positive than it was in 2018 (56%, 49%, 52% and 53% respectively). The view on ‘the reduction of corruption’ was particularly negative with only 23% of citizens (compared to 30% in 2018) acknowledging the benefits of EU support. Less citizens also acknowledged the positive effects of EU support on trade: 41% versus 53% in 2018.

In line with these findings, 52% of citizens (versus 44% in 2018) believe the EU should play a greater role in ‘reducing corruption’²⁰. Around one in three Moldovans also believe that the EU should play a greater

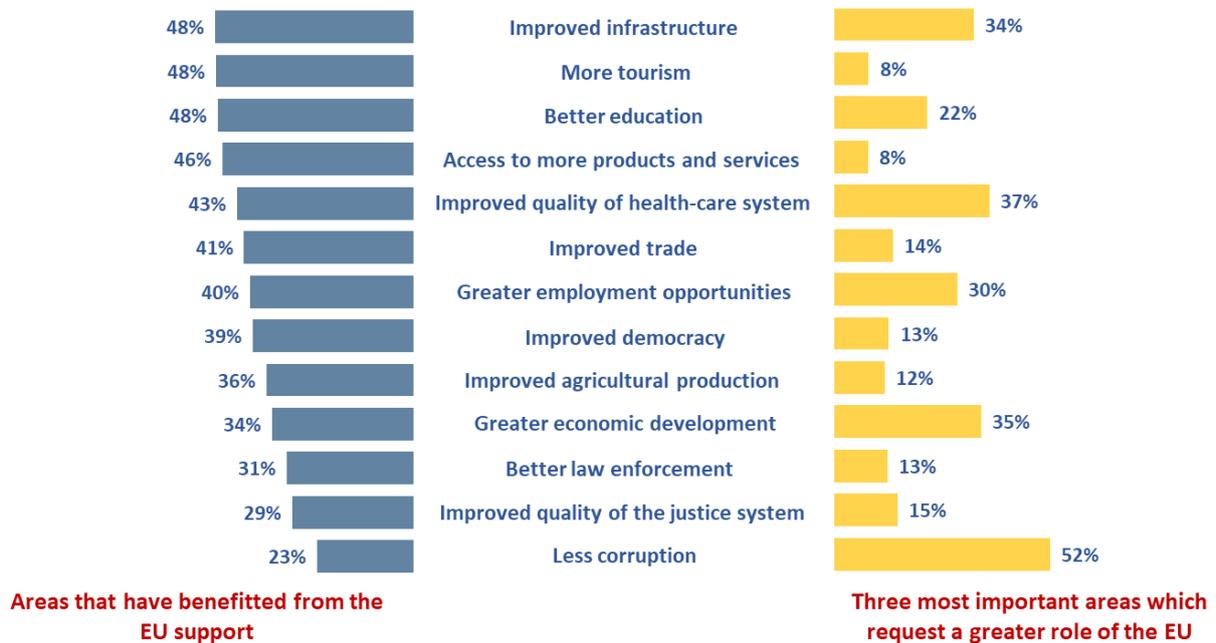
¹⁹ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European Union is perceived by citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not 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’.

²⁰ Respondents were asked to name and rank the three most important areas in which the EU should play a greater role.

role in ‘supporting economic development’ (35%), ‘improving infrastructure’ and ‘the quality of the healthcare system’ (37% and 34% respectively)²¹.

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’²², nearly 65% of Moldovans ‘strongly’ (16%) or ‘fairly’ (47%) agree, versus 29% of the population who do not support the statement. 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 (8%).

²¹ More details are provided in Annex – Tables 8 and 9.

²² The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European 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 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)



Nearly 70% of Moldovans are also convinced that ‘closer integration with the EU increases the country’s security and stability’ (67%, up 6% since 2018),²³ which is a very important finding considering that the Republic of Moldova has an unresolved territorial conflict over Transnistria with Russia and that 37% of the population named ‘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)



²³ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European 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’.

3.3. Sources of information on the EU

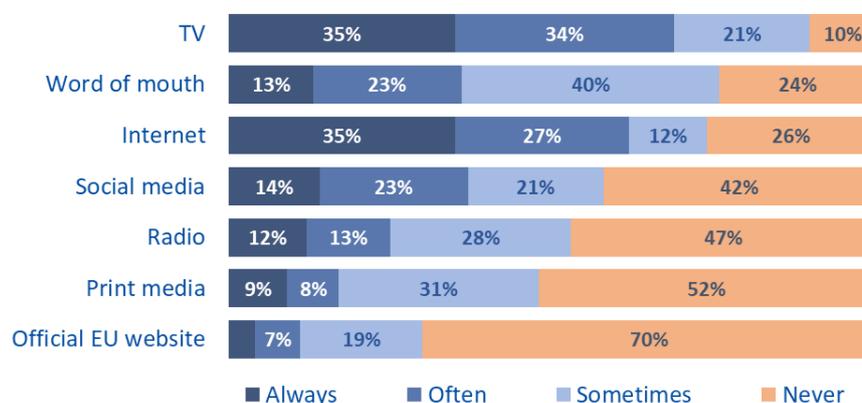
Nearly 80% of Moldovans say that they have seen or heard information about the EU in the last three months and passive exposure stems mostly from TV (69%) and the Internet (59%). Around 30% of citizens also access to information on the EU either ‘frequently’ or ‘very frequently’ and around 40% ‘sporadically’. Active searches for EU-related information are also more likely to happen via the Internet (74%) compared to television (56%). Overall, around 30% of Moldovans have used EU informational websites at least once. The quality of EU-related information was rated quite positively by over 80% of active searchers.

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

Television continues to be the most popular source of information in Moldova – only one in ten citizens ‘never’ watches it – followed by ‘word of mouth’ – around one in four citizens ‘never’ relies on it – and Internet – 26% ‘never’ accesses it. Usage frequencies of different information sources are however very different and, if only habitual usage is considered, Internet is very close to TV (with 35% of individuals ‘always’ relying on both and 27% and 34% respectively ‘often’ relying on them), whereas social media aligns with word of mouth (14% and 13% respectively ‘always’ rely on them and 23% ‘often’ rely on both). The radio and print media are used by around half of the population, though only around one in ten citizens ‘always’ uses them. 30% of Moldovans accesses the official EU website, most of which ‘sometimes’ (19%).

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



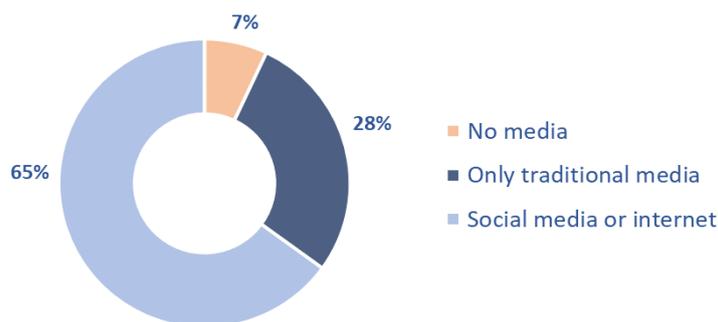
The breakdown of frequent users of traditional media only, new media and no media is shown in Figure 18²⁴. Most Moldovans frequently access the Internet or social media (65%), 28% traditional media only, while only 7% of the population do not rely on any media, with no significant change since 2018.

Frequent usage of new media decreases with age (90% for younger individuals, 66% for the middle age bracket and 26% for older individuals) and increases with the level of education and employment status - 81% of highly educated and 70% of employed citizens frequently access the Internet or social media, versus 61% of citizens with a lower level of education and who are unemployed/inactive. Native Russian

²⁴ 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.

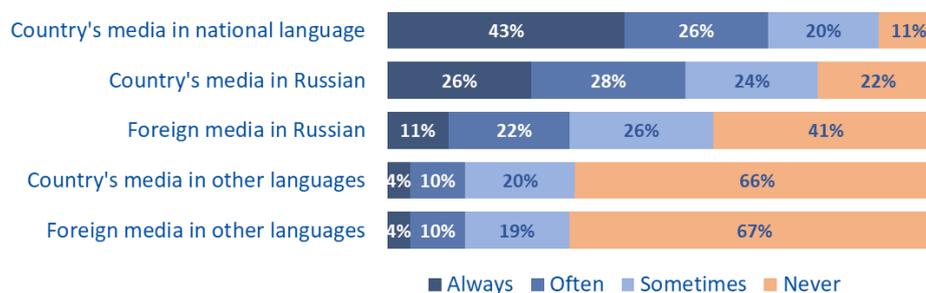
speakers (72%) are also more likely to use new media than native Romanian speakers (63%), which, on their hand, tend to rely more on traditional media only (30% versus 23%)²⁵.

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



Compared to 2018 – when the circulation of national media in Russian and Romanian was very similar – there has been a slight decrease of the former (78%, down 7%) in favour of the latter (89%, up 5%). The gap between the two is even more pronounced if habitual usage is considered, with 43% of Moldovans ‘always’ accessing media in their national language versus 26% ‘always’ using national media in Russian. Around 60% of Moldovans also rely on foreign media in Russian²⁶, whereas the usage of both national and foreign media in other languages is more sporadic (around 5% always use them around 30% never do).

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



No change since 2018 was recorded if frequent usage of media in Romanian, Russian and foreign languages is considered, irrespective of whether the medium is national or foreign²⁷: 69% of citizens frequently uses media in their national language; 59% media in Russian; and 19% media in other foreign languages.

Quite naturally, nearly all citizens who have Russian as their mother tongue frequently access media in Russian (93%), with one in four also relying on media in other foreign languages (23%). Native Romanian speakers, on their hand, are more likely to access media in their national language than native Russian speakers (80% versus 43%), although half of them are also frequent users of Russian media (52%). Highly educated citizens have a preference for media in Romanian and in foreign languages other than Russian

²⁵ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 10.

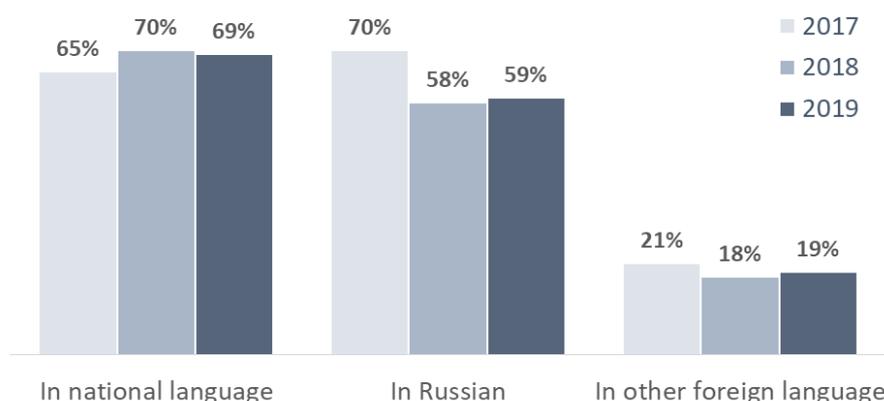
²⁶ The role of Russian TV channels in Moldova is quite significant. As in Armenia and Belarus, these channels are freely available through terrestrial transmitters or through the so-called ‘hybrid channels’. In addition, they are also available on different local broadcasters and on cable television 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

²⁷ Frequent users of media in Romania 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.

(82% and 27% respectively). At geographical level, frequent usage of media in Russian is particularly widespread in the north of the country²⁸, where as much as 71% of citizens rely on such sources²⁹.

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



Television, national media in Romanian and the Internet appear to be the most trusted sources of information in the country according to around one in two citizens (49%, 48% and 48% respectively). Around 40% of Moldovans also trust national media in Russian and ‘word of mouth’ (41% and 38% respectively). Otherwise, trust levels are quite low and comprised between one fifth and one third of citizens for each media source. The low levels of trust in national and foreign media in foreign languages other than Russian (21% and 26% respectively) and the official EU website (29%) are presumably linked with the lower usage of such sources; in fact between one quarter and one third of citizens could not rate their trust and answered ‘don’t know’³⁰.

3.3.2. Sources of information about the EU

Nearly 80% of Moldovans said that they had seen or heard information about the EU in the three months preceding the survey (79%). This figure has increased since 2017 (up 12%) and its value is back at 2016 levels, when it recorded a peak of 80%. Passive exposure to EU-related information is greatly linked with education, and 93% of highly educated citizens had heard about the EU versus 72% of those with a lower level of education. On the contrary, native Russian speakers have been less exposed to EU-related information, with 70% of citizens having heard about the EU compared to 81% of Romanian mother tongue³¹.

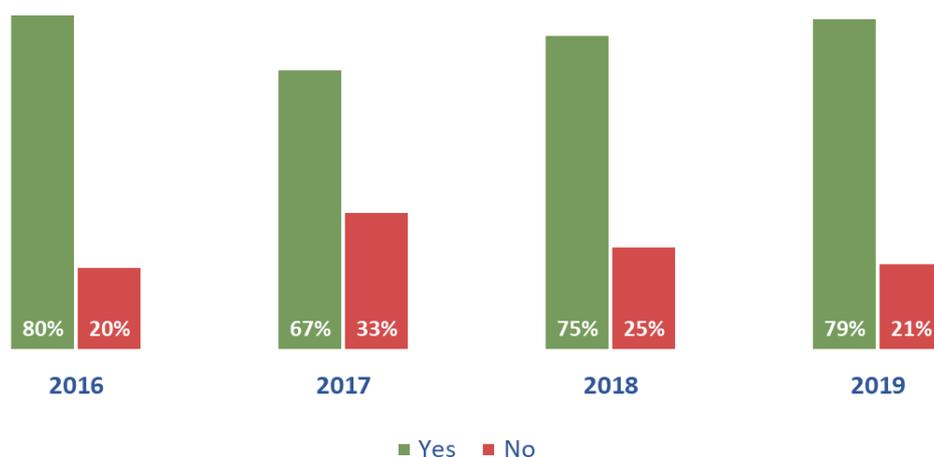
²⁸ According to the 2014 census, around 80% of Moldova’s inhabitants reported that they considered Moldovan (57%) or Romanian (24%) to be their native language. A share of 10% consider Russian as their mother tongue, however if common usage is considered, the share of Russian speakers increases to 15% since Russian is the language of choice for inhabitants of the ethnic-Russian north, as well as the majority of ethnic minorities such as Ukrainians, Bulgarians and Gagauz people. <http://www.statistica.md/pageview.php?l=en&idc=479>.

²⁹ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 11.

³⁰ More details are provided in Annex – Table 12.

³¹ More details on exposure to information about the EU and socio-demographic characteristics are provided in Annex – Table 13.

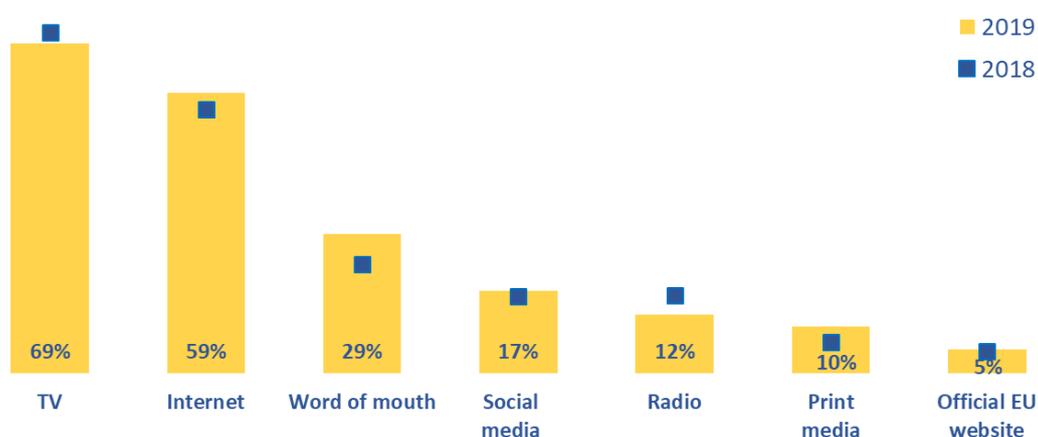
FIGURE 21 – Have you seen or heard any information about the EU in the last three months? (Q3.2)
(Percentages refer to Moldovans who have heard of the EU)



Passive exposure stems mostly from the television (69%) and the Internet (59%). Word of mouth as a source of information was cited by 29% of the population, while 17% of Moldovans who heard or saw information about the EU did so through social media. One in ten citizens mentioned the radio (12%) or print media (10%); one in twenty the official EU website (5% of the population, just like in 2018).

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)

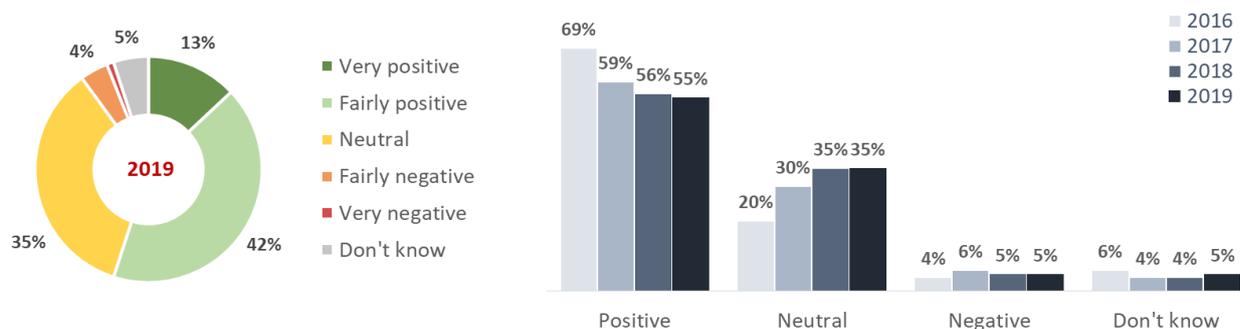
(Percentages refer to Moldovans who have heard any information about the EU in the last three months)



Among those who had heard about the EU, 55% felt that national media presented the European Union positively (13% 'very positively', 42% 'fairly positively') with no significant change compared to 2018. Citizens with a lower level of education (42%), native Russian speakers (43%), southern (40%) and capital city residents (40%) generally have a more neutral view than their socio-demographic counterparts; whereas residents of middle-sized settlements and north of the country share more negative views (9% both)³².

³² 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)

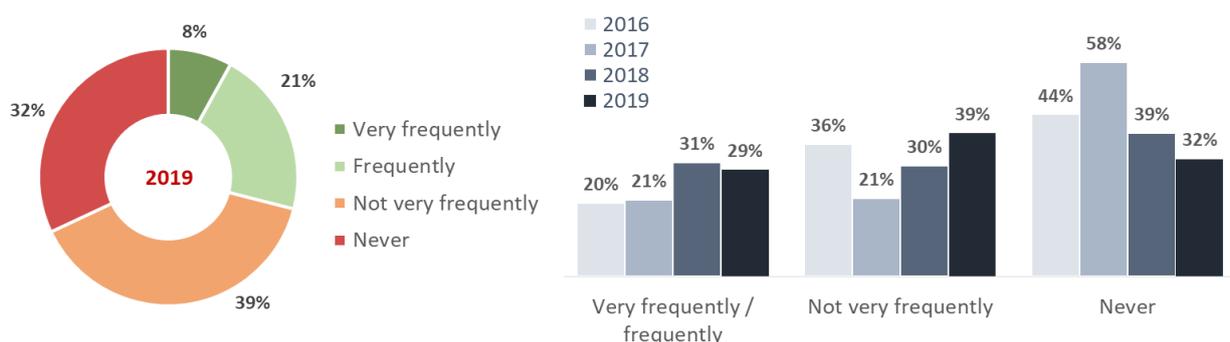


According to 66% of the population, the information which they read, watch or access online helps them to have a better understanding of the European Union, either ‘fairly’ (12%) or ‘very much’ (54%). It is overall a more positive measurement than in 2018 (up 8 percentage points). Still, around 30% find the information ‘not at all’ (5%) or ‘not very useful’ (23%).

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.

Less than one third of citizens access to information on the EU either ‘frequently’ or ‘very frequently’ (29%) – with no important change since 2018. However sporadic access has recorded an increase (from 30% to 39%) and has now surpassed the peak observed in 2016 (36%). Active exposure is particularly common among individuals with a high level of education (85%) and younger citizens (79%). In fact, one in two highly educated citizens frequently looks for EU related information (49%). Native Russian speakers are less likely to actively search for information (55%) than native Romanian speakers (71%), just like older citizens (55%). Residents of the north of the country are less pro-active in searching EU related information (37% never do it) compared to residents of other areas, however if they do search, they are more likely to do it frequently (35%) than other residents³³.

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 (71%) and only 24% look for information in Russian. English is even less frequently used, by 5% of the population.

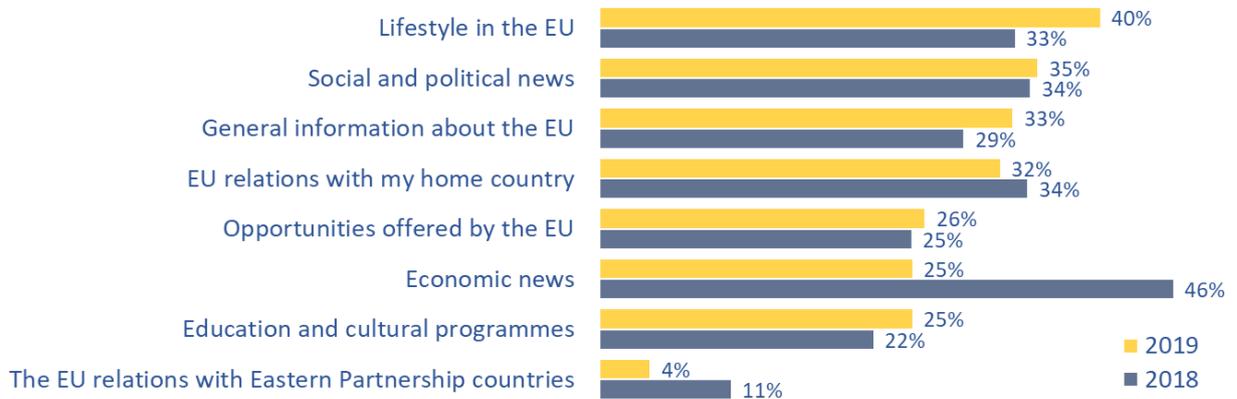
Compared to 2018, ‘economic news’ (25%, down 21%) have witnessed a big drop in interest and currently ‘active’ Moldovans are mainly interested in ‘the lifestyle in EU Member States’ (40%, up 7%), ‘social and

³³ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 15.

political news’ (35%), ‘general information on the EU’ (33%) and ‘the EU relations with their country’ (32%). One in four ‘active’ citizens also searched for ‘opportunities offered by the European Union’ (26%) and ‘educational and cultural programmes’ (25%). Only 4% of them were interested in knowing more about ‘the EU’s relations with Eastern Partner countries’ – it was 11% in 2018.

FIGURE 25 – What type of information do you normally look for? (Q3.1.2, multiple answers possible)

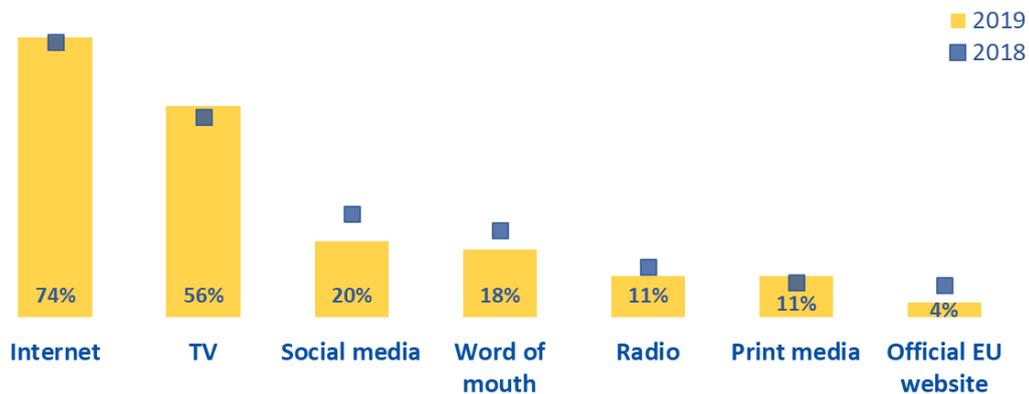
(Percentages refer to Moldovans who have looked for/accessed information on the EU)



Like in previous waves, those actively searching for/accessing information mostly rely on the Internet (74%) and around half on television channels (56%). Around one in five active searchers also tend to rely on social media and word of mouth (20% and 18% respectively), while radio, print media and the official EU website are on average very seldom used (between 4% and 11%), with a slight decrease since last year (between 9% and 13% each).

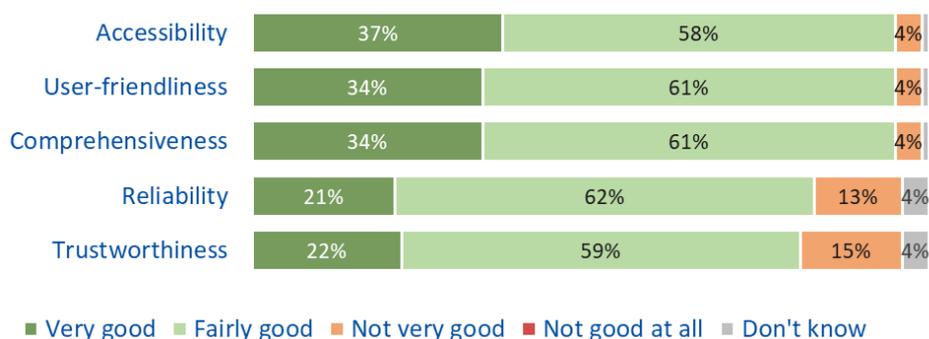
FIGURE 26 – Where do you go to find information about the EU? (Q3.1.4, multiple answers possible)

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



The quality of EU-related information was rated quite positively by over 80% of active searchers. In particular, 95% rated as user-friendly, accessible and comprehensive. Opinions were only slightly less positive in terms of reliability and trustworthiness, with around 15% of citizens not so satisfied – although their rating was generally only ‘fairly negative’.

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, 29% of Moldovans have used EU informational websites³⁴ at least once, with no change compared to 2018. The Facebook profile of the European Union is the most accessed among all EU websites (22% of active users); followed by the websites of EU institutions (15%) and EU projects (14%). Twitter pages, the EU Delegation website and the ‘EU NEIGHBOURS’ were accessed each by less than one in ten citizens searching/looking for EU related information.

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

As in previous waves, the share of Moldovans who trust their institutions is extremely low. Yet, an increase in trust towards the Government (28%, up 4%) and, particularly, the Parliament (22%, up 9%) was observed, reflecting the somewhat more positive expectations in the newly elected institution. Still around 80% of Moldovans openly distrust the political parties and around 70% the regional and local authorities. ‘Corruption’, ‘independence of the judiciary’ and ‘poor governance’ continue to be the most problematic areas, according to 87%, 78% and 78% of the population respectively, attesting how the progress towards democratic reforms and governance appears to have overall stalled. In fact, citizens continue to be much more optimistic towards their personal future (72%) than the future of their country (49%). Around one in two citizens is very concerned about ‘low salaries and pensions’ (54%) and ‘corruption’ (47%).

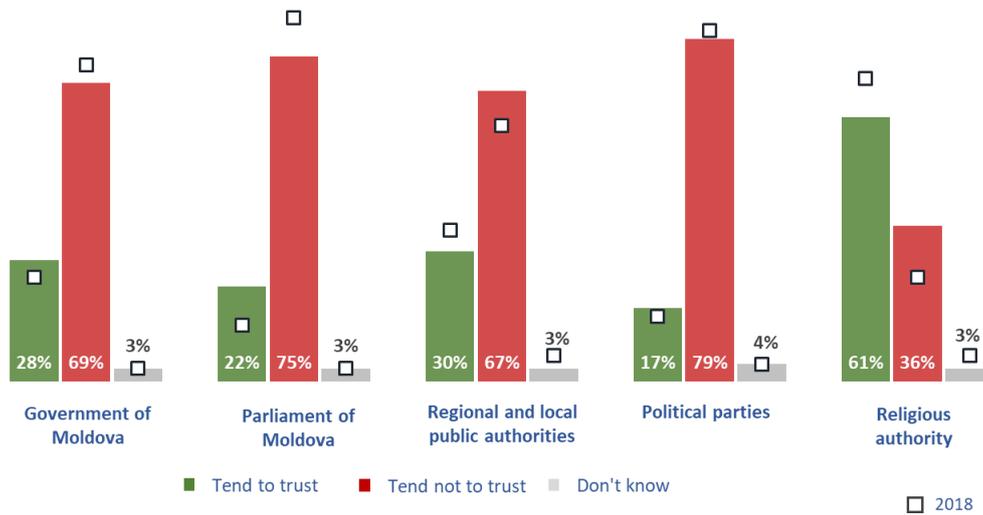
This section presents an assessment of Moldova’s current and future situation, with regard to the current functioning of democracy and the most pressing problems.

3.4.1. View of Moldova’s current situation

As in previous waves, the share of Moldovans who trust national, regional and local institutions is extremely low. However, an increase in trust towards the Government (28%, up 4%) and, particularly, the Parliament (22%, up 9%) was observed, reflecting the somewhat more positive expectations in the newly elected institution. Around 80% of Moldovans openly distrust the political parties (79%) and around 70% the regional and local authorities (67%). **The only institution trusted by the majority of the population is the religious authority (61%),** however its appreciation has decreased by 9 percentage points compared to 2018.

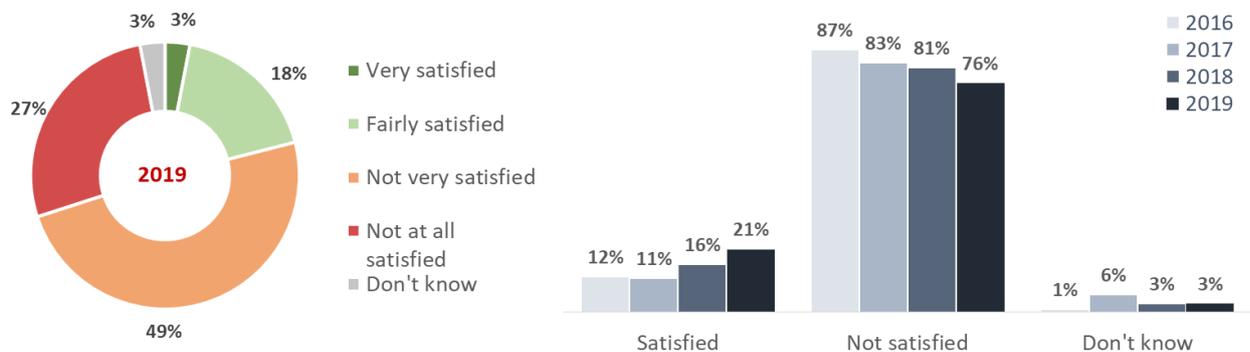
³⁴ This refers to EU institutions’ websites; the EU Delegation website; EU projects’ websites; the ‘EU NEIGHBOURS’; EU Twitter and EU Facebook pages.

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



Accordingly, 76% of Moldovans are dissatisfied with the way democracy works in their country (81% in 2018 and 87% in 2016), reflecting again a mildly more positive view presumably linked to newly held elections. Native Russian speakers and residents of the southern parts of the country seem less satisfied (14%) than those who have Romanian as their mother tongue (24%) and residents of other parts of the country (north 29%, centre 21%). Males too tend to be slightly less pleased than females (18% versus 24%)³⁵.

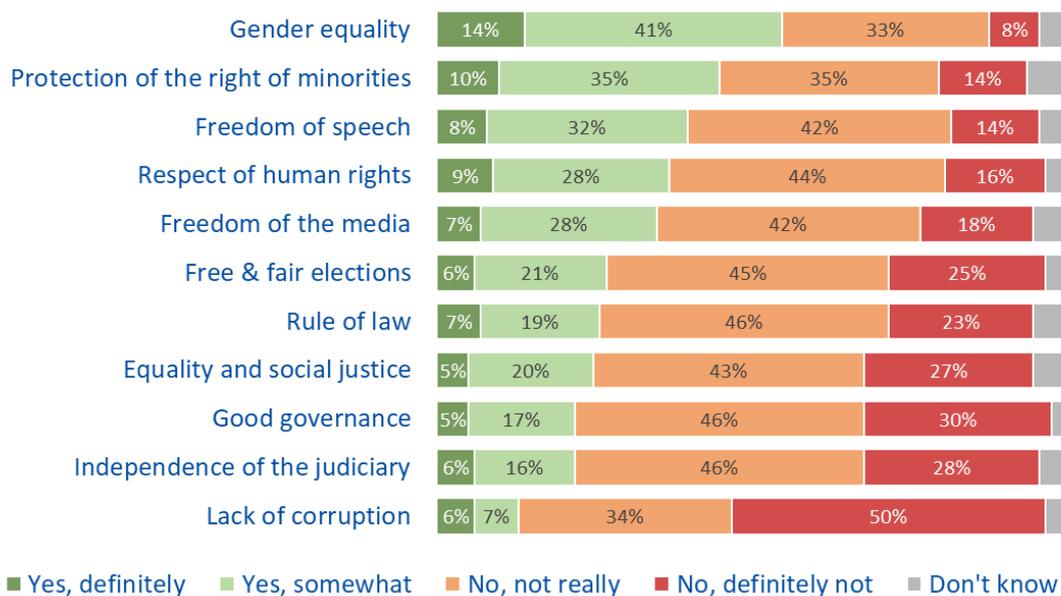
FIGURE 29 – On the whole, are you ‘very satisfied’, ‘fairly satisfied’, ‘not very satisfied’ or ‘not at all satisfied’ with the way democracy works in Moldova? (Q4.3)



The hierarchy of the elements that Moldovans believe apply to their country is largely consistent with previous waves, and basically sees at the top of the list the elements associated with individual freedom – such as ‘gender equality’ (55% of citizens believe it applies to Moldova), ‘protection of the rights of minorities’ (45%), ‘freedom of speech’ (40%) and ‘respect of human rights’ (37%) – whereas progress towards democratic reforms and governance appears to have overall stalled. ‘Corruption’, ‘independence of the judiciary’ and ‘poor governance’ continue to be the most problematic areas, with 84%, 74% and 76% of the population respectively convinced that they do not apply to the Republic of Moldova.

³⁵ More details on satisfaction with democracy and socio-demographic characteristics are provided in Annex – Table 16.

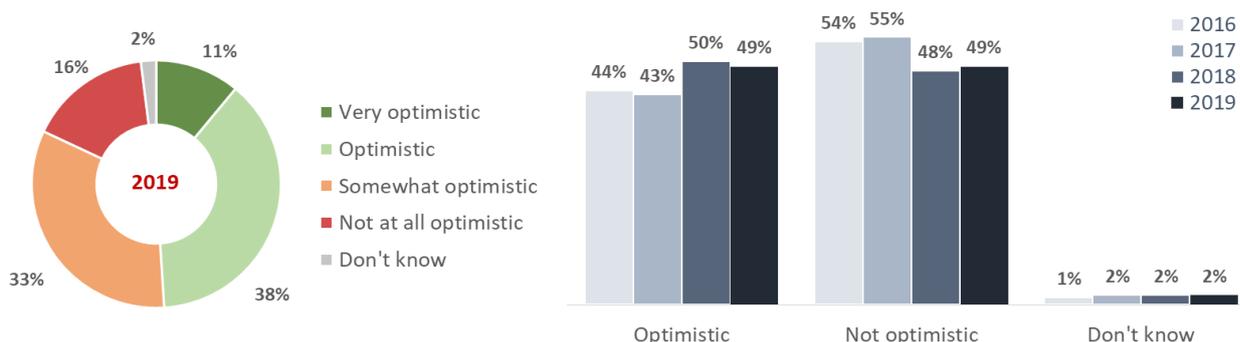
FIGURE 30 – To what extent do you think that the following elements apply in Moldova? (Q4.4)



3.4.2. Future expectations

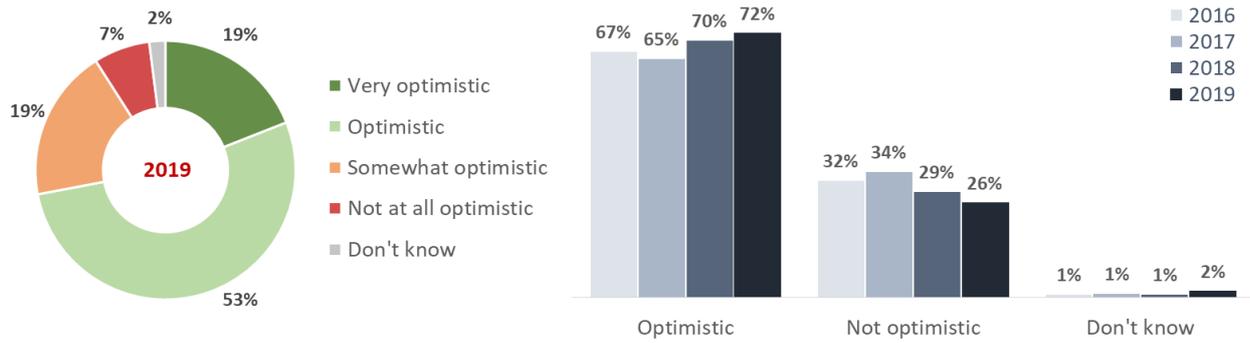
Moldovans continue to be much more optimistic towards their personal future (72%) than the future of their country (49%). Positive views are mostly linked with age and language. In the case of personal future, the gap between optimists and pessimists is very large: 81% of younger individuals are optimistic versus 69% and 64% of individuals in the middle and oldest age brackets respectively – and 75% of native Romanian speakers are also positively disposed towards their personal future versus 59% of native Russian speakers. The most pessimistic groups towards the future of Moldova are those living in the capital city (60%), again Russian speakers (59%) and middle-aged individuals (55%)³⁶.

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



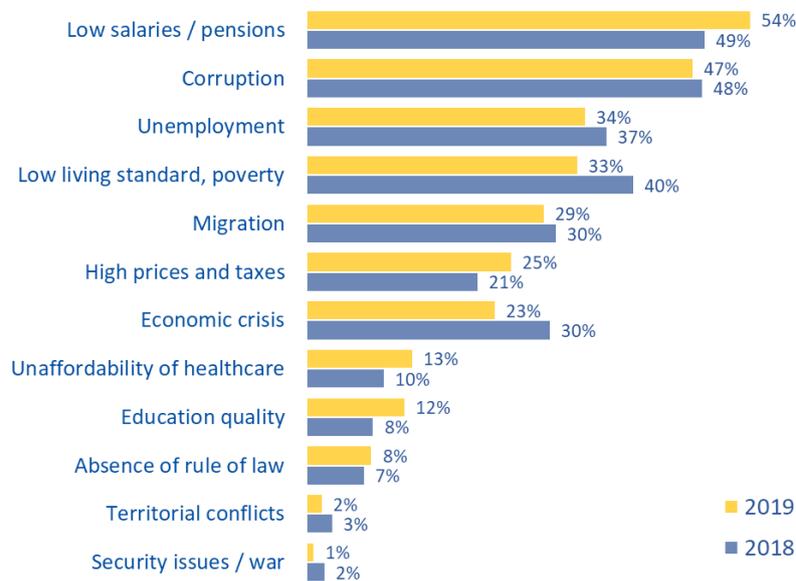
³⁶ More details on optimism regarding citizens' personal future and the country's future and socio-demographic characteristics are provided in Annex – Tables 17 and 18.

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



No great change was noted since last year and Moldovans' primary priorities in 2019 continue to be 'low salaries and pensions' (54%) and 'corruption' (47%). Around one third of citizens are also worried about 'unemployment' (34%) and 'low living standards and poverty' (33%); and around one quarter about 'migration' (29%, stable since last year but up 11% since 2017) and 'high prices and taxes' (25%). It is worth noting that, despite the issue of the unresolved dispute over Transnistria, 'territorial conflicts' and 'security issues/war' are not a big concern, as only 2% and 1% of the population respectively mentioned them.

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 over half of the population (55%, up 7% since 2018). Their most interesting characteristic is that nearly all are native Romanian speakers (90%), whereas neutral Moldovans, who account for 33% of the population, are more concentrated among native speakers of Russian (15%) and other languages (17%), such as Ukrainian, Gagauz language and Bulgarian. They are also more likely to be males (51%), older (30%), with a lower level of education (93%), and live either in the south (31%) or the north (28%) of the country. Active and passive exposure are also strong characterising factors: 71% of neutral citizens have heard EU-related information and 55% had accessed/searched for it versus 87% and 83% respectively of EU supporters. Neutrality tends also to be linked to a greater habitual usage of traditional media only (33%) and, particularly, of media in Russian (64%). This preference affects their perception in the sense that they hold a greater trust in the EEU (48%) than in the EU (42%), and they are less likely to consider the EU as an independent actor in foreign relations (50%). Overall, neutral citizens are also slightly less optimistic (46%) about Moldova's future than EU supporters (54%).

In this section, the attitude of Moldovans towards the EU has been analysed according to two main profiles: individuals that have a positive image of the EU and those who are neutral towards it.³⁷

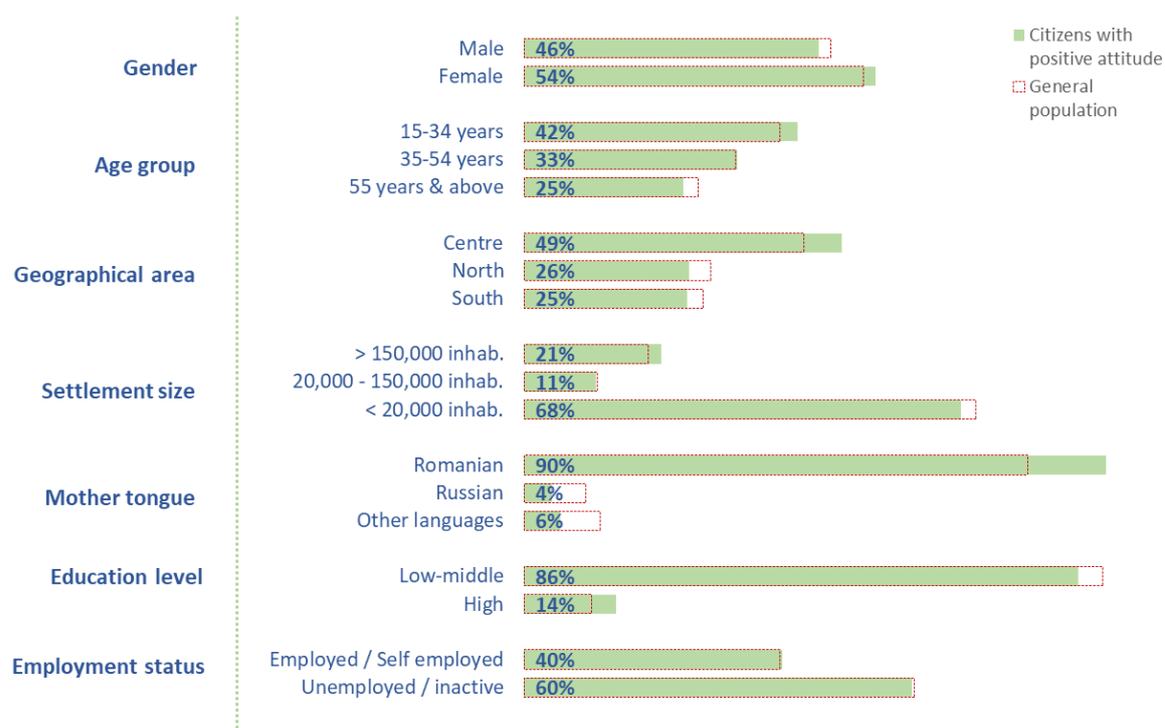
Attitudes were profiled against a comprehensive set of indicators, starting with the main socio-demographic characteristics, followed by passive and active exposure to EU-related information (including main language used and subjects of interest), assessment of the relationship between Moldova and the 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 slightly over half of the population (55%, up 7% since 2018). Their most characteristic feature is that nearly all are native Romanian speakers (90%). Compared to the overall population, they are more concentrated among residents of the centre of the country (49% versus 43%) and most educated group (14% have a high level of education versus 10%). No significant difference was recorded in terms of gender, age and employment status; 54% of EU supporters are female and 46% are males; 42% belong to the younger age group, 33% are middle-aged and 25% are over 55 years; 60% are unemployed/inactive and 40% are employed/self-employed.

³⁷ 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

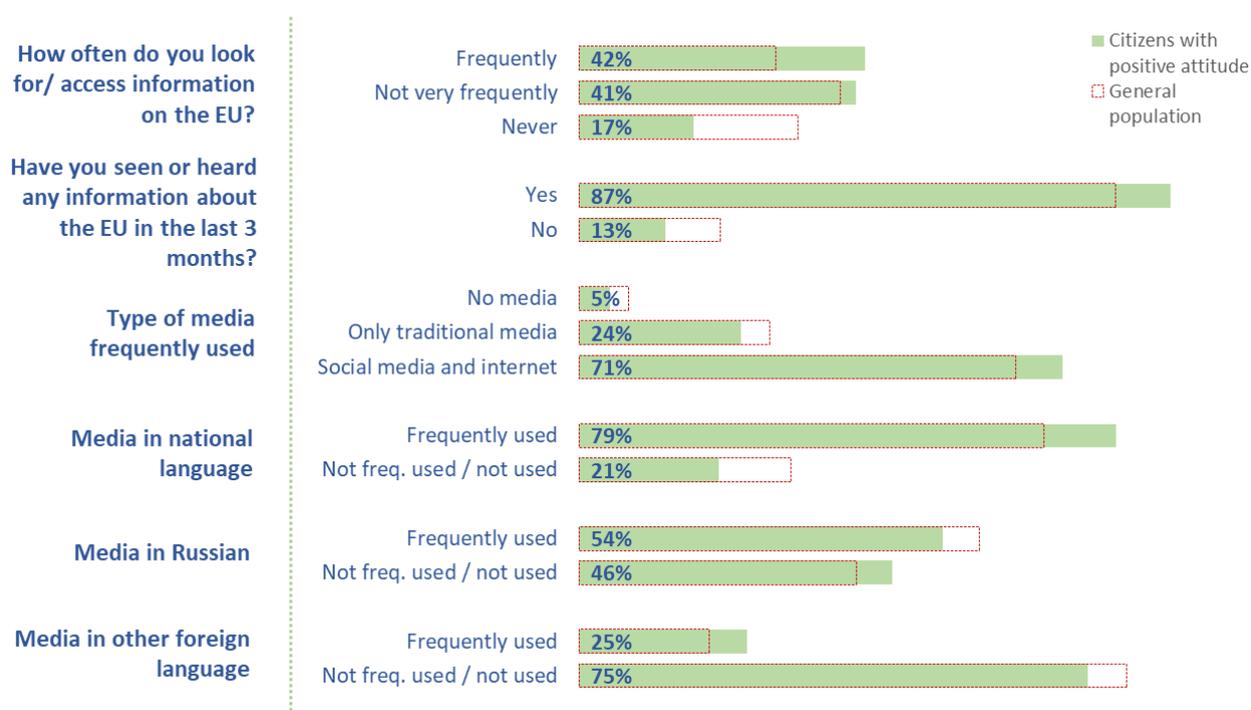


EU supporters are more likely to be actively and passively exposed to information about the EU. In fact, 87% had seen or heard information about the EU in the three months preceding the survey and 42% have looked for/accessed information on the EU frequently or very frequently – the corresponding figures of passive and active exposure in the general population stand at 79% and 29% respectively.

If searching for EU-related information, EU supporters prefer to do so in their national language (79%), which is expected, considering that nearly all are native Romanian speakers. Among frequent searchers, 25% also rely on media in other foreign languages (19% among the general population). EU supporters are also keener users of new media – 71% frequently use the Internet and social media (compared to 65% of the general population), showing a higher penetration rate.

In addition to ‘social and political news’ (35%, their most searched topic), EU supporters are slightly more likely to look for ‘EU’s relations with Moldova’ (34%), ‘opportunities offered by the EU’ (30%) and ‘educational and cultural programmes’ (27%) than the general population (32%, 26% and 25% respectively).

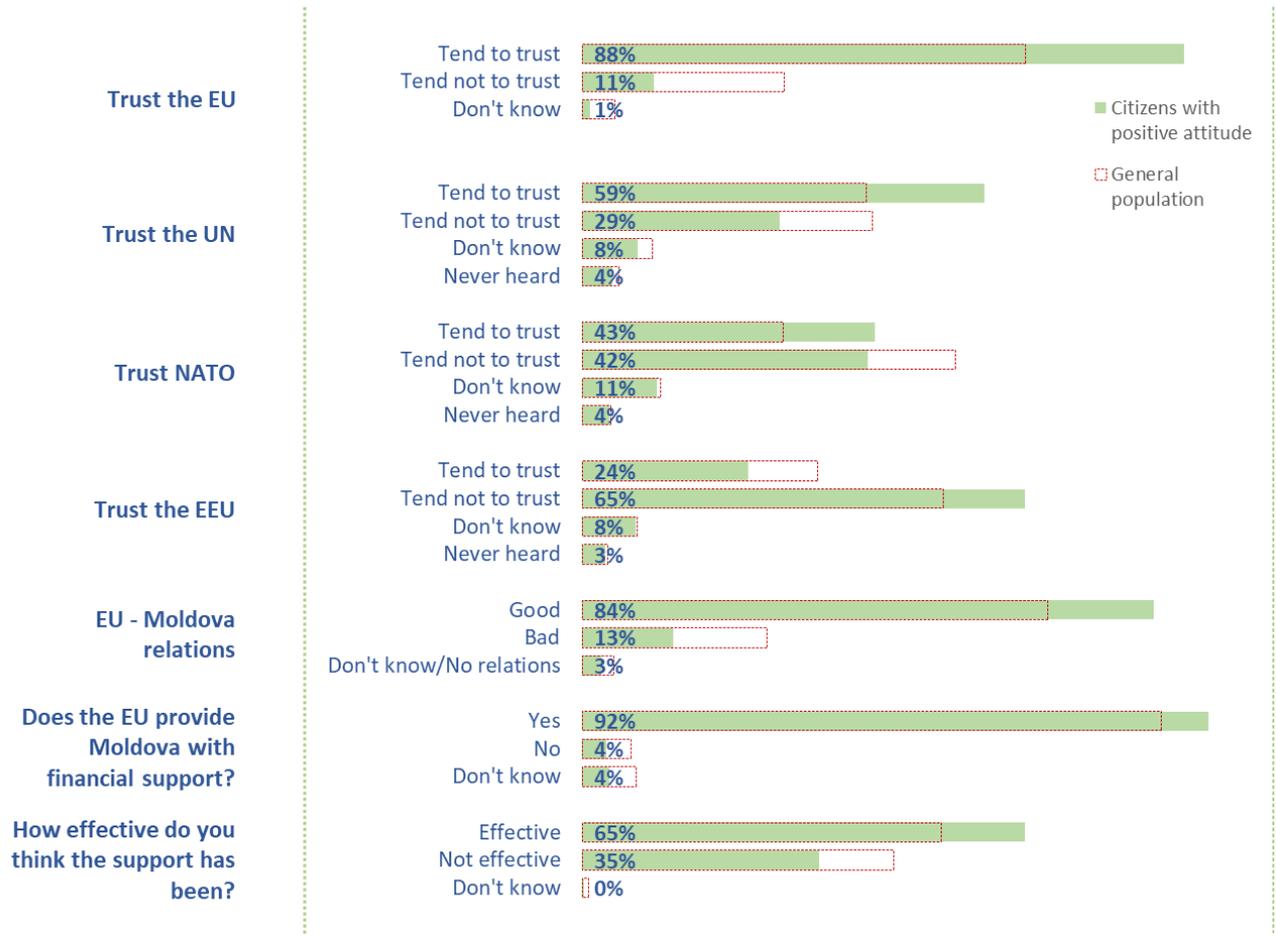
FIGURE 35 – Exposure to information about the EU and media usage among Moldovans with a positive image of the EU



A positive image of the EU is definitely linked to a higher level of confidence in all international institutions except the EEU. Trust in the EU is particularly high, and 88% of EU supporters are confident towards the European Union – the corresponding figure in the general population stands at 65%. Conversely, only one in four EU supporters trust the EEU (24% versus 35% among the overall population).

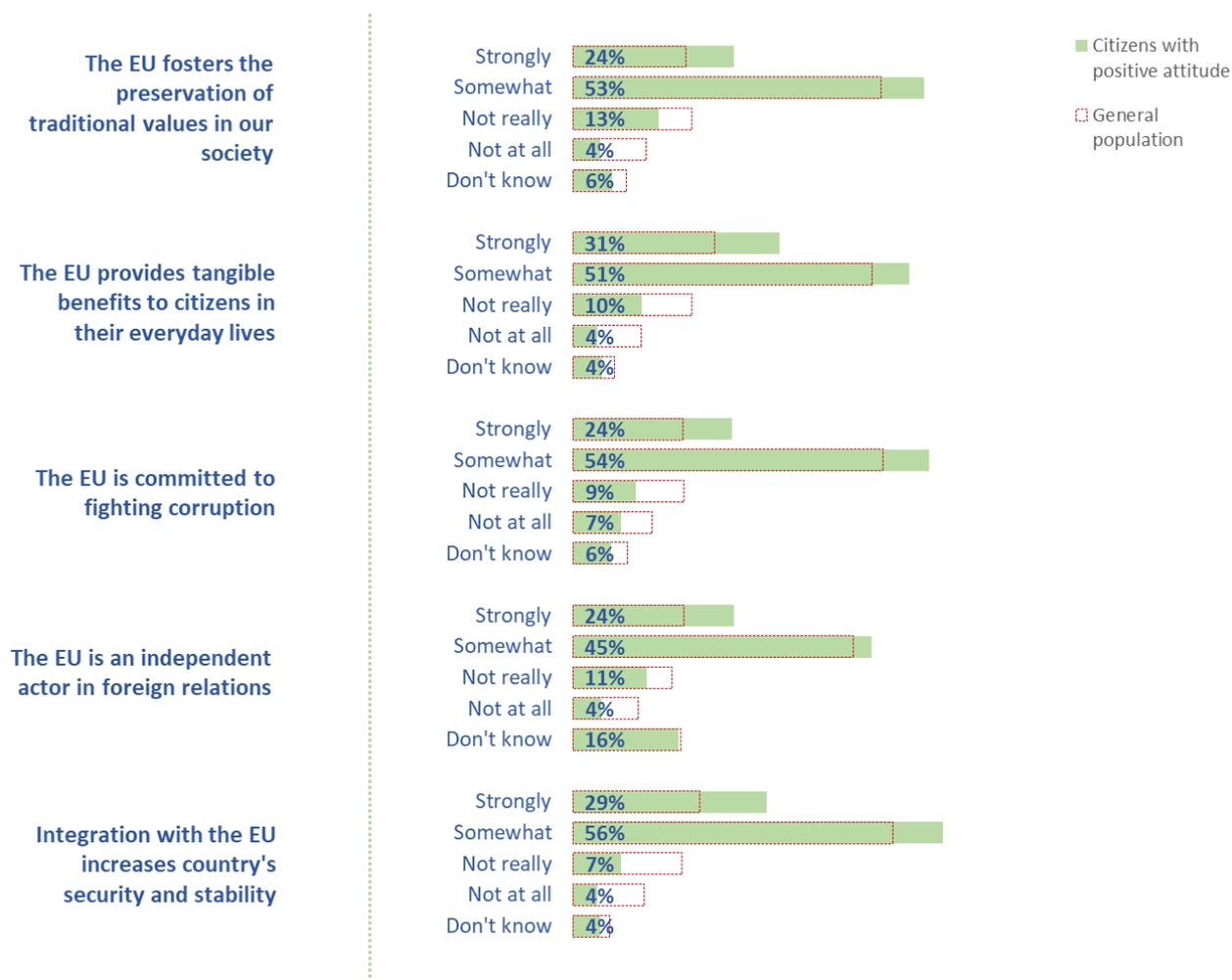
In addition, 84% of all positively oriented individuals have a positive image of the relations between Moldova and the EU (versus 68% among the overall population), 92% acknowledge the EU’s financial support (versus 85%) and 65% rate it as effective (versus 53%).

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



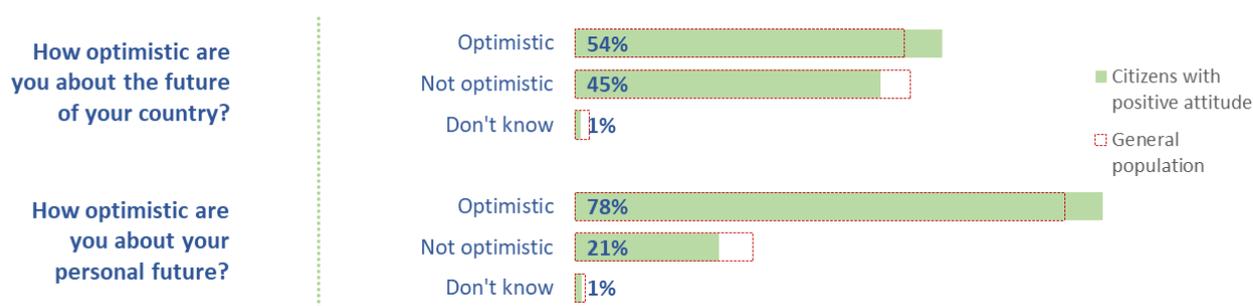
When it comes to common beliefs, EU supporters tend to share a much stronger and more positive view of the EU than the general population. In fact, between 69% and 85% of individuals with a positive image of the EU ‘strongly’ or ‘somewhat’ agree with all the proposed statements (it is between 59% and 67% for the general population). In particular, the statement ‘integration with the EU increases the country's security and stability’ collected the higher levels of agreement (85%), at the opposite end 69% of EU supporters believe that ‘the EU 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, can be linked with a positive image of the EU. In fact, 54% of EU supporters feel positive about Moldova’s future and 78% about their own prospects (49% and 72% in the general population). However, with regard to their main concerns, no significant difference was found between EU supporters and the general population: 54% are worried about ‘low salaries and pensions’, 48% about ‘corruption’ and 33% about ‘unemployment’ (their most pressing concerns. In fact, EU supporters seem only slightly more worried about ‘the absence of rule of law’ (10% versus 8%) and slightly less about ‘healthcare costs’ (11% versus 13%), although the difference is really small.

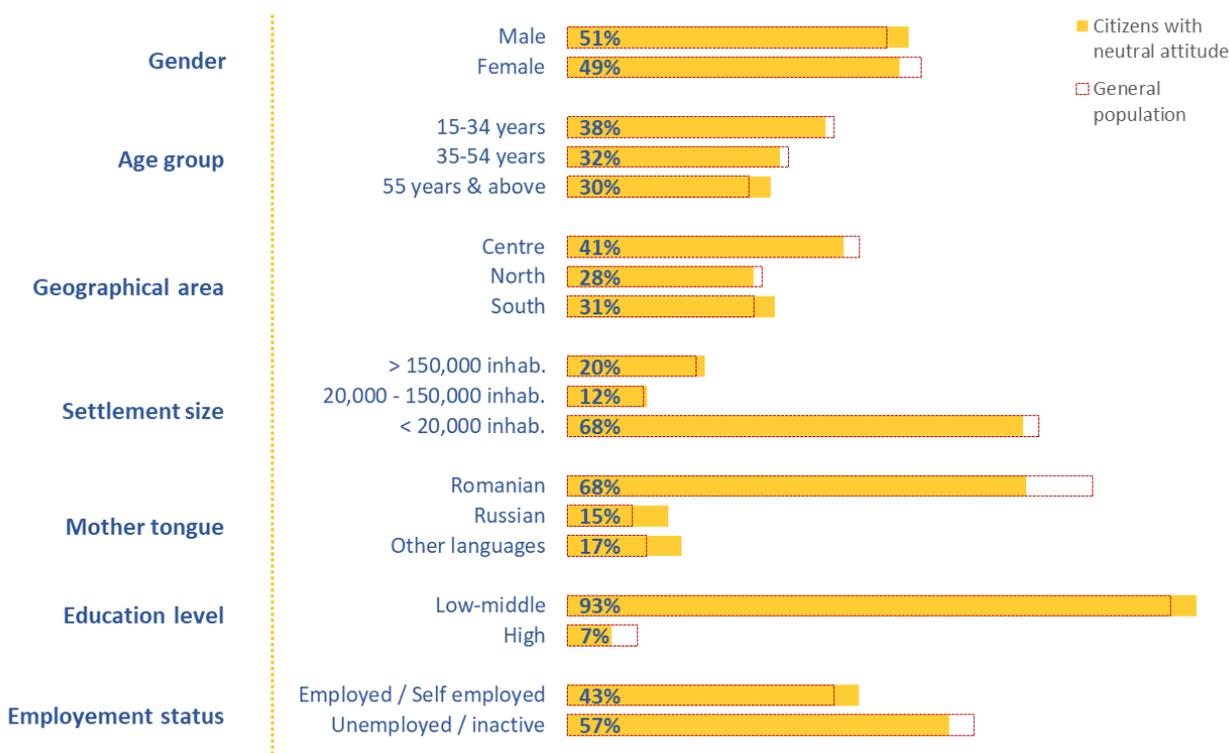
FIGURE 38 – View of the future among Moldovans with a positive image of the EU



3.5.2. Neutral attitudes

As in 2018, Moldovans with a neutral view of the EU account for around a third of the population (33%). One in three are native speakers of Russian (15%) and other languages (17%), such as Ukrainian, Gagauz language and Bulgarian (versus 4% and 6% of EU supporters)³⁸. Compared to EU supporters, they are also slightly more likely to be male (51%), older (30% are over 55) and have a lower level of education (93%). Citizens with a neutral stance are also more likely to live in the south (31%) or the north of the country (28%) than EU supporters (25% and 26% respectively) and to be employed/self-employed (43% versus 40%) rather than unemployed/inactive. As previously noted, the north hosts a large number of ethnic Russians and Ukrainians, whereas most Bulgarians and Gagauz, which are in fact Russian speakers, live in the south of Moldova.

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



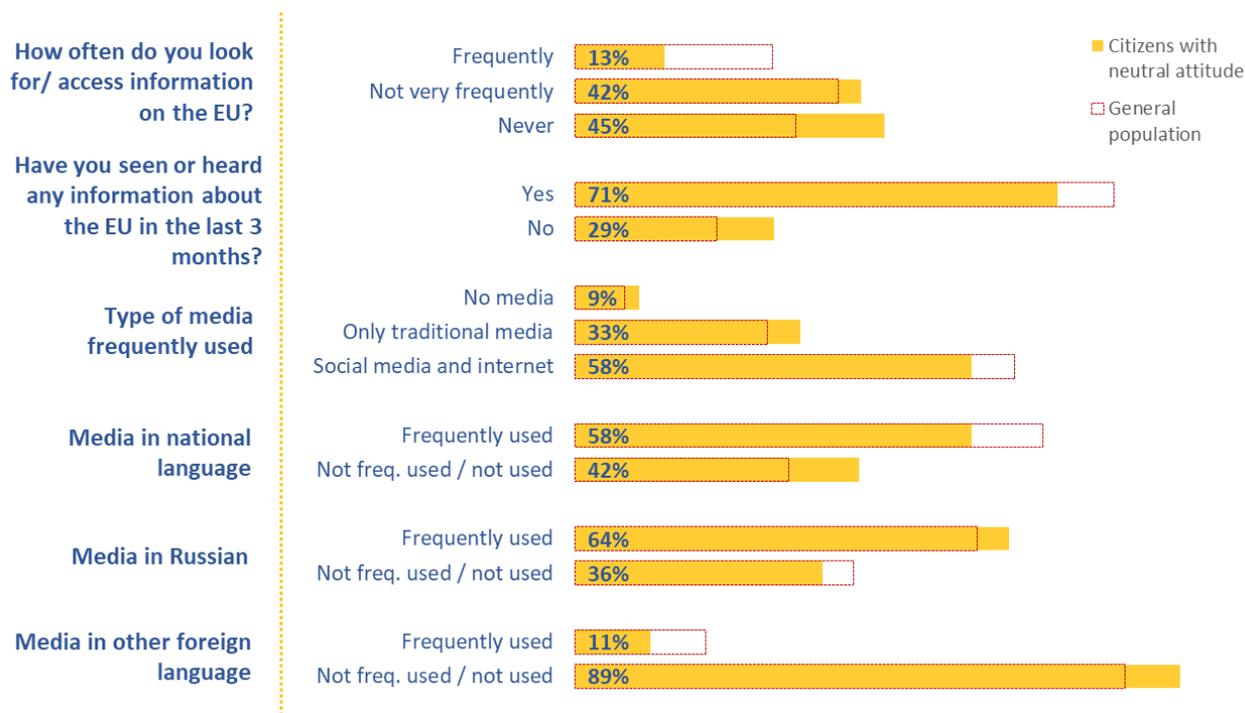
Neutrality is characterised by a lower passive and active exposure to EU-related information compared to EU supporters: 71% of those with a neutral stance towards the EU had heard information about the EU in the three months preceding the survey and 55% had accessed/searched for EU-related information (87% and 83% 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 (33%) and less likely to be frequent users of new media (58%) than EU supporters (24% and 71% respectively). Around one in ten neutral citizens frequently does not use any media at all (9%). As for language, 64% rely frequently on media in Russian but only 11% on media in other foreign languages – which means that both native Russian speakers and other ethnic minorities who commonly use Russian, such as Ukrainian, Bulgarian and Gagauz, have a strong habitual preference for media in Russian.

³⁸ It is important to note that – according to the 2014 census - even if the majority of Ukrainians, Bulgarians and Gagauz declared the language of their nationality as their mother tongue, every second Ukrainian, Bulgarian and Gagauz usually speaks Russian. This finding can be linked to the high share of neutral citizens, who have languages other than Russian as their mother tongue, but who use media in Russian rather than media in other foreign languages (supposedly English). See <http://www.statistica.md/newsview.php?l=en&id=5583&idc=168>

Compared to EU supporters, neutral citizens tend to engage more frequently in generic searches about the EU – 43% looked up for ‘lifestyle in the European Union’ and 38% for ‘general information about the EU’. Conversely, they are much less interested in ‘the relations between the EU and their home country’ (29%), ‘educational and cultural programmes’ (20%) and ‘opportunities offered by the EU’ (19%).

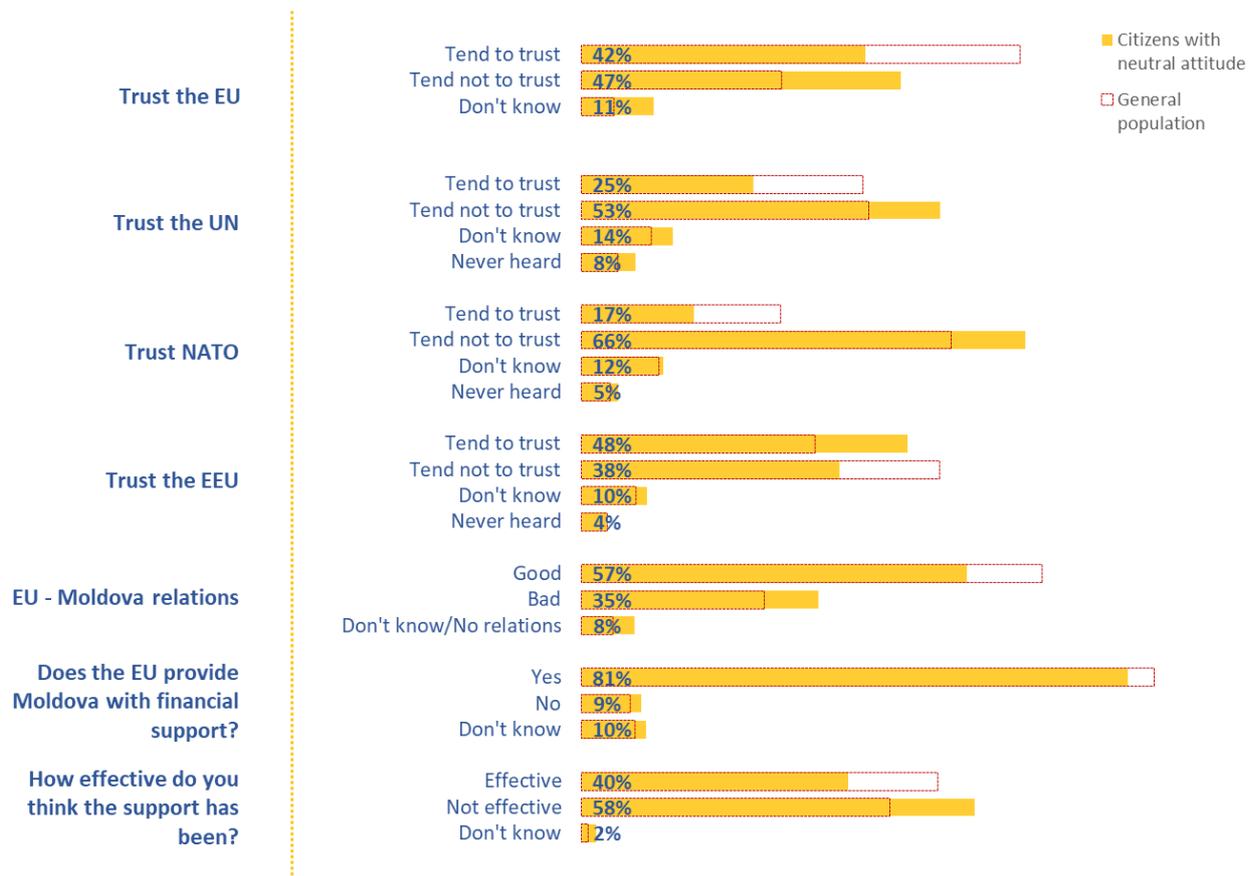
FIGURE 40 – Exposure to information about the EU and media usage among Moldovans with a neutral image of the EU



Compared to EU supporters – as well as the overall population – neutral citizens are more likely to trust the EEU and not trust the EU: around one in two is confident in the former (48%) versus 42% who trust the latter. Trust in the NATO is at its lowest, with only 17% of neutrally oriented citizens who hold faith in the institution (30% for the general population and 43% for EU supporters).

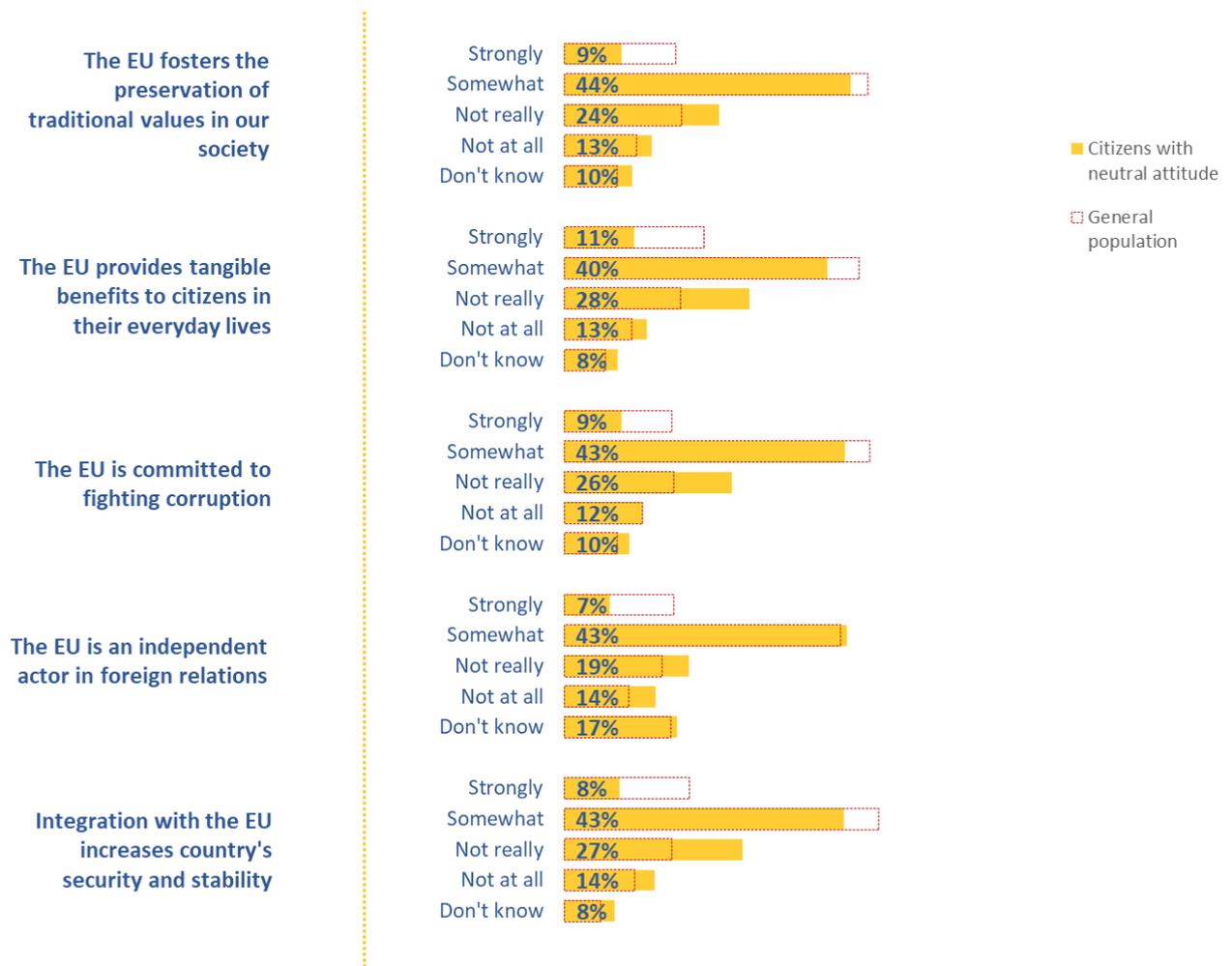
The opinion of EU-Moldova relations and of the EU’s financial support is accordingly less positive: only 57% of neutral citizens would describe the relations between the Republic of Moldova and the EU as ‘good’ (down 14 percentage points since 2018). Despite being more critical than EU supporters about the effectiveness of EU financial support (58% rated it as ‘ineffective’ versus 35% of EU supporters), neutrally oriented citizens are well aware of it, with 81% who know that the EU is supporting their country.

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



When it comes to common beliefs, individuals with a neutral image of the EU seem to be quite influenced by the pro-Russian media they are keener to rely on. In fact, only around one in ten citizens with a neutral stance ‘strongly’ agrees with all the proposed statements, whereas around 40% are ‘not really’ or ‘not at all’ agreeing with them. The lowest share of approval was recorded for the statements that ‘the EU is an independent actor in foreign relations’ (50%), with an additional 17% of citizens who did not provide a definite answer.

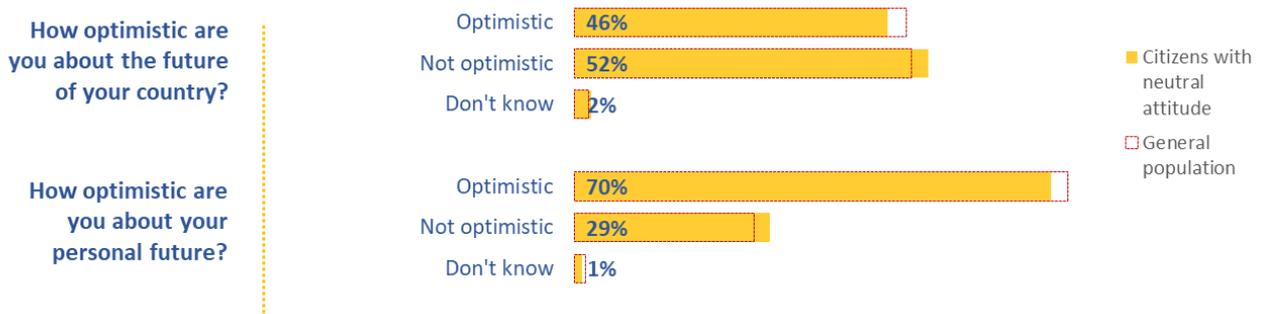
FIGURE 42 – Common beliefs of Moldovans with a neutral image of the EU



Neutral individuals are also slightly less optimistic than EU supporters and the overall population, with 52% openly pessimistic towards Moldova’s future and 29% towards their personal future.

Their primary concern is ‘corruption’ (47%) – just like EU supporters. However, compared to them, individuals with a neutral stance seem more concerned about ‘unemployment’ (36%), ‘high prices and taxes’ (27%), ‘the unaffordability of the healthcare’ (44%) and ‘the quality of education’ (14%). These issues 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. Finally, it should be noted that individuals with a neutral stance seem slightly less concerned about ‘the absence of rule of law’ (7%) than EU supporters.

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	61%	35%	3%	1%	100%
	Between 20,000 and 150,000 inhabitants	54%	34%	12%	0%	100%
	Less than 20,000 inhabitants	54%	32%	12%	2%	100%
Gender	Male	54%	35%	9%	2%	100%
	Female	57%	31%	11%	1%	100%
Age group	15-34 years	59%	32%	8%	1%	100%
	35-54 years	56%	32%	12%	0%	100%
	55 years & above	49%	36%	11%	4%	100%
Education level	Low/medium level	47%	35%	15%	3%	100%
	High level	75%	20%	4%	1%	100%
Employment status	Employed / Self-employed	56%	36%	7%	1%	100%
	Unemployed or temporarily not working / inactive	55%	31%	12%	2%	100%
Mother tongue	Romanian	63%	29%	6%	2%	100%
	Russian	24%	52%	22%	2%	100%
Geographical area	Centre	63%	31%	5%	1%	100%
	North	49%	32%	18%	1%	100%
	South	50%	37%	10%	3%	100%
Total		55%	33%	10%	2%	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
Economic prosperity	20%	62%	13%	3%	2%	100%
Human Rights	20%	59%	13%	3%	5%	100%
Freedom of speech	18%	60%	14%	3%	5%	100%
Freedom of Religion	14%	63%	12%	3%	8%	100%
Respect for other cultures, minorities	15%	61%	16%	4%	4%	100%
Democracy	16%	57%	16%	3%	8%	100%
Individual Freedom	18%	55%	17%	3%	7%	100%
Rule of Law	15%	58%	18%	2%	7%	100%
Equality and social justice	15%	58%	18%	3%	6%	100%
Freedom of the media	16%	57%	18%	3%	6%	100%
Honesty & Transparency	13%	56%	20%	4%	7%	100%
Peace, Security and Stability	13%	54%	24%	5%	4%	100%
Absence of corruption	10%	47%	29%	8%	6%	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	64%	30%	6%	100%
	Between 20,000 and 150,000 inhabitants	60%	35%	5%	100%
	Less than 20,000 inhabitants	67%	29%	4%	100%
Gender	Male	63%	33%	4%	100%
	Female	68%	27%	5%	100%
Age group	15-34 years	70%	26%	4%	100%
	35-54 years	62%	35%	3%	100%
	55 years & above	64%	28%	8%	100%
Education level	Low/medium level	58%	36%	6%	100%
	High level	80%	17%	3%	100%
Employment status	Employed / Self-employed	62%	34%	4%	100%
	Unemployed or temporarily not working / inactive	68%	27%	5%	100%
Mother tongue	Romanian	74%	22%	4%	100%
	Russian	41%	46%	13%	100%
Geographical area	Centre	67%	27%	6%	100%
	North	60%	34%	6%	100%
	South	69%	29%	2%	100%
Total		65%	30%	5%	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	71%	27%	2%	100%
	Between 20,000 and 150,000 inhabitants	71%	24%	5%	100%
	Less than 20,000 inhabitants	67%	28%	5%	100%
Gender	Male	66%	30%	4%	100%
	Female	70%	25%	5%	100%
Age group	15-34 years	70%	25%	5%	100%
	35-54 years	65%	30%	5%	100%
	55 years & above	69%	28%	3%	100%
Education level	Low/medium level	66%	28%	6%	100%
	High level	72%	26%	2%	100%
Employment status	Employed / Self-employed	68%	27%	5%	100%
	Unemployed or temporarily not working / inactive	69%	27%	4%	100%
Mother tongue	Romanian	72%	24%	4%	100%
	Russian	59%	31%	10%	100%
Geographical area	Centre	71%	25%	4%	100%
	North	62%	34%	4%	100%
	South	70%	23%	7%	100%
Total		68%	27%	5%	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%	6%	9%	100%
	Between 20,000 and 150,000 inhabitants	78%	13%	9%	100%
	Less than 20,000 inhabitants	86%	7%	7%	100%
Gender	Male	87%	6%	7%	100%
	Female	84%	8%	8%	100%
Age group	15-34 years	85%	5%	10%	100%
	35-54 years	87%	7%	6%	100%
	55 years & above	83%	11%	6%	100%
Education level	Low/medium level	79%	9%	12%	100%
	High level	91%	6%	3%	100%
Employment status	Employed / Self-employed	86%	7%	7%	100%
	Unemployed or temporarily not working / inactive	84%	7%	9%	100%
Mother tongue	Romanian	89%	6%	5%	100%
	Russian	66%	8%	26%	100%
Geographical area	Centre	82%	9%	9%	100%
	North	83%	7%	10%	100%
	South	91%	4%	5%	100%
Total		85%	7%	8%	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	52%	48%	0%	100%
	Between 20,000 and 150,000 inhabitants	67%	30%	3%	100%
	Less than 20,000 inhabitants	51%	47%	2%	100%
Gender	Male	49%	50%	1%	100%
	Female	56%	41%	3%	100%
Age group	15-34 years	59%	41%	0%	100%
	35-54 years	42%	56%	2%	100%
	55 years & above	57%	40%	3%	100%
Education level	Low/medium level	52%	46%	2%	100%
	High level	60%	39%	1%	100%
Employment status	Employed / Self-employed	52%	46%	2%	100%
	Unemployed or temporarily not working / inactive	54%	45%	1%	100%
Mother tongue	Romanian	56%	42%	2%	100%
	Russian	42%	57%	1%	100%
Geographical area	Centre	51%	48%	1%	100%
	North	59%	40%	1%	100%
	South	50%	48%	2%	100%
Total		53%	46%	1%	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	52%	48%	100%
	Between 20,000 and 150,000 inhabitants	72%	28%	100%
	Less than 20,000 inhabitants	60%	40%	100%
Gender	Male	62%	38%	100%
	Female	57%	43%	100%
Age group	15-34 years	62%	38%	100%
	35-54 years	57%	43%	100%
	55 years & above	60%	40%	100%
Education level	Low/medium level	49%	51%	100%
	High level	75%	25%	100%
Employment status	Employed / Self-employed	67%	33%	100%
	Unemployed or temporarily not working / inactive	55%	45%	100%
Mother tongue	Romanian	61%	39%	100%
	Russian	49%	51%	100%
Geographical area	Centre	47%	53%	100%
	North	70%	30%	100%
	South	67%	33%	100%
Total		59%	41%	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	9%	39%	40%	7%	5%	100%
More tourism	12%	36%	33%	9%	10%	100%
Better education	8%	40%	32%	13%	7%	100%
Access to more products and services	7%	39%	35%	9%	10%	100%
Improved quality of health-care system	7%	36%	38%	13%	6%	100%
Improved trade	7%	34%	39%	12%	8%	100%
Greater employment opportunities	7%	33%	43%	13%	4%	100%
Improved democracy	6%	33%	38%	13%	10%	100%
Improved agricultural production	5%	31%	43%	12%	9%	100%
Greater economic development	5%	29%	45%	13%	8%	100%
Better law enforcement	4%	27%	41%	21%	7%	100%
Improved quality of the justice system	4%	25%	40%	19%	12%	100%
Less corruption	5%	18%	42%	27%	8%	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	24%	52%
Create greater employment opportunities	12%	30%
Improve infrastructure	11%	34%
Promote economic development	11%	35%
Improve quality of health-care system	11%	37%
Promote a better education	5%	22%
Promote better law enforcement	5%	13%
Improve quality of the justice system	5%	15%
Improve trade	4%	14%
Improve agricultural production	3%	12%
Improve democracy	3%	13%
Increase tourism	3%	8%
Promote access to more products and services	2%	8%

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	12%	18%	70%	100%	29%
	Between 20,000 and 150,000 inhabitants	4%	29%	67%	100%	47%
	Less than 20,000 inhabitants	6%	31%	63%	100%	36%
Gender	Male	8%	28%	64%	100%	34%
	Female	7%	28%	65%	100%	38%
Age group	15-34 years	6%	4%	90%	100%	34%
	35-54 years	7%	27%	66%	100%	38%
	55 years & above	9%	65%	26%	100%	37%
Education level	Low/medium level	11%	28%	61%	100%	32%
	High level	3%	16%	81%	100%	32%
Employment status	Employed / Self-employed	8%	22%	70%	100%	37%
	Unemployed or temporarily not working / inactive	7%	32%	61%	100%	36%
Mother tongue	Romanian	7%	30%	63%	100%	33%
	Russian	5%	23%	72%	100%	41%
Geographical area	Centre	9%	25%	66%	100%	25%
	North	6%	32%	62%	100%	49%
	South	5%	30%	65%	100%	40%
Total		7%	28%	65%	100%	36%

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	65%	56%	22%
	Between 20,000 and 150,000 inhabitants	75%	70%	15%
	Less than 20,000 inhabitants	69%	58%	19%
Gender	Male	66%	59%	20%
	Female	71%	59%	19%
Age group	15-34 years	71%	57%	29%
	35-54 years	65%	61%	13%
	55 years & above	70%	60%	11%
Education level	Low/medium level	62%	57%	15%
	High level	82%	50%	27%
Employment status	Employed / Self-employed	71%	60%	15%
	Unemployed or temporarily not working / inactive	67%	59%	22%
Mother tongue	Romanian	80%	52%	18%
	Russian	43%	93%	23%
Geographical area	Centre	72%	54%	18%
	North	71%	71%	22%
	South	61%	54%	19%
Total		69%	59%	19%

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 websites	29%	36%	35%	100%
Television	49%	45%	6%	100%
Radio	31%	45%	24%	100%
Print media	31%	45%	24%	100%
Social media	33%	43%	24%	100%
Internet	48%	35%	17%	100%
Word of mouth	38%	53%	9%	100%
Country's media in national language	48%	43%	9%	100%
Country's media in Russian	41%	51%	8%	100%
Country's media in other languages	21%	52%	27%	100%
Foreign media in Russian	30%	54%	16%	100%
Foreign media in other languages	26%	48%	26%	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	69%	31%	100%
	Between 20,000 and 150,000 inhabitants	76%	24%	100%
	Less than 20,000 inhabitants	83%	17%	100%
Gender	Male	78%	22%	100%
	Female	80%	20%	100%
Age group	15-34 years	85%	15%	100%
	35-54 years	74%	26%	100%
	55 years & above	77%	23%	100%
Education level	Low/medium level	72%	28%	100%
	High level	93%	7%	100%
Employment status	Employed / Self-employed	76%	24%	100%
	Unemployed or temporarily not working / inactive	81%	19%	100%
Mother tongue	Romanian	81%	19%	100%
	Russian	70%	30%	100%
Geographical area	Centre	75%	25%	100%
	North	80%	20%	100%
	South	86%	14%	100%
Total		79%	21%	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	52%	40%	3%	5%	100%
	Between 20,000 and 150,000 inhabitants	59%	30%	9%	2%	100%
	Less than 20,000 inhabitants	55%	35%	5%	5%	100%
Gender	Male	55%	36%	5%	4%	100%
	Female	54%	34%	6%	6%	100%
Age group	15-34 years	56%	36%	5%	3%	100%
	35-54 years	52%	40%	6%	2%	100%
	55 years & above	54%	29%	5%	12%	100%
Education level	Low/medium level	47%	42%	5%	6%	100%
	High level	69%	25%	3%	3%	100%
Employment status	Employed / Self-employed	53%	37%	7%	3%	100%
	Unemployed or temporarily not working / inactive	55%	34%	4%	7%	100%
Mother tongue	Romanian	58%	33%	5%	4%	100%
	Russian	49%	43%	4%	4%	100%
Geographical area	Centre	56%	34%	5%	5%	100%
	North	56%	32%	9%	3%	100%
	South	51%	40%	3%	6%	100%
Total		55%	35%	5%	5%	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	25%	40%	35%	100%
	Between 20,000 and 150,000 inhabitants	34%	37%	29%	100%
	Less than 20,000 inhabitants	29%	39%	32%	100%
Gender	Male	29%	39%	32%	100%
	Female	29%	38%	33%	100%
Age group	15-34 years	34%	45%	21%	100%
	35-54 years	27%	37%	36%	100%
	55 years & above	24%	31%	45%	100%
Education level	Low/medium level	21%	34%	45%	100%
	High level	49%	36%	15%	100%
Employment status	Employed / Self-employed	32%	36%	32%	100%
	Unemployed or temporarily not working / inactive	27%	40%	33%	100%
Mother tongue	Romanian	33%	38%	29%	100%
	Russian	19%	36%	45%	100%
Geographical area	Centre	26%	42%	32%	100%
	North	35%	28%	37%	100%
	South	28%	44%	28%	100%
Total		29%	39%	32%	100%

Percentages refer to Moldovans who have heard about the EU

TABLE 16 – Satisfaction with democracy in Moldova

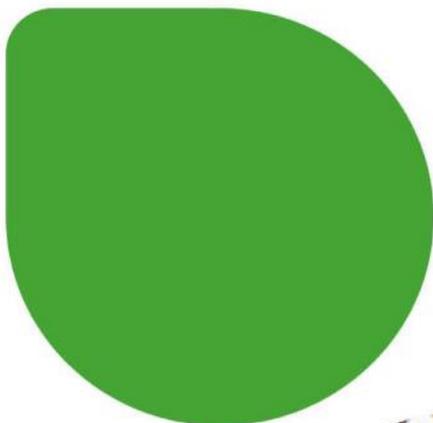
Q4.3. On the whole, are you 'very satisfied', 'fairly satisfied', 'not very satisfied' or 'not at all satisfied' with the way democracy works in Moldova?		Satisfied	Not satisfied	Don't know	Total
Settlement size	Capital	21%	79%	0%	100%
	Between 20,000 and 150,000 inhabitants	24%	76%	0%	100%
	Less than 20,000 inhabitants	21%	75%	4%	100%
Gender	Male	18%	80%	2%	100%
	Female	24%	73%	3%	100%
Age group	15-34 years	24%	74%	2%	100%
	35-54 years	19%	78%	3%	100%
	55 years & above	20%	76%	4%	100%
Education level	Low/medium level	22%	73%	5%	100%
	High level	22%	78%	0%	100%
Employment status	Employed / Self-employed	21%	78%	1%	100%
	Unemployed or temporarily not working / inactive	21%	75%	4%	100%
Mother tongue	Romanian	24%	73%	3%	100%
	Russian	14%	86%	0%	100%
Geographical area	Centre	21%	77%	2%	100%
	North	29%	67%	4%	100%
	South	14%	84%	2%	100%
Total		21%	76%	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	39%	60%	1%	100%
	Between 20,000 and 150,000 inhabitants	48%	51%	1%	100%
	Less than 20,000 inhabitants	51%	46%	3%	100%
Gender	Male	48%	51%	1%	100%
	Female	49%	48%	3%	100%
Age group	15-34 years	54%	45%	1%	100%
	35-54 years	44%	55%	1%	100%
	55 years & above	46%	48%	6%	100%
Education level	Low/medium level	48%	49%	3%	100%
	High level	45%	54%	1%	100%
Employment status	Employed / Self-employed	48%	50%	2%	100%
	Unemployed or temporarily not working / inactive	49%	49%	2%	100%
Mother tongue	Romanian	50%	48%	2%	100%
	Russian	41%	59%	0%	100%
Geographical area	Centre	45%	54%	1%	100%
	North	54%	45%	1%	100%
	South	47%	48%	5%	100%
Total		49%	49%	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	74%	26%	0%	100%
	Between 20,000 and 150,000 inhabitants	68%	31%	1%	100%
	Less than 20,000 inhabitants	72%	26%	2%	100%
Gender	Male	74%	25%	1%	100%
	Female	70%	28%	2%	100%
Age group	15-34 years	81%	19%	0%	100%
	35-54 years	69%	30%	1%	100%
	55 years & above	64%	32%	4%	100%
Education level	Low/medium level	71%	27%	2%	100%
	High level	71%	28%	1%	100%
Employment status	Employed / Self-employed	73%	26%	1%	100%
	Unemployed or temporarily not working / inactive	72%	26%	2%	100%
Mother tongue	Romanian	75%	23%	2%	100%
	Russian	59%	40%	1%	100%
Geographical area	Centre	73%	26%	1%	100%
	North	75%	25%	0%	100%
	South	69%	27%	4%	100%
Total		72%	26%	2%	100%



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