OVERALL RESULTS

Report prepared for Public Association Representation in Moldova, International Research & Exchanges Board (PA IREX Moldova) Novateca Program

November 23, 2017

This assignment was commissioned by IREX to OPINIA
Overall results of the NATIONAL CITIZENS SURVEY 2017

Attribution and Acknowledgments

This study was carried out under the Novateca program on behalf of the International Research & Exchanges Board (IREX) Representation in Moldova. All data resulting from this study belong to the PA IREX Moldova. The research was carried out by the Independent Sociology and Information Service OPINIA, in close collaboration with the Impact Specialist of Novateca Program and conducted in conformity with the standards of the ICC/ESOMAR International Code on Market and Social Research (www.esomar.org/index.php/codes-guidelines.html).
INTRODUCTION

The Novateca program is aimed at facilitating the transformation of Moldovan libraries into vibrant community centers. The program focuses on areas of activity such as equipping libraries with modern technologies, training librarians, cooperation with local and central public authorities for supporting public libraries as community development centers, and cooperation with civil society and the private sector for raising awareness of the population and institutions concerning libraries modernization.

To identify the existing perceptions of libraries and their visitors and to evaluate the trends of development of public libraries in the country, the Novateca program and IREX Moldova launched the National Citizens Survey on a national sample of 1,200 adults from Moldova aged 15 and older.

Research Objectives

IREX Moldova contracted ISIS OPINIA to carry out a national sociological survey with the following objectives:

- To identify the population’s perceptions in relation to public libraries
- To determine the roles of the public library and the librarian in the community;
- To assess the most popular library services and activities, as well as identifying services and activities that would interest the population and increase the frequency of their visiting the library
- To assess the population’s willingness to contribute to the development of the public library in the community
- To identify the population’s interest in training to develop both general and IT skills in return for payment as well as acceptable cost margins of these library services
- To assess the frequency of internet use and its role in increasing the interest of the communities in the public library
- To evaluate the impact of the “See You at the Library” campaign on consumers

EXECUTIVE SUMMARY

This report on the National Citizens Survey was designed to identify the existing perceptions of libraries and their visitors from the Republic of Moldova and to analyze the trends of the development of public libraries in the country based on the survey results of the current year and two similar studies conducted in 2014 and 2016.

The survey was conducted from October 7–24, 2017 on a sample of 1,200 respondents in 68 localities in the Republic of Moldova. The adult population aged 15 and older and living in households were surveyed through a direct interview technique (face to face) in their homes. The data gathered were statistically analyzed and compared with the data obtained in 2014 and 2016 in similar studies.

The perception of the library changed from a welcoming and comfortable place, a place where people go to find books to read and a place where children go to receive help to learn to read/improve their reading skills in 2014 to a place where people in the community meet to share experiences and information in a friendly place in 2017. Also, community members associate the library with an institution that provides people with all the resources they need when they were asking for. During a period of three years, public libraries in the country were increasingly being perceived as multifunctional cultural centers by community groups, and performance requirements of libraries were increasing.
Overall results of the NATIONAL CITIZENS SURVEY 2017

There is also a steady growth trend of 5–7% of those who visit the library weekly, several times a month, and once a month.

Public libraries in general have managed to promote their image and attract more visitors by developing certain services and activities of public interest through the direct involvement of the community. The public library is perceived as an institution that organizes events and activities useful to the community (as stated by one-half of those surveyed).

The survey revealed a high level of awareness of the negative impact caused by the closure of libraries in the community. Over the three years of the surveys, respondents realized that their public library closing would have a negative impact on their community, with their share growing steadily every year.

In 2017, when the spectrum of library services became more diverse, and more opportunities for accessing community-based information on the internet became available, members of the community were using these services and technology to acquire new professional skills. They were focusing on the need to find information that would contribute to their continuous learning and training – a fact confirmed by respondents’ stated desire to learn a foreign language in the library and participate in information sessions on agricultural subjects and other useful trainings that were not always available online free of charge.

The general competencies that the participants of this survey expressed an interest in developing in the public library include learning foreign languages (34.3%), healthy lifestyle (30.3%), basic accounting (21.8%), followed by both oral and written communication skills (19.7%), job-search skills (17.8%), and culture of media consumption (9.3%).

Respondents requested training in the following IT skills in their libraries: Microsoft Office skills (19.5%), advanced internet searches for information for education and use in daily life (17.6%), using the internet to buy goods and services (14.4%), editing of images and photos (18.5%), audio and video recordings (16.3%), communication applications, and skills for efficient use of smart phones and tablets (11.4%).

Members of the community have shown their readiness to contribute to the development of local libraries, mostly with donations of books or objects that would improve the infrastructure of the library (furniture, paintings, etc.), or they would help to diversify library collections, help the library to organize and direct events or promote library activities and services. A quarter of respondents said they would willing to be personally involved in the repair or renovation of library premises, especially rural respondents and those who confirmed the considerable impact of the library on the community and their families; 14% of those willing to contribute to the development of library in the community said they could contribute financially (up to MDL 100).
Overall results of the NATIONAL CITIZENS SURVEY 2017

METHODOLOGY

Sample Universe
Adult population of the Republic of Moldova, aged 15+, and living in households.

Sample Characteristics
Type: Multistadiol, stratified, nonprobabilistic
Volume: 1,200 respondents from the Republic of Moldova
Age: 15 +

Representativity: The sample is representative for the area of research and represents the demographic structure of the investigated population (nationality, gender, region, and age of the population 15+ years, both urban and rural). The survey was conducted in 68 Moldovan settlements on 170 secondary sampling units (SSUs), with a maximum of seven interviews conducted on each SSU.

Control Quota: 20%

Research Technique
Direct Interview (face to face) with the selected respondent. Direct interviews took place at the homes of the respondents in Romanian or Russian languages, depending on the preferences of the interviewed person. All interviews were conducted in accordance with the sampling plan.

Toolkit
Sociological standardized questionnaire composed of thematic blocks of questions.

Toolkit Pretest
In accordance with the rules of sociological research, ISIS OPINIA conducted a pretest of the questionnaire for qualitative improvement of its further use in the field.

The pretest questionnaire took place September 24–27, 2017.

Data Collection
The information was collected in the field by interviewers of the Sociology and Information Service OPINIA.

Fieldwork Dates

Data Processing
The collected information was entered and processed with SPSS software, which was also used to analyze statistical data.

Margin of error: +/-3%.

Response rate: -72.2%. 
Overall results of the NATIONAL CITIZENS SURVEY 2017

PERCEPTION OF LIBRARY

The library played a vital role in the communities served, as the main institution providing information and documentation services in various forms and in different contexts. Thus, it has contributed to the personal development of users through education, information culture, leisure activities, or access to information.

Another aspect, related to social cohesion, and would transform the library space into a meeting place and a center for community development, deserves to be developed, as noted by the specialists in the field. Cultural and local identity has significant impact on the community and needs to be publicized through the public library, while imagination and creativity develop the public’s interest in cultural activities.

All this demonstrates that the public library has a special social role in the community, and the services provided by it were focused on fulfilling this role.

Considering the fact that significant participation in social life increasingly involves accessing digital resources, the role of the public library in the community needs to be more visible, as mentioned by respondents who suggested that their public library should provide more information to the community about the existing and the new services and activities at the library.

Of all respondents, 34.5% were very or somewhat interested in the activity of the library. Their share is bigger than the share of respondents who visited public library in 2017 (29%), which reveals the attractiveness of public libraries, especially in the context of the changes they have made, and reflects the existing potential of attracting new visitors.

Figure 1. How interested are you in the Moldova public libraries’ activities? (%)

Not interested at all | 2 |
Somewhat desinterested | 17.6 |
Neither interested, nor desinterested | 40.4 |
Somewhat interested | 21.7 |
Very interested | 12.8 |
Don’t know | 0.2 |

Just as the main function of the library is information and modern users want to get information when they need it, people do not come to the library only to borrow books. However, in 2014 the public library was perceived primarily as a place where one went to find books for reading and where most children went to be helped to learn to read and develop their reading abilities, while giving children the opportunity to acquire different intellectual skills. In 2016, the library was perceived primarily as a welcoming and comfortable place, which was in 2017, as community members said the library was an institution that provided all the resources that community members needed when they requested it. Regionally, urban visitors to the library expressed this more than rural visitors (13 percentage points more).

Over the three years of the surveys, the public library became increasingly perceived as a multifunctional cultural center by community groups. The performance requirements of libraries continued to grow: one-half of respondents confirmed
that libraries in Moldova organize their activities according to the needs of the community and that they were constantly developing, and also many have expressed that they would like their libraries to be public spaces, too.

Table A. Most increasing positive trend from 2014 to 2017 for “strongly agree with the statement about the library.”

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>A welcoming and comfortable place</td>
<td>18.0</td>
<td>38.2</td>
<td>40.1</td>
</tr>
<tr>
<td>A place where people go to find new and interesting books to</td>
<td>2014</td>
<td>23.8</td>
<td>2016</td>
</tr>
<tr>
<td>read</td>
<td>2014</td>
<td>20.0</td>
<td>2016</td>
</tr>
<tr>
<td>A place where people meet and share their experience and</td>
<td>2014</td>
<td>9.5</td>
<td>2016</td>
</tr>
<tr>
<td>information with each other</td>
<td>2014</td>
<td>6.5</td>
<td>2016</td>
</tr>
<tr>
<td>Activities and events held in my public library focus on topics</td>
<td>2014</td>
<td>20.0</td>
<td>2016</td>
</tr>
<tr>
<td>that are relevant to my life</td>
<td>2014</td>
<td>6.5</td>
<td>2016</td>
</tr>
</tbody>
</table>

In the same way, the library is perceived as accessible to everyone (men, women, people with special needs, minority groups), contributing to social inclusion – as opposed to other public institutions in the community. Half of the respondents agreed that the library is a place where people can go to find new and interesting books to read, although the desire to update book collections in the library is one of the first in the list of changes wanted by respondents, and only 28.6% of respondents said that the library is a good place to learn about the latest information.

Beginning in 2014, only 20% of respondents said the library was a place where people could go to use the internet. Their number increased in 2016 to 32%, and then to 41.8% in 2017, including both urban and rural respondents.

Also, during the three years of the surveys, there has also been a positive trend (from 6.5% in 2014 to 10.5% in 2016 and 2017) in associating the public library with patrons receiving assistance in starting a business and a place where one could get information about elections, taxes, laws, state forms, and other legal, social, or political topics (from 6.8% in 2014 to 12.5% in 2017).

The role of the library in teaching the younger generation as a component of their education process was also noted with a positive trend (52.6% in 2014 to 67.1% in 2017).

The role of the library is not only to improve the level of skills but also to assist in helping visitors prepare for job interviews. In 2014 only 16% of respondents expressed their total or somewhat agreement that the public library helps patrons find in employment: in 2017, 30% of participants in the survey confirmed the ability of the library to assist job seekers, which indicates a positive trend in this perception.

In conclusion, the library’s perception has changed from a welcoming and comfortable place, a place where people go to find books for reading and where most children go to be helped to learn to read and develop reading literacy, to a place where people in the community can meet to exchange experiences and information and a friendly place for the public. The number of people is steadily increasing who associate the public library with the assistance in employment, in finding
useful health information and healthy living, computer and internet assistance, and as an institution where relevant for the community and interesting events take place. All this is due to librarians, who have succeeded in not only initiating modern services useful to the community but also demonstrating their usefulness and promoting them effectively.

**The Role of the Librarian**

The analysis of the above results regarding the role and activity of the library also suggests the importance of the librarian in ensuring the steadily growing objectives of the institutions that they lead. Increasing the number of services that the library offers to community members also reflects the continuous development of knowledge that the librarian must possess to satisfy patrons’ demand for information.

The respondents’ level of satisfaction with their librarians is high. While in the 2014 survey, 52.8% of respondents agreed that librarians teach visitors how to use different sources of information in the library, in 2017 this conviction has recorded a positive trend of +10 percentage points. Also, in 2014, only 25% of the surveyed people expressed their agreement that librarians teach them how to use computers and the internet, but by 2017 that number grew considerably, practically doubling in four years. It is also encouraging that library users in rural areas expressed their gratitude to the librarian for assisting and training in computer and internet use more often than in cities (+6%), which confirms openness to training and refinement of public libraries staff in rural areas to meet the needs of the community they serve. The public library has made important strides in recent years in offering various services and activities, making efforts to open up to a growing audience. This state of affairs has been noticed by more than a third of respondents in 2014, and in 2017 the percentage of those who mentioned that librarians organize useful community activities or events has increased significantly to as much as 50%. The survey found an increase in the share of those who agree that librarians ask for community suggestions for activities and events to be organized in the library (45.2% of respondents in 2017 totally and somewhat agreed, 10 percentage points more in the last three years).

The librarian plays a vital role in the community, being the main provider of information and documentation services in various forms and in different contexts, as mentioned by the respondents with a high appreciation of the role of the librarian. Thus in 2014, 59.3% of respondents agreed that librarians’ role is undeniable and that their assistance is very useful to visitors; in 2017 this percentage increased to 70.4%.

**Conclusion:** In 2014 the librarian was first perceived as a library assistant and a person of great help, and by 2017, the librarian is perceived as a specialist providing training on the use of various sources of information in the library and help with the use of computers and the internet, and as a public authority involved in community life by organizing useful activities and events. The results of this research help make the case that local and national authorities should develop libraries and information strategies in line with international trends.

The library is an institution that enriches the lives of many people, improves their quality of life through educational opportunities, help in finding a job, and promoting social cohesion, all of which are community-based benchmarks for strengthening the identity of the population. Public libraries have a special contribution make in creating social capital by ensuring social inclusion, bringing people together, promoting tolerance, and understanding of cultural diversity.

The great value of the library is its intellectual potential. It is the staff of the library who create and enhance the positive image of the institution. The general perception of the library in the community depends to a large extent on the way the staff are being perceived. Staff proving consultative support for patrons is the first step in establishing a trust relationship.
between the library and the user.

**THE USE OF PUBLIC LIBRARY**

In 2017, the public library was visited by 29% of respondents; 13.7% of them visited the library two to three times a year, 8.1% went to the library monthly, and 7.3% went more often than once a month. Active visitors include mostly students and people involved in professional or university studies.

However, public libraries were involved in a process of developing services and activities that have a visible impact on visitors and the entire community. There is an increase in the number of those in the rural communities visiting the library two to three times a month (+3.4% compared to last year) and urban respondents who come to the library monthly (+2%). As in previous years, more active users of libraries were young people (aged 15–24 years old), either pupils (27.3%) or students (20.8%), followed by young people who have graduated from school or university and feel the need for free access to information at the public library, visiting it for this purpose once a month (+9%). There is less motivation for older people to visit the library, as evidenced in this survey by the high numbers of those aged 45–65 and older (from 61% to 77%) and those with a low level of education never go to the library.

**Figure 2. On average, how often do you visit the public library? (2014-2016-2017) (%)**

The library’s activities have a major impact in bringing benefits to users. These can be direct, in the sense of increasing the number of active users; in the development of collections, covering as broad a spectrum as possible of users’ reading...
and research options; offering more diverse and attractive services that attract a large number of users or unique visitors to come as often as possible; and finding solutions for today’s everyday needs. The survey found again that the library’s most popular service remains borrowing books – a traditional service rendered by the public library (in 2017, an increase 19 percentage points over previous years), followed by the use of the reading room, and search for information using the library catalog. These services were used by all age categories, in both cities and the countryside.

The number of those involved in various library activities – reading-related programs and activities (presentations, book fairs, public lectures, etc.) – increased from 2.9% in 2016 to 6.1% in 2017. Also, there is a positive trend in the share of those visitors who participated in non-reading-related library trainings and activities (storytelling, foreign languages, IT courses, etc.). As well, there is a positive trend in internet use service at the library, for information or entertainment; the share of those who said they used the internet rose from 13% in 2014 to 17% in 2017. Other services that were becoming more popular among public library visitors include accessing state electronic services, borrowing multimedia material at home, and receiving training in various activities organized by the library.

Respondents who said they did not visit the public library mentioned various reasons for this. The main reason claimed by nonusers of public libraries is the lack of time and necessity. Although the library nonusers have a different level of education, respondents who have secondary education find that they do not need to access information at the library (32%) or they have access to other sources compared to those with a higher level of education who do know the contribution of a library for continuous training (14%).

**Figure 3. What public library services did you use? (%)**

Average nonusers (18%), especially those in the urban area (51.3%), said that they lacked interest in visiting their library because all the information available at the library could be found on the internet. At the same time, respondents in urban areas who did not visit the library (80%) more often said that they did not have up-to-date information about library services and activities, and if the library had been more visible in the public space, their interest in the possibilities offered by the library in their area probably would have increased. Another reason invoked, as in the previous years, was the library’s schedule, which did not suit people actively engaged in work and who preferred to be able to go to the library after work or on a weekend. This survey found an increased need for a public campaign about the possibilities offered in public libraries as long as there is a large discrepancy between the level of visitor information about library services and activities and the perception of the library by nonusers as an institution with outdated literature and not necessarily useful in their daily life.
Today, the key issue that determines not only the prestige of the library but also the ability of the library to compete and demonstrate is that the library must be indispensable to the community, including the diversification of services, development of quality of services, and the level of comfort. According to respondents, the most important services provided by the library for both them and their families were activities for young people and adults (38.3%), access to the library for books and multimedia materials (36.4%), internet access (36.1%), activities for adults in the public library (34.3%); and access to a quiet, safe place where people could meet (33.7%). The other library services that were very important for a quarter of the participants in the survey were access to various state electronic services, health information, legal advice, and other information.

Access to books and multimedia materials were needed more in the opinion of young people aged 15–44. Services and activities for children and young people were very important for both younger people and those aged 35–44 (83.7%) who have children and enjoy the opportunity to diversify their daily extracurricular program, especially for families in cities. Respondents in rural areas more often confirmed the importance of adult services and activities in the library, which can be deduced from the insufficient involvement of the rural population in cultural life.

The undoubted importance of the internet that can be accessed in the library is largely confirmed by the young generation, with 7 out of 10 respondents aged 15–24 years old considering it important to have access to the global network in their library, as well as welcoming the opportunity to access computers, printers, scanners, or copy machines in the library.

Given the unemployment problem in Moldova, library programs that assist in looking for and applying for a job in the library have become useful services to the community, said more than half of the interviewed respondents, especially those who after graduating from educational institutions experienced difficulty in finding vacancies for specialists, which was especially true for those from rural areas (40%).

Regarding health information, 70% of respondents who considered access to this type of information in the library important or very important were middle-aged people (aged 35–44).

The possibility of accessing the state electronic services in the library was also mentioned at the top of the services provided by the library, being very important for 23.2% of respondents, both for those in urban (25.5%) and rural areas (21.6%).

Figure 4. Could you mention several reasons why you did not visit the public library? (%)
Figure 5. How important are the following library services to you and your family? (%)

<table>
<thead>
<tr>
<th>Services/activities for children and youth</th>
<th>Very important</th>
<th>Somewhat important</th>
<th>Somewhat not important</th>
<th>Not important at all</th>
<th>DK</th>
<th>Refuse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to computers and printers</td>
<td>36.1</td>
<td>21.3</td>
<td>13.4</td>
<td>28.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to internet</td>
<td>36.1</td>
<td>23.9</td>
<td>13.8</td>
<td>25.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services/activities for adults</td>
<td>34.3</td>
<td>33.7</td>
<td>11.7</td>
<td>20.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to a quite, safe place were people can meet</td>
<td>33.7</td>
<td>28.4</td>
<td>14</td>
<td>22.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Possibility to access gov services online</td>
<td>23.2</td>
<td>26.9</td>
<td>19.4</td>
<td>30.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop IT skills (PC and tablet use)</td>
<td>23</td>
<td>24.4</td>
<td>15.5</td>
<td>36.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to books and multimedia materials</td>
<td>20.5</td>
<td>20.4</td>
<td>16.7</td>
<td>40.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Help finding and applying for a job</td>
<td>14.3</td>
<td>23.3</td>
<td>15.8</td>
<td>45.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to information about health</td>
<td>12.5</td>
<td>47.8</td>
<td>24.2</td>
<td>15.1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Libraries have been developing and organizing courses for people according to their requirements over the past few years. Libraries provide community members with premises and training where they continue to learn and to develop the basic skills to participate in the social, cultural, and economic life of the community.

Among the general competencies, skills, and abilities that the participants of this survey said they would like to see developed in their public library, learning foreign languages was in first place. Library visitors were aware that engaging a person in a library to teach a foreign language would require certain payment, and they thus accepted that they would need to contribute financially to learn a foreign language. Respondents were open to paying an average of MDL 100 per hour (from 20 MDL to 200MDL). There were more people in urban than in rural areas (9 percentage points more) who, because they didn't know a foreign language, encountered difficulties in hiring, accessing online services, and sometimes even in everyday life.

In recent years there has been a continuing interest in a healthy lifestyle, which is reflected in the results of this survey. One-third of respondents, predominantly aged 24–34 (41.7%) and 35–44 (40%) said learning more about this was important to them. Accounting skills were other general competencies that respondents would like to acquire and to which they were willing to contribute financially with an average amount of MDL 300 per course, followed by both oral and written communication skills. Employment-related and job-search skills were of interest to one-fifth of respondents in urban areas, predominantly those aged 24–35, but they did not want to pay for these services.

Also, the development of skills and knowledge about best practices in agriculture is another library service that the participants mentioned in the survey.

According to the respondents, being able to use information sources was considered a useful service (the percentage of respondents with an interest in developing this competence in the library steadily increased in recent years).

Figure 6. Would you be interested in learning or developing the following skills and abilities if they were provided by your library? (%)
Among the IT skills, the most interesting for the respondents was the development of more advanced computer skills, Microsoft Office applications, which were both deemed increasingly necessary for employment in the last few years by respondents from both urban and rural areas. Survey participants were willing to pay about MDL 200-400 for a course. The possibility of learning in the public library about advanced internet searches for useful information both in education and everyday life, as well as using the internet to buy goods and services, was mostly wanted by young people aged 15–24. The next choice of IT skills that respondents would like to see developed consisted of trainings in editing images, and photos, and audio and video recordings (people under the age of 35 years old), who were willing to pay MDL 300–600 for such courses. Urban and predominantly older people (7.7%) would like to see developed the capabilities of using communication applications, smartphones, and tablets efficiently, but few would contribute financially to these courses (4.5%). Technologies are changing as quickly as the opportunities offered, and as rapidly as the expectations of users. Over the years, the younger generation’s interest increased in learning programming languages (9%) and blogging/vlogging (7.9%). They had an interest in participating in this type of training in the public library, and one-quarter of them would be willing to pay for the development of these skills.

Figure 7. *Would you be interested in learning or developing the following IT skills, if they were provided by your library?* (%)

---

**Overall results of the NATIONAL CITIZENS SURVEY 2017**
Public libraries play an important role in providing informal learning, especially with regard to social inclusion. This role of libraries has been elucidated by identifying that patrons want to attend various training sessions. A top of preference has been made by asking how interested the respondents were in participating in certain activities in the library. In 2014, the most needed library activities were labor market information sessions and assistance in preparing employment files, creating CVs, and learning interviewing skills, the possibility of being trained in looking for a job abroad and a possible consultation for the preparation of dossiers in this regard, support in finding information about educational institutions and their offers, training on finding sources where they could find useful medical advice, adequate professional consultation, and the desire to have more than one cultural display in the community library.

In 2016, among the most requested library activities were information sessions on human rights, presentations of state social services, and information on their effective use; although coming from different social groups, the public library can contribute to the integration of its users to the community life. The need for information leads to increased motivation to use the services provided by the public library. In 2017, when the spectrum of library services became more diverse, as more and more opportunities for accessing community-based information on the internet became available, members of the community had already formulated their wishes for acquiring new professional skills, focusing on the need for information that would contribute to continuous training – fact confirmed by the desire to learn a foreign language in the library, information sessions on agricultural subjects, and other useful trainings that were not always available online or free of charge.

Circulation of specialized information and knowledge is much faster and more intense than ever before. In the respondents’ view, the library needs to help them find information about online education courses, an especially valuable service for low-income people. Trainings in different fields can be organized for specific target groups interested in certain topics; also, in rural areas cultural activities can be combined with the informative ones to promote the results obtained by users of the public library in the locality.

With a constant positive trend, art or photography competitions, dance performances, cinema screenings, and board game activities were considered useful; thus, public libraries would have the opportunity to teach and familiarize members of the community with elements of art and encourage all age groups to participate.

Figure 8. How interested are you in attending the following activities in the library? (%)
The library needs to constantly renovate its resources, intellectual production, and services to be more important for the community and to demonstrate that it is indispensable and has all the potential to improve the quality of life of community members. In the survey, respondents were asked to indicate what should be changed in the library in their community.

The exterior and the interior of the venues play a special role in shaping the image of the libraries; the survey found that respondents would like to have a pleasant library (with light, spacious rooms, new furniture), more new literature in all fields and more community activities, as well as services for all ages.

One of the first in the list of changes wanted by respondents was the update of book collections in the library. Thus, there is a growing interest in increasing library funds for new literature in all areas. Access to modern technology (computers, scanners, printers) in the library was more often required by more active visitors, while those who come to the library less frequently than once a month would like to have more information about related services and activities of the library.

People who did not come to the library, but knew that the library in their community was in the process of modernization stated that one of the reasons why they did not come to the library was because they did not know what was going on there or what services might be useful to them.

Respondents in rural areas more often asserted that the library in their community needed capital repairs both to create comfort for visitors and to provide library staff with normal working conditions to serve the public, as compared to those in urban areas who invoked the need to promote library services and activities and to provide training for visitors.

**Figure 9. To what extent do you agree with the following statements – totally agree, partially agree, neither agree nor disagree, partially disagree, or totally disagree (%)**
Overall results of the NATIONAL CITIZENS SURVEY 2017

As a meeting place, libraries assume the role of a multifunctional cultural and community development center. To this end, libraries need to support community groups to have equitable access to information and to increase their interest in issues of local culture and local identity that offers a significant impact on community membership. The survey reveals a high level of awareness of the negative impact for the community by library closure. Respondents agreed that if the public library closed, this would have a negative impact on their community, their share steadily rising per year: 58% in 2014, 62% in 2016, and 68.6% in 2017. Whether the public library offers traditional or modern services, their impact on the personal development of the individual and even the families is important, with impacts on formal education, the development of information culture skills, and access to public information. One-fourth of respondents were of the opinion that if the public library closed, this would have a negative impact on their families, and also same number of respondents is worried about the direct negative impact on themselves. The importance of the public library and the indisputable value of it for the community have increased awareness of the negative impact of library closure on literacy, intellectual development, imagination, and level of education of community members. That is why all efforts must be concentrated on developing this public service so useful to the community.

Public libraries have a direct impact on the future of localities by developing services that no other institution can offer. Modern and diverse services can play a decisive role in the vitality of communities and in preventing marginalization of the population. In this respect, respondents were asked to indicate what a library should and should not do in the community. More comfortable rooms for reading and relaxation in the library were required or likely to be required by most of the interviewees (66.0%), regardless of their region, age, or education profile. Other ideas to improve the library included rearranging books and book blocks to free up more space for computer workstations, meeting rooms, production areas, and cultural events. One-half of the respondents confirmed the need for public library training programs to teach people, including children and older people, how to use digital tools such as computers, smartphones, and applications (47.7% consider that the library should definitely do it). Those who visited the public library and had access to computers and the internet there considered it necessary to purchase 3D printers, as well as other digital tools such as virtual reality drones or VR glasses to enable library users to learn how to use them, and perhaps through these purchases and new services and presentation activities to attract the nonusers as well.

Figure 10. In your opinion, public libraries should or should not do the following. (%)
Volunteering has been developing with an increasing trend as well, with many of the library’s activities being organized with the help of patrons. The survey found that respondents wishing to contribute to the development of the library were 4.5% more than those who were unwilling to contribute: the “yes” option was 49.0%, and the “no” option, 44.5%.

It is difficult to overestimate the role and importance of the public library in the life of the community. It has a major role in providing information, being accessible to all citizens without discrimination, and expanding and diversifying its collections and library services for their benefit. To accomplish this mission, it is necessary to involve those who want to support science and culture in general.

Respondents showed a willingness to contribute to the development of local libraries, mostly with book donations (46%) – the option that made up the largest share of the survey. Respondents also expressed their initiative to help the public library in organizing and directing events or in promoting library activities and services. One-fourth of respondents offered to be personally involved in the repair or renovation of library premises in the community, especially rural respondents and those who confirmed the considerable impact of the library on the community and their families.

**Figure 11. Are you willing to contribute to the development of your library? (%)**

**Figure 12. If yes, how could you contribute to the development of your library? (%)**
The availability for financial contributions was 14% (mostly sums up to MDL 100), which, although not much, is meaning in that those who were ready to donate money to the library and objects that would improve the infrastructure of the library (furniture, paintings, etc.) or would diversify library collections (e.g., toys, tools) were concentrated in the localities where the library was more in need. If the local public authorities together with the librarians could launch a fundraising campaign and would participate in a public-private partnership, projects could, with small but safe steps, create better and more attractive conditions for the community.

**Figure 13. The profile of respondents who would like to contribute to the development of the library (in regional profile, gender, age and education level) (%)**

<table>
<thead>
<tr>
<th>Option</th>
<th>Urban</th>
<th>Rural</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donate books</td>
<td>42.3</td>
<td>57.7</td>
<td>47.3</td>
<td>52.7</td>
</tr>
<tr>
<td>Help in organizing/conducting events</td>
<td>22.2</td>
<td>22.2</td>
<td>22.2</td>
<td>22.2</td>
</tr>
<tr>
<td>Help in reparation/renovation of the library</td>
<td>17.6</td>
<td>17.6</td>
<td>17.6</td>
<td>17.6</td>
</tr>
<tr>
<td>Promote library activities and services</td>
<td>15.9</td>
<td>15.9</td>
<td>15.9</td>
<td>15.9</td>
</tr>
<tr>
<td>Donate money</td>
<td>14.1</td>
<td>14.1</td>
<td>14.1</td>
<td>14.1</td>
</tr>
<tr>
<td>Donate things which will improve the library</td>
<td>10.5</td>
<td>10.5</td>
<td>10.5</td>
<td>10.5</td>
</tr>
<tr>
<td>Find potential sponsors/projects</td>
<td>9.2</td>
<td>9.2</td>
<td>9.2</td>
<td>9.2</td>
</tr>
<tr>
<td>Donate IT products</td>
<td>4.4</td>
<td>4.4</td>
<td>4.4</td>
<td>4.4</td>
</tr>
</tbody>
</table>

**COMPUTERS AND INTERNET**

The internet has quickly become a sociotechnical phenomenon. It has and will have a definite impact on society and its future. People devote a great deal of time to using the internet, which is changing work patterns and affecting human interaction. A new information society is beginning to develop, and therefore the most significant share accounted for the option “yesterday” – 56.8% in 2014, 55.0% in 2016, and 53.2% in 2017 (although there was a decrease, it is not significant). The share of respondents who used internet at least once per week was 73% in 2017, which is 4 more percentage points than in 2016 and 2014. It is a legitimate right of the internet user, as reaffirmed today, to have free access to information. Thus the “never” option decreased, with 5.2% in 2017 compared to 15.5% in 2014 and 15.9% in 2016. It is interesting to note the upward trend of the option “over the last 7 days” with 13.0% in 2014, 14.3% in 2016, and 19.8% in 2017.
According to survey data, the internet was most often accessed by respondents at home. More than a quarter of respondents said, “I am always connected to the internet on my mobile phone,” the most significant share being registered in 2017 was 29.1%, which is 9.7% higher than in 2016 and 2.2% more than in 2014. A first major effect of the internet is to simplify and facilitate day-to-day activities on the administration or management of professional activities; 17.9% of respondents in 2014 accessed the internet at work, while in 2016, 6% fewer respondents accessed the internet at work, and in 2017, 20.6% of respondents accessed the internet at work. The option of accessing the interest at the homes of friends, relatives, or acquaintances decreased: 20.1% in 2014, 12.7% in 2016, and 11.9% in 2017.

The share of respondents who accessed social networks daily (45.8%), plus those who looked for the latest news (32.5%), and used the internet for communication every day (30.9%) to search for images and video (30.4%), and to listen to music (18.9%) shows that the global network serves the survey participants first of all as a means of informing and communication, entertainment, and a cultural center, thus removing geographical, sociocultural, and informational barriers, and opening new opportunities for individuals.

The situation is different for respondents who used the internet less frequently than once a month. Most of them stated that the global information network has served them to carry out specific tasks, such as sending email (30.3%). More than
Overall results of the NATIONAL CITIZENS SURVEY 2017

60% of them directly indicated that they used the internet in their job duties or when looking for information about employment, and nearly 22% to find a job.

The internet has become important for everyday life, education, and working relationships, allowing people to have free and immediate access to the necessary information.

Technological users generally expressed their interest in using the internet to consult different ads or discussion forums; and other interests included research for carrying out tasks related to studies or services. The survey found that visiting boards, discussion boards, or groups on the internet has a growing share, accounting for 38.5% in 2014 and rising in 2016 to 50.3% respondents who have accessed the internet several times a week. A considerable number of respondents accessed the internet every day to perform tasks related to service or studies. The internet is a fascinating space where communication, information, and entertainment are beneficial to all people regardless of age or culture.

**Figure 16. How often have you used the internet over the past 12 months for the following purposes? (%)**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use social network sites</td>
<td>45.8</td>
</tr>
<tr>
<td>Find latest news</td>
<td>32.5</td>
</tr>
<tr>
<td>Communicate with friends or relatives using Skype, instant messenger or voice-over IP program</td>
<td>30.9</td>
</tr>
<tr>
<td>Visit video and picture sharing websites</td>
<td>30.4</td>
</tr>
<tr>
<td>Listen to music</td>
<td>18.9</td>
</tr>
<tr>
<td>Perform tasks connected with your work/education</td>
<td>13.1</td>
</tr>
<tr>
<td>Find information related to work/school</td>
<td>12.5</td>
</tr>
</tbody>
</table>

Three years ago, the overwhelming majority of respondents who did not use the internet at all was lack of knowledge (77.3%) or lack of equipment (74.7%). Two years later, the reasons remained unchanged, but the state of affairs improved significantly. The share of people interviewed who did not know how to use a computer or the internet or have access to a computer was considerably reduced. In the latest research, among the reasons that prevented some respondents from using the internet, there were new important reasons, such as usage costs.

At the same time, there is a significant share of those who did not have the necessary knowledge to use a computer or who did not have access to such equipment. There is an inverse correlation between the respondent’s income and the use of the internet, which has remained unchanged over the past three years. The cost of access is too high for many people in low-income households. Adults in lower-income households were more likely to be in nonusers of the internet than those in higher-income households.

Level of education is also an indicator of being a nonuser of the internet. Approximately one-third of adults with lower levels of education did not use the internet, and their share decreases as the level of education increases.
The global information network also serves as a faster means of solving certain problems and as a tool for communication and information exchange. Its lack is especially felt by persons of adult age groups. Communities that do not have access to the internet and would welcome its presence in the public library were interested in this service, and half of the respondents from both urban and rural areas stated that they would take advantage of internet access in the public library at least once per month (a fact found both in 2016 and 2017).

A library able to provide access to equipment for everyone, and with effective ways to retrieve the information sought, is considered useful. The public accessibility of the computers in the library was reported by 32.55% of respondents in 2014, 35.2% in 2016, and by 60.8% in 2017, a percentage that has doubled compared to the previous years.

As in any field of activity, holding and obtaining relevant and cutting-edge information positively influences decisions taken at any institutional level, as long as information is considered a very important resource. The impact of new information and communication technologies has led to the establishment of modern services, including high-performance equipment and internet access. Most respondents stated that most of the library computers were connected to the internet: in 2014, 82.3% of respondents mentioned this fact, in 2016 the percentage of respondents increased by 90.0% and by 91.4% in 2017. We can see that information technologies are an indispensable part of local libraries.

**Figure 17-18. Does your library have computers for public access? (%) If YES, are those computers connected to the internet? (%)**

The largest share of respondents visiting the library said they used computers and the internet in the library monthly (4.8%) or several times a year (13.7%). Young people were exposed to more in this respect, and those who visited the library more often formed a greater share.

The survey found that in 2014, 36% of respondents were interested in free use of the internet in the public library and another third were less interested in free access to the internet in the library. In 2017, one-half of respondents did not appear to be interested in this opportunity offered by the public library. On the other hand, people who rarely use the internet at home or elsewhere and have free internet access in the library confirmed that this service is very useful and they were very interested in using the internet at their library. These statistics demonstrate the importance of the internet in meeting the information needs of Moldovan citizens and thus the important role that public libraries can have in meeting those needs.

Citizens increasingly rely on the internet for information, which could lead them to rely on the library for free internet access. While in 2014, 45% of respondents said they used the public internet access service in the public library weekly and 30% monthly, in 2016 only 14% of respondents said they used it weekly (a third less than in 2014).
In 2017, the vast majority of those visiting the library said they used the internet provided by the library monthly, and only school-age students coming to the library more often than once a week said they used the internet at the library weekly or even daily.

From the answers received, there is a low percentage (13.2%) of those who would like to learn at the library to use other equipment besides computers. Most of the respondents said they would be interested in learning how to use 3D printers – for example, creating 3D plastic objects – (18%), and also how to use a 3D scanner (17%). Other equipment that library users would like to learn to use are Lego robots, virtual reality glasses, electric bicycles, and sewing machines. Also, few were willing to pay for such services, and generally over 80% of them thought it should be free of charge. However, it was found that library visitors whose libraries don’t have much technical equipment would rather accept a fee for some training for a fee, than those who attend libraries with access to several library services. One-third of the women who mentioned they would like to learn how to work with a digital sewing machine were willing to pay a fee from MDL 300 to MDL 500. Another service the respondents were willing to pay for is learning how to use the electric bicycle and 3D printers; the amount people were willing to pay ranged from MDL 200 to MDL 600 per course.

The younger generation aged 15–24 (31.2%) and those aged 25–34 (29.7%) were more interested in learning how to program Lego robots and understand how virtual reality glasses and drones work, but were unwilling to pay; they preferred such training to be offered for free.

Figure 19. Would you like to learn at the library to use other technical equipment other than the computer? (%)
Promoting the image of the library should be carried out based on a well-developed plan by a coordinated activities directed to retain users, build a positive image of the institution at the community level served, provide training and support patrons' confidence in the quality and diversity of collections, maintain a high level of cultural events, and increase the professionalism of the library staff. One-half of respondents who knew about the launching of the “See You at the Library” campaign had heard about or saw some of the promotional materials of the this campaign (leaflets, flags, posters) during 2017, while in 2016 survey their share constituted only 30%. A positive trend of the campaign was manifested by the advertising spot on TV (+10% compared to 2016). The activities and events of the campaign in 2017 recorded a negative trend, although the share of those who have not heard of any events in this respect has diminished insignificantly. However, it is necessary to promote this campaign more actively through library events. Also, the involvement of community members would be very welcome, because only 6% of those who knew about the concerned campaign to promote libraries had participated in activities or events in these institutions.

The positive image of the library in society is not formed in a day or a year, but over time as the impact of information disseminated in the media, through publicity and relations with the local community, and through opinions expressed publicly by the employees and by the users of the library. In the survey, it was found that 16.0% of respondents had heard about the Novateca program, most of whom were users of libraries that participated in the Novateca program.
CONCLUSION

PERCEPTION OF LIBRARY
- In 2014, the public library was perceived primarily as a place where people can go to find books for reading and a place where children go to develop their reading skills, at the same time providing children with the possibility of acquiring different intellectual competencies. In 2016, the library was already perceived primarily as a welcoming and comfortable place, then reconfirmed by its perception as a public-friendly place in 2017, as community members associated it with an institution that provides resources that community members need. Over three years, public libraries in the country were increasingly perceived as a multifunctional cultural center by community groups and the performance requirements toward libraries with the outline of this perception grow. Also, during the last three years there was a positive trend in the perception of the library as an institution where community members can receive assistance in starting a business and where people can get informed about elections, taxes, laws, state forms, and other legal, social, or political issues (from 6.8% in 2014 to 12.5% in 2017).
- The library is perceived as accessible to everyone as opposed to other public institutions in the community, contributing to social inclusion.
- In 2014 librarians were perceived as library assistants who were of great help, and by 2017 they were perceived as specialists providing training on the use of various resources in the library, helping with the use of computers and the internet, and being a public authority involved in community life organizing useful activities and events.

THE USE OF PUBLIC LIBRARIES
- There is a steady growth trend of those who visit the library weekly, several times a month, or once a month.
- Active visitors of public libraries remain students and people involved in the process of professional or university studies.
- There is a positive trend in the number of those participating in various library activities – books and reading-related programs and activities (presentations, book fairs, public lectures, etc.), nonreading library activities (stories, language courses, IT courses, etc.) – including those who benefit from internet use service in the library, accessing state electronic services, borrowing multimedia material at home, and receiving training in various activities organized by the library in some campaigns.
- The library’s activities have a major impact bringing benefits to users. The library’s most popular service remains borrowing books, followed by the use of the reading room, and search for information using the library catalog.
- According to information consumers, the most important services provided by the library for both respondents and their families are activities for young people and adults, access to books and multimedia materials, internet access, access to computers and printers, and the development of skills to access various state electronic services, health information, legal advice, and other information in the concerned institution.
- Organizing courses for users according to their requirements is a service developed by libraries over the past few years, which is popular especially among visitors, providing them with more and more new and useful services foreign languages courses, information sessions about where to find medical and legal professional advices, trainings how to
find professional adequate counseling, and information sessions on state social services and information on human rights.

- Among the general competencies, skills, and abilities that the participants of this survey said they would like to see developed in their public library are learning foreign languages, healthy lifestyle, accounting skills, and both oral and written communication skills. Job-search skills and employment-related skills were of interest to one-fifth of the respondents.

- The most needed IT skills in the respondents’ opinion are the use of Microsoft Office applications, the opportunity to learn about advanced internet searches of useful information both for study and everyday life, using the internet to buy goods and services, editing of images, photos, and audio and video recordings, development of the capability to use communication applications and skills for efficient use of smartphones and tablets. Over the years, the younger generation’s interest in learning programming languages and blogging/vlogging increased. They have an interest in participating in this type of training in the public library and would be willing to pay for the development of these skills.

- In 2017, when the spectrum of library services became more and more diverse, members of the community already formulated their wishes for acquiring new professional skills, focusing on the need of receiving information that would contribute to the continuous training of the user – the possibility to learn in the library a foreign language, information sessions on agricultural subjects, and other useful trainings that are not always available online and the even more free of charge.

- Interest in art or photography competitions, dance performances, cinema screenings, and board game activities grew; thus, public libraries would have the opportunity to teach, familiarize members of the community with elements of art and encourage participating spirit in all age groups.

- The survey revealed a high level of awareness of the negative impact for the community if their library closed. Respondents agreed that if the public library closed, this would have a negative impact on their community, their share being steadily rising per year.

- Respondents showed a willingness to contribute to the development of local libraries, mostly with book donations. The respondents also expressed their initiative to help the public library in organizing and directing events and in promoting library activities and services. One-fourth of respondents offered to be personally involved in the repair or renovation of library premises in the community, especially rural respondents and those who confirmed the considerable impact of the library on the community and their families. The availability for financial contributions was 14% (mostly the sums were up to MDL 100). Although it is not much, it is gratifying that people were ready to donate money to the library, objects that would improve the infrastructure of the library, and books that would diversify library collections.

**COMPUTERS AND INTERNET**

- In recent years, the upward trend of the number of internet users was among adults or older people from urban and rural areas and among the population having incomplete studies.

- The specific activities accessed by the internet included social networks, communication, search for images and video, and listening to music. The internet served the survey participants first of all as a means of socializing and
Overall results of the NATIONAL CITIZENS SURVEY 2017

communicating, and entertainment, and as a cultural center, thus removing the geographical, sociocultural, and informational barriers, and opening new opportunities for individuals. At the same time, it cannot be ignored that an important share of respondents use the internet as an information center and a work tool.

- The main reasons for not using the internet in 2017 were usage costs and lack of necessary equipment.
- Information technologies are an indispensable part of local libraries. A library that is able to provide access to equipment for everyone, with effective ways to retrieve the information sought, is considered useful.
- The variety and complexity of the services offered by Moldovan public libraries vary greatly depending on the level of the library and the available resources. Most of the respondents would be interested to learn how to use 3D printers and 3D scanners at the library. The younger generation is more interested in learning how to program Lego robots and understand how virtual reality glasses and drones work, but are unwilling to pay, they would have preferred such training to be offered for free.

“SEE YOU AT THE LIBRARY” CAMPAIGN

- In the survey of 2016, only 23% of the interviewed population confirmed that they had heard about the “See You at the Library” public campaign. Almost one-third respondent had heard about this campaign in 2017. It is especially gratifying that in 2016, 15% of non visitors knew about the campaign, and in 2017 their share increased by 12%.
- Half of the respondents who knew about the launching of the “See You at the Library” campaign had heard about or saw some of the promotional materials of the this campaign (leaflets, flags, posters) in 2017, while in 2016 survey, their share constituted only 30%. Also there was a positive trend of the campaign through the advertising spot on TV (+10% compared to 2016).
- It is necessary to promote the image of the library more actively through library events. Also, the involvement of community members would be very welcomed.
- 16.0% of respondents had heard about the Novateca program, most of whom were users of libraries that participated in the Novateca program.