

**ANNUAL SURVEY REPORT:
REPUBLIC OF MOLDOVA**

5th Wave (Spring 2020)

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

MARCH 2020

**#
STRONGER
TOGETHER**

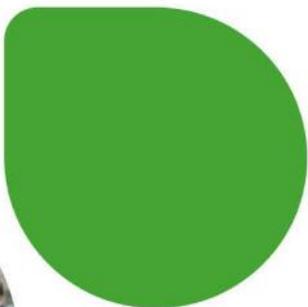
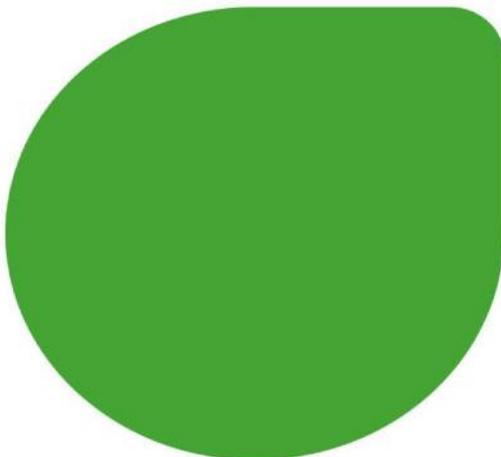
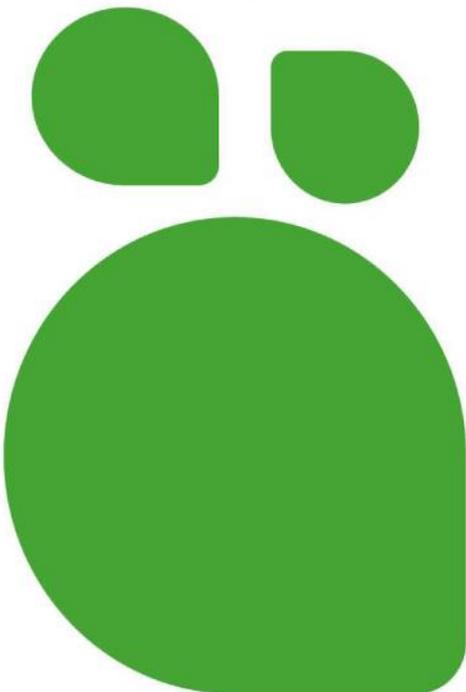


TABLE OF CONTENTS

1. Background	3
2. Research methodology in brief	4
3. Survey findings	5
3.1. Executive summary	5
3.2. Perceptions of the European Union	8
3.2.1. General perceptions of the EU	8
3.2.2. EU relations with Moldova and awareness of EU financial support	11
3.3. Sources of information on the EU	18
3.3.1. Media usage as sources of information	18
3.3.2. Sources of information about the EU	21
3.4. View of Moldova’s current situation and future expectations	25
3.4.1. View of Moldova’s current situation	25
3.4.2. Future expectations.....	27
3.5. Profiling attitudes towards the EU: positive versus neutral	28
3.5.1. Positive attitudes	29
3.5.2. Neutral attitudes	33
4. Annex	37



act

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

1. Background

In February 2020, a fifth 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 2020.

This document presents the results of the **5th wave of annual surveys** (Spring 2020 – **before COVID-19 crisis**) conducted in the **REPUBLIC OF MOLDOVA**¹ and is organised 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 the 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 5th wave of the survey, also provide comparisons between the findings of the 2019, 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 (field work) took place between February and March 2020 (before COVID-19 crisis), 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, Soroca, 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

- **Most Moldovan citizens (61%) have a positive image of the European Union (EU)**, 29% feel neutral about it and only 9% hold a negative view. **Compared to 2019, positive perceptions have increased by 6 percentage points** – mainly at the expense of neutral views (down 4%), **reflecting the upward trend that sees EU popularity growing in the country.**
- **Over 70% of Moldovans ‘strongly’ or ‘very strongly’ associate the EU with nearly all values.** ‘Economic prosperity’ (82%), ‘human rights’ (79%), ‘freedom of religion’ (77%), ‘freedom of speech’ and ‘respect for other cultures’ (75% both) are the strongest association. ‘Peace, security and stability’ (67%) and ‘absence of corruption’ (58%) are the weakest associations, though being important priorities at a personal level.
- **The European Union is the most trusted international institution and the only one trusted by the majority of the population (63%)** – a finding consistent with last year (65%). **NATO has the lowest level of trust (21%),** though indecision (28%, up 13%) rather than distrust (51%, down 4%) has increased, possibly reflecting the shift towards a more ‘balanced foreign policy’.

EU relations with Moldova and awareness of EU financial support

- **Nearly three quarters of Moldovans describe the relations between their country and the EU as ‘fairly good’ (67%) or ‘very good’ (7%)** – with an increase of 6 percentage points since 2019.
- **The awareness of EU’s financial support is also widespread in the country:** around 80% of Moldovans know that the European Union financially supports their country (82%) and **nearly 60% of them consider that it is ‘effective’ (58%, up 5% and the highest figure observed since 2016).**
- **Nearly one in two citizens who are aware of the EU’s financial support knows some specific EU-funded programmes (45%).** In line with previous waves, ‘Infrastructure development projects’ are the most well-known programmes - mentioned by 58% of Moldovans who were aware of specific programmes financed by the EU. ‘Educational programmes’ were mentioned by 43% of citizens (up 6% since 2019), which may be an attestation of the continued participation in Horizon 2020, Erasmus+ and the Mobility Partnership Programme
- Most citizens are convinced that the EU supports their country the ‘same’ or ‘more’ than the International Monetary Fund/World Bank (54%), the United Nations and its agencies (57%), the United States of America (67%) and the Russian Federation (74%).
- **Moldovans consider EU’s engagement as ‘adequate’ mainly in terms of ‘access to more products and services’ and ‘tourism’:** these two areas record both the highest share of citizens who acknowledge a ‘very’ or ‘fairly’ strong benefit from the EU’s support (57% and 49% respectively) and the lowest share of people who indicate the need for a greater role of the EU (6% for both sectors). **‘Corruption’ continues to be the most problematic area: 45% of citizens believe that the EU should play a greater role in tackling corruption and only 19% of them think anti-corruption measures benefitted ‘very much’ or ‘fairly’ from EU’s engagement.**

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 five citizens ‘never’ relies on it – **and Internet** – 27% ‘never’ accesses it. **However, if only frequent usage is considered, Internet surpasses TV** (with 38% of individuals ‘always’ relying on it versus 35% for TV) **and social media exceeds ‘word of mouth’** (21% versus 14%).

- **The penetration of national media in Romanian and Russian is quite similar** – around 85% of citizens use them – **although their circulation is different** – 42% of Moldovans ‘always’ access the former versus 24% the latter. **Foreign media in Russian are also widely used** (only 34% of citizens ‘never’ rely on them), **whereas the usage of media in other languages is less common** (around 40% of the population use them) **and more sporadic** (around 5% ‘frequently’).

Sources of information about the EU

- **Nearly 70% of Moldovans said that they have seen or heard information about the EU in the three months preceding the survey (69%) and 60% of them did it through TV channels.** Though TV is confirmed to be the most important source of passive exposure, new media, such as Internet (57%) and especially social media (27%, up 10% since 2019) play an importantly increasing role.
- Less than 30% of citizens access information on EU either ‘frequently’ (7%) or ‘very frequently’ (20%) – with no significant change since 2019. **Moldovans who search for information about the EU prefer to do it in their national language (65%, down 6%).** Compared to 2019, searches in Russian (28%, up 4%) have slightly increased while those in English remained stable (5%).
- **‘Active searchers of information’ display a strong interest towards the European Union**, with between 28% and 43% of them looking for all thematic areas – except for ‘the EU’s relations with other Eastern partner countries’ (8%, the least searched as in previous waves).
- **The quality of EU-related information was rated ‘very’ or ‘fairly’ positively by over 85% of Moldovans who looked for it.** Accessibility (93%), comprehensiveness (93%) and user-friendliness (92%) are the most rated qualities.

View of Moldova’s current situation

- The effects of the political turmoil in Moldova are reflected in the figures, with a low share of Moldovans who trust the government (25%), the Parliament (18%) and political parties (14%) - even lower than it was in 2019. **The only institution trusted by the majority of the population remains the religious authority (69%).**
- Accordingly, 78% of Moldovans are dissatisfied with the way democracy works in their country – and 19% ‘not all’ satisfied. The hierarchy of the elements that citizens believe apply to their country is consistent with the past, and ‘corruption’ and ‘good governance’ continue to be the most problematic areas – respectively 90% (up 6%) and 80% (up 6%) of the population is convinced they do not apply to Moldova. ‘Independence of the judiciary’, though still very problematic, recorded a slight decrease in the share of those who think it did not apply to the country (71%, down 5 percentage points compared to in 2019)
- Despite the poor assessment in terms of Moldova’s institutions and democratic progress, nearly one in two citizens is optimistic towards the future of their country (44%, though slightly less than in 2019, down 5%) and 66% towards their personal future (again down 6%). Moderate to large increases were observed with regard to the most pressing concerns – ‘low salaries and pensions’ (59%, up 5%), ‘low living standards and poverty’ (41%, up 8%), ‘unaffordability of the healthcare’ (17%, up 4%) – which may be an indication of a growing difficulties over rising costs of living.

Profiling attitudes towards the EU: positive versus neutral

- **Moldovans with a positive view of the EU account for the majority of the population (61%, up 6% since 2019). Their most characteristic feature is that nearly all are native Romanian speakers (88%).** Geographically speaking, they are concentrated in the centre (47%) and the south of the country (32%). They also tend to be younger (46%) and more educated (12%) than neutrally oriented people.
- **Neutral Moldovans, who account for 29% of the population, are more concentrated among native speakers of Russian (18%) and other languages (20%).** They are slightly more prevalent in the north of the country, which historically hosts a large number of ethnic Russians and

Ukrainians (36%). They are also slightly more likely to be male (51%), older (32%) and lowly educated (91%).

- **Although most ‘neutral’ individuals had heard information about the EU in the three months preceding the survey (59%) – versus 76% of EU supporters – their levels of ‘active’ exposure are very low:** only 9% of them ‘frequently’ accessed/searched for EU-related information – versus 40% of EU supporters.
- **Media in Russian is the preferred source of information for the people with a ‘neutral’ stance** (73% of them frequently used them), followed by media in the national language (57%). Compared to the positively oriented citizens, **‘neutral’ Moldovans rely less on new media** (60% versus 74%) **and more on traditional media** (33% versus 22%).
- **Levels of confidence in international organisations are very diverse and most ‘neutral’ citizens tend to trust the EAEU (45%) and distrust the EU (41%), UN (43%) and, particularly, NATO (59%) – which is the opposite of EU supporters (26%, 9%, 24% and 43% respectively).** ‘Neutrals’ also display very low levels of confidence in answering these questions: between 18% and 33% could not rate their level of trust or had never heard of the specific international organisation.
- When it comes to common beliefs, ‘neutral individuals’ seem to be quite influenced by the pro-Russian media. In fact, most of them either ‘disagree’ (figures ranging between 32% and 41%) or are unwilling to express an opinion (figures ranging between 13% and 25%) – it is between 11% and 21% and between 6% and 10% respectively for EU supporters.
- ‘Neutral individuals’ are also less optimistic than EU supporters: 56% are openly pessimistic towards Moldova’s future (versus 49%) and 36% towards their personal future (versus 29%). In fact, their primary concerns are ‘low salaries and pensions’ (58%), ‘unemployment’ (43%) and ‘low living standards and poverty’ (41%), possibly reflecting the increasing difficulties they are encountering in their daily life. They also seem slightly less concerned about ‘corruption’ (36% versus 46%) and ‘migration’ (23% versus 29%) than EU supporters.

3.2. Perceptions of the European Union

The majority of Moldovan citizens (61%) have a positive image of the European Union (EU), 29% feel neutral about it and only 9% hold a negative view. Compared to 2019, positive perceptions have increased by 6 percentage points reflecting the upward trend that sees the EU popularity growing in the country. The country continues to be split between pro-Western and pro-Russian views with very significant differences according to mother-tongue: most native Romanian speakers are openly pro-EU (68%) whereas nearly 70% of citizens who have Russian as their mother tongue are either neutral (55%) or negative (14%). Nevertheless, the EU is the most trusted international institution (63%), with 82% of citizens well aware of its financial support to Moldova, nearly 60% of whom consider it as 'effective' (58%, up 5%). 'Infrastructure development projects' are the most well-known EU-financed programmes in the country (58% of Moldovans aware of EU-funded programmes), followed by 'educational programmes' (43%, up 6%), which may be an attestation of the continued participation in Horizon 2020, Erasmus+ and Mobility Partnership Programme. 'Fighting corruption' continues to be the area that has least benefitted from the EU's support, and 45% of citizens would request a greater involvement of the EU to tackle the issue.

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

3.2.1. General perceptions of the EU

The majority of Moldovan citizens (61%) have a positive image of the European Union (EU), 29% feel neutral about it and only 9% hold a negative view. Compared to 2019, positive perceptions have increased by 6 percentage points – mainly at the expense of neutral views (down 4%), reflecting the upward trend that sees the EU's popularity growing in the country.

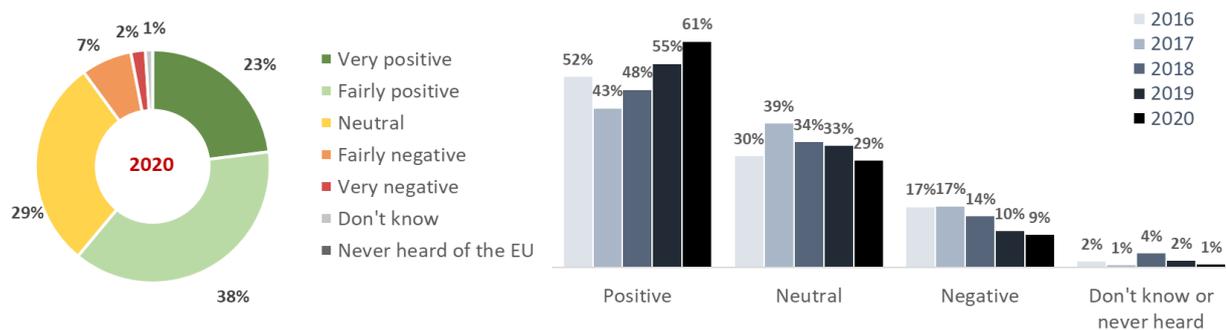
As the 2019 General Elections and following events showed⁶, the country continues to be split between pro-Western and pro-Russian views with **significant differences according to mother-tongue and geographical residence**. Most native Romanian speakers are openly pro-EU (68%), whereas nearly 70% of citizens who have Russian as their mother tongue are either neutral (55%) or negative (14%). The same discrepancy was observed between citizens who live in the centre and the south of the country (around 65% are pro-EU and around 5% are negatively disposed) and residents of the north (45% are pro-EU and 17% 'negative') where a large number of ethnic Russians and Ukrainians live⁷. Younger (70%) and highly educated citizens (69%) too tend to be more positive towards the EU than their socio-demographic counterparts⁸.

⁶ The results of the February 24, 2019 elections were inconclusive, with no party taking a definite majority. In fact, Moldova has subsequently undergone major political turmoil: three governments succeeded each other during the year with President Dodon eventually gaining full control over the Executive. It is also worth noting that President Dodon, formerly 'leftist pro-Russian', began moving toward a less unilateral position during the 2019 election campaign and embraced a more 'centrist' position that implies a more 'balanced policy' between Russia and the West, welcoming closer relations with Europe and the United States while at the same time favouring stable, 'normal' relations with Russia. (Source: <https://jamestown.org/program/moldovas-leftist-president-moving-steadily-toward-the-political-center-part-one>).

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)



Confirming the popularity of favourable views towards the European Union, over 70% of Moldovans ‘strongly’ or ‘very strongly’ associate the EU with nearly all values⁹. ‘Economic prosperity’ (82%), ‘human rights’ (79%), ‘freedom of religion’ (77%), ‘freedom of speech’ and ‘respect for other cultures’ (75% both) are the strongest association, just like in 2019. By contrast, ‘peace, security and stability’ (67%) and ‘absence of corruption’ (58%) are the weakest associations, though being important priorities at a personal level, (44% of citizens place them among the three most important values). It is worth noting that Moldova continues to score very low in the whole of Southeast and Central Europe in terms of corruption¹⁰, while the conflict over the Transnistria region is still not yet resolved though ‘frozen’.

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)



Values strongly associated with the EU

Most important personal values

⁹ More details are provided in Annex – Table 2.

¹⁰ According to Transparency International 2019 Corruption Perceptions Index, Moldova is making no progress in the fight against graft: the country scored worst in the whole of Southeast and Central Europe (120th place on the world list), with no change compared to 2015. (Source: https://www.transparency.org/news/feature/cpi_2019_europe_central_asia)

Moldovans are also slightly more confident that ‘the EU fosters the preservation of traditional values in their society’¹¹. Over 60% of Moldovans ‘strongly’ (19%, up 2 percentage points) or ‘somewhat’ (47%, up 1 percentage point) agree with the above statement. Only 11% do not have a definite opinion on the issue, while 14% are ‘not really’ and 9% ‘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. Positive associations were prevalent and confirm the highest linkage between the EU and ‘economic prosperity/high standards of living’ with as many as 29% of Moldovans spontaneously mentioning it. The EU was also associated with ‘confidence in the future’, ‘good working conditions’, ‘peace and stability’ and ‘freedom’ (around 5% each). Only 6% of individuals felt ‘they could not trust the EU’, 3% mentioned the issue of ‘different values’ and 1% that of ‘losing sovereignty’. Despite the high degree of awareness about the European Union (all citizens know what the EU is and nearly 70% have heard about it in the three months before the survey), 17% of citizens found the question ‘too hard to answer’.

Republic of Moldova is a member of several international organisations, including the UN. It has concluded an Association Agreement with the EU and is an observer to the EAEU. Despite joining NATO’s Partnership for Peace 25 years ago, the Republic of Moldova is not a member of NATO¹². Among these, **the European Union is the most trusted international institution and the only one trusted by the majority of the population (63% of citizens)** – a finding consistent with last year (64%). NATO has the lowest level of trust (21%, down 9%), however indecision (28%, up 13%) rather than distrust (51%, down 4%) has increased in the country, possibly reflecting the shift towards a more ‘balanced foreign policy’¹³.

As previously noted, **the level of trust in the EU reflects both the citizens’ mother tongue and their geographical residence**. Nearly 70% of Romanian speakers (67%) trust the European Union versus 39% of Russian speakers – which, on average, are also slightly more unaware (16% versus 12% answered ‘don’t know’). Residents of the north of the country are overall more sceptical (38%) or unaware (18%) than those living in the south (17% and 9%) and the centre (20% and 11%). Highly educated (76%) and younger citizens (72%) are keener to trust the EU than their socio-demographic counterparts¹⁴.

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 See footnote 6.

¹⁴ 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)

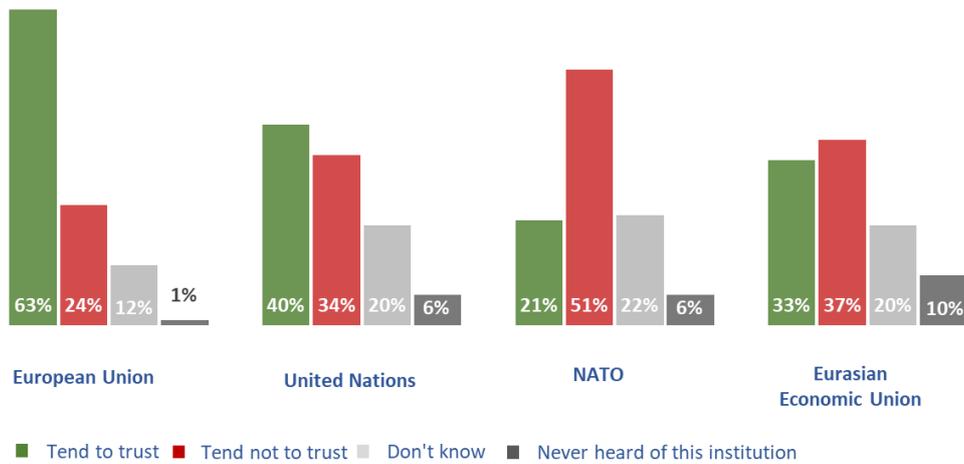
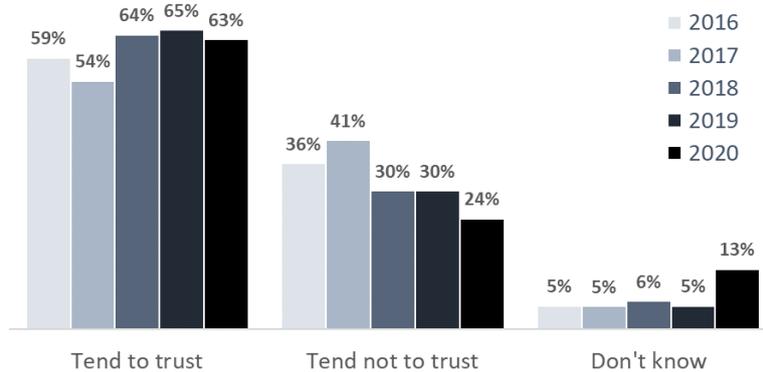


FIGURE 5 – Trust towards the EU (Q2.11)
(Percentages refer to Moldovans who have heard of the EU)



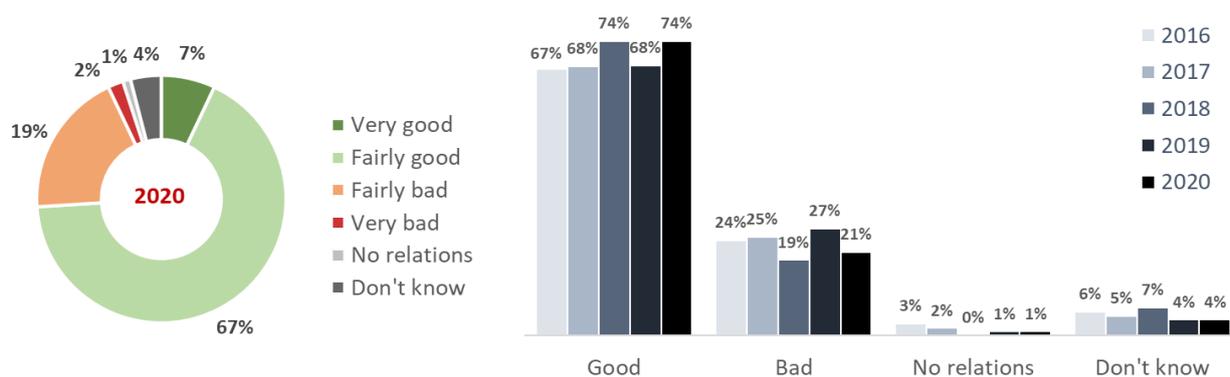
3.2.2. EU relations with Moldova and awareness of EU financial support

Nearly three quarters of Moldovans describe the relations between their country and the EU as ‘fairly good’ (67%) or ‘very good’ (7%) – with an increase of 6 percentage points since 2019. Appreciation is common to all segments of the population and particularly among Romanian speakers (78%), residents of the centre of the country (78%) and younger citizens (79%). By contrast, only 58% of citizens who have Russian as their mother tongue, 70% of residents of northern parts of the country and 68% of older individuals positively rated the relations between the EU and their country¹⁵.

¹⁵ 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)



Most Moldovans perceive the EU as ‘an independent actor in foreign relations’ (58%) - and slightly more citizens are ‘strongly’ convinced by the statement (20%, up 3% since 2019). The situation is stable compared to 2019 (down 1%), hence much more positive than it was in 2018 (up 8 percentage points)¹⁶.

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)



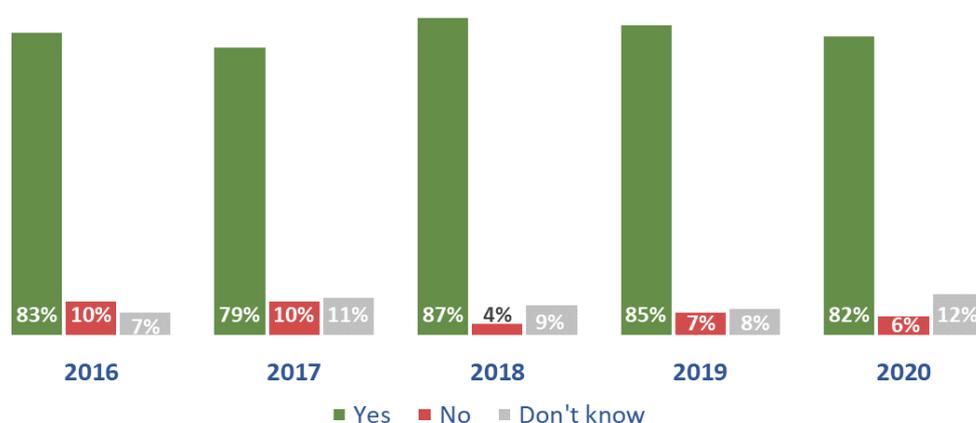
The awareness of EU’s financial support is widespread in the country and around 80% of Moldovans – regardless of their mother tongue, age and/or geographical residence – know that the European Union financially supports their country (82%). Education appears to be the strongest characterising factor in this regard with 92% of individuals with a higher level of education acknowledging the EU’s financial support versus 77% of those with a lower level of education. Citizens living in larger cities and those who have Russian as mother-tongue tend more frequently not to express a definite opinion (18% and 17% respectively)¹⁷.

¹⁶ 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’.

¹⁷ 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)

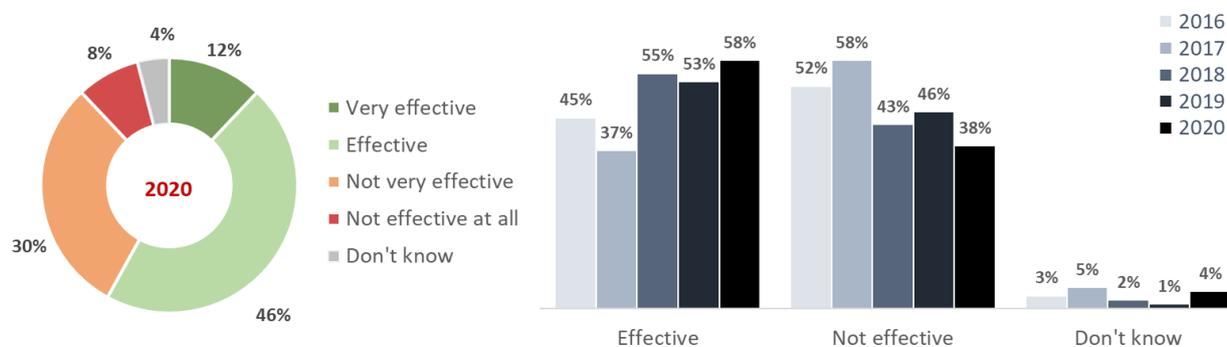
(Percentages refer to Moldovans who have heard of the EU)



Nearly 60% of citizens aware of the EU’s financial support consider it as ‘effective’ (58%, up 5%) and this is the highest figure observed since 2016. Native Russian speakers are the most critical: 58% of them consider the EU’s support as ‘ineffective’ versus 34% of native Romanian speakers. A similar divide was observed between the capital city residents (52%) and inhabitants of smaller settlements (32%). Only 27% of those settled in the south of the country, on average the area most likely to evaluate positively the EU’s financial support (70%)¹⁸ considered the support ineffective, as against 43% of citizens living in the north and 41% in the centre.

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)



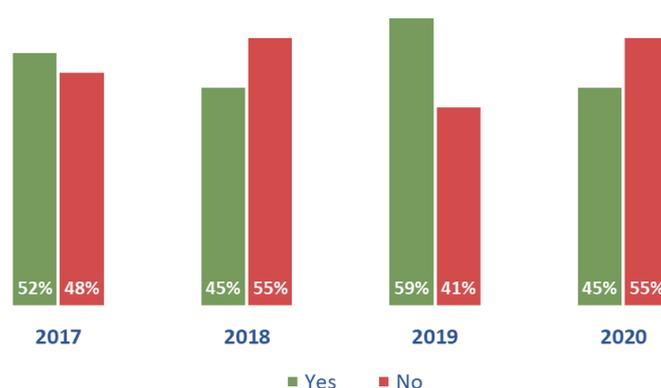
Among Moldovans aware of the EU’s financial support, the knowledge of EU-funded programmes stands at 45% and is back at 2018 levels after reaching a peak last year (59%). Highly educated citizens are the most informed of all socio-demographic groups: 69% of them know of specific programmes versus 42% of those with a lower level of education. Males (47%), younger (49%) and employed/self-employed citizens (49%) too tend to be slightly more knowledgeable – a fact that may indicate an interest in specific EU-funded programmes. Native Russian speakers (50%) are, on average, as informed as the native Romanian speakers (47%), while residents of the centre (38%) tend to be less aware than the residents of the north (50%) and the south (52%) of the country¹⁹.

¹⁸ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 6.

¹⁹ 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)

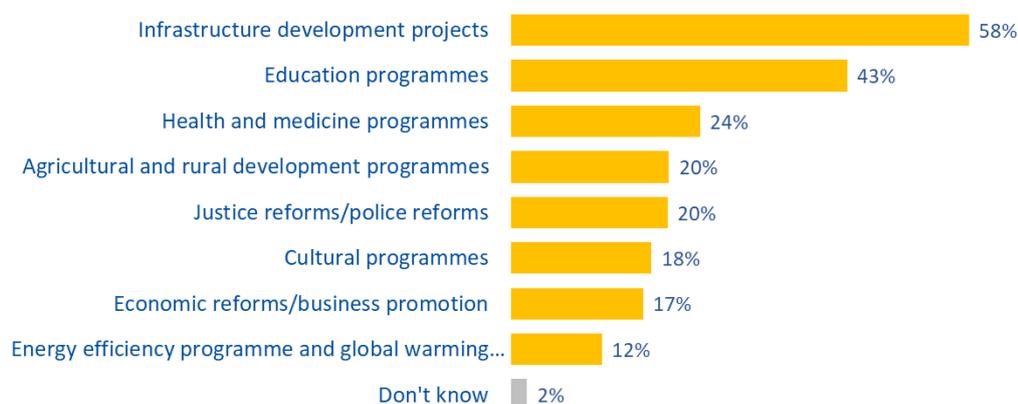


Among citizens aware of EU-funded programmes in Moldova, ‘infrastructure development projects’ continue to be the most well-known (58%) in line with previous waves²⁰. ‘Education programmes’ were mentioned by 43% (up 6%) of citizens, which may be an attestation of the continued participation in Horizon 2020, Erasmus+ and Mobility Partnership Programme. Around one in four individuals aware of EU-funded programmes also know about projects in the area of ‘health and medicine’ (24%), and around one in five cited programmes in the field of ‘agricultural and rural development’ (20%), ‘justice/police reforms’ (20%), ‘culture’ (18%) and ‘economic reform/business promotion’ (17%).

Around one in ten Moldovans have personally been (or know someone who has been) involved in recent EU-funded projects (9%, up 2% since 2019).

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 the EU’s financial support: as a result, most citizens are convinced that the European Union financially sustains their country the ‘same’ or ‘more’ than the International Monetary Fund/World Bank (54%), the United Nations and its agencies (57%), the United States of America (67%) and the Russian Federation (74%).

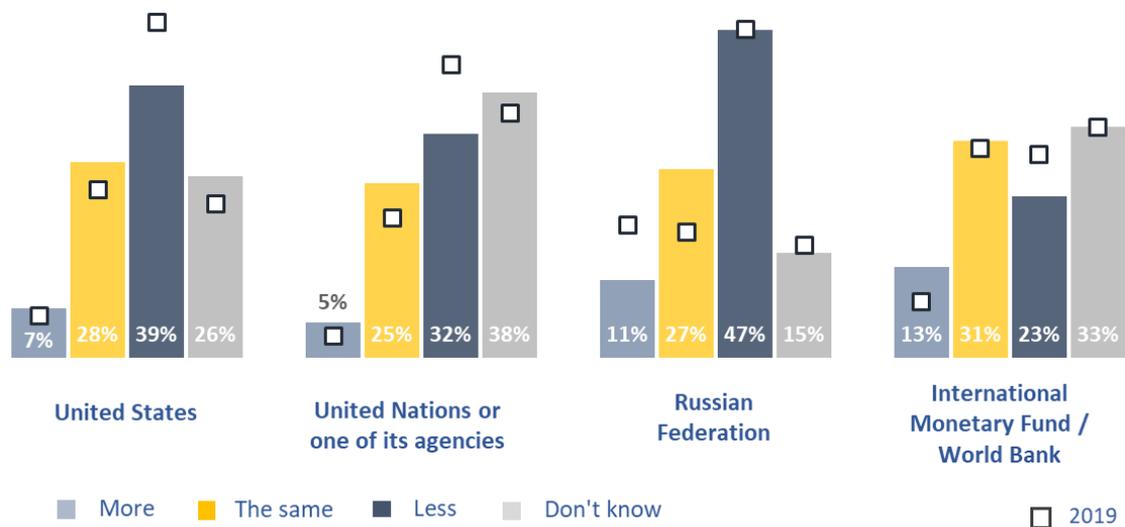
In fact, the Russian Federation is perceived as a greater donor to Moldova than the EU by only one in ten citizens (11%, down 8% since 2019). The level of confidence in answering this question was also quite high, considering that only 15% of Moldovans did not know how to answer the question. The levels of

²⁰ EU assistance has helped to achieve tangible improvements in people’s daily lives. Several projects were completed, contributing to energy efficiency (biomass project), improved road infrastructure (building a bypass around the city of Ungheni), supported customs and border operations (the Palanca jointly operated border crossing point) and youth and educational exchanges (Erasmus+). On connectivity, energy efficiency, climate action, environment and civil protection, Moldova overall has recorded limited progress on implementing reforms in line with the AA/DCFTA. Education. (Source: Joint Association Implementation Report on Moldova, European Commission, 2019).

'don't know' responses for other institutions were much higher and respectively 26% for the United States, 33% for the International Monetary Fund/World Bank and 38% 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)



According to most citizens, the EU's assistance has helped to achieve tangible improvements in people's daily lives (66%). In fact, **22% and 44% of citizens respectively 'strongly' or 'somewhat' agree with the proposed statement**²¹. Very negative reactions were recorded for only 8% of the population, one in ten citizens also 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)



The comparison between the areas that have benefitted most from EU's support and those who would require a stronger support from it²² shows how Moldovans consider EU's engagement as 'adequate' mainly in terms of 'access to more products and services' and 'tourism'. As matter of fact, these two areas record both the highest share of citizens who acknowledge a 'very' or 'fairly' strong benefit from the EU's

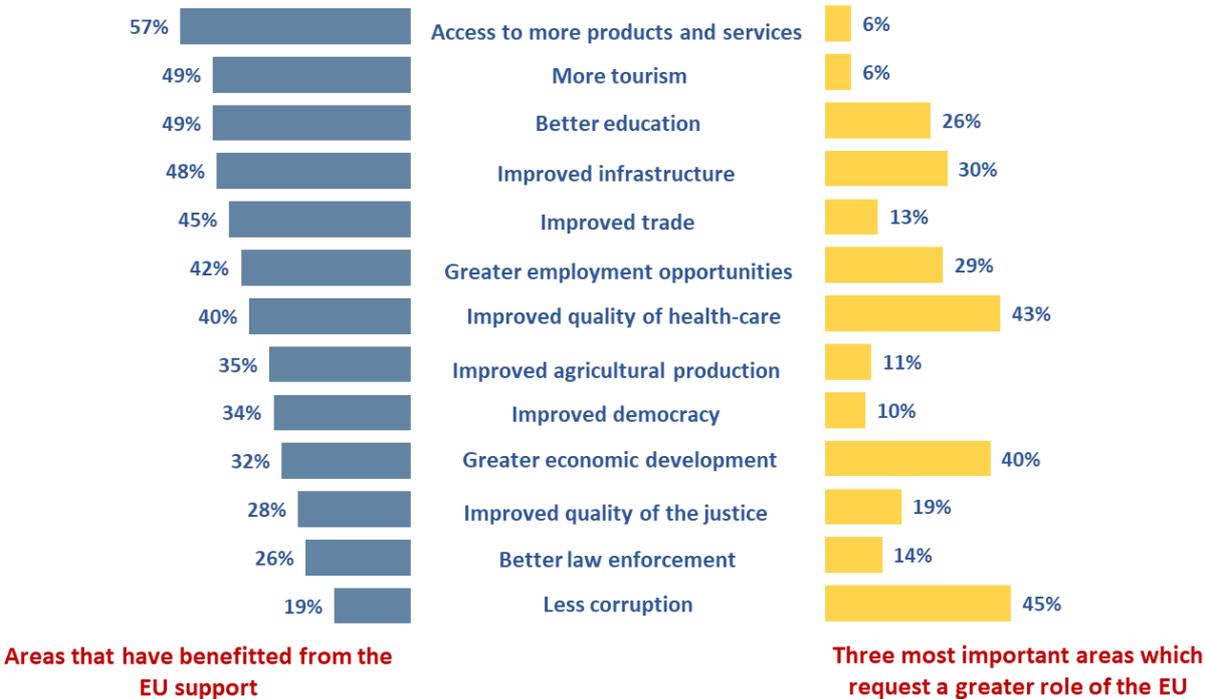
²¹ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European Union is perceived by citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (('strongly', 'somewhat', 'not 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'.

²² Respondents were asked to name and rank the three most important areas in which the EU should play a greater role.

support (57% and 49% respectively) and the lowest share of people who indicate the need for a greater role of the EU (6% for both sectors). Support in other areas continue to be seen as ‘insufficient’: for instance, around 30% of citizens would favour more support from the EU to ‘education’, ‘infrastructure’ and ‘employment opportunities’ – despite 40-50% of them acknowledge that it has already been ‘very’ or ‘fairly’ strong. Around 40% of citizens also believe that the EU should be more involved in ‘supporting economic development’ (40%) and improving ‘the quality of the healthcare system’ (43%) – EU’s engagement has been significant for only 32% and 40% of citizens respectively. ‘Corruption’ remains the most problematic area: 45% of citizens believe that the EU should play a greater role in fighting corruption and only 19% of them think tackling corruption benefitted ‘very much’ or ‘fairly’ from the EU’s engagement²³.

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)



However, when asked directly if ‘the EU is committed to fighting corruption’²⁴, the share of Moldovans who ‘strongly’ (17%) or ‘fairly’ (40%) agree with the statement nearly doubles that of those who disagree (31%). **This finding suggests that, even if Moldovans would favour more support from the EU in tackling corruption, they do acknowledge the EU’s commitment in this regard.** The level of ‘don’t know’ responses was also quite low, with only one in ten citizens not answering the question (12%).

²³ More details are provided in Annex – Tables 8 and 9.
²⁴ 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 65% of Moldovans are also convinced that ‘closer integration with the EU increases the country’s security and stability’ (63%),²⁵ which is a very important finding considering that the Republic of Moldova has an unresolved territorial conflict over Transnistria with Russia and that 44% 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)



²⁵ 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

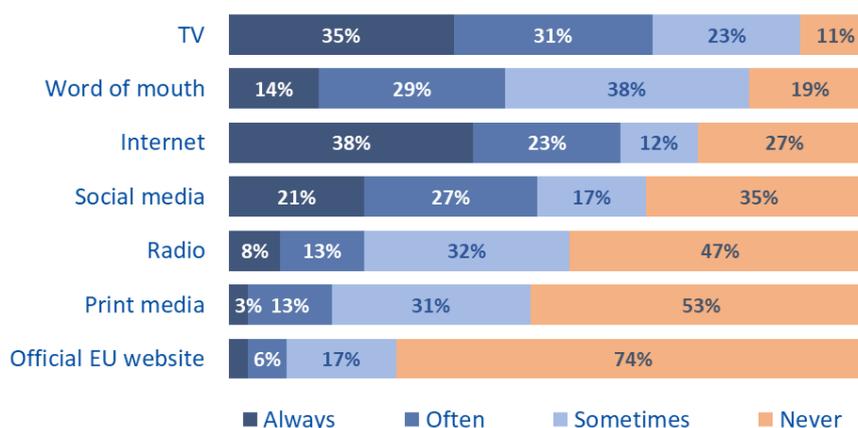
Nearly 70% of Moldovans were reached by information about the EU in the last three months mainly through TV (60%) and the Internet (57%). Around 30% of citizens also searched for information on the EU either ‘frequently’ (7%) or ‘very frequently’ (20%) and another 38% ‘sporadically’. Active searches for EU-related information are also more likely to happen via the Internet (68%) compared to television (52%) and via social media (27%) rather than ‘word of mouth’ (20%). Overall, around 34% of Moldovans have used EU informational websites at least once, with a 5% increase compared to 2019. The quality of EU-related information was rated quite positively by over 85% of ‘active searchers’.

This section looks at the main sources of information in the Republic of 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 five citizens ‘never’ relies on it – and Internet – 27% ‘never’ accesses it. However, if only very frequent usage is considered, Internet surpasses TV (with 38% of individuals ‘always’ relying on it versus 35% for TV) and social media exceeds ‘word of mouth’ (21% versus 14%). The radio and print media are used by around half of the population, though less than 8% of citizens ‘always’ uses them and 13% do so ‘often’. One in four Moldovans accesses the official EU website (26%), most of which do so ‘sometimes’ (17%).

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



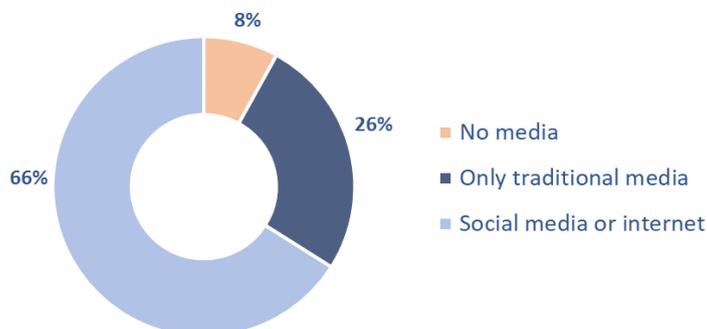
The breakdown of frequent users of traditional media only, new media and no media is shown in Figure 18²⁶. Most Moldovans frequently access the Internet or social media (66%), 26% traditional media only, while only 8% of the population do not rely on any media, with no significant change since 2019.

Frequent usage of new media decreases with age (93% for younger individuals, 69% for the middle age bracket and 24% for older individuals) and is more widespread among highly educated (83%) and employed or self-employed citizens (72%) compared to their socio-demographic counterparts (58% and 62% respectively). No difference was observed with regard to language and native Russian and native Romanian speakers display on average similar media usage. Frequent usage of new media is very

²⁶ The first group 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.

common in the capital (77%) and least common among residents of the north (54%) and, particularly, medium-sized settlements (48%), where people tend to rely more often on traditional media (40%) only or no media at all (12%).²⁷

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



The penetration of national media in Romanian and Russian is quite similar – nearly all citizens use them (88% and 85% respectively) – although their circulation is different – 42% of Moldovans ‘always’ access media in Rumanian versus 24% who do so in Russian. Foreign media in Russian are also widely used (only 34% of citizens ‘never’ rely on them)²⁸, whereas the usage of both national and foreign media in other languages is less common (around 40% of the population use them) and more sporadic (around 5% ‘frequently’).

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



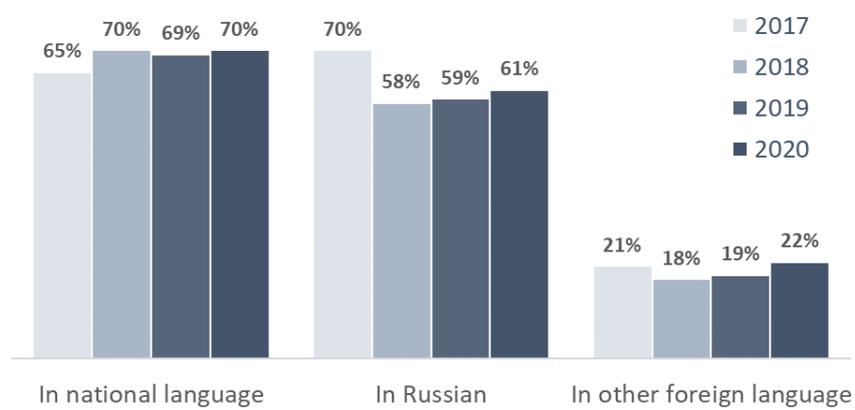
²⁷ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 10.

²⁸ 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://memo98.sk/uploads/content_galleries/source/memo/russia/full-report-in-english.pdf

Frequent usage of media in Romanian, Russian and foreign languages – irrespective of whether the medium is national or foreign²⁹ - has been consistently stable since 2018: **70% of citizens frequently uses media in their national language; 61% media in Russian; and 22% media in other foreign languages.**

Nearly all citizens who have Russian as their mother tongue³⁰ frequently access media in Russian (86%), with one in four also relying on media in other foreign languages (23%). Native Romanian speakers are more likely to access media in their national language than native Russian speakers (82% versus 27%), although half of them are also frequent users of Russian media (54%). Highly educated citizens have a preference for media in foreign languages other than Russian (27% versus an average of 22%). At geographical level, frequent usage of media in Russian is particularly widespread in the north of the country (73%) – as well as in the capital city (69%), where as many as 27% of citizens also rely on media in other foreign languages³¹.

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



Trust levels are quite low in Moldova, possibly reflecting the fact that the media landscape remains strongly concentrated³². **Television, national media in Romanian** and the **Internet** are the most trusted sources of information by around one in two citizens (49%, 49% and 48% respectively). Around one third of Moldovans also trust national media in Russian, ‘word of mouth’ and social media (36%, 35% and 34% respectively). The lowest levels of trust were observed for national and foreign media in foreign languages other than Russian and the official the EU’s website (14%, 19% and 21% respectively) although these are presumably linked with the limited usage of these sources; between 39% and 47% of citizens could not rate their trust and answered ‘don’t know’³³.

²⁹ Frequent users of media in Romanian 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.

³⁰ 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 (Source: <http://www.statistica.md/pageview.php?!=en&idc=479>).

³¹ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 11.

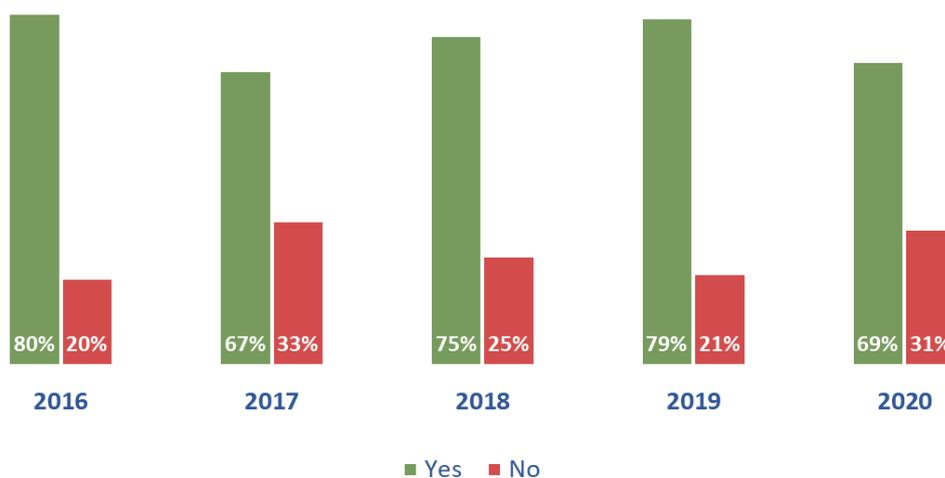
³² According to ‘Reporters without Borders’ World Press Freedom Index, Moldova fell by one position in 2018 and by a further 10 positions in 2019 to the 91 place out of 180 countries. The media landscape is strongly concentrated in terms of both ownership and access to advertising market. In fact, smaller and independent media outlets find it very difficult to compete due to the strong monopolisation of advertising (Source: *Joint Association Implementation Report on Moldova, European Commission, 2019*).

³³ More details are provided in Annex – Table 12.

3.3.2. Sources of information about the EU

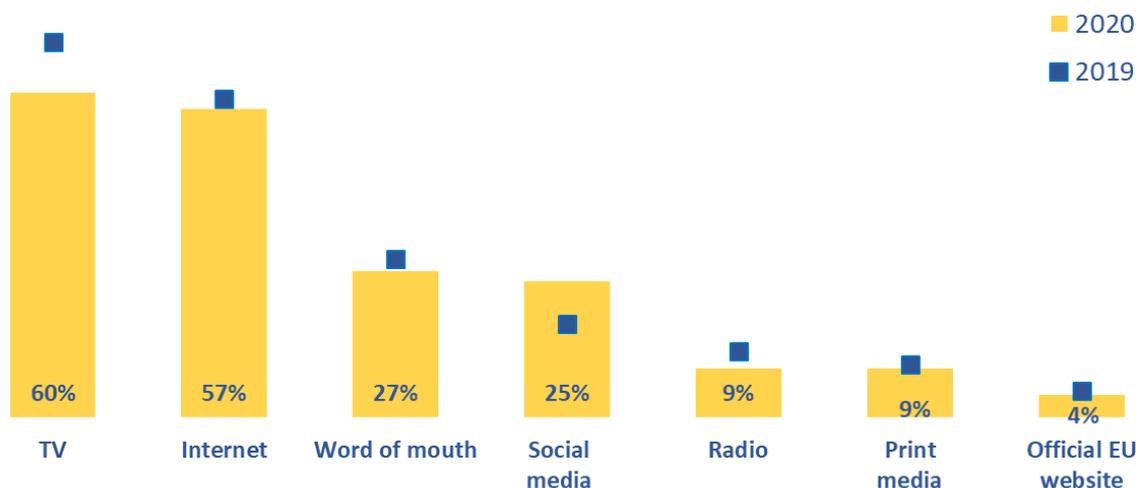
Nearly 70% of Moldovans said that they had seen or heard information about the EU in the three months preceding the survey (69%). Capital city residents and highly educated citizens were the most ‘exposed’: over 80% of them were reached by EU-related information versus around 63% of residents of smaller settlements and lowly-educated citizens. It is also worth noting that passive exposure has decreased by around 10 percentage points since the last wave possibly due to the extensive coverage of national issues since February 2019 elections at the expenses of EU-related themes. In fact, as opposed to the 2019 wave, native Russian speakers (72%) have been slightly more passively exposed than native Romanian speakers (68%).

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)



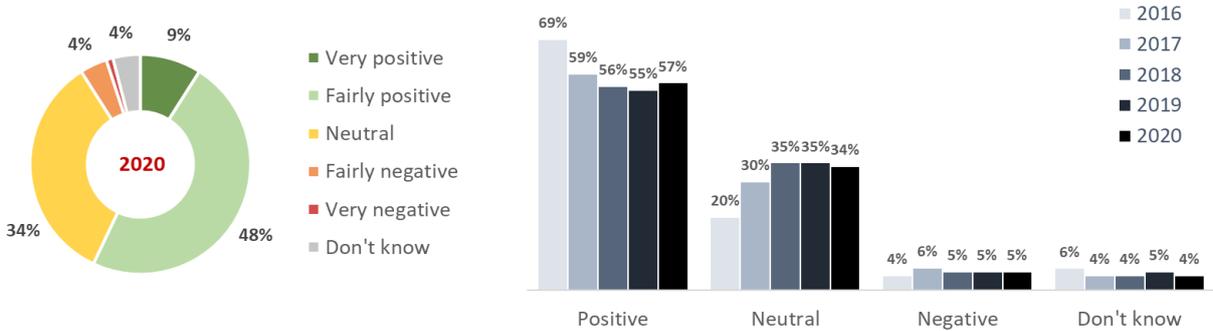
Though television is confirmed as the most important source of passive exposure (60% of Moldovans who have seen/heard information about the EU did it through this media), new media, such as Internet (57%) and especially social media (27%, up 10% since 2019) play an increasing role. ‘Word of mouth’ was cited by 27% of the population, and less than one in ten citizens mentioned the radio (9%), print media (9%) and/or the official EU website (4%), with no significant change compared to 2019.

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)



Most citizens who have heard about the EU feel that it is positively presented on national media – 9% ‘very positively’ and 48% ‘fairly positively’. In this case, native language highly impacts on perceptions and native Romanian speakers are much more positive (58%) than native Russian speakers (45%) – and indirectly of residents of the north (47%), where most ethnic Russians and Ukrainians live. Younger citizens and individuals with a high level of education also display more positive opinions – 67% both³⁴.

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 64% 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’ (11%) or ‘very much’ (53%).

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.

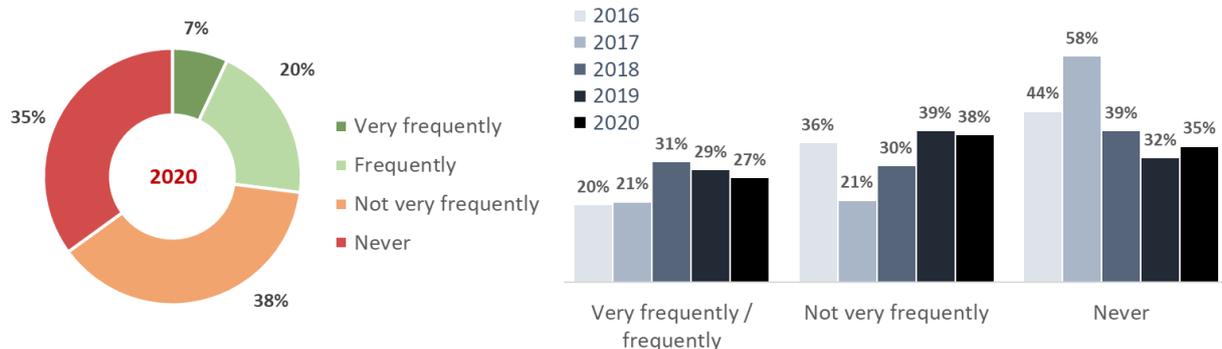
Less than 30% of citizens access information on the EU either ‘frequently’ (7%) or ‘very frequently’ (20%) – with no significant change since 2019. Frequent active exposure is most common among individuals with a high level of education (45%), younger citizens (39%) and capital city residents (36%). Native Romanian speakers are also more frequently engaged in EU-related searches (30%) than native Russian speakers (18%). Older citizens are the least pro-active searchers of all socio-demographic groups: one in two never search for EU-related information (52%) – together with around 45% of individuals living in the north of the country and/or middle-sized settlements and/or with lower levels of education³⁵.

³⁴ For the distribution according to the main socio-demographic characteristics, see Table 14 in Annex.

³⁵ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 15.

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)

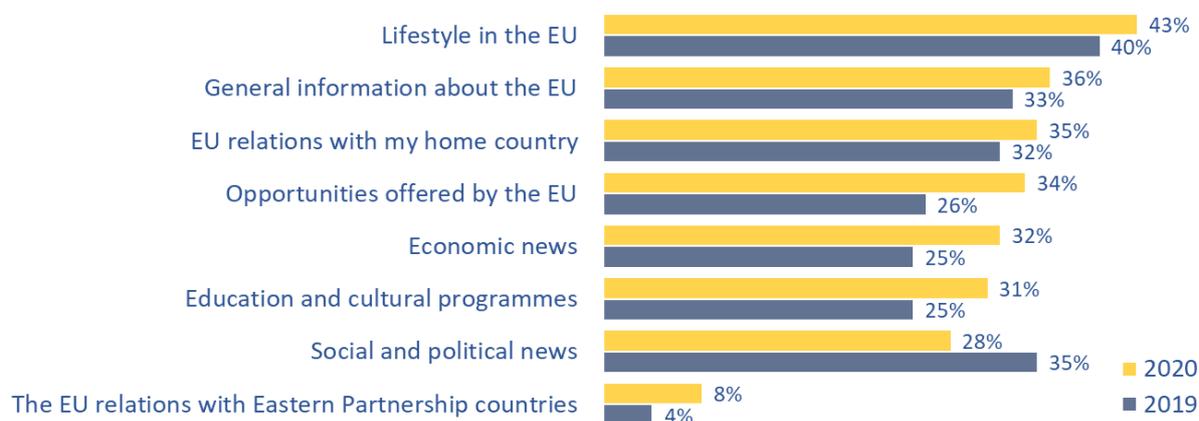


Moldovans who frequently search for information about the EU prefer to do it in their national language (65%, down 6%). Compared to 2019, searches in Russian (28%, up 4%) have slightly increased while those in English remained stable (5%).

‘Active searchers’ display a strong interest towards the European Union, with between 28% and 43% of them looking for all thematic areas – except for ‘the EU’s relations with other Eastern partner countries’ (8%, the least searched as in previous waves). ‘Lifestyle in the EU’ (43%, up 3%), ‘general information on the EU’ (36%, up 3%) and ‘the EU relations with their country’ (35%, up 3%) remain at the top of the list and have all witnessed an increase in the level of interest. One in three citizens who searched for information about the EU were interested in ‘opportunities offered by the European Union’ (34%, up 8%), ‘economic news’ (32%, up 7%) and ‘educational and cultural programmes’ (31%, up 6%).

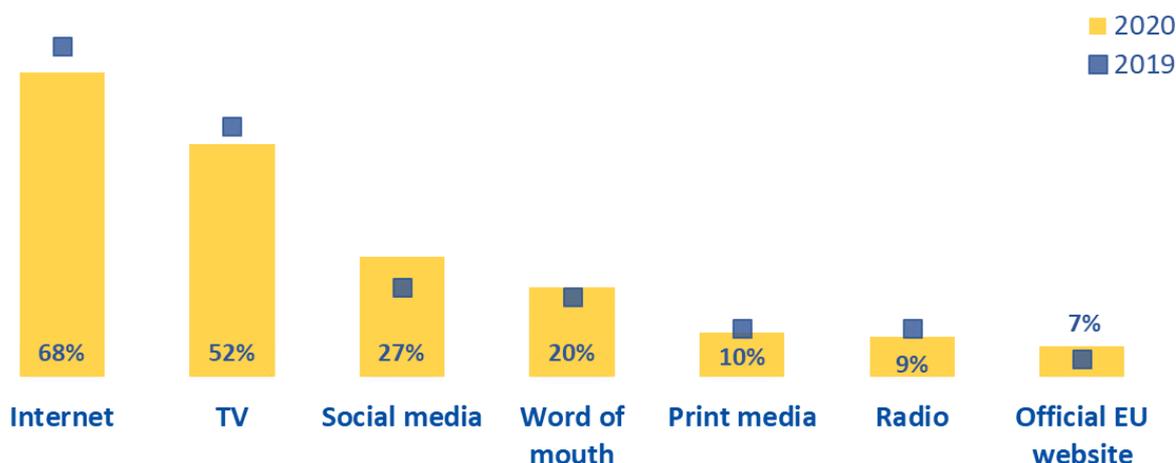
FIGURE 25 – What type of information do you normally look for? (Q3.1.2, multiple answers possible)

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



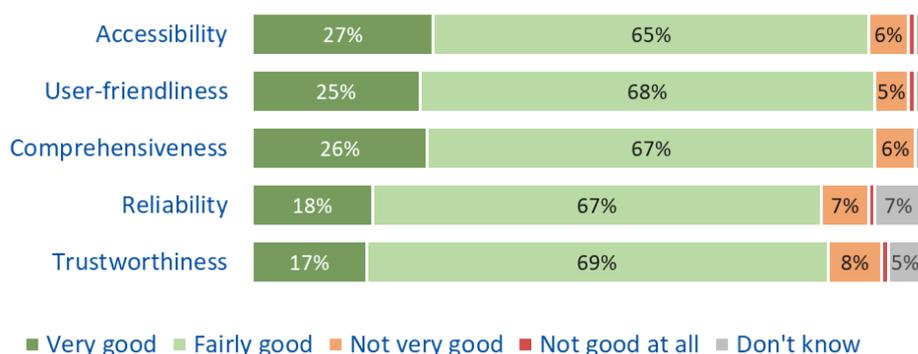
Like in previous waves, those actively searching for/accessing information mostly rely on the Internet (68%) and around half on television channels (52%). Social media witnessed the greatest increase in accesses (27%, up 7%) while the remaining media sources – such as ‘word of mouth’ (20%), print media (10%), radio (9%), and the official EU website (7%) – remained substantially stable compared to last year.

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 ‘very’ or ‘fairly’ positively by over 85% of Moldovans who looked for it. Comprehensiveness (93%), user-friendliness (93%) and accessibility (92%), are the most rated qualities. Opinions were slightly less positive in terms of reliability and trustworthiness, with around 15% of citizens not so satisfied or not able/willing to provide their opinion.

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, 34% of Moldovans have used EU informational websites³⁶ at least once, with a 5% increase compared to 2019. The Facebook profile of the EU is the most accessed among all EU online channels and also the one recording the greatest increase in accesses (31% of active users, up 9%). Around one in ten ‘active’ citizens also accessed the websites of EU projects (13%), EU institutions (12%) and Twitter pages (8%); around one in twenty the EU Delegation website (5%) and the ‘EU NEIGHBOURS’ website (4%).

³⁶ This refers to EU institutions’ websites; the EU Delegation website; EU projects’ websites; the ‘EU NEIGHBOURS’; EU Twitter and EU Facebook pages.

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

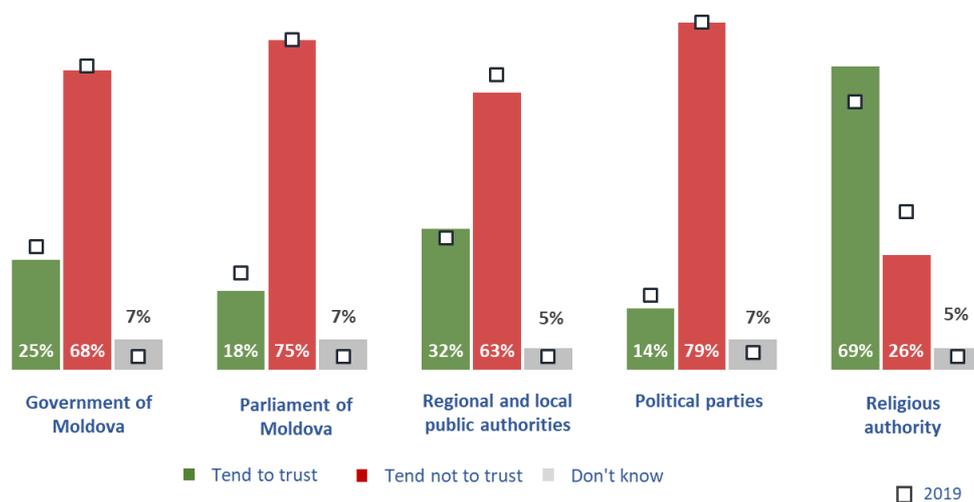
Moldova has gone through significant political changes since the last wave and the effect of this political turmoil is reflected in the figures: the share of Moldovans who trust the Government (25%), the Parliament (18%) and political parties (14%) is lower than it was in 2019 – together with that of those who are undecided (7% for all). 78% of Moldovans are dissatisfied with the way democracy works in their country – and 19% ‘not at all’ satisfied. ‘Corruption’ and ‘good governance’ continue to be the most problematic areas, with more citizens convinced that they do not apply to the Republic of Moldova – respectively 90% (up 6%) and 80% (up 6%). In fact, citizens continue to be much more optimistic towards their personal future (66%) than the future of their country (44%). Around 60% of citizens are very concerned about ‘low salaries and pensions’ and around 40% about ‘corruption’ and ‘low living standards and poverty’.

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

Moldova has also gone through significant political changes since the last wave – three governments succeeded each other during 2019. The effects of this political turmoil are reflected in the figures, with a low share of Moldovans who trust the Government (25%), the Parliament (18%) and political parties (14%) – even lower than it was in 2019. In fact, only trust in regional and local institutions has remained stable at 32%. **The only institution trusted by the majority of the population remains the religious authority (69%),** up 8% on the 2019 figures.

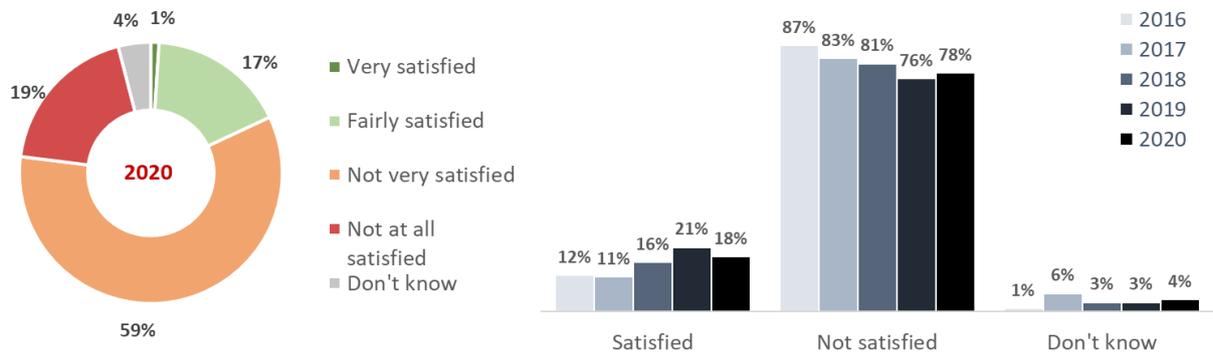
FIGURE 28 – Please tell us your level of trust in the following institutions (Q4.1)



Accordingly, 78% of Moldovans are dissatisfied with the way democracy works in their country – and 19% ‘not at all’ satisfied. Levels of dissatisfaction peak in the south of the country (87%) and among citizens with higher levels of education (85%). Native Russian speakers tend to be slightly less negative (72%) or more unaware (9%) than native Romanian speakers (78% and 5% respectively) and their attitudes are mirrored in the north of the country – where most native Russian speakers live – where only 61% of citizens are ‘dissatisfied’ with the functioning of democracy and 8% generally unaware. On average, males

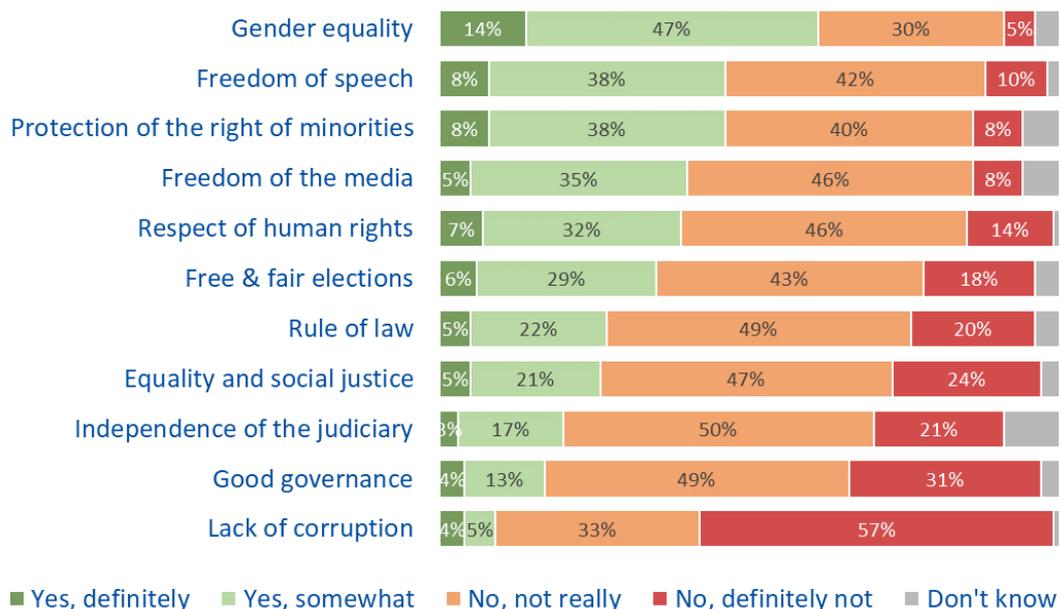
seem slightly more satisfied than females (21% versus 15%) and younger citizens more than the older ones (23% versus 12%)³⁷.

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 values 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’ (61% of citizens believe it applies to Moldova), ‘freedom of speech’ (46%), ‘protection of the rights of minorities’ (46%), ‘freedom of the media’ (40%) and ‘respect of human rights’ (39%) – whereas progress towards democratic reforms and governance appears to have stalled. ‘Lack of corruption’ and ‘good governance’ continue to be the most problematic areas, with more citizens convinced that they do not apply to the Republic of Moldova – respectively 90% (up 6%) and 80% (up 6%) of the population. By contrast, ‘independence of the judiciary’, though still among the most problematic areas, recorded a slight decrease in the share of those who think it did not apply to the country (71%, down 5 percentage points compared to in 2019).

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



³⁷ More details on satisfaction with democracy and socio-demographic characteristics are provided in Annex – Table 16.

3.4.2. Future expectations

Despite the poor assessment in terms of Moldova’s institutions and democratic progress, nearly one in two citizens is optimistic about the future of their country (44%, though slightly less than in 2019, down 5%) and 66% towards their personal future (again down 6%). When it comes to the future of Moldova, individuals with a lower level of education (45%) and native Romanian speakers (48%) tend to be more optimistic than individuals with a higher level of education (39%) and native Russian speakers (30%). In the case of personal future, views tend to be influenced by age, gender and language – and not by the level of education – and gaps between groups are even larger. More specifically, 79% of younger individuals are optimistic versus 64% and 49% of individuals in the middle and oldest age brackets respectively; 70% of native Romanian speakers are also positively disposed towards their personal future versus 47% of native Russian speakers; and 74% of males versus 58% of females³⁸.

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

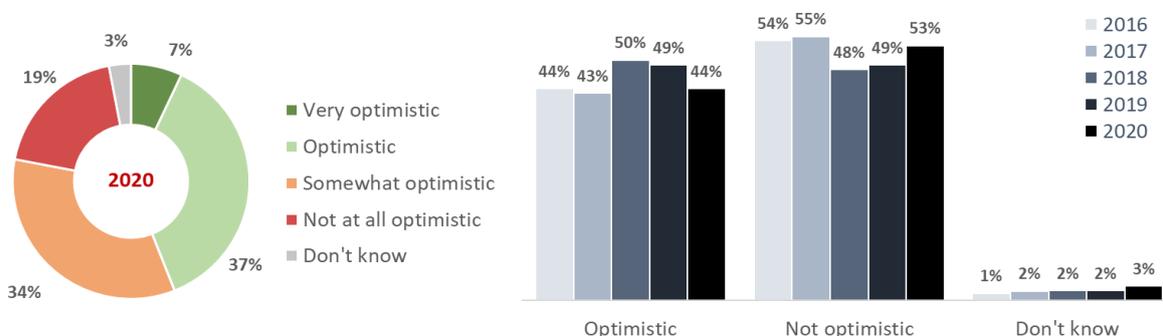
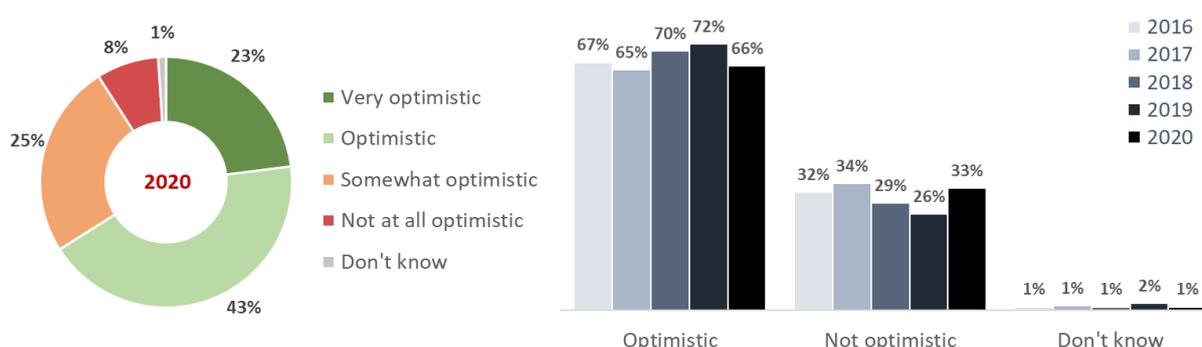


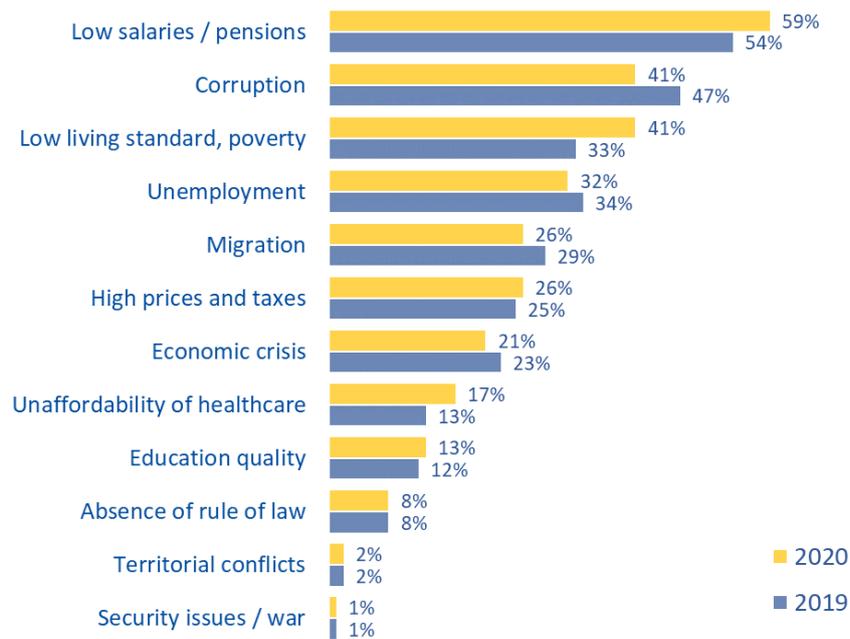
FIGURE 32 – How optimistic are you about your personal future? (Q4.6)



Moldovans’ primary priorities in 2020 are consistent with last year’s findings. However, moderate to large increases were observed with regard some indicators – namely ‘low salaries and pensions’ (59%, up 5%), ‘low living standards and poverty’ (41%, up 8%), ‘unaffordability of the healthcare’ (17%, up 4%) – which may be an indication of a growing concern over rising costs of living. 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, just like in 2019.

³⁸ 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 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 the majority of the population (61%, up 6% since 2019). Their most interesting characteristic is that nearly all are native Romanian speakers (88%), whereas neutral Moldovans, who account for 29% of the population, are more concentrated among native speakers of Russian (18%) and other languages (20%), such as Ukrainian, Gagauz language and Bulgarian. People with a neutral stance are also more likely to live in the north of the country (36% versus 21% for EU supporters), to be males (51% versus 46%) and older (32% versus 23%). Neutrality is also characterised by very low levels of ‘active’ exposure to information: only 9% of ‘neutral’ citizens ‘frequently’ accessed/searched for EU-related information – versus 40% of EU supporters. Media in Russian are their preferred source of information (73%), followed by new media (60%) and media in national language (57%) - versus 54%, 74% and 79% respectively for EU-supporters. This preference affects their perception in the sense that most ‘neutral’ citizens tend to trust the EAEU (45%) and distrust the EU (41%), UN (43%) and, particularly, NATO (59%) – which is the opposite of EU supporters (26%, 9%, 24% and 43% respectively). Overall, neutral citizens are also slightly less optimistic (56%) about Moldova’s future than EU supporters (49%).

In this section, the attitude of Moldovans towards the EU has been analysed according to two main profiles: individuals who have a positive image of the EU and those who are neutral towards it.³⁹

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

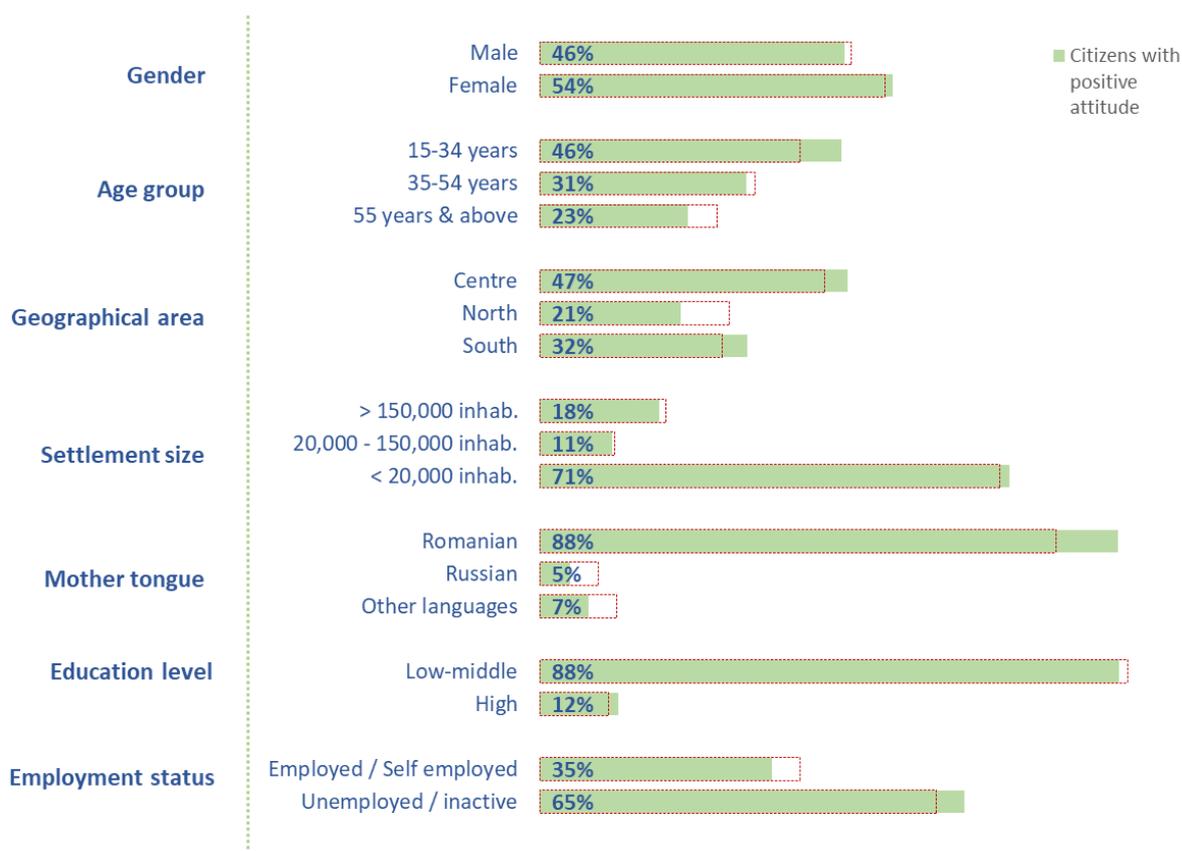
³⁹ Individuals that were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

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 the majority of the population (61%, up 6% since 2019) and their most characteristic feature is that nearly all are native Romanian speakers (88%). Geographically speaking, they are concentrated in the centre (47%) and the south of the country (32%). Compared to the general population, they also tend to be younger (46% versus 40%) and slightly more highly educated (12% versus 10%). No significant difference was observed in terms of gender and settlement size: 54% of EU supporters are female and 46% are males; and 71% live in small villages, 11% in medium-sized settlements and 18% in the capital city.

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



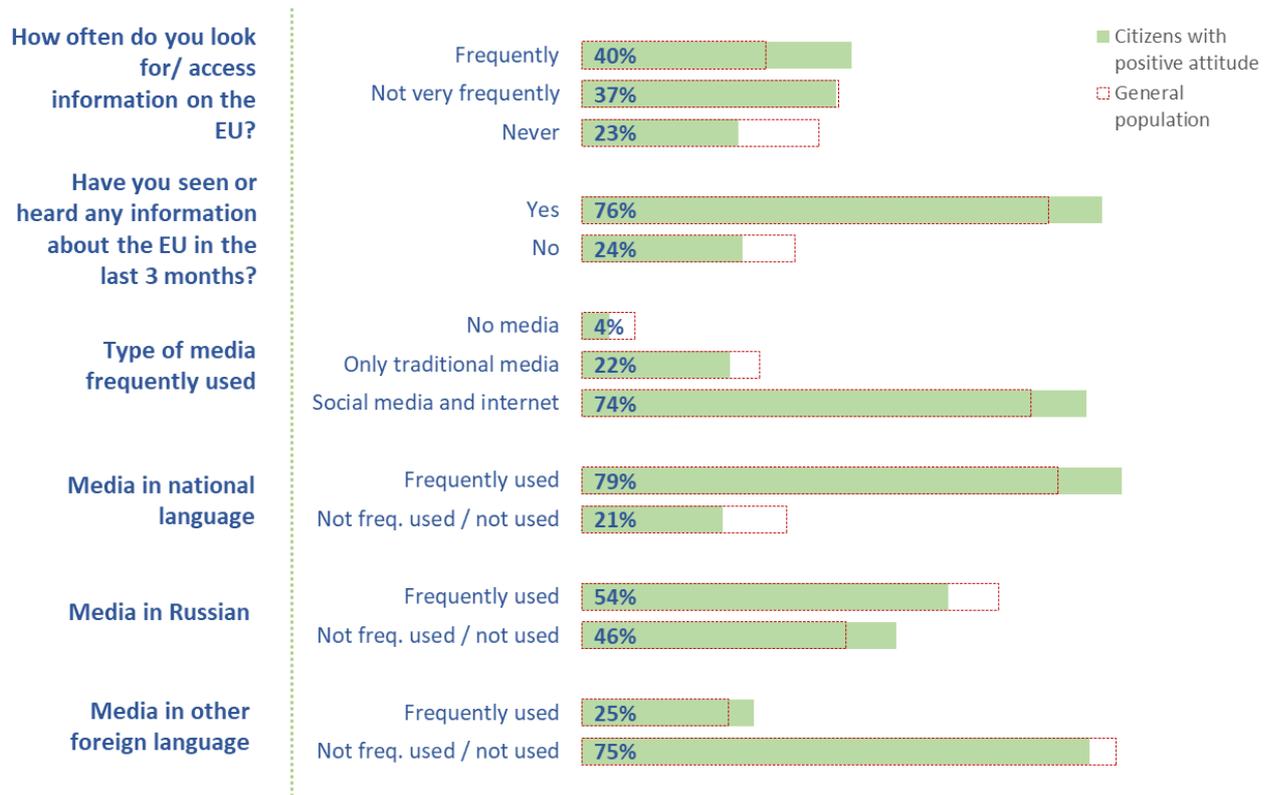
EU supporters have very high levels of both passive and active exposure to EU-related information. In fact, 76% had seen or heard information about the EU in the three months preceding the survey and 77% have looked for/accessed information on EU – the corresponding figures in the general population stand at 69% and 65% 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, but also in other foreign languages (25% versus 22% among the general population). EU supporters are also keener users of new

media – 74% frequently use Internet and social media (compared to 66% of the general population), showing a higher penetration rate.

In addition to ‘lifestyle in the EU’ (47%, their most searched topic), EU supporters are slightly more likely to look for ‘EU’s relations with Moldova’ (36%) and ‘other EaP countries’ (9%), and ‘educational and cultural programmes’ (33%) than the general population (35%, 8% and 31% respectively).

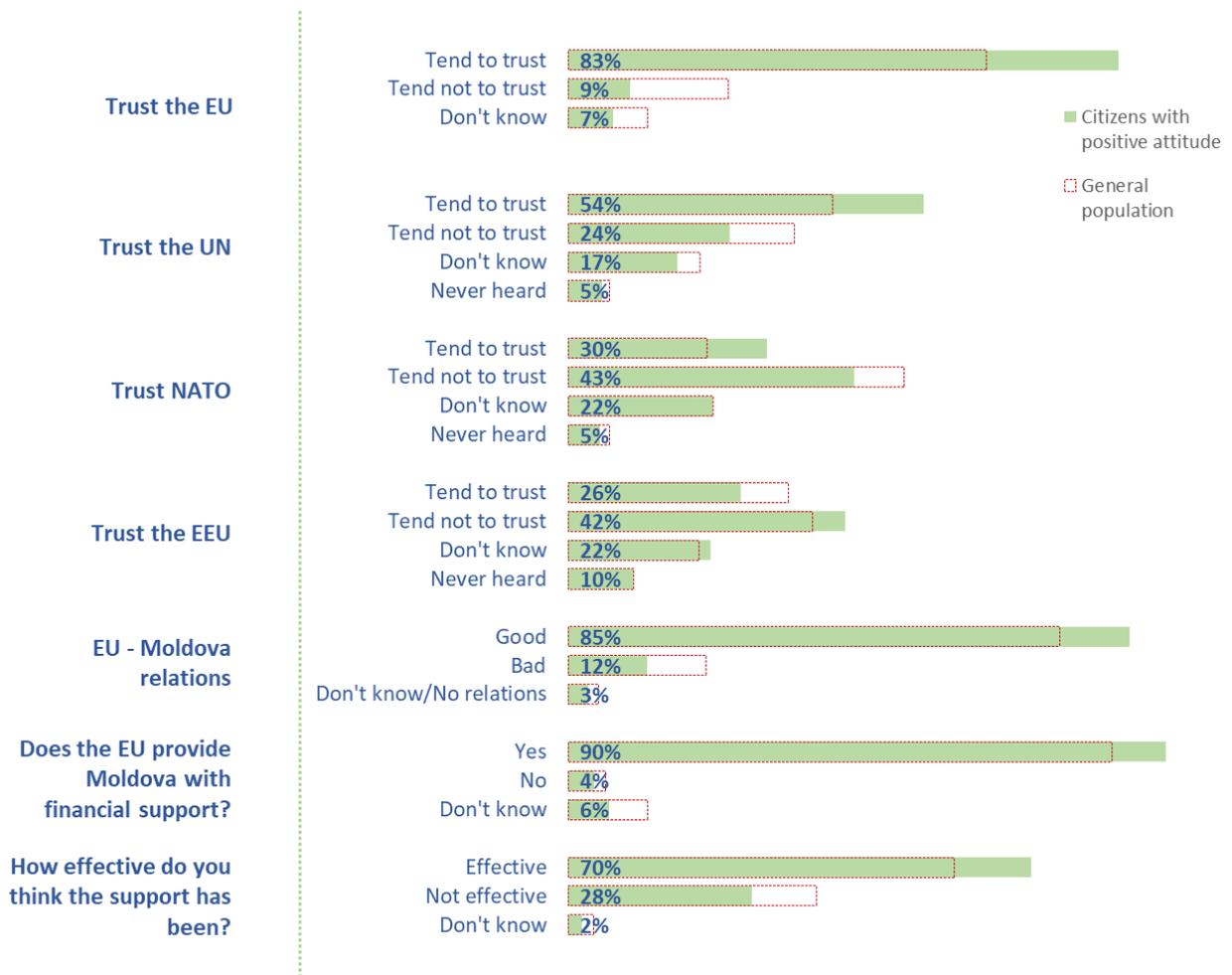
FIGURE 35 – Exposure to information about the EU and media usage among Moldovans with a positive image of the EU



A positive image of the EU is definitely reflected also by a higher level of confidence in all international institutions except the EAEU. Trust in the EU is particularly high, and 83% of EU supporters are confident towards the European Union – a difference of 20 percentage points compared to the general population (63%). Conversely, only one in four of EU supporters trust the EAEU (26% versus 33% for the general population).

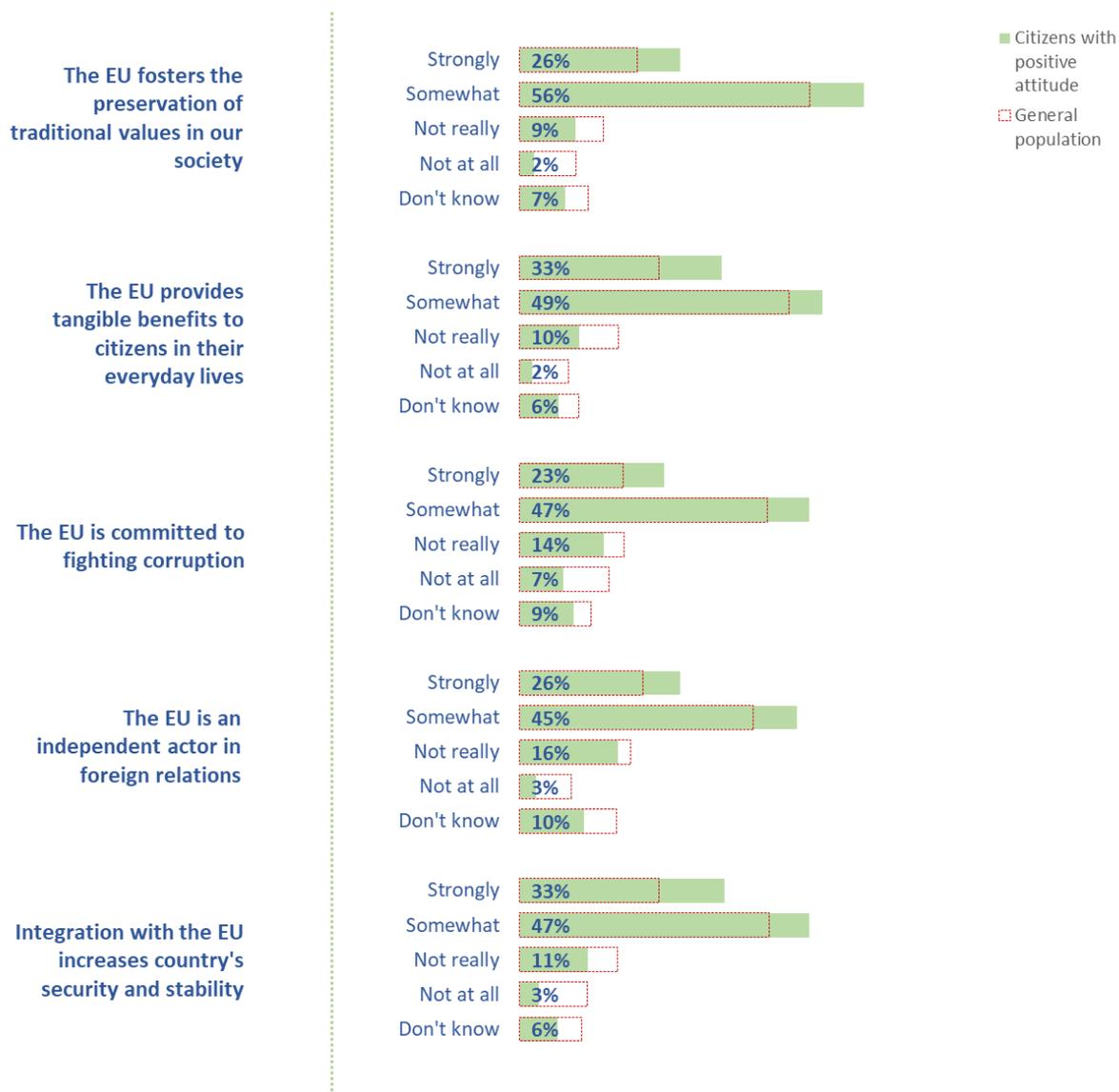
The great majority of EU supporters have a positive image of the relations between Moldova and the EU (85% versus 74% for the general population), acknowledge the EU’s financial support (90% versus 82%) and rate it as effective (70% versus 58%).

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



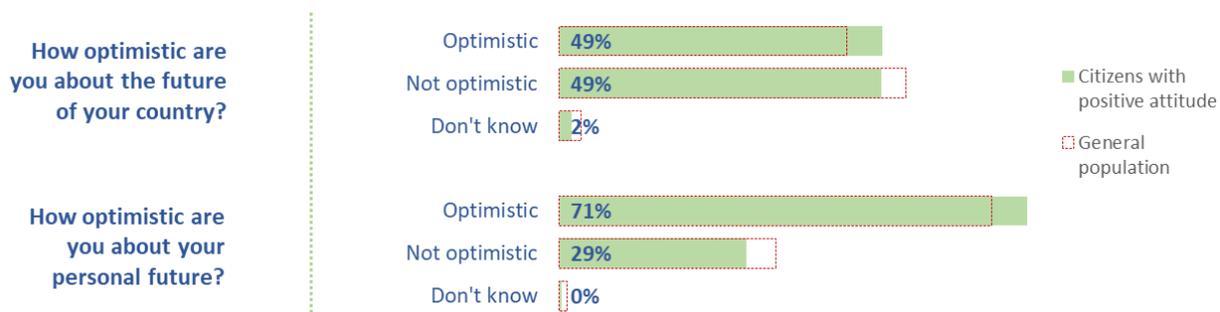
When it comes to common beliefs, EU supporters tend to share a much stronger and more positive view of the EU than the general population. In fact, between 70% and 82% of individuals with a positive image of the EU ‘strongly’ or ‘somewhat’ agree with all the proposed statements (it is between 57% and 66% for the general population). The two statements ‘the EU is committed to fighting corruption’ (70%) and ‘it is an independent actor in foreign relations’ (71%) collected the lowest levels of agreement.

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



EU supporters share slightly more optimistic attitudes towards the future: 49% of them view positively Moldova’s future and 71% their own future (versus 44% and 67% in the general population). On average, they tend to be slightly less worried about low ‘salaries and pensions’ (56%) and/or ‘living standards and poverty’ (40%) and the ‘unaffordability of the healthcare’ (16%), but slightly more about ‘corruption’ (46%), ‘migration’ (29%) and ‘the quality of education’ (14%) than the general population.

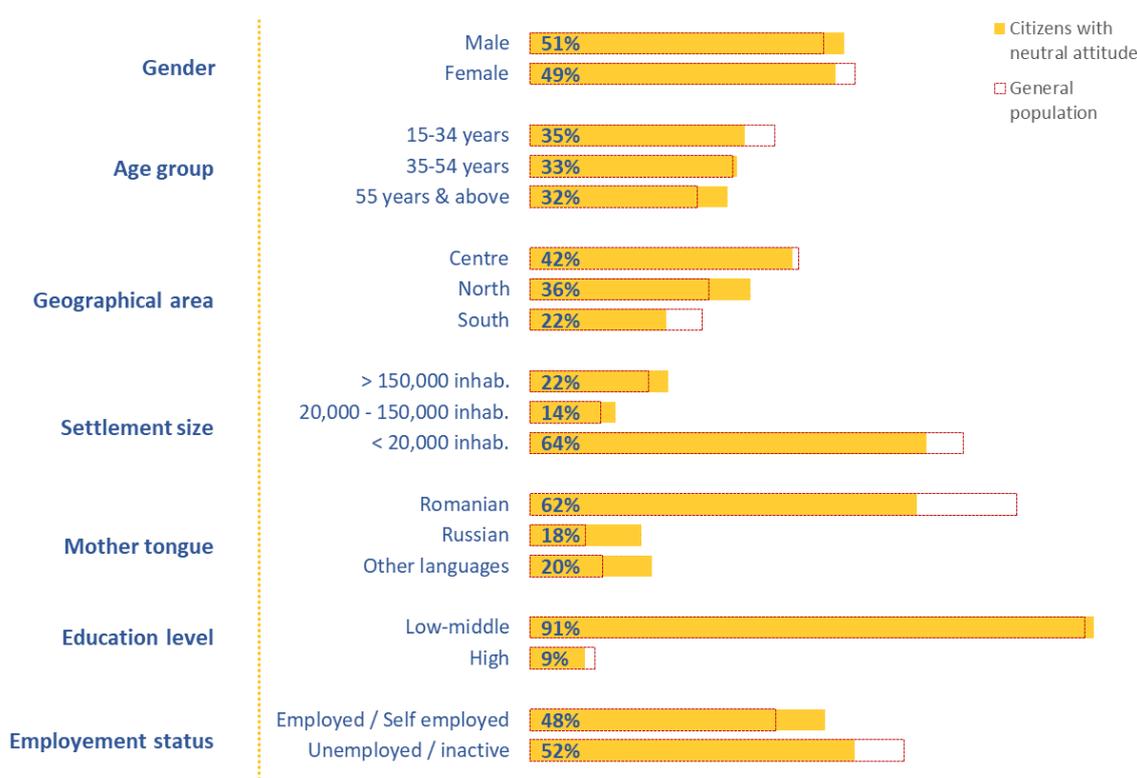
FIGURE 38 – View of the future among Moldovans with a positive image of the EU



3.5.2. Neutral attitudes

Moldovans with a neutral view of the EU account for 29% of the population – a little less than they were in 2019 (33%). Like EU supporters, they are strongly characterised by their mother tongue: nearly 40% are native speakers of Russian (18%) and other languages (20%), such as Ukrainian, Gagauz language and Bulgarian (versus 5% and 7% respectively of EU supporters)⁴⁰. As such, they are slightly more prevalent in the north of the country, which historically hosts a large number of ethnic Russians and Ukrainians (36% versus 21% for EU supporters). They are also slightly more likely to be male (51% versus 46%), older (32% versus 23%) and lowly educated (91% versus 88%).

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



Most ‘neutral’ individuals had heard information about the EU in the three months preceding the survey (59%) – though less than the EU supporters (76%). Still, their interest in the EU is low and only 9% of them ‘frequently’ accessed/searched for EU-related information – versus 40% of EU supporters.

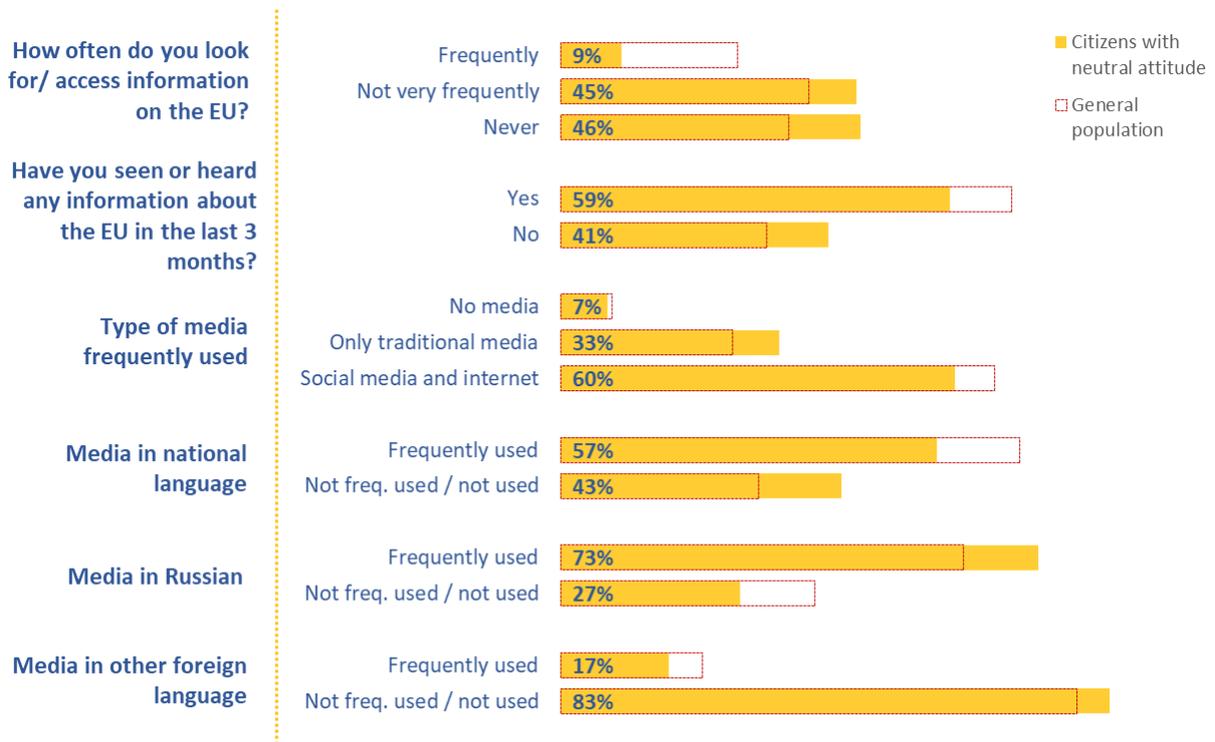
Media in Russian are their preferred source of information (73% of them frequently used them), followed by media in the national language (57%). Compared to the positively oriented citizens, ‘neutral’ Moldovans rely less on new media (60% versus 74%) and more on traditional media (33% versus 22%).

Though slightly less interested, neutral citizens who look for EU-related information tend to engage in similar searches to those of EU supporters – 41% looked up for ‘lifestyle in the European Union’, 35% for ‘the relations between the EU and their home country’ and 34% in ‘economic news’ (34%). Around one

⁴⁰ 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>

third of 'neutral' active searchers also looked up for 'educational and cultural programmes' (30%) 'opportunities offered by the EU' (33%).

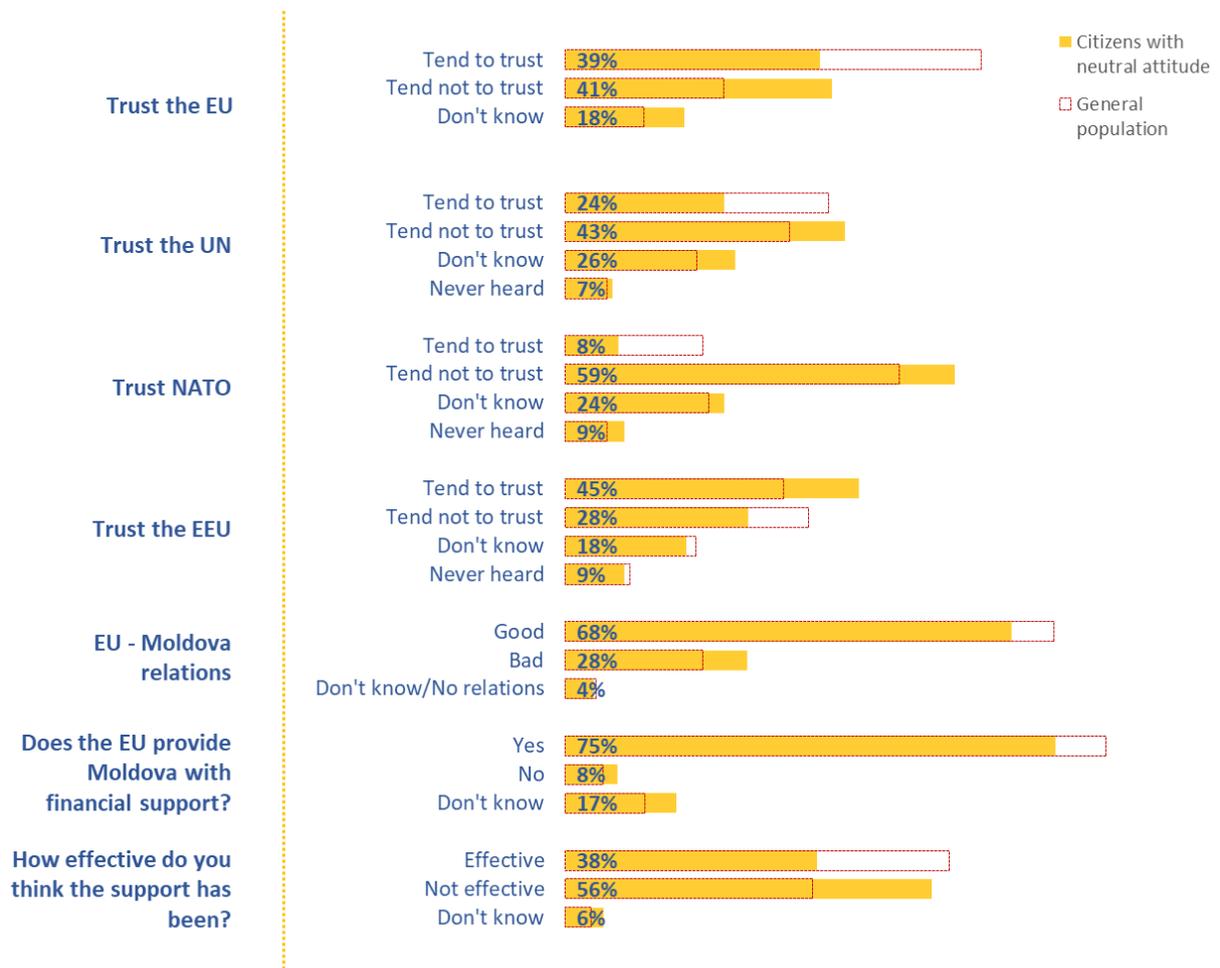
FIGURE 40 – Exposure to information about the EU and media usage among Moldovans with a neutral image of the EU



Levels of confidence in international organisations are very diverse and most 'neutral' citizens tend to trust the EAEU (45%) and distrust the EU (41%), UN (43%) and, particularly, NATO (59%) – which is the opposite of EU supporters (26%, 9%, 24% and 43% respectively). 'Neutral' citizens also display very low levels of confidence in answering these questions: between 18% and 33% could not rate their level of trust or had never heard of the specific international organisation.

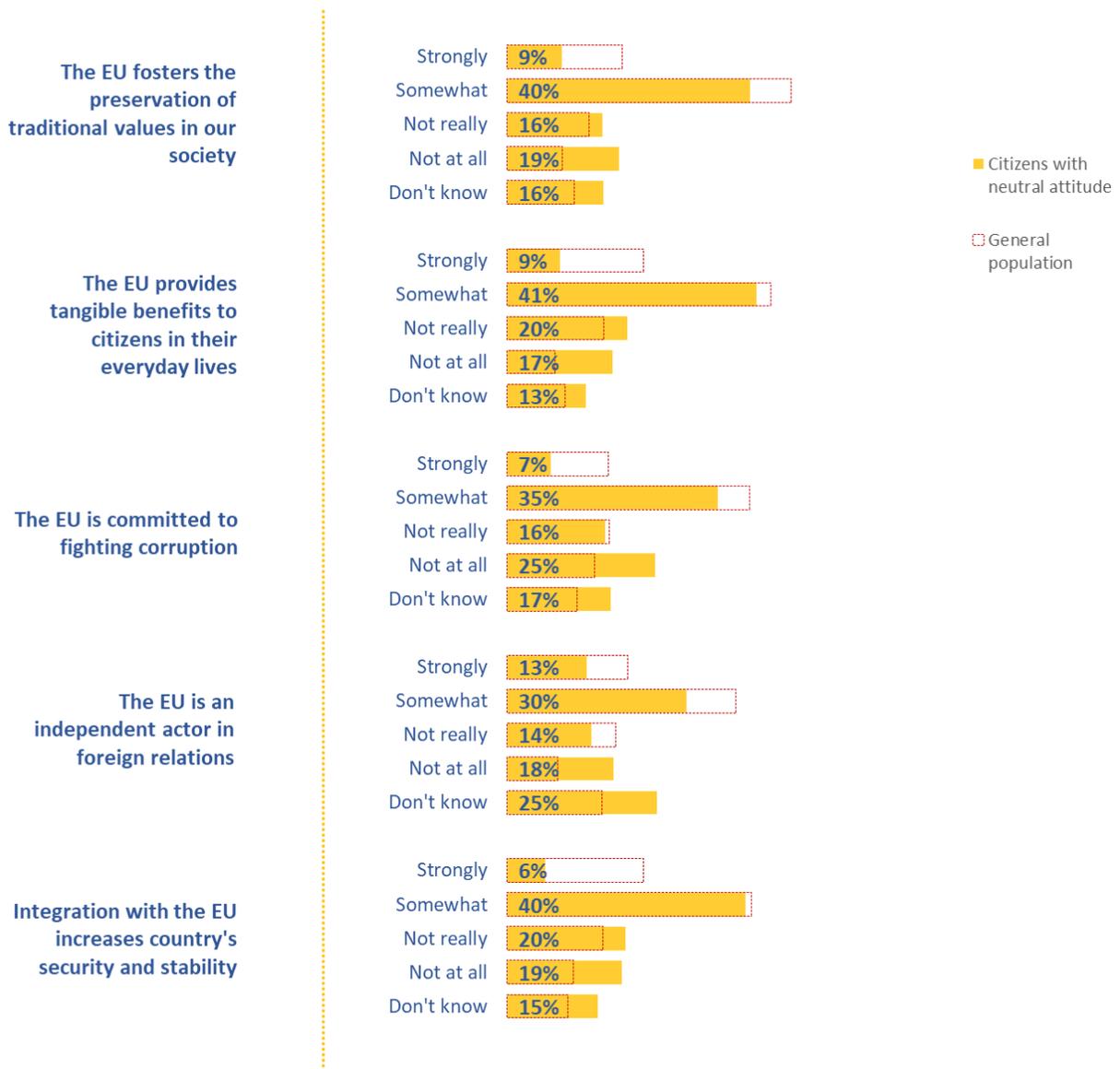
The rating of the relations between the Republic of Moldova and the EU is in overall positive: only 28% of 'neutral' citizens would describe relations as 'bad' (12% for EU supporters). The majority of 'neutral' citizens also acknowledges EU's financial support (75% versus 90%) – though they tend to be quite critical in terms of its 'effectiveness' (56% of those aware of the EU's financial support rated it as 'ineffective' versus 28% of EU supporters).

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 influenced by the pro-Russian media. In fact, most of them either ‘disagree’ (figures ranging between 32% and 41%) or are unwilling to express an opinion (figures ranging between 13% and 25%). The higher share of approval was recorded for the statements that ‘the EU provides tangible benefits to citizens in their everyday life’ (50%).

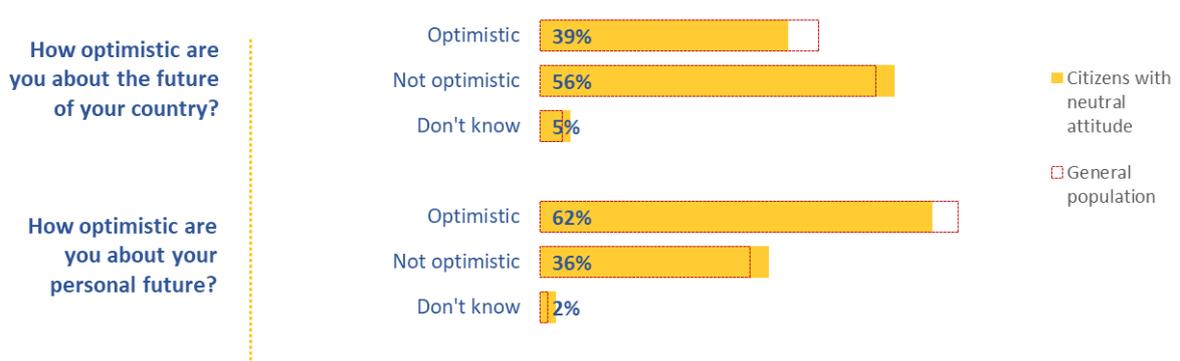
FIGURE 42 – Common beliefs of Moldovans with a neutral image of the EU



Neutral individuals are also slightly less optimistic than the EU supporters: 56% are openly pessimistic about Moldova’s future and 36% about their personal future.

Their primary concerns are ‘low salaries and pensions’ (58%), ‘unemployment’ (43%) and ‘low living standards and poverty’ (41%), possibly reflecting the increasing difficulties they are encountering in their daily life. Compared to the EU supporters, they seem slightly less concerned about ‘corruption’ (36% versus 46%) and ‘migration’ (23% versus 29%).

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



4. 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	57%	34%	8%	1%	100%
	Between 20,000 and 150,000 inhabitants	56%	35%	5%	4%	100%
	Less than 20,000 inhabitants	62%	27%	10%	1%	100%
Gender	Male	59%	31%	9%	1%	100%
	Female	62%	27%	9%	2%	100%
Age group	15-34 years	70%	26%	3%	1%	100%
	35-54 years	58%	30%	11%	1%	100%
	55 years & above	50%	34%	14%	2%	100%
Education level	Low/medium level	63%	24%	10%	3%	100%
	High level	69%	25%	6%	0%	100%
Employment status	Employed / Self-employed	54%	35%	9%	2%	100%
	Unemployed or temporarily not working / inactive	65%	25%	9%	1%	100%
Mother tongue	Romanian	68%	23%	8%	1%	100%
	Russian	29%	55%	14%	2%	100%
Geographical area	Centre	65%	29%	5%	1%	100%
	North	45%	36%	17%	2%	100%
	South	69%	23%	6%	2%	100%
Total		61%	29%	9%	1%	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 Religion	14%	63%	12%	3%	8%	100%
Respect for other cultures, minorities	14%	61%	16%	4%	5%	100%
Freedom of speech	18%	57%	17%	3%	5%	100%
Democracy	17%	57%	16%	3%	7%	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%	55%	20%	4%	8%	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	63%	19%	18%	100%
	Between 20,000 and 150,000 inhabitants	56%	33%	11%	100%
	Less than 20,000 inhabitants	65%	24%	11%	100%
Gender	Male	64%	25%	11%	100%
	Female	62%	23%	15%	100%
Age group	15-34 years	72%	18%	10%	100%
	35-54 years	59%	27%	14%	100%
	55 years & above	56%	29%	15%	100%
Education level	Low/medium level	64%	22%	14%	100%
	High level	76%	19%	5%	100%
Employment status	Employed / Self-employed	61%	27%	12%	100%
	Unemployed or temporarily not working / inactive	65%	22%	13%	100%
Mother tongue	Romanian	67%	21%	12%	100%
	Russian	39%	45%	16%	100%
Geographical area	Centre	69%	20%	11%	100%
	North	44%	38%	18%	100%
	South	74%	17%	9%	100%
Total		63%	24%	13%	100%

Percentages refer to Moldovans who have heard about the EU

TABLE 4 – Relations between the EU and the Republic of 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	67%	31%	2%	100%
	Between 20,000 and 150,000 inhabitants	79%	14%	7%	100%
	Less than 20,000 inhabitants	76%	19%	5%	100%
Gender	Male	76%	20%	4%	100%
	Female	73%	22%	5%	100%
Age group	15-34 years	79%	17%	4%	100%
	35-54 years	74%	23%	3%	100%
	55 years & above	68%	24%	8%	100%
Education level	Low/medium level	76%	19%	5%	100%
	High level	74%	22%	4%	100%
Employment status	Employed / Self-employed	77%	18%	5%	100%
	Unemployed or temporarily not working / inactive	73%	23%	4%	100%
Mother tongue	Romanian	78%	18%	4%	100%
	Russian	58%	37%	5%	100%
Geographical area	Centre	78%	19%	3%	100%
	North	70%	24%	6%	100%
	South	74%	21%	5%	100%
Total		74%	21%	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 Republic of Moldova with financial support?					
		Yes	No	Don't know	Total
Settlement size	Capital	81%	1%	18%	100%
	Between 20,000 and 150,000 inhabitants	86%	3%	11%	100%
	Less than 20,000 inhabitants	82%	7%	11%	100%
Gender	Male	83%	5%	12%	100%
	Female	82%	6%	12%	100%
Age group	15-34 years	85%	5%	10%	100%
	35-54 years	81%	4%	15%	100%
	55 years & above	80%	9%	11%	100%
Education level	Low/medium level	77%	8%	15%	100%
	High level	92%	1%	7%	100%
Employment status	Employed / Self-employed	86%	4%	10%	100%
	Unemployed or temporarily not working / inactive	80%	7%	13%	100%
Mother tongue	Romanian	83%	6%	11%	100%
	Russian	80%	3%	17%	100%
Geographical area	Centre	85%	4%	11%	100%
	North	77%	9%	14%	100%
	South	84%	5%	11%	100%
Total		82%	6%	12%	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	42%	52%	6%	100%
	Between 20,000 and 150,000 inhabitants	50%	46%	4%	100%
	Less than 20,000 inhabitants	65%	32%	3%	100%
Gender	Male	55%	41%	4%	100%
	Female	62%	35%	3%	100%
Age group	15-34 years	61%	37%	2%	100%
	35-54 years	59%	37%	4%	100%
	55 years & above	55%	40%	5%	100%
Education level	Low/medium level	63%	32%	5%	100%
	High level	59%	38%	3%	100%
Employment status	Employed / Self-employed	54%	40%	6%	100%
	Unemployed or temporarily not working / inactive	62%	36%	2%	100%
Mother tongue	Romanian	63%	34%	3%	100%
	Russian	30%	58%	12%	100%
Geographical area	Centre	55%	41%	4%	100%
	North	52%	43%	5%	100%
	South	70%	27%	3%	100%
Total		58%	38%	4%	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 the Republic of Moldova?				
		Yes	No	Total
Settlement size	Capital	43%	57%	100%
	Between 20,000 and 150,000 inhabitants	42%	58%	100%
	Less than 20,000 inhabitants	46%	54%	100%
Gender	Male	47%	53%	100%
	Female	43%	57%	100%
Age group	15-34 years	49%	51%	100%
	35-54 years	46%	54%	100%
	55 years & above	38%	62%	100%
Education level	Low/medium level	42%	58%	100%
	High level	69%	31%	100%
Employment status	Employed / Self-employed	49%	51%	100%
	Unemployed or temporarily not working / inactive	42%	58%	100%
Mother tongue	Romanian	47%	53%	100%
	Russian	50%	50%	100%
Geographical area	Centre	38%	62%	100%
	North	50%	50%	100%
	South	52%	48%	100%
Total		45%	55%	100%

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

TABLE 8 – Benefits from current EU support

Q2.8. To what extent would you say that Moldova has benefitted from the current European Union support in the following areas?						
	Very much	Fairly	Not very much	Not at all	Don't know	Total
Access to more products and services	9%	48%	32%	5%	6%	100%
More tourism	11%	38%	36%	6%	9%	100%
Better education	8%	41%	37%	8%	6%	100%
Improved infrastructure	9%	39%	40%	7%	5%	100%
Improved trade	8%	37%	43%	6%	6%	100%
Greater employment opportunities	10%	32%	42%	11%	5%	100%
Improved quality of health-care system	6%	34%	39%	16%	5%	100%
Improved agricultural production	6%	29%	44%	13%	8%	100%
Improved democracy	4%	30%	44%	13%	9%	100%
Greater economic development	4%	28%	46%	15%	7%	100%
Improved quality of the justice system	3%	25%	44%	17%	11%	100%
Better law enforcement	5%	21%	48%	17%	9%	100%
Less corruption	4%	15%	44%	31%	6%	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	20%	45%
Improve quality of health-care system	14%	43%
Promote economic development	12%	40%
Create greater employment opportunities	12%	29%
Promote a better education	10%	26%
Improve infrastructure	8%	30%
Improve quality of the justice system	6%	19%
Promote better law enforcement	4%	14%
Improve democracy	4%	10%
Improve trade	3%	13%
Improve agricultural production	3%	11%
Increase tourism	2%	6%
Promote access to more products and services	1%	6%

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	2%	21%	77%	100%	53%
	Between 20,000 and 150,000 inhabitants	12%	40%	48%	100%	30%
	Less than 20,000 inhabitants	9%	25%	66%	100%	43%
Gender	Male	6%	26%	68%	100%	38%
	Female	9%	26%	65%	100%	48%
Age group	15-34 years	5%	2%	93%	100%	41%
	35-54 years	13%	18%	69%	100%	46%
	55 years & above	5%	71%	24%	100%	44%
Education level	Low/medium level	11%	31%	58%	100%	43%
	High level	2%	15%	83%	100%	38%
Employment status	Employed / Self-employed	9%	19%	72%	100%	43%
	Unemployed or temporarily not working / inactive	7%	31%	62%	100%	43%
Mother tongue	Romanian	8%	24%	68%	100%	45%
	Russian	7%	24%	69%	100%	37%
Geographical area	Centre	2%	25%	73%	100%	52%
	North	17%	29%	54%	100%	39%
	South	6%	26%	68%	100%	34%
Total		8%	26%	66%	100%	43%

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

		Individuals that always or often use media		
		In national language	In Russian	In other foreign language
Settlement size	Capital	71%	69%	27%
	Between 20,000 and 150,000 inhabitants	57%	66%	11%
	Less than 20,000 inhabitants	72%	59%	22%
Gender	Male	67%	62%	23%
	Female	73%	61%	20%
Age group	15-34 years	74%	49%	29%
	35-54 years	68%	66%	18%
	55 years & above	66%	74%	15%
Education level	Low/medium level	69%	55%	24%
	High level	72%	69%	27%
Employment status	Employed / Self-employed	67%	67%	21%
	Unemployed or temporarily not working / inactive	71%	58%	22%
Mother tongue	Romanian	82%	54%	23%
	Russian	27%	86%	23%
Geographical area	Centre	83%	57%	23%
	North	63%	73%	19%
	South	57%	56%	21%
Total		70%	61%	22%

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	21%	32%	47%	100%
Television	49%	41%	10%	100%
Radio	25%	41%	34%	100%
Print media	26%	40%	34%	100%
Social media	34%	36%	30%	100%
Internet	49%	30%	21%	100%
Word of mouth	35%	47%	18%	100%
Country's media in national language	48%	38%	14%	100%
Country's media in Russian	36%	52%	12%	100%
Country's media in other languages	14%	43%	43%	100%
Foreign media in Russian	29%	53%	18%	100%
Foreign media in other languages	19%	42%	39%	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	82%	18%	100%
	Between 20,000 and 150,000 inhabitants	80%	20%	100%
	Less than 20,000 inhabitants	63%	37%	100%
Gender	Male	72%	28%	100%
	Female	66%	34%	100%
Age group	15-34 years	69%	31%	100%
	35-54 years	71%	29%	100%
	55 years & above	66%	34%	100%
Education level	Low/medium level	63%	37%	100%
	High level	86%	14%	100%
Employment status	Employed / Self-employed	66%	34%	100%
	Unemployed or temporarily not working / inactive	70%	30%	100%
Mother tongue	Romanian	68%	32%	100%
	Russian	72%	28%	100%
Geographical area	Centre	72%	28%	100%
	North	62%	38%	100%
	South	71%	29%	100%
Total		69%	31%	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	59%	29%	6%	6%	100%
	Between 20,000 and 150,000 inhabitants	53%	38%	5%	4%	100%
	Less than 20,000 inhabitants	56%	35%	5%	4%	100%
Gender	Male	58%	33%	6%	3%	100%
	Female	55%	35%	5%	5%	100%
Age group	15-34 years	67%	29%	2%	2%	100%
	35-54 years	55%	35%	7%	3%	100%
	55 years & above	43%	40%	9%	8%	100%
Education level	Low/medium level	54%	35%	7%	4%	100%
	High level	67%	28%	4%	1%	100%
Employment status	Employed / Self-employed	52%	38%	5%	5%	100%
	Unemployed or temporarily not working / inactive	60%	31%	5%	4%	100%
Mother tongue	Romanian	58%	35%	4%	3%	100%
	Russian	45%	44%	3%	8%	100%
Geographical area	Centre	60%	33%	3%	4%	100%
	North	47%	43%	8%	2%	100%
	South	60%	28%	6%	6%	100%
Total		57%	34%	5%	4%	100%

Percentages refer to Moldovans who have heard about the EU

TABLE 15 – Accessing information about the EU

Q3.1. How often do you look for/access information on the EU?		Frequently	Not very frequently	Never	Total
Settlement size	Capital	36%	36%	28%	100%
	Between 20,000 and 150,000 inhabitants	19%	35%	46%	100%
	Less than 20,000 inhabitants	27%	39%	34%	100%
Gender	Male	32%	33%	35%	100%
	Female	23%	42%	35%	100%
Age group	15-34 years	39%	42%	19%	100%
	35-54 years	21%	41%	38%	100%
	55 years & above	20%	28%	52%	100%
Education level	Low/medium level	25%	33%	42%	100%
	High level	45%	37%	18%	100%
Employment status	Employed / Self-employed	27%	39%	34%	100%
	Unemployed or temporarily not working / inactive	28%	37%	35%	100%
Mother tongue	Romanian	30%	38%	32%	100%
	Russian	18%	42%	40%	100%
Geographical area	Centre	28%	35%	37%	100%
	North	24%	32%	44%	100%
	South	31%	47%	22%	100%
Total		27%	38%	35%	100%

Percentages refer to Moldovans who have heard about the EU

TABLE 16 – Satisfaction with democracy in the Republic of Moldova

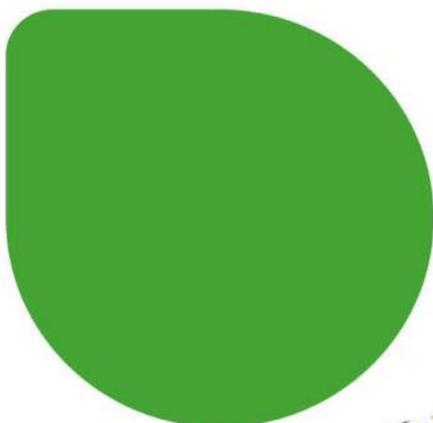
Q4.3. On the whole, are you 'very satisfied', 'fairly satisfied', 'not very satisfied' or 'not at all satisfied' with the way democracy works in the Republic of Moldova?		Satisfied	Not satisfied	Don't know	Total
Settlement size	Capital	16%	80%	4%	100%
	Between 20,000 and 150,000 inhabitants	25%	64%	11%	100%
	Less than 20,000 inhabitants	18%	79%	3%	100%
Gender	Male	21%	75%	4%	100%
	Female	15%	80%	5%	100%
Age group	15-34 years	23%	76%	1%	100%
	35-54 years	17%	78%	5%	100%
	55 years & above	12%	80%	8%	100%
Education level	Low/medium level	20%	75%	5%	100%
	High level	14%	85%	1%	100%
Employment status	Employed / Self-employed	14%	81%	5%	100%
	Unemployed or temporarily not working / inactive	20%	76%	4%	100%
Mother tongue	Romanian	17%	78%	5%	100%
	Russian	19%	72%	9%	100%
Geographical area	Centre	13%	83%	4%	100%
	North	31%	61%	8%	100%
	South	12%	87%	1%	100%
Total		18%	78%	4%	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	21%	77%	2%	100%
	Between 20,000 and 150,000 inhabitants	54%	42%	4%	100%
	Less than 20,000 inhabitants	49%	48%	3%	100%
Gender	Male	45%	50%	5%	100%
	Female	43%	55%	2%	100%
Age group	15-34 years	43%	57%	0%	100%
	35-54 years	46%	51%	3%	100%
	55 years & above	42%	50%	8%	100%
Education level	Low/medium level	45%	48%	7%	100%
	High level	39%	60%	1%	100%
Employment status	Employed / Self-employed	45%	54%	1%	100%
	Unemployed or temporarily not working / inactive	43%	52%	5%	100%
Mother tongue	Romanian	48%	49%	3%	100%
	Russian	30%	67%	3%	100%
Geographical area	Centre	39%	59%	2%	100%
	North	52%	45%	3%	100%
	South	43%	52%	5%	100%
Total		44%	53%	3%	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	53%	45%	2%	100%
	Between 20,000 and 150,000 inhabitants	73%	27%	0%	100%
	Less than 20,000 inhabitants	68%	31%	1%	100%
Gender	Male	74%	25%	1%	100%
	Female	58%	40%	2%	100%
Age group	15-34 years	79%	20%	1%	100%
	35-54 years	64%	35%	1%	100%
	55 years & above	49%	49%	2%	100%
Education level	Low/medium level	64%	34%	2%	100%
	High level	64%	36%	0%	100%
Employment status	Employed / Self-employed	71%	27%	2%	100%
	Unemployed or temporarily not working / inactive	62%	37%	1%	100%
Mother tongue	Romanian	70%	29%	1%	100%
	Russian	47%	49%	4%	100%
Geographical area	Centre	69%	30%	1%	100%
	North	68%	31%	1%	100%
	South	60%	39%	1%	100%
Total		66%	33%	1%	100%



Albert House, Quay Place
92-93 Edward Street
Birmingham
B1 2RA
United Kingdom

T: +44 (0) 845 313 7455

www.ecorys.com

Rue Belliard 12
1040 Brussels
Belgium

T: +32 2 743 89 49