



Centrul pentru Jurnalism Independent

Study on the Needs of Mass Media in the Republic of Moldova **(including the census of Moldovan media outlets)**

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This study was developed by the iData Company (legal name Date Inteligente SRL), that specializes in market research, marketing studies, quantitative and qualitative research and statistical and econometric analyses.

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Abbreviations

AIP	Association of Independent Press
BCC	Broadcast Coordinating Council
IJC	Independent Journalism Center
MO	media outlet
VAT	value-added tax

1. Research Methodology

1.1. General Methodological Aspects

This research on Moldovan mass media included several types of studies, each with certain objectives:

- **The census of media outlets** (MOs) aimed to identify all the MOs in the Republic of Moldova and to gather general data about their work. Overall, the census identified 474 outlets.
- **A survey on the needs of MOs** included 200 that completed a more detailed questionnaire than the one in the census. Questions aimed to identify the situation of MOs from the perspective of needs in human resources, technological and material infrastructure, funds and management, training and other aspects.
- **A qualitative study** included four focus group sessions with representatives of major media categories working in Chisinau: television, radio, newspapers/magazines and online portals. Also, 10 interviews were conducted with representatives of MOs outside of Chisinau to analyze the situation in the regions. The purpose of the qualitative study was to identify the problems faced by MOs as well as what they needed to develop or to maintain their work.

The Explanatory Dictionary of the Romanian Language 2009 edition defines mass media as, "A term that designates the entirety of modern technical means of informing and influencing public opinion, including radio, television, print media, Internet, etc.; means of mass communication." In the legislation of Moldova there is no strict definition of mass media or of "means of mass communication." Taking into consideration the situation in Moldova, iData proposed the following definition of MOs: "A media outlet is an agency, newspaper, magazine, TV or radio station, or online portal if it meets the following conditions: In March 2017, it was actively working generating its own content and had its own team/editorial office." Thus, some newer types of media such as blogs, vlogs or profiles on social networks were excluded.

1.2. Methodology of the Study on the Needs of Mass Media: Quantitative Component

For the study on needs, a sample of 200 outlets was selected for a more detailed interview; the data were subsequently extrapolated to all outlets. The sample was very large making up 42.2% of the total number of outlets identified. The structure of the sample reliably reflects the general structure of MOs as they were selected from a sample structured by regions (Chisinau and outside) and by type of outlet. After the selection was completed, a set of 100 outlets was extracted to cover non-answers from the first selection. Thus, the final sample included 200 outlets, double the sample in 2007 when 94 outlets were interviewed, including some from the Transnistrian region.

For data analysis, five kinds of segmentation were performed; the results are presented in the Annex in Table A1:

- year of establishment (before 1990, 1991–2000, 2001–2010, 2011 and later);
- form of ownership (domestic, foreign, private, public and non-commercial);
- number of full-time employees (fewer than 5; 5–9; 10 or more);
- region (Chisinau, outside Chisinau);

- type (newspapers, magazines, TV and radio stations, online portals and news agencies).

1.3. Methodology of the Study on the Needs of Mass Media: Qualitative Component

The qualitative study involved four focus group sessions, one each for print, online, TV and radio. Participants were representatives of MOs that work in Chisinau Municipality. In addition to those discussions, 12 detailed interviews were conducted with representatives from 3 print, 4 online, 4 TV and 3 radio MOs with national coverage: 10 regional outlets and 2 in Chisinau. Each discussion lasted about 2 hours, and each interview about 45 minutes. The majority of the MOs interviewed had an online outlet in addition their main endeavor (e.g. *Cuvantul* newspaper), so those interviews included their online activities too.

The study aimed to identify the needs of MOs and to find out the views of media representatives on how those needs could be met in the short, medium and long terms. Outlets also shared their opinions regarding what they would like to invest in, if they had the possibility, identifying at the same time the main obstacles they face in their development.

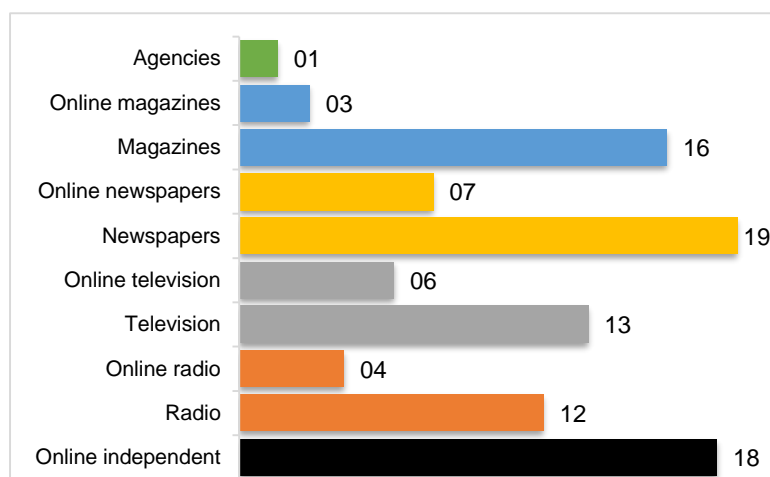
The focus group discussions and in-depth interviews were moderated based on an interview guide developed according to the objectives of the study. Participants met in a relaxed and open atmosphere, so everyone had the opportunity to share ideas and opinions freely. Interviews were mostly conducted in the offices of the MOs.

The results and conclusions of the qualitative study reflect only the opinions of the participants and cannot be extrapolated to all MOs. Data can be interpreted in terms of trends and need to be confirmed by the quantitative study.

2. Results of the Census of Moldovan Media Outlets

The census of MOs conducted from November 2016 to March 2017 identified 473, the majority of which were online news portals (181). Print media was represented by 90 newspapers and 77 magazines. The number of television stations was 63 and of radio stations was 55. Overall, 7 news agencies were identified. Figures 1 through 12 and Table 1 use the 2017 census data to show percentages of outlets in various categories. All 473 outlets are included in the percentages unless otherwise stated.

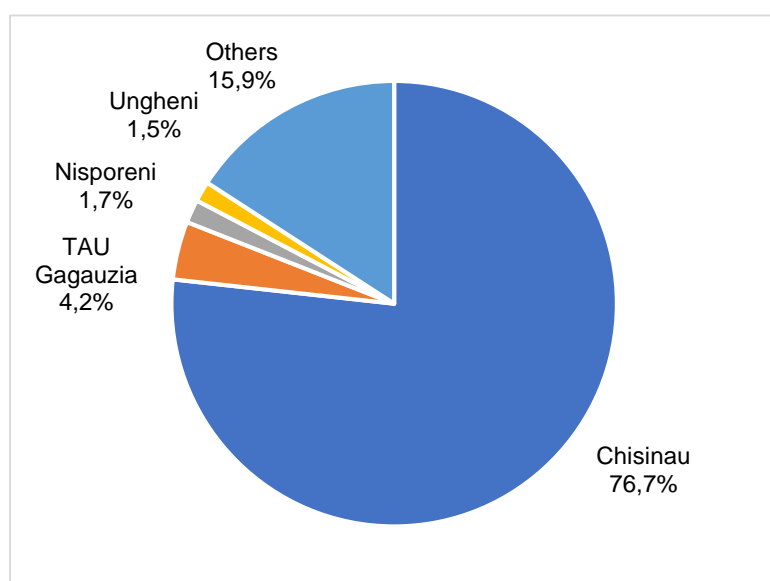
Figure 1. Online Media Outlets in Moldova by Affiliation (%)



Online outlets were divided into several categories in order to distinguish between independent outlets and outlets affiliated with a newspaper, a magazine or a radio or TV station. Exclusively online outlets made up only 16.9% of the total while the rest were created as part of radio or television stations, newspapers or magazines. The share of newspapers and of portals associated with newspapers made up 26.4%; TV stations,

including those online made up 19.2%; magazines and their online versions made up 19% and the share of radio stations and their online outlets was 15.6%. The percentage of independent online outlets was less than those of newspapers, TV stations and magazines.

Figure 2. Media Outlets in Moldova by Location (%)

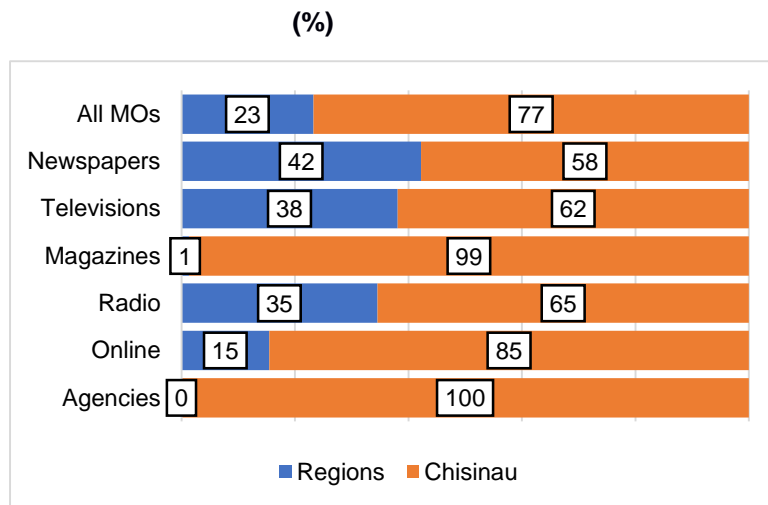


Most (363 or 76.7%) of the outlets identified work in the City of Chisinau, but a number work in the Administrative Territorial Unit (UTA) of Gagauzia (20 or 4.2%). The districts with most local outlets were Nisporeni with 8 (1.7%) and Ungheni with 7 (1.5%). In all other districts, including Balti Municipality, there were 75 outlets or 15.9% of the total.

Note: The study does not include information from the Transnistrian region.

This situation is due to the presence of regional and national outlets that provide most of the information to the public and also to the fact that many local outlets have already closed.

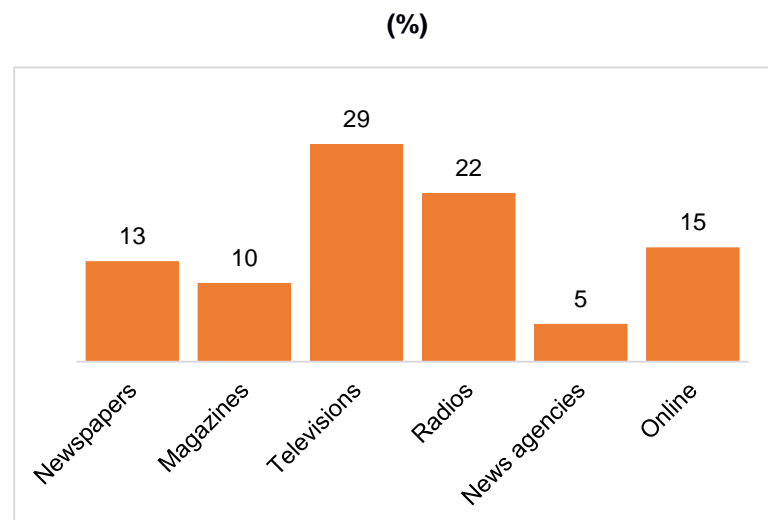
Figure 3. Percentage of Media Outlets in Moldova by Location



By type, we note that magazines and news agencies are located almost exclusively in Chisinau as are 85% of online portals. It should be noted that some newspapers, magazines and TV and radio stations in the regions have their own websites, but they are not developed enough to be considered individual MOs. Thus, one can say that in the regions there is some online media

but far less than in Chisinau.

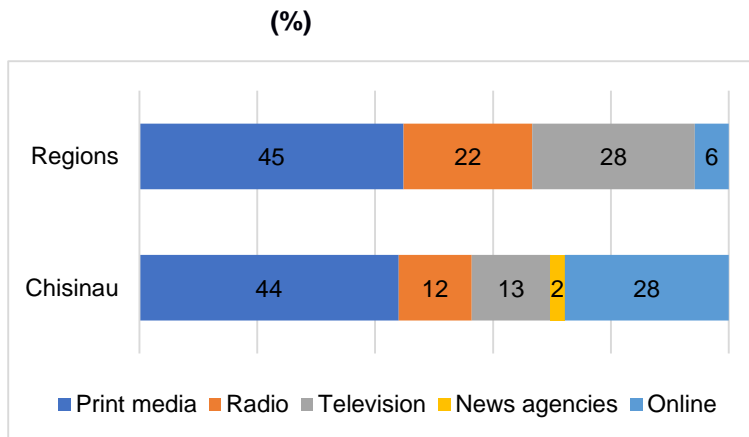
Figure 4. Media Outlets in Moldova by Type and Number of Full-Time Employees



The share of newspapers and television and radio stations in Chisinau is greater than that in the regions, but it should be noted that the outlets in Chisinau present news from around the country though the information space is dominated by events in Chisinau, especially in politics, as confirmed by the qualitative study. Although the actual number of TV stations is relatively small, the majority of full-time employees work in these outlets

at 29% of the total number of media employees while 22% of the total work at radio stations. The online component is also becoming increasingly important for Moldovan media and comprises 15% of employees, although the number of such outlets is much larger. Thus, the average number of employees at an online portal is quite small, while at TV and radio stations it is much larger compared to other types of outlets.

Figure 5. Percentage of Media Outlets in Moldova by Location and Type

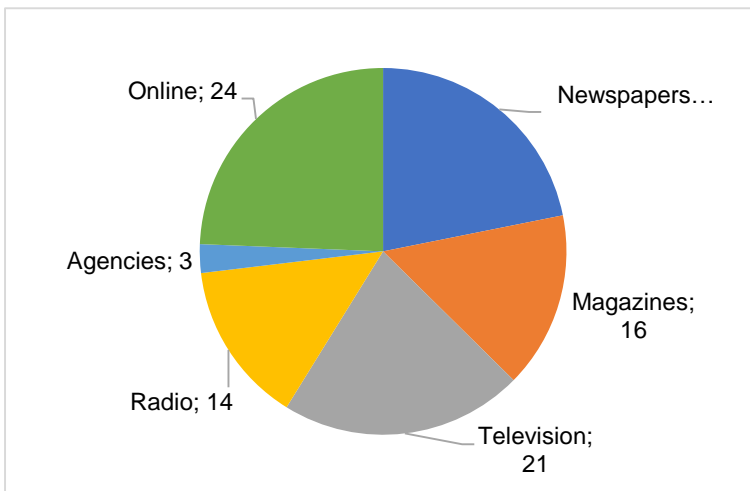


As also shown in Figure 5, in 2017 no regional news agencies were identified. (This research does not include information from the Transnistrian region.) Comparing the City of Chisinau with the regions, there is a similar share of print press (44–45%) while online outlets are more numerous in the capital (28%) than in the rest of the country

(6%). In the regions, there are important shares of TV and radio stations.

Figure 6. Small Media Outlets by Type

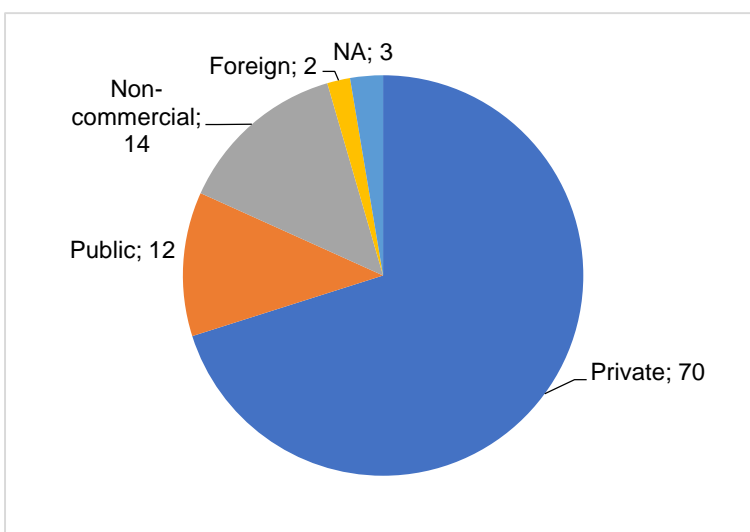
(%)



Almost a quarter of small media outlets are online portals because the creation and maintenance of such outlets requires fewer human resources. Thus, only several portals have more than five full-time employees. At the same time, although the costs of maintaining a portal are not as high as those for traditional outlets, in terms of revenue portals face many difficulties that prevent them from expanding their staff sizes.

Figure 7. Media Outlets by Type of Ownership

(%)

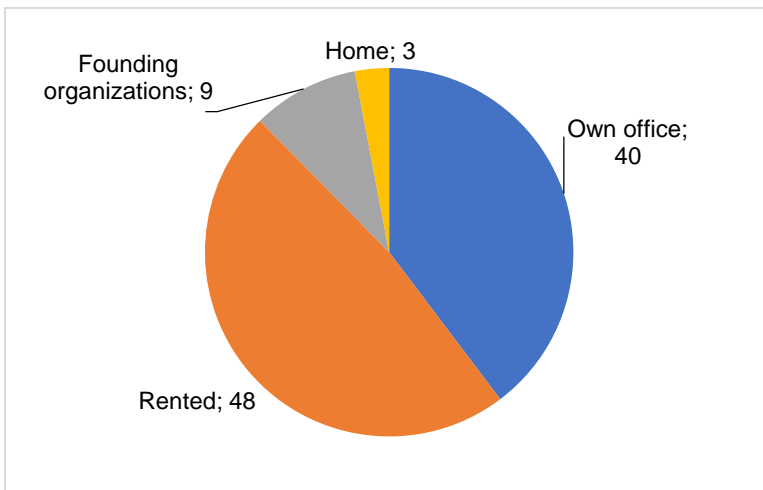


In the census, the classification "non-commercial MOs" was used for outlets belonging to public associations, religious organizations, political parties and associations focused on scientific activities. Outlets that were not created for commercial purposes were also included in that classification. Most outlets (70%) were privately owned, 14% were non-commercial and 12% were public. Only 2% of the outlets were financed by foreign capital.

Note: This figure does not include online portals that are part of traditional outlets as separate outlets. NA means type of ownership could not be determined.

Figure 8. Media Outlets by Office Ownership

(N = 267, %)

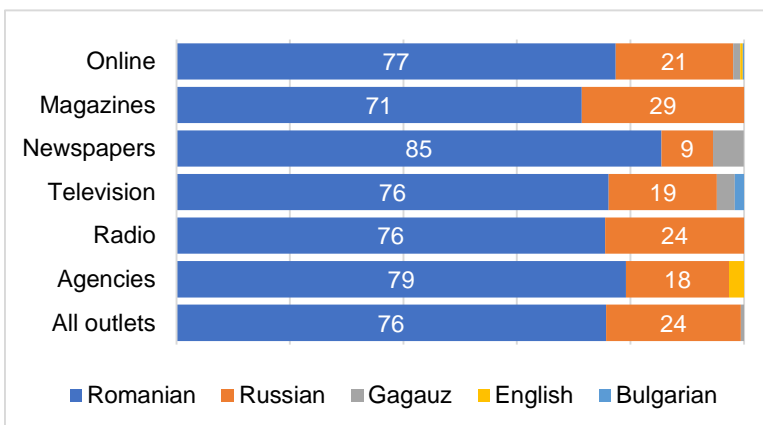


Nearly half of the MOs worked in rented offices either separately or with other outlets (48%) while 40% of the outlets worked in their own offices. The census also found that about 9% used offices provided by founding organizations, usually if they were state-owned or non-commercial organizations, and 3% of outlets worked from the founder's home.

Note: Online portals created under traditional outlets were not included as separate outlets. Some outlets did not specify the type of office in the interview.

Figure 9. Media Outlets by Type and Main Language

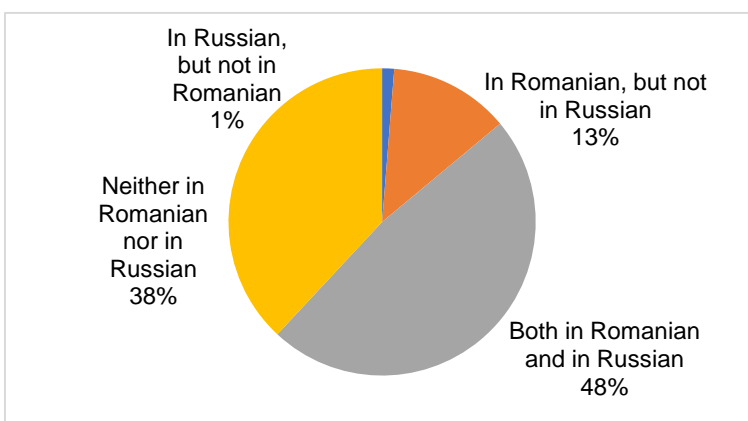
(%)



According to the census, at 77% Romanian is the main language of information for most MOs including for 85% of radio stations. Russian was the main language of 21% and was more prevalent in online outlets, newspapers, and news agencies than on radio. Gagauz was the main language of 5% of radio stations and 3% of TV stations; Bulgarian was the main language of one

TV station; and English the language for two scientific journals. Among minority languages, Russian was the most widespread though there is a portal in Chisinau with 100% content in the Gagauz language. The percentages in Figure 9 do not reflect the volume of information produced or the market shares of the outlets.

Figure 10. Percentage of Media Outlets by Language



Only 1% of all media outlets in Moldova had content in languages other than Romanian or Russian, mostly in the Gagauz language. Nearly half of the outlets (48%) had content in Romanian and no content in Russian while 13% of the outlets had content in Russian and no content in Romanian. A total of 38%,

however, used both Romanian and Russian, thus, Russian was used by 51%. English is used by about 10% mostly by news agencies, magazines, online portals and to a lesser degree newspapers and TV and radio stations.

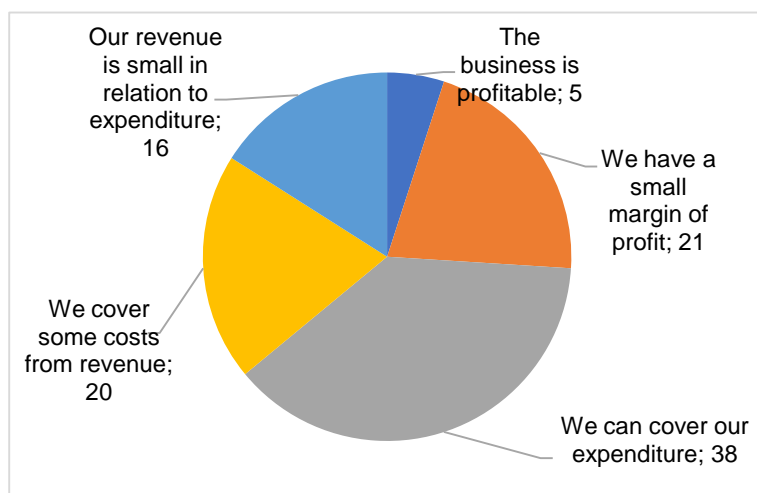
Table 1 shows that Gagauz was used by 10.9% of radio stations and 6.4% of TV stations, but it was absent in the content of magazines and news agencies. The share of online outlets using the Gagauz language was very small at 1.7%. Other languages in which media content appeared are French, Bulgarian, Italian, Ukrainian and German. It should be noted that in this question, each MO could select several languages including those in which content is produced less frequently. The study shows that the Ukrainian language is little used in Moldovan media even though Ukrainians are the largest national minority according to the population census of 2014.

Table 1. Media Outlets by the Language of Content (total or partial) by Type

	(%)								
	Romanian	Russian	English	Gagauz	French	Bulgarian	Italian	Ukrainian	German
Online	85.1	47.0	12.2	1.7	1.1	0.0	0.0	0.6	0.6
Magazines	87.0	54.6	20.8	0.0	7.8	0.0	3.9	0.0	1.3
Newspapers	82.2	54.4	2.2	1.1	2.2	1.1	0.0	0.0	0.0
Television	85.7	57.1	4.8	6.4	0.0	3.2	0.0	1.6	0.0
Radio	94.6	40.0	1.8	10.9	0.0	7.3	0.0	0.0	0.0
Agencies	85.7	85.7	57.1	0.0	0.0	0.0	0.0	0.0	0.0
Total	86.1	50.7	10.2	3.0	2.1	1.5	0.6	0.4	0.4

Figure 11. Media Outlets by Profitability

(%, N=270)

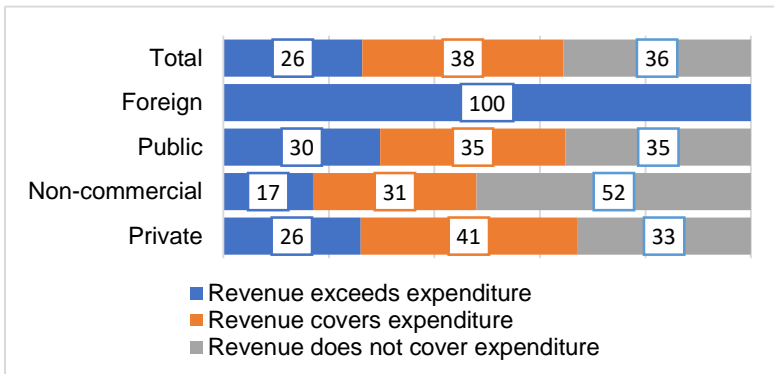


Media outlets in Moldova can be divided into three main categories according to profitability. Only 26% of them are considered profit-making businesses, including 5% with a significant profit margin and 21% with relatively small margins. Other MOs either fully cover their costs but make no profit (38%) or do not have enough revenue to cover their expenditures (36%).

Note: This figure does not include online portals created under traditional outlets as separate outlets so as not to distort the results.

Figure 12. Media Outlets by Type of Ownership and Profitability

(N=270 %)



It should be noted that some media outlets were not created to make a profit: They are non-commercial, and many are maintained by the owner or by founding organizations. In all, 52% of non-commercial MOs did not cover their expenses with their revenues, and only 17% were profitable. While 26% of

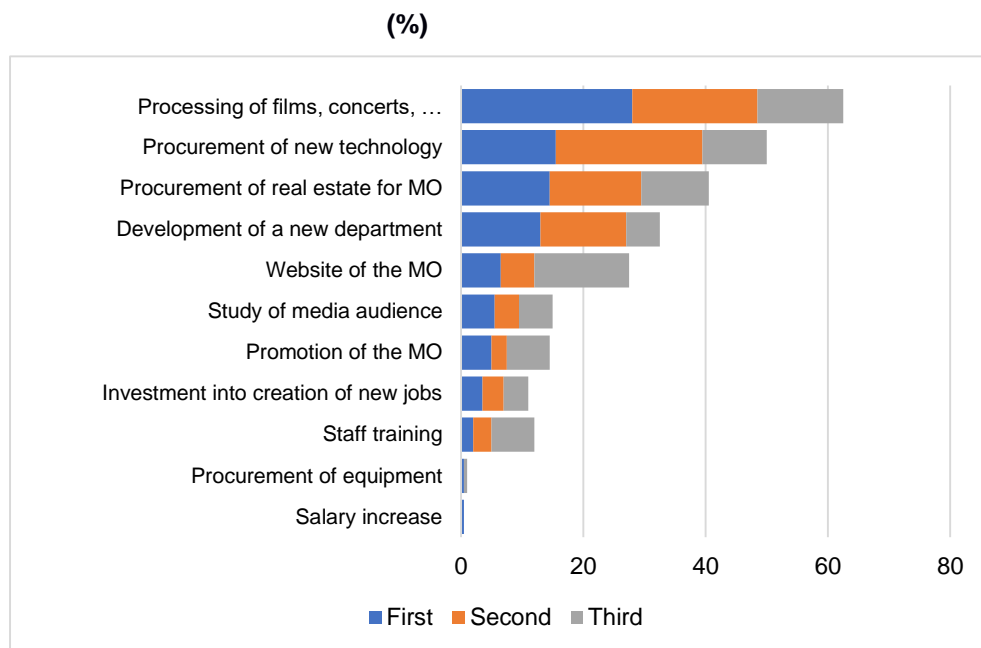
private MOs and 30% of public MOs were profitable, private outlets were nevertheless vulnerable as 41% just covered their expenses with their revenues.

3. Results of the Survey on the Needs of Moldovan Media Outlets: Quantitative Study

Figures 13–26 and Table 2 in this section use data from the survey of 200 media outlets drawn from the 2017 media census. The percentages are based on 200 responses unless otherwise noted.

3.1. Needs of Media Outlets

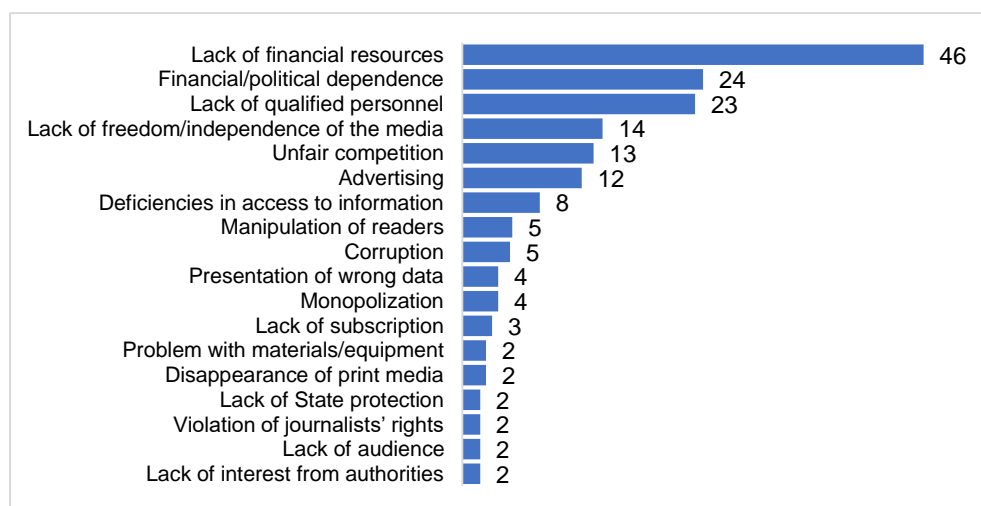
Figure 13. What Would You Invest in if You Had the Means?



If media outlets had the funds they would invest primarily in salary increases and in purchasing better equipment. An important priority for 41% was staff training while 32% would create new jobs.

Figure 14. What are the Main Problems of the Media in Moldova at Present?

(N=168, %, maximum 3 answers)



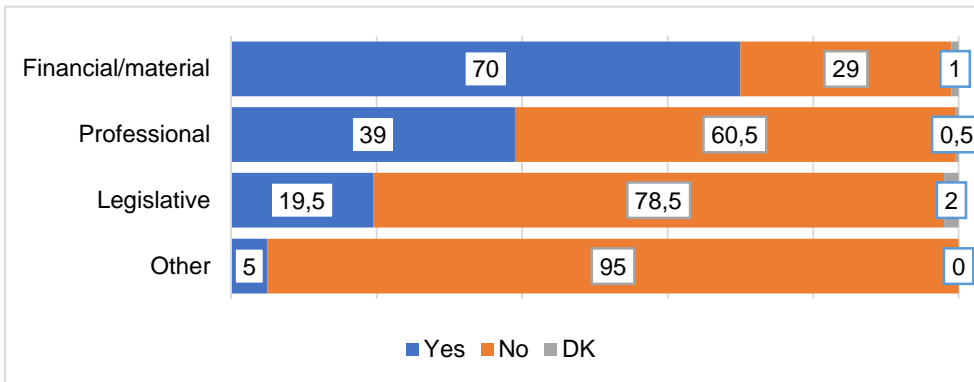
Of the 46% of MOs that named a problem, a lack of funds was the biggest difficulty they faced.

Financial/political dependence and lack of qualified personnel were mentioned by 23% and 24% of respondents,

respectively. Other problems mentioned depended on the type of MO.

Figure 15. What are the Particular Needs of Your Media Outlet

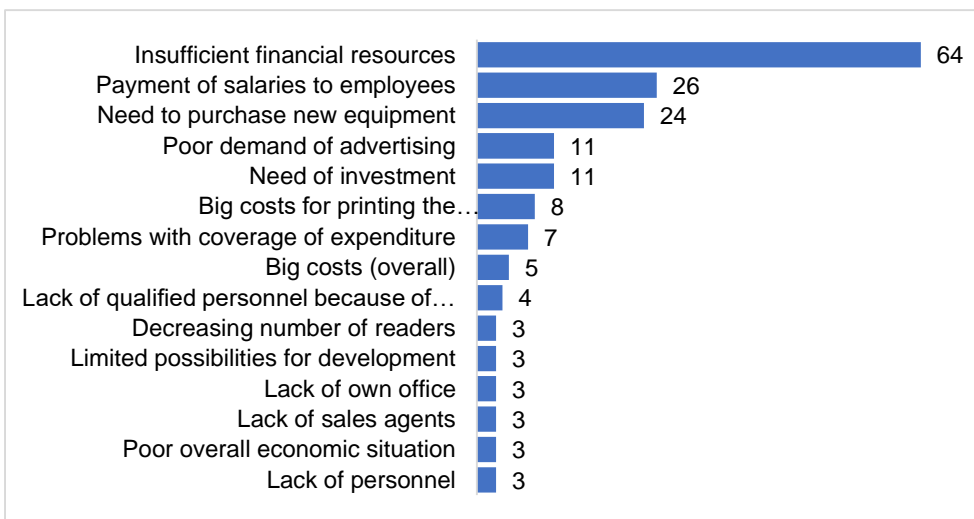
(%)



The majority – 70% – believed their needs were of a financial or material nature although 39% named professional needs as important and 19.5% mentioned legislative needs.

Figure 16. What Financial Needs/Problems does Your Outlet Have?

(N=107, %, maximum 3 answers*)

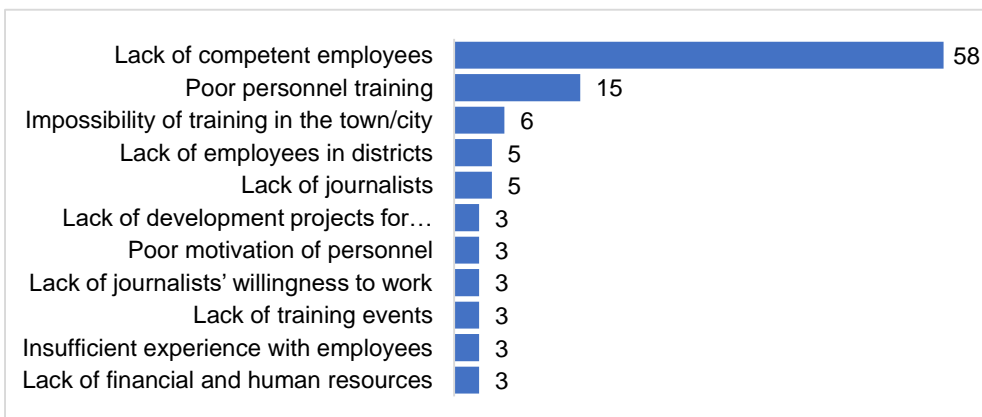


With regard to financial needs/problems, 64% cited lack of sufficient resources followed by paying salaries to employees (26%) and the purchase of new equipment (24%).

Note: *=open question with answers mentioned by a minimum 3% of respondents

Figure 17. What Professional Needs/Problems Does Your Outlet Have?

(N=67, %, maximum 3 answers*)

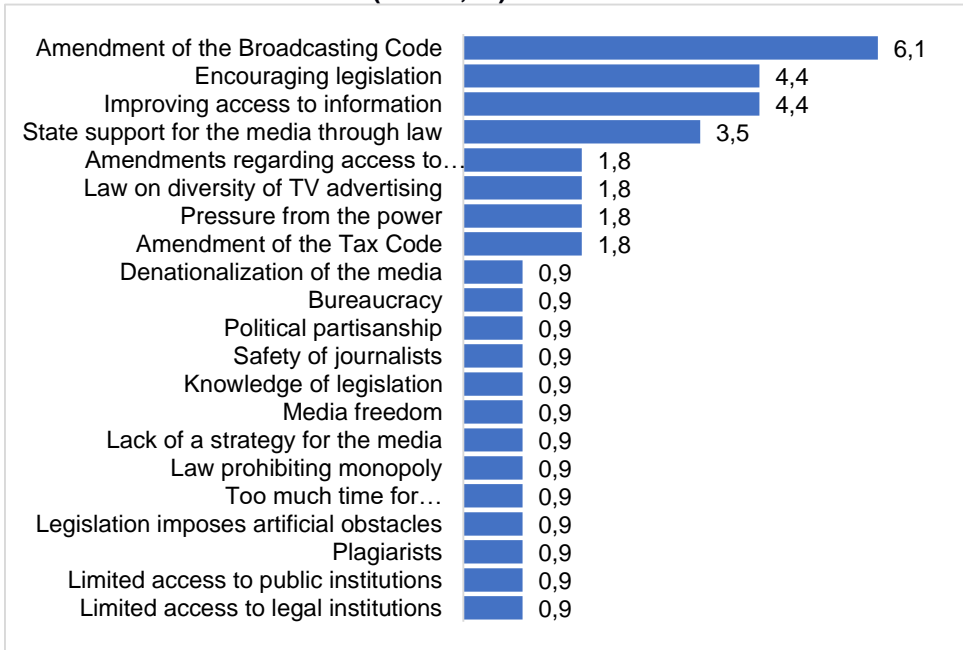


A lack of competent employees was the main professional problem followed by poor training of personnel or the impossibility to provide training in the town/city where the outlet is

Note: *=open question with answers mentioned by a minimum 3% of respondents

located which is especially valid in the regions where there is an acute lack of well-trained employees.

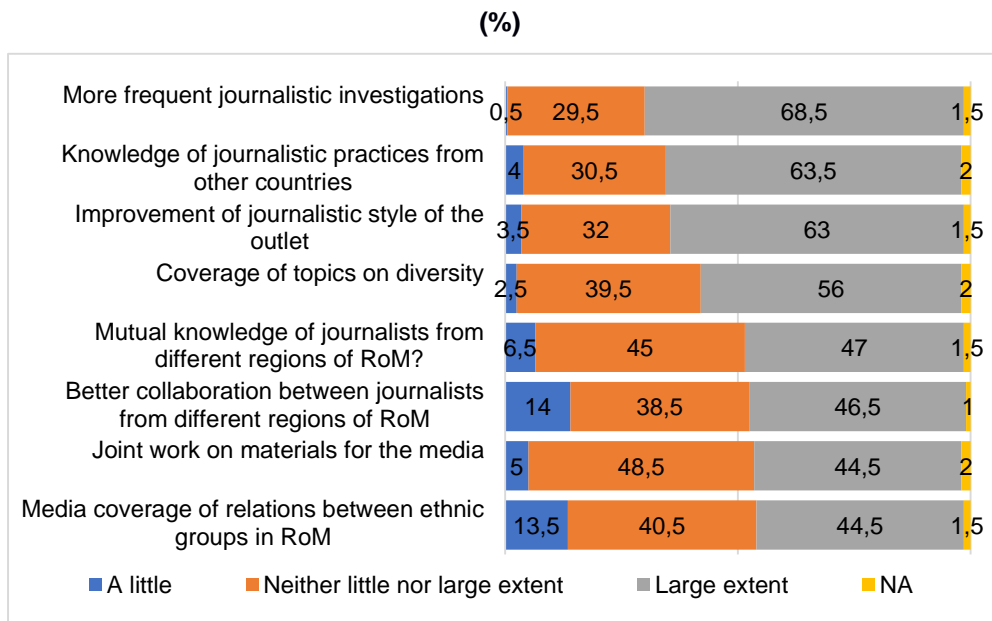
Figure 18. What Legislative Needs/Problems Do You See in Moldovan Mass Media?
(N=114, %)



Respondents made several suggestions in regard to solving the legislative problems they face: (6.1%) referred to amending the Broadcasting Code and 4.4% to improving journalists' access to information. Also, some outlets wanted legislation to support the development of the media in Moldova or even to provide state

support for the media.

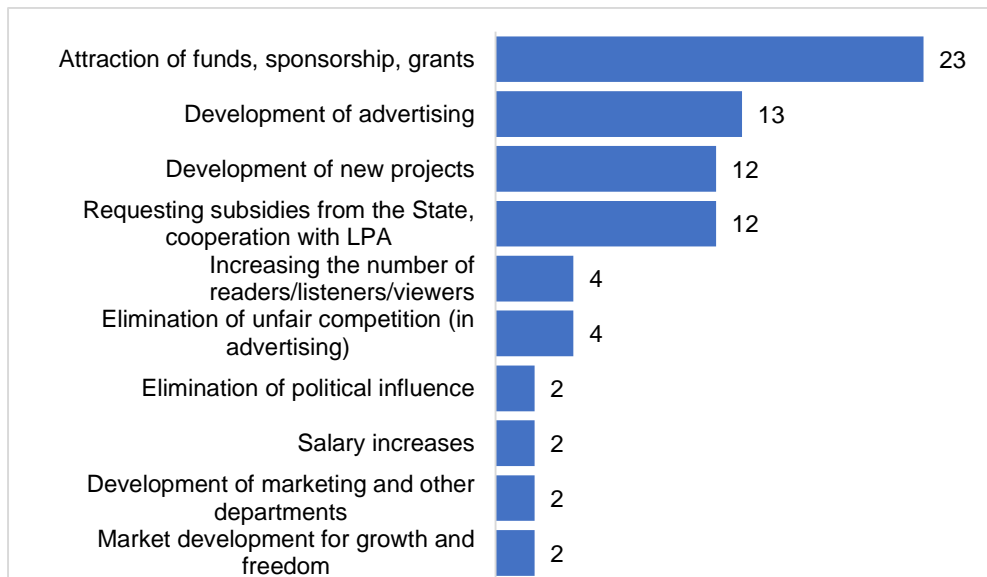
Figure 19. To What Extent Do You Find the Following Types of Collaboration among Journalists Necessary?



Collaboration among journalists from different outlets was considered beneficial in all forms to provide coverage on a large variety of topics or to produce joint journalistic investigations.

3.2. Possible Solutions to the Needs and Problems of Media Outlets

Figure 20. How Can Financial Needs/Problems be Solved?
(N=146, %, maximum 3 answers)

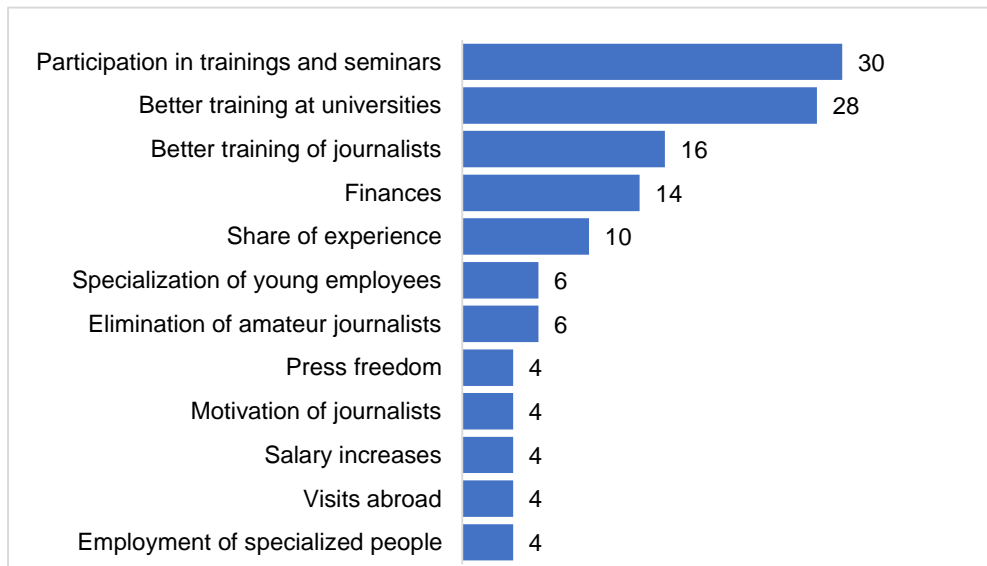


Most respondents believed that the problems of their MOs could be solved by attracting more funds from sponsorships or grants (23%). Another solution offered was to develop advertising (13%) which could also increase revenues.

Note: *=open question with answers mentioned by a minimum of 2% of respondents

About 12% of respondents believed that problems could be solved by appealing for state subsidies or by cooperating with local public authorities.

Figure 21. How Can Professional Needs/Problems Be Solved?
(N=50, %, maximum 3 answers*)

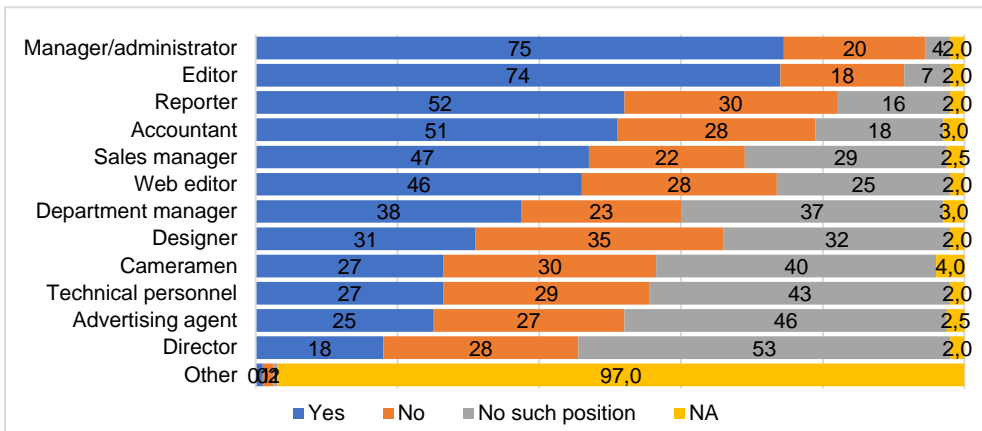


Of the 50 respondents that proposed solutions, the majority believed that training and seminars could improve their situations from a professional point of view. A solution suggested by several was to improve teaching in specialized university settings.

Note: *=open question with answers mentioned by a minimum of 2% of respondents

3.3. Training Needs of MOs

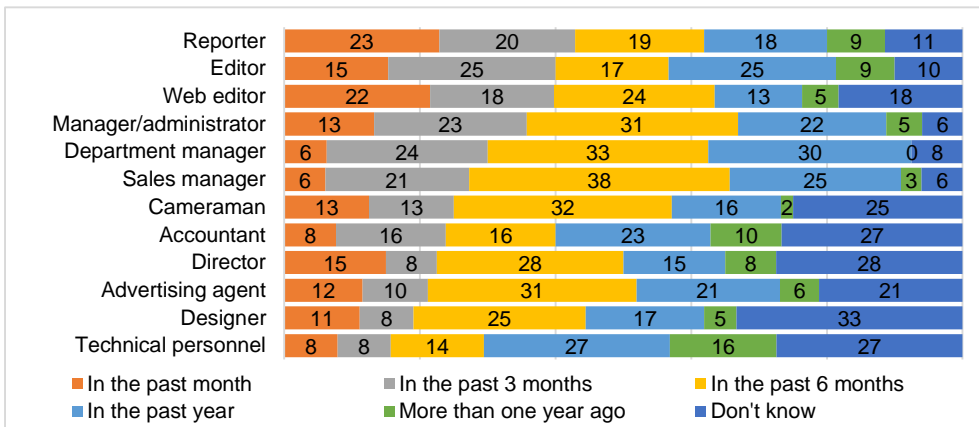
Figure 22. Has Your Staff Participated in Training Courses?
(%)



The managers, administrators or editors of about 75% of the outlets had participated in at least one course. Reporters, accountants and sales managers had also attended such courses.

Figure 23. When was the Last Time Staff Participated in Training?
(% of those who answered)

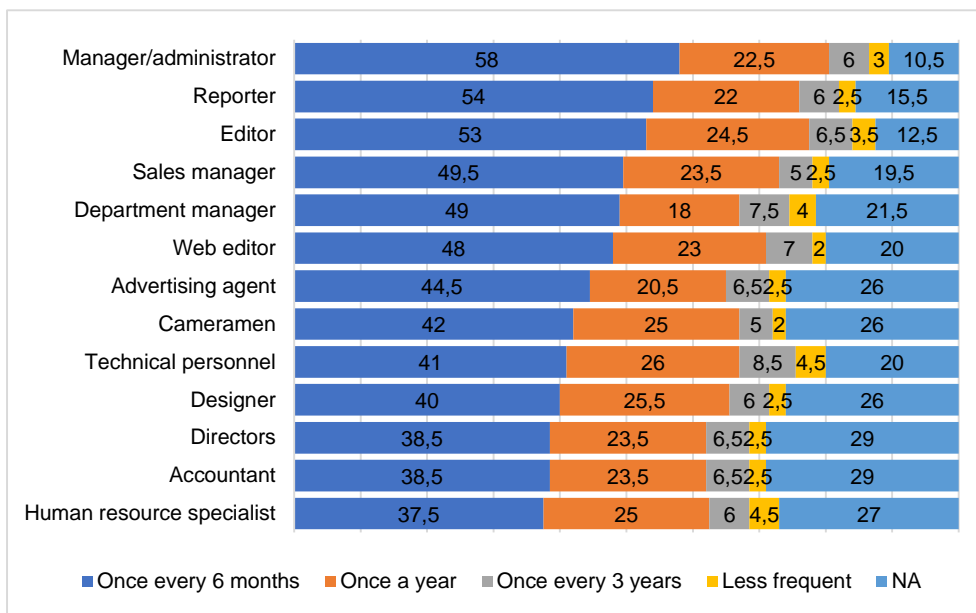
Reporters, editors and web editors had participated in training courses most recently as over 40% had been



to one in the past three months. For the majority of positions in MOs, training apparently occurs at least once a year.

Figure 24. How Often Should Training/Refresher Courses be Organized for Each Type of Employee?

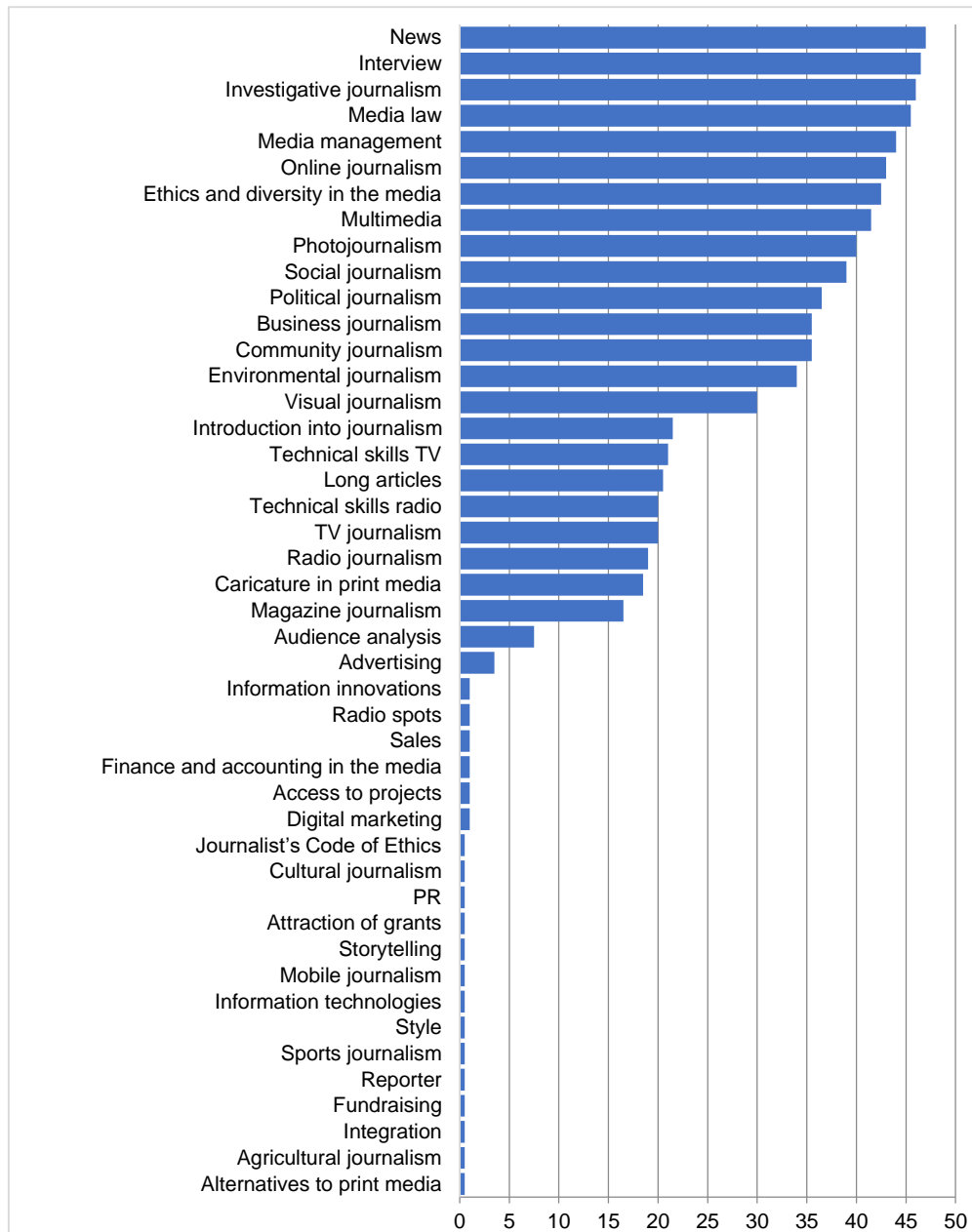
(%)



Most respondents believed training should be held every six months or annually. The share of those who believed that such activities should be done less than once a year was only about 10%.

Figure 25. What Training Courses Do You Think Are Most Important?

(% of those who said yes to training)



The courses deemed the most important for journalists were news writing, interviewing, investigative journalism, media law, media management, online journalism, ethics and diversity of the media, multimedia and photojournalism. Over 40% of respondents found these courses to be necessary for MOs. Among the courses suggested by respondents that were not in the questionnaire, the most important were audience analysis (7.5%) and advertising (3.5%).

Note: Responses that registered 7.5% or less were obtained from free answers.

Table 2 offers data on respondents' views of the ideal length for training courses in various categories.

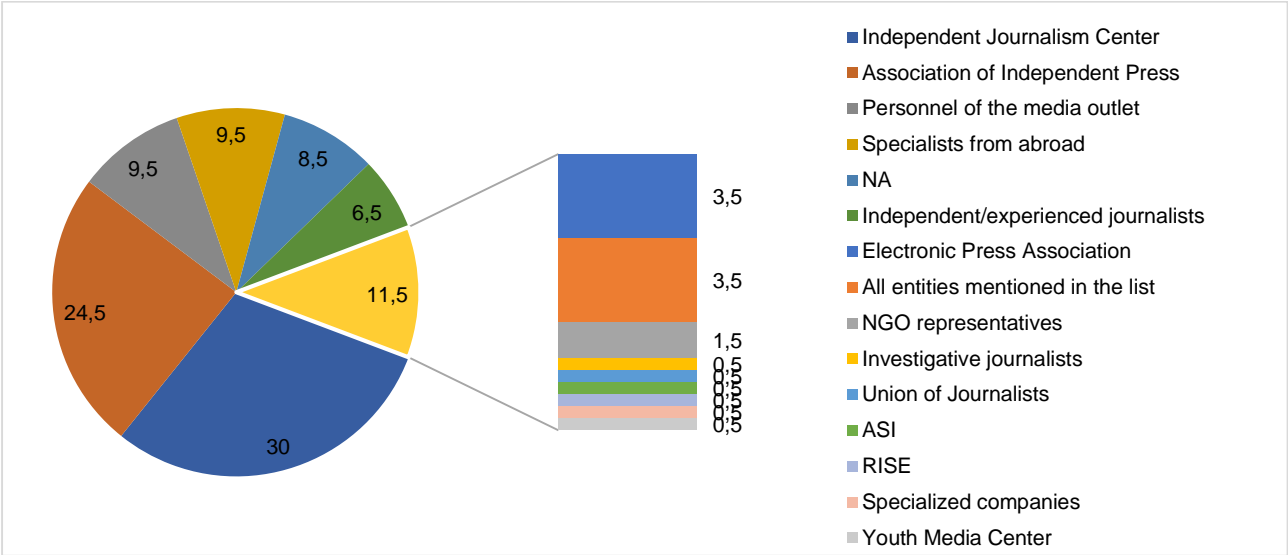
Table 2. What is the Optimal Duration of Training in Days per Type of Course?

Course	Average	Standard Error	Confidence Interval		N=
	Duration (days)	(days)	95%		
Radio technical skills	3.6	0.3	2.9	4.3	33
TV technical skills	3.5	0.3	2.9	4.2	35
Long articles	3.5	0.3	2.9	4.1	37
Caricature in print media	2.7	0.2	2.2	3.2	31
Ethics and diversity of the media	2.7	0.2	2.4	3.1	73
Photojournalism	3.0	0.2	2.5	3.4	63
Interview	2.9	0.2	2.6	3.3	82
Introduction to journalism	2.9	0.3	2.4	3.4	31
Community journalism	2.9	0.2	2.5	3.4	66
Investigative journalism	3.2	0.2	2.8	3.5	85
Environmental journalism	2.9	0.2	2.5	3.3	62
Business journalism	2.9	0.2	2.4	3.3	63
Online journalism	3.1	0.2	2.7	3.6	76
Political journalism	2.9	0.2	2.5	3.3	67
Social journalism	3.1	0.2	2.6	3.5	68
TV journalism	3.2	0.3	2.7	3.8	36
Magazine journalism	2.9	0.3	2.3	3.5	30
Media law	2.8	0.2	2.4	3.1	81
Media management	3.1	0.2	2.7	3.5	81
Multimedia	3.1	0.2	2.7	3.6	67
Radio journalism	3.2	0.3	2.6	3.8	29
News	3.2	0.2	2.8	3.6	85
Visual	3.1	0.3	2.5	3.6	46

Note: Standard Error= average deviation of answers compared to "Average Duration"; Confidence Interval = the interval where the true average is for 95% of cases; N = number of respondents who specified the duration of the course per course.

Figure 26. Who Could Organize Training Courses?
(%)

The Center for Independent Journalism (IJC) and the Association of the Independent Press (AIP) were the organizations most frequently cited as providers of training.



4. Results of the Survey on the Needs of Moldovan Media Outlets: Qualitative Study

The information in this section was drawn from the 4 focus group discussions with representatives from television, radio, newspapers/magazines and online portals and the 10 interviews with MO representatives outside of Chisinau. The identifiers after comments refer to the specific focus group (FG 1, 2, 3 or 4) and to the gender of the respondent (M for male and F for female) and the number assigned to that person or to a person interviewed.

4.1. How Do You See the Media Generally in Moldova?

At present, mass media is rapidly developing in terms of the emergence of new outlets. Most of the ones that have appeared relatively recently are online portals or new television or radio stations. This development is definitely due in large part to the evolution of information technology that benefits journalists in their work. State-of-the-art equipment allows the job of a journalist to grow in intensity.

From the point of view of development, I think we are witnessing a mega development of the media because we have so many television and radio stations and websites. Praise the Lord, diversity we do have. [FG1 - M1]

There is new equipment, new technologies. [FG2 - M1]

Another opinion is that the media is poorly developed despite the multitude of media outlets. The fact that there are many media outlets does not mean they are professional.

The media is poorly developed: There are very many TV stations and news websites, but each of them in part is not a strong media outlet. [I13]

The media is poorly developed, i.e., there is little original content of good quality. [I4]

The shows produced locally, such as talk shows, seem sterile and trite. [I13]

The media, for the most part, is a reflection of society and totally mirrors the situation in the country.

The situation in the media is the same as in the country. [FG1 - M1]

There is independent media and the media controlled by politicians or groups of influential people. In the opinion of participants in the group discussion and interviews, controlled MOs are largely divided into pro-Western and pro-Russian. Also, controlled media becomes a source of mass manipulation. This is done in order to be able to influence public opinion and to offer to the consumer whatever the employers want them to have.

Unfortunately, the worst part is that the media tends to be controlled, especially politically, even if some outlets are not controlled. [FG1 - M1]

The share of affiliated and media controlled by oligarchs is very large, so to say, in the media market. [FG1 - M3]

Somewhere there is manipulation; somewhere there is simply a center that wants to conquer public opinion. [FG1 - M4]

It is no good because in this way the consumer is simply deceived, but that's about something else, about conduct, deontology, and so on. [I2]

The media is currently becoming a source of mass manipulation. [FG1 - F1]

The media is divided into, say, pro-Western and pro-Eastern, pro-Russian. [FG1 - M4]

The real situation of the media has deteriorated a lot. Yes, it is a good thing that many new media outlets have appeared, especially electronic ones even TV and radio stations and online media portals, but unfortunately, most of these new outlets have been divided and are under the aegis of political parties and oligarchs who engage in political games. And this has led to the dependence of a majority of outlets on authorities, political parties and, ultimately, has led to a decrease in public trust in the media. [I5]

In the opinion of participants in the focus group discussion, some outlets were opened in order to promote their corresponding businesses.

Many radio directors opened their stations to promote their own businesses, not to promote the radio's values or to make a quality product for the market. And I don't understand the logic, why they still exist, if we have only 300,000 radio listeners in Chisinau and as many as 33 radio stations. [FG3 - M1]

Another aspect of media development is the emergence of bloggers who have increased in recent years according to study participants.

Bloggers appeared. [FG1 - M4]

There are more and more people who create blogs and post their own material. They usually write on a specific topic and have specific consumers for their products. [FG1 - M3]

Print media has decreased in terms of number of outlets, number of subscribers, readers and national coverage. According to the participants, print media will regress in stages: First, national media will disappear followed by regional outlets. Their opinions are, however, divided as some experts believe that MOs are

different and that therefore consumers are different too. Some people like to read while others prefer to watch or listen. Still others prefer to be informed from several different sources. MOs adapt according to market requirements. As long as there is demand, participants said there will be print, online, radio and TV.

Now we see that we have fewer subscribers, we are getting closer to the stage when the print media will disappear; this is also felt in the speed of the online movement. [FG2 - M1]

How will it disappear? First, the national print will disappear. National outlets mostly talk about, let's say, Chisinau, the government, Parliament. And later, print media will disappear in the regions because regional information can be found on our websites. At a training event, we were advised to strengthen our websites and stay online. [FG2 - M2]

If we talk about radio which appeared a hundred years ago and it was said that people would no longer read books and newspapers, it seems it is not the time. The same was true with television and so on. Now we have the Internet that, we can't know for sure, might be the last stage. Will the Internet disappear too? [FG2 - M1]

If we look at trends, for example, there are some who consume everything online while some have time to listen to material on the radio or to read about it. The trend now is to present everything in audio and, if possible, video format plus in writing. Because when you're on the move, it's easier to read or listen, so the international media portals have begun to go with this triple message: writing, audio, video in different packaging to make it comfortable. [FG2 - F2]

I agree with my colleagues who have already spoken because paper or electronic form depends on readers' preferences: They either buy newspapers or are used to reading in electronic form. But I believe that the written form will remain: It will definitely remain. [FG2 - M3]

A major problem for the press is unfair competition between media outlets funded by institutions and those that work alone to support themselves. Often, participants believe, these outlets persist over time simply due to the enthusiasm of their staff.

Some newspapers and magazines belong to the councils that we cannot call independent; they changed their names, founders and complied with the law on denationalization, but they are not independent and continue to be financed by the institutions under which they work. [FG2 - M2]

Another observation is about media outlets whose target group is children and students. Participants believe that such media should be funded and supported by the state. Scientific and literary journals, also addressed to children, should be in that group too.

In the concrete case of Ms. Verdes, we have a domain and audience that need to be funded by the state, as these are publications for children... [FG1 - F4]

Along with specialized magazines, perhaps scientific and literary ones should be in the province of the state that wants to educate its citizens, to form and inform level-headed citizens. Florile Dalbek [children's magazine] I think should also be unconditionally supported. They definitely know what to publish for growing kids. [FG2 - F4]

4.2. Changes over the Past Ten Years

The majority of participants in the study believed that the changes that have taken place over the past 10 years have led to the development of the media in terms of content, freedom and possibilities. An initial impetus in the development of the press came from external donors after which the growth in the number of media outlets gained momentum.

There was a period after 1989 when the media was mostly state owned; then, with denationalization, independent media emerged with television stations and so on. At that time, the press was supported by some foundations, external donors, embassies, etc. [I2]

In 2011 I would say there was a free and independent press. At that time, in 2010–2011, Publika and Jurnal television stations were launched. [FG1 - F1]

But now it seems we're going back to party press, i.e. under the influence of parties; we have regressed. [FG1 - F1]

Yes, I'll say that in 2006 the Party of Communists' control over the press weakened although not much. In 2011 their control disappeared completely, and the press seized the momentum for continuing and lasting development. [FG1 - M4]

I believe that access to this market has become much freer. In addition, IPTV (NB: Internet protocol television) was a second big evolution in everything related to television. [FG4 - M1]

Another factor that has allowed the media to develop is related to amendments in the legislation with some changes promoted due to the insistence of specialized non-government organizations.

Since 2006, positive changes have occurred in the legislation concerning the media; new laws have appeared like the law on freedom of expression and the law on the denationalization of public periodic publications of September 2010. [I13]

Further amendments to the legislation have been promoted due to the insistence of media organizations, especially the AIP and the IJC. [I5]

Over the past decade, the number of websites has grown significantly, some newspapers have disappeared, and others have been modernized technologically. The majority of outlets has added their own content, according to the participants.

But really, they have evolved; there are more of them, people can seek information from more sources than 10 years ago. At that time, the Internet was virtually non-existent, but now you can get online and immediately find out everything that happens; you don't necessarily have to wait for the evening news at 6, 7, or 8 o'clock. [14]

I believe that the Internet started to be perceived as a power during the April 7 events. I say that year 2009 was the turning point when the big websites emerged which are still very popular. [16]

At this very time investigative journalism appeared. Although it is difficult to maintain, usually the media outlets that are financed from projects are the ones that can afford this exercise.

Investigative journalism appeared around this time; now it is getting fed little by little, but I say, only by external projects. Local investigative journalism is not really done on one's own initiative. [12]

Other participants agreed that there have been many changes in the media but that not all of those in recent years have led to quality journalism. This is due in large part to the fact that some outlets are controlled politically. Citizens are the ones who suffer if they consume the product of such an outlet.

I can say there have been very many changes, both positive and negative. Many TV stations, portals and websites have appeared, but still many are politically controlled. [14]

The citizen, indeed, should be very careful about what he/she chooses to read and should filter the information very carefully.

4.3. Stages of Transformation over the Past Ten Years (2006–2016)?

In the past decade, broadcast products in the domestic media market have gone through various stages of development.

Yes, at first glance it might seem that Moldova is overloaded with media outlets, many and diverse—television and radio stations, newspapers, online outlets, blogs—anything you wish, a whole ocean. About 20 years ago, it was hard to find any channels, and now we are thinking about how to separate and classify them, find our way around them, because there are so many. [12]

The increase in the number of outlets has resulted in increased market demand for qualified persons in the field, according to the participants. If 10 years ago it was difficult to find a job at a television station or at a newspaper as an editor, now the demand for such staff in the media market is much greater.

I believe that over the past 10 years many changes have taken place. When I joined the media in 2008, for example, it was very difficult to find a job. There were, basically, 2, 3 or 4 TV stations, so it was very good if you managed to find a place since there was just one press agency and 4 newspapers. Now you have the possibility to choose where to work. [FG1 - M1]

However, the increase in the number of outlets has not, over time, led to an increase in the quality of journalistic material. According to the participants, the main reasons include the multitude of outlets, political influence and information technology.

Two factors have influenced quality: technology and political influence have radically changed journalistic material. [FG1 - M1]

New television stations that employ dozens even hundreds of journalists appeared overnight, so the market, understandably, did not have enough trained people. [FG2 – F2]

Nowadays, with advanced information technology, journalists no longer go to conferences; they stay in offices, watch privesc.eu and write news which significantly decreases the quality of the material. [I5]

Another phenomenon the participants noticed during this period was the emergence in the market of journalists from Romania.

We have a very, very interesting phenomenon, and I say it's negative: journalists coming from over the Prut River, from Romania. Since 2010 and 2011, we have been witnessing the continuous dictation of journalistic tone by consultants, publishers, editors and famous presenters from Romania. [FG1 - M1]

4.4. How Do You See Today's journalist?

The participants in the discussion identified a profile of today's journalist as one who works at a very fast pace:

Very hurried. [FG1 - F1]

Today's journalists want everything here and now. [I5]

Other participants considered that journalists in Moldova are professionals who over time have made names for themselves but have not always enjoyed material well being.

I want to say that the profile of Moldovan journalists is mostly that of persons quite eroded by life, by material troubles. They are not losers in other areas but are simply stubborn and remain in their profession which has not been lucrative. [FG2 – F4]

You can't make money in our profession. At best, being insistent, having a strong spirit for an entire lifetime, journalists can make names for themselves and can thus open doors if they want to. There are very few such people: If there are 2, 3, 4 or 5 of them in Moldova, I would be amazed. Maybe there are more of them, but they don't write. [I6]

Some participants said that today's journalists are young, at the beginning of their careers.

Because of the emergence of a large number of media outlets, experienced journalists have taken management functions, and the demand for reporters has grown so much that people who have very little or no experience at all are employed. [I12]

The level of professionalism has fallen. The effort you need to make is not great when you press "like" and the news is ready. But in general, nothing has changed in the journalist's job, regardless of the emergence of new technology and social networks such as Facebook and others. [FG3 - F1]

The role of a journalist today is largely to adapt to the requirements of the market. Consumers mostly want to see current information and hear as many opinions as possible, and journalists often filter information, process it and give it shape and content.

Today's journalist is a person who filters information because in comparison with 10–15 years ago, you had to run after news. Now there is no need: News comes along and you only have to filter it, sieve it through your knowledge, give it a good background, package it like a news story and give it to the consumer. [I6]

The majority of journalists consider they are free to write as they see best at the moment.

Personally, I consider myself a free journalist because I write and do what I know best. [FG3 - F1]

In two words I can say that today there are strong journalists, there are good journalists, but they are very few. I mean those who have rich experience, who do journalistic investigations, and I really envy their ability to obtain information over the phone or from other sources in order to argue their theories or the issues they cover. [FG2 – F4]

However, the journalist is going through quite a difficult period when there are political interests on the agenda.

From this point of view, the journalistic profession grew in value, unfortunately artificially, but grew because of politicians' interests. [FG1 - M1]

To be good and strong, a journalist should have plenty of will, a strong spirit, rectitude. [FG2 – F3]

As I said, there are journalists who wanted to and few who managed to keep their souls clean and straight. Now in our environment there is a focus on Filat, a focus on Plahotniuc, earlier there was a focus on Voronin. [FG2 – M2]

But there are others, whose material you read and don't know whether to believe or not because you have the impression that they are paid, biased, that they produce at someone's order so as to unjustly denigrate a person. [FG2 - M3]

For a free press, journalists, no matter in what field they specialize, must deliver information according to the standards of quality journalism, the participants said.

To generalize, I think nothing has changed, the profession has remained the same, i.e. you must do your job. [FG1 - M1]

Another challenge for some journalists at present is that they have to adapt very quickly to the advanced technologies that appear day after day in order to be in step with the times.

I struggled. I was told with shock to establish a Facebook account though I didn't want one. My director told me directly that I must be in step with the times, so I had no way out. I understood that at any age we must learn, even at 80. Journalism is like medicine, a liberal profession, and if you are accepted and don't clash with those around you, you can do it, but for that you have to constantly improve. [FG2 - F4]

There is a lot of pressure on journalists who do their jobs honestly. They are forced to defend their craft, even if it sometimes causes them personal problems.

The worst of what is happening in the market is that the profession of journalist is being discredited. There is an artificial war among journalists that unfortunately increases in intensity and is powered by certain interests, and that is very bad. I fear that we will at some point find ourselves in a country where no craft is respected. [FG1 - M1]

Participants in the qualitative study believed that some journalists should have more commitment when they write articles and filter information so that their material is not harmful for teenagers and other segments of the population.

Material can sometimes be harmful to teenagers; journalists should be taught to the extent the media outlet can afford to be fully responsible to the reader who may be a child or a teenager. [FG1 - M4]

I'll say a journalist is irresponsible who sometimes produces material that harms consumers. [I6]

Sometimes, some journalists expect big salaries at the very beginning of their careers, participants said.

When they first come, they think about the material aspect. [FG2 - M1]

One of the first questions they ask is how much they will be paid, not taking into account the fact that they are only starting and have no experience. [I8]

I don't even want to speak about young people; they are like stressed rats in the market wanting a place with more bait. [FG3 – M1]

They are a "fast food" product somehow, because they don't have the patience, don't understand that everything takes time and that first they have to learn to be very good before their incomes will grow. [FG2 – F2]

Another trend among journalists is that they want to work in television.

Everyone wants to be on the screen. [FG2 - F4]

They are passive and secondly, they want everything at once, as much money as possible and quickly onto the screen. Now many are leaving and not thinking about ethics and deontology. There are very few quality journalists; I feel that many have chosen the wrong profession. [I11]

Sometimes, the most wanted journalists in media outlets are men. According to participants, it is because they will not go on maternity leave.

You are glad that a man comes, because he won't go on maternity leave and so on. Women come and go, they marry. [FG2 - M1]

The turnover of journalists at outlets is quite large.

The majority goes to their parents abroad; they don't persevere; they want it all now. [I7]

The turnover of staff is quite big, but you can't really fight it. [I4]

4.5. How Do You See Today's Media Consumer?

Media consumers are hurried, they read little, they prefer watching short videos, and there are just a few who are interested in detailed analyses and documentary reports.

You know, I feel that people no longer read, in principle. [FG2 - F3]

I don't know if we can convince the younger generation to go to the library or to read; we can talk about it, investigate the problem, but we remain in this vicious circle. [FG2 - F2]

Diverse, very diverse; they often prefer reading the headlines. I am now speaking generally, meaning light, quick reading, which doesn't take much time. If the text is two pages or more, that scares them; people think they don't have time to read much, they skip and are not very attentive to details. There is a lot of text available to the consumer. I see text everywhere online. [FG2 - F2]

Sometimes consumers are manipulated and misinformed according to representatives.

In large part, they are manipulated and misinformed. The majority of the population remains subordinated to the interests of politicians and interest groups, especially by television stations with national coverage. [I5]

The average citizen finds it difficult to have an opinion, and so we are where we are. [I12]

Participants believe that the audience dictates what it wants, and media outlets are oriented according to their audiences. Sometimes, consumers should be more demanding and react to material of poor quality, but it doesn't really happen.

I would say it is the degradation not only of journalists but of the audience, too. If in the past the audience demanded quality information and was able to pay for such information, now we practically do not have an audience that would pay for quality information, and consumers who read or consume such information are very few. [FG1 - M3]

Consumers are not very demanding. If in the past a reader was displeased, he would write, go to the party committee, the issue was examined. Now, let me tell you, there is no feedback as it used to be. Consumers absorb information, but there is no backward link. [I2]

The public wants explosive, extraordinary news according to the participants.

Now, the general public is running for or waiting for the extraordinary. [I3]

Everyone wants explosive news. [FG2 – F4]

Media consumers have different preferences in relation to journalistic material. Some of the aspects that identify them as a segment in terms of media consumption are geographical distribution, age, hobbies, language and education among others. A separate type of media consumer in Moldova is those citizens who have gone abroad and have their own consumption preferences. Journalists adapt to consumers and their wishes.

People from Gagauzia and from the north use some types of mass media while those from Chisinau use other types of the media. [FG1 - M1]

They differ in the fact that some consume media in the Russian language and others in Romanian. [FG1 - M1]

Age matters! [FG1 - F1]

Here, people really are more educated, have more opportunities. Chisinau is somehow the "New York" of Moldova, so you can find anything in terms of jobs, the quality of life is better and prices are higher, people make more effort to learn a new profession, and that makes them more competitive in relation to the rest of the country. [FG1 - M3]

Plus mobility. They move a lot, interact with each other here in Chisinau. [FG1 - M1]

I feel that the people who are abroad read online more than those in the country who have much more concrete preferences. [FG1 - M4]

To keep media consumers close and catch their interest, media outlets organize public events, sweepstakes, promotions, concerts, etc. According to the participants, with young readers it is difficult to make them loyal to an outlet, and that is why such attractive activities are needed.

Print media is mainly read by people older than 35 years of age because young people under 30 must be somehow enticed. We try to organize activities, offer gifts, i.e. we want to awaken their interest to buy our magazine. [FG2 - F3]

It is true that it's very hard to capture attention today; it seems to me that our readers today have a very wide choice of information, and I'm not talking about the Internet. So how can you make them interested and draw their attention to your media outlet? [FG2 - F3]

According to another opinion, consumers are bewildered by so many media outlets and find it hard to choose. Participants believe that educational materials are needed that would teach them how to choose the material they consume.

There are very many of them, and this abundance confuses consumers at some point. [FG2 - F2]

Media consumers receive a great deal of information and don't know what to choose, what's best; they have to be very clever, educated, informed. We air some educational shows helping people understand and filter information and whatever else they are offered. [I4]

4.6. What Are the Potential Challenges for Journalists with Respect to Media Consumers?

The main challenge is that journalists might deliver content that is not requested by the media consumer.

The press provides a lot, and there is not much interaction with consumers aside from certain venues, so to speak, where readers can post comments. [FG1 - M4]

Innovation is very good. There are very affordable tools that show you in real time whether your reader is or is not interested in the news story. In principle, it is possible; it depends on the ability and willingness of the journalist to reach a segment of the audience... [FG1 - M1]

To catch and somehow maintain the balance, because it is clear that a news story on pornography or something like that will appear much more attractive. [FG1 - M1]

A problem is that media outlets need to know consumers' needs, otherwise they lose their audiences. [FG3 - M1]

Journalists spreading false news is another challenge according to participants. Experts recommend that consumers be cautious and verify information by consulting different sources.

There are very many media outlets that confuse; consumers should seek information from all sources and then decide which sources they trust and which they do not. [FG1 - M3]

4.7. Needs of media outlets

The main needs of media outlets are:

- investment in new equipment and products;
- qualified personnel to make the products;
- legislative changes that would allow outlets to be sustainable in the market;
- staff training.

Financial stability is the main concern of MOs according to the participants. Lack of money does not allow managers to invest in new media products or equipment.

Money. [FG1 - M1]

Funding. [FG1 - F1]

For all 3 issues - money. [FG1 - M3]

I think the needs of the media, especially of the regional outlets, are first of all financial needs. [I4]

Another aspect, equally important, is the lack of qualified personnel to produce journalistic material of good quality.

Respectively, the thing that impedes us sometimes is the search for professionals in the niche we need. [FG3 - M1]

The most sought-after types of personnel in the media are: sales agents, reporters and web designers.

I, for example, am looking for a sales person. [FG1 - M1]

We had been looking for a good journalist for weeks and couldn't find one. [FG2 - M2]

In sales, it is difficult to find someone good. [FG3 - M1]

It's hard to find a guy who could make your website as you want it and would not ask for a lot of money, as IT services are among the most expensive. [I4]

If you're looking for someone who would make your website really user friendly, it's hard to find a good web designer. [FG3 - M1]

Some participants are of the opinion that a good professional dedicated to a media outlet should be mentored and trained at that outlet. Although there is a risk that one day he/she might go elsewhere, many would still make this investment for lack of an alternative.

Well, if you expect to find someone good, you won't find one quickly, you have to mentor, develop one. [FG2 - F3]

Through work, through ourselves. [FG2 - M2]

A person can become quite good if he/she takes it into his/her head to do it; then, she/he can really manage. [FG3 - F1]

Normally, you understand that the first three months you must invest in staff, teach them your point of view on what an image or the lighting should look like, and so forth. [FG4 - M1]

When you decide to mentor one yourself, you should be aware that investment in people is the most expensive and the most insecure, because at some point they may leave: you taught them and they let you down. [FG3 - M1]

According to the participants, sometimes those who remain in this profession are not the best but the most persistent.

Those who keep working are not the best in their profession but the most resistant to difficult social factors. [FG2 - F4]

Another factor that influences the financial sustainability of media outlets is labor migration both abroad and to other outlets that offer more competitive salaries. Some of the staff leaves to get an education. This is more evident in regional media outlets when it comes to going abroad.

Many have gone to other media outlets, most often to television stations where they get bigger salaries. [FG3 - F1]

Many have also gone to study because young people now are studying in France, Turkey, or other places. [FG2 – F2]

We—the main team—are only 7 people, but we used to be up to 18. Now it is hard, very hard as many of our people have gone abroad. [FG4 - M2]

Another concern for media outlets is continuous training of their personnel. This, participants believe, in large part is driven by the development of information technology.

They need to be trained. With the development of information technologies they may or may not be aware of there is a certain trend. They should get training once a year to keep in step with it I believe. [FG1 - M4]

In terms of the frequency of such training, participants' opinions were divided: Some believed once a year is enough while others said once every two years.

In terms of the duration of a refresher course, the experts believed that it depends on the theme of the course, but opinions here differed too.

Two weeks. [FG1 - F1]

One week is very good. [FG2 – M3]

Refresher courses should be mostly organized by qualified organizations such as the Independent Journalism Center, the Association of Independent Press, foreign experts who will give examples from their experience and, last but not least, the media outlet itself which should conduct regular training for its staff.

The IJC and the AIP are usually the ones who mainly organize quality courses. [FG3 - F1]

I would prefer bringing international experts to training and would ask journalists to come up with examples from their own experiences. [FG1 - M1]

I would like journalists to have knowledge of English or another foreign language so we could listen to and read the original as it is more effective. [FG1 - M3]

Labs, more reports, so they could improve. It hurts no one to have speech lessons as even our most experienced DJs need them because you speak a certain way into the microphone but then you go out on the street and there you find another kind of speech. [FG3 - M1]

A major problem felt by representatives of media outlets is that formal education does not always meet market demand; in most cases students are offered courses that are not relevant.

There's a big discrepancy between what they are told in school and what they have to deal with when they get into an editorial office and realize they don't know anything about some software, saying they didn't learn it or hear about it. [I6]

And they don't work much with texts. I would have liked them to basically take the press and work with texts: Here is how it is done, how it is written, and so on. But the problem is complex ... [FG2 - F2]

I know teachers who can't use the computer. [FG3 - F1]

As far as school is concerned, I agree 100% that there are a lot of staff who are behind in modern knowledge. [FG3 - M1]

I mean, the training of journalists should also change a little; if there used to be ink pots and paper, now it's different; people come with laptops and smartphones to class. [I2]

In particular, television journalists. Now there are even drones and cameras that shoot 360 degrees, and we will come to virtual journalism or some other high-profile journalism we can't even imagine, and then we who do regular journalism we will stay behind, I tell you. [I6]

A solution, according to participants, is for experienced journalists to periodically go to schools and to give practical classes.

How can anyone become a good specialist immediately if everyone is trained relatively identically? Maybe the problem could be solved by people with experience coming to journalism schools to share their experiences with students. You see, the level of training at specialized university departments is the same. [FG2 - F2]

Regarding legislative needs, radio stations find it difficult to broadcast 30% of domestic music as the Broadcast Coordinating Council (BCC) requires. A solution would be for the performers to make an effort and produce tracks that can be connected to the style of the radio station.

Yes, the problem is that since the BCC forced radio stations to air 30% domestic music, performers should also think a little and not produce only wedding songs which they need for their businesses. Before a law is written, there should first be a market analysis. [FG3 - F1]

Here is an example: A law forces radio stations to air 30% domestic music, and the BCC doesn't care how that music sounds. You see, they force you to promote domestic products, 30% minimum. Now the question is: If this 30% weren't required, would music in Moldova develop better? On the one hand, performers would complain they are not aired, but on the other hand, it would push them to work more, I think. [FG3 - M1]

An initiative would be to bring pornography under regulation on some websites.

An example is to block pornography or some websites that could lead to a different interpretation... [FG1 - M1]

Another proposal for amending legislation was related to news about suicide. Here, we can add news related to crime, homicide, etc.

Rules should require us not to deliver news related to suicide. [FG1 - F1]

Rules should prevent media outlets from disseminating news about suicide in the hours when children are not asleep yet. Some outlets even take the liberty of giving the details of how suicide is committed. [I9]

The market needs to be regulated in relation to monopolies because nowadays there is no equity, which leads to unfair competition.

I think our market should be somehow regulated as there are monopolies (...) There should be equity, i.e. you generate this amount of money, you can pay, but there is unfair competition in the market (...) the one who can afford to attract journalists. [FG1 - M2]

Income tax and the value-added tax (VAT) are rather high for media outlets, the participants said.

20% for the media seems too much to me, it should be reduced a little. [FG1 - M1]

The income tax is somewhat all right, but the VAT is absolutely inexplicable. What is VAT in the media?... [FG1 - M4]

Yes... nearly 20% of the income we give to the state, but the media in fact is not a money-generating industry. [FG1 - M1]

I agree with the suggestions of my colleagues in terms of legislation, as I said (...). It could be somehow reduced, taking into account the turnover, i.e. there are several possible solutions (...). Smaller [outlets]

could be somehow stimulated, not from the start but indirectly, through facilities, exemptions, etc. [FG4 - M1]

Another suggestion was to cancel fees for official information.

I would add to legislative issues the cancellation of fees for official information... [FG1 - M3]

They are too large... [I2]

Another problem was regulating retransmissions of Russian media outlets.

Another problem now is that even though there are media products produced in Chisinau according to all requirements, they are overshadowed by programs retransmitted from foreign channels, especially Russian channels. Their popularity is explained by the fact that millions of dollars are invested into these programs, and they air analysis and entertainment shows that Moldovan media outlets cannot afford to produce. In this case, citizens choose whatever catches their eyes—spectacular filming locations and cutting-edge graphics—and with the help of these “weapons” the editors/producers/managers of television or radio stations infiltrate the minds of our citizens manipulating them with propagandistic messages. [I5]

The monopoly of Russian television and press, especially Russian television. This, we can't fight. [FG2 - M2]

You can't be equal with a channel that retransmits a show into which millions were invested and which is aired all over Russia and in Moldova, such as “Vecherny Urgant” or “Vecherny Ogonyok” or something, and then there is you. [FG4 - M1]

Russian press has invaded everything. [FG2 - F3]

On the other hand, the Broadcast Coordinating Council should set clear rules for the retransmission of Russian channels: time, type of programs, educational messages. [I5]

The regulations provided by the media legislation do not always protect media outlets, and sometimes protect other interests.

The Broadcasting Code keeps being modified depending on certain interests. [I14]

Changes are made but not in favor of freedom of the press and expression nor for the benefit of the consumer or for offering correct information to consumers but rather in the interests of authorities and of the parties or oligarchs. [I10]

Another aspect that participants found discriminatory was that regional television stations have the same regulations as those with nationwide outlets.

So, it is unfair and even discriminatory to treat regional television stations like those that have national coverage. [I2]

To subtitle films or news, for example, many more human resources are needed. [I13]

For people with hearing deficiencies, you need a qualified specialist to do the work. [I10]

Another discriminatory aspect, according to participants, was that public stations participate in contests for frequencies equally with private stations.

According to the law, public radio participates equally with other stations in the contest [for frequencies], only proving it has a good product. I believe the BCC should have a bigger role in terms of selection because what they do now is distribute frequencies objectively, or so they say. [FG3 - F1]

Participants believed that the BCC should come up with regulations to ensure media outlets of good quality in the market:

The BCC should set regulations so there could be certain requirements, certain standards in the media, which everyone should abide by. [FG3 - M1]

Solutions should be discussed, because if you want to make media of good quality, you need to impose certain standards, and if you don't comply with standards, sorry... Just as you can't teach in school or do a specific job without the relevant education. [FG4 - M1]

One of the problems is that not all outlets comply with the law, and sometimes, the law is applied selectively.

But not all tracks are in the format of the radio. If I have adult pop and someone comes with a rock track, I can't air it, because it will scare my listeners. It is mainly a problem of the Broadcasting Code. For example, I, as an outlet, am upset that some outlets have no local programming while the BCC says, "You have been working for so long and can't have a longer local program?" OK, we do as we're asked, but what about others? I feel offended that I do and others don't. [FG3 - M1]

Yes, it is exactly what I was talking about, rules that would be equal for all, not favoring only some. [I9]

If you don't punish that outlet, at least be a bit softer with me or something. Because it's not right when you see that I'm doing the thing and you still ask more of me while you're leaving others be. [FG3 - F1]

Some requirements, although the laws seem good, are applied selectively depending on interests; it could be clearly seen during the recent elections. Some television stations were biased, and they were gradually warned, then punished, then they recovered, i.e. there was not a punishment from the start because clearly it was delayed until the last minute, and it was risky to punish or to remove a station from this broadcasting environment as it would have been misunderstood. But it should have been done sooner. [I2]

The law must be mandatory for all, but we see that it is applied to some and not to others. [I9]

One suggestion is that 50% of the content in prime time should be of domestic production.

In prime time, at least 50% must be domestic production, and I trust, I hope that if this draft law gets to be adopted in the second reading, the broadcasting market will change a lot, or at least the participants, actors in this market will have a different attitude to domestic production, to jobs in Moldova. And why not? Maybe we will be able to equal the older players in this market. [FG4 - M1]

The representatives participating believed that journalists are not protected by law.

Journalists are not really protected by law; they can catch a bat on the head or be threatened. [I2]

We even had local journalists on a project, and at one point one of them and his family were threatened, and he asked us to guarantee him protection. I appealed to donors, and they said we shouldn't get too deep, we should maneuver carefully. But then he refused further investigation. [FG2 – F2]

Other needs:

Technical equipment is another need of media outlets, according to the participants.

One of the main needs is technical equipment. [FG1 - M2]

Technical equipment; everything changes very quickly, and the equipment is getting old. [FG1 - M3]

Other problems of media outlets are related to the advertising market which is small, but even the advertising that does exist is directed in a certain way. The price on advertising is not regulated for all outlets.

You can't compare 30 seconds on TV: They make as much as our budget for a week. [FG1 - M1]

Advertising. [FG4 - M2]

Equality in the advertising market, not so much advertising as the right to participate in the income that it makes. [FG4 - M1]

A major problem currently consists in false news and its retransmission, participants said.

At the moment, a large part of our media cannot even be called mass media because they produce false, parasitic news stories that are also retransmitted. [FG4 - M1]

Media outlets do not always act in accordance with their statutes.

If a television station calls itself sports TV, it should deal with sports; if it is a broadly themed channel, it should have broad content. [FG4 - M1]

If it has the statute of television for children, it should make shows and products for children. [FG4 - F1]

4.8. What Would Media Outlets Invest In?

The majority of participants in the study agreed that one of the main aspects the media would invest in is personnel.

In the team, into people. [FG1 - F1]

In personnel. [FG1 - M3]

First of all, I would invest in people; the rest, such as equipment or the office, comes second. I would invest in people although I realize that the press is not profitable. [FG2 - M2]

Of course one should invest in people and salaries as everything starts there since it gives the journalist a sense of security in tomorrow and in his/her pen. [FG2 - F1]

Investment should also be made in personnel. I understand that television means people and equipment, but people come first; they are more important than equipment. I would invest in people going two ways: I would keep investing in the young who like birds grow and then take flight. [I2]

Another aspect of investment is personnel training.

I would invest in the creation of a program of periodic training and into multimedia. [FG1 - M4]

Training. [FG1 - M3]

I would give training to everyone; I would share experiences. I would look for experience sharing in the country and abroad since experience sharing means a lot for a media outlet. []

I would also give funds for team building because it is very important to have a team, a community in which everyone feels good like in a family, otherwise everyone minds their own business only. [FG2 - F2]

A continuing concern for media outlets, according to the participants, is equipment. While in the past the problem was that outlets sometimes had a deficit of equipment, now the problem is that information technology develops by the day, and equipment gets outdated very quickly. To face the challenge, you need to be in step with advanced technologies continuously investing in new, advanced equipment.

Yes, into equipment, too. [FG1 - F1]

I, first of all, into equipment. [FG1 - M3]

Into equipment. [FG2 - M2]

Equipment, i.e. cameras, lights are necessary; you can't make quality television without all that. [I2]

A long-lasting investment, in the view of the representatives, especially for print media, is a mini printing office which would reduce the costs of printing. They believe it could be possible through cooperation among several outlets.

A printing line to print newspapers, magazines, booklets, different materials. [I9]

If I had money, I would invest in buying a printing line. [FG2 - M3]

Some participants wanted a stage that would offer them different possibilities.

I dream about a beautiful stage with an LED display with lots of lights where children would feel like stars when they come to us. [FG4 - M1]

Another investment participants would like is training courses for managers.

I would invest in marketing and management because I see I'm not doing what I should. [I12]

Developing a new project or product for the company was another investment mentioned by participants.

Development of a new project. We have a lot of projects, but we can't launch them. [FG1 - M2]

I would offer even free subscriptions, investing in readers. [FG2 - M2]

A marketing department that would deal with sales was another opportunity noted by participants.

I would first of all invest in a marketing department that needs to be developed. For everyone to have good salaries, we need good sales, visibility, and so on. [FG2 - F2]

Conclusions

Overall situation

The census of media outlets identified 473 outlets; their actual number would be greater if it included all scientific journals, some online portals not covered by the research, blogs, vlogs and some profiles on social networks that generate a greater media impact than many of the traditional outlets. Out of these outlets, 181 were online portals, including 86 independent portals and 95 portals affiliated to a traditional media outlet (print, TV, or radio). The number of newspapers was still relatively large at 90 as was the number of magazines at 77; however, the majority were local or scientific publications with a limited circulation and/or frequency of publication. The number of television stations was 63 and of radio stations was 55; many of them were local.

There was a very big concentration of MOs in the capital city at 76.7% of the total (Figure 2). In the regions, the most widespread MOs were newspapers and television and radio stations meaning that online outlets were very concentrated (85%) in Chisinau (Figure 3). Most MOs (70%) belong to local private companies, about 14% were non-commercial and 12% belong to public institutions. Only 2% of MOs were financed with foreign capital (Figure 7). In 2017, nearly half of the MOs worked in rented offices while 40% had their own premises (Figure 8).

Romanian was the main language for 77% of MOs while Russian was for 21% (Figure 9). At the same time, 86.1% of MOs produced at least some content in Romanian and 50.7% in Russian (Figure 10). As for other languages, 10.2% had some content in English, 3% in Gagauz, and 2.1% in French. The outlets in the census produced content in nine different languages (Table 1).

Only 26% of MOs were profitable, while 38% merely stayed “afloat” meaning they only covered their costs with their revenues. For 36% of the outlets the situation was more difficult including 16% of outlets whose situation was critical as they could not cover their costs from their revenues (Figure 11).

The qualitative study (Section 4) revealed that there is a perception of rapidly developing media in Moldova and that it is related to the overall socio-economic situation in the country. At the same time, media representatives saw the media divided according to political criteria: independent and directly or indirectly affiliated to a party or to a politician. The significant growth in the number of media outlets in recent years has created enormous personnel pressure because new MOs need more and more journalists and specialists. Thus, journalists work at a hectic pace given the large number of events to cover and the fact that many outlets did not have the financial possibility to employ more reporters or specialists. Small town journalists tend to be wanted by television stations in Chisinau which reduces the human and professional potential of local outlets.

Consumers' behavior has also changed: Now, they want quick access to information and do not spend much time reading/watching news. Thus, online media have developed quickly, and many journalists have migrated from print media, television, and radio to the Internet. At the same time, the majority of MOs has created online content in order to be in line with consumers' needs. It is increasingly difficult for MOs to catch

the attention of information consumers, so they organize public events, sweepstakes, promotions, concerts and the like though few outlets can afford active promotions.

Problems and needs

The main problems that Moldovan media face today are lack of financial resources (46%); financial and/or political dependence of media outlets (24%) and lack of qualified personnel (23%). Other important problems are lack of media freedom, unfair competition, unfair advertising placement and problems with access to information (Figure 14). Grouped into broader factors, the financial/material needs of MOs prevail; they are common for 70% of outlets followed by professional needs (39%). Only one fifth of respondents mentioned they have legislative needs or problems (Figure 15). During the interviews, the majority of respondents confused the notion of need with that of a problem, considering the solving of a problem as a need.

Among the outlets that have financial problems, about two thirds need money and just over one fourth have problems with paying salaries to employees. A little under one third mentioned that their financial/material needs are mainly related to the need to buy new equipment (Figure 16). In addition to the needs and problems common to a large number of MOs, there were particular needs/problems: for newspapers and magazines it is the high cost of printing while for television and radio stations it is insufficient advertising.

From a professional point of view, the biggest problem of MOs is the lack of competent employees (58%) and the poor training of personnel (15%) (Figure 17). Legislative problems were diverse and were related to the type of the media rather than to the general need to amend laws referring to all media. Specifically, respondents want the Broadcasting Code to be amended, improved access to information and improved legislation to encourage the development of the press, including with support from the state (Figure 18).

Solutions

Moldovan media seek solutions to financial problems first of all in attracting grants and funding and only second in the developing and increasing revenue based on advertising. Other solutions suggested were financial support from local public authorities, including through public-private partnerships and the development of new projects (Figure 20). Solutions for professional problems addressed upgrading personnel by participating in short-term training and in universities courses before employment in MOs among others (Figure 21).

Training for Media Outlets

The study on needs identified training as important. While 75% of managers and administrators, 74% of editors and 52% of reporters had participated in some sort of training at some point, directors, technical personnel, designers, camera operators and advertising agents were the least likely to have participated at 26% or fewer (Figure 22).

Annex. Segmentation Tables for the Survey on the Needs of Mass Media

Table A1. Structure of the Sample

Categories		N	%
Type	Online portals	59	29.5
	Magazines	30	15.0
	Newspapers	47	23.5
	TV	34	17.0
	Radio	25	12.5
	Agencies	5	2.5
Size (no. of employees)	0-4	41	20.5
	5-9	59	29.5
	10+	68	34.0
	NA	32	16.0
Region	Chisinau	141	70.5
	Rest of the country	59	29.5
Year of establishment	Before 2000	59	29.5
	2001–2010	64	32.0
	2011 and later	55	27.5
	NA	22	11.0
Form of ownership	Private	52	26.0
	Public	148	74.0
Total		200	100.0

Table B1. On a scale of 1 to 10, where 1 means "very little" and 10 means "very much", please rate to what extent you consider the following necessary/useful (%)

	Very little <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Very much										99
a. Mutual knowledge of journalists from various regions of the Republic of Moldova?	0.0	1.0	5.5	4.5	14.0	13.0	13.5	19.0	4.5	23.5	1.5
b. Better collaboration between journalists from various regions of the Republic of Moldova?	1.0	0.5	12.5	5.0	10.5	8.5	14.5	15.5	7.5	23.5	1.0
c. Teamwork in production of materials for the media?	2.0	0.0	11.5	8.5	15.5	4.5	12.0	21.5	7.5	15.5	1.5
d. Knowledge of journalistic practices from other countries?	0.0	0.0	4.0	5.0	5.0	6.5	14.0	16.0	13.5	34.0	2.0
e. Improving journalistic style?	1.5	0.0	2.0	1.5	6.0	9.0	15.5	20.5	15.5	27.0	1.5
f. As frequent as possible production of journalistic investigations?	0.0	0.5	0.0	4.5	5.5	9.5	10.0	22.5	13.0	33.0	1.5
g. As frequent as possible coverage of diverse topics?	0.5	0.0	2.0	5.0	8.0	7.0	19.5	21.5	9.5	25.0	2.0
h. Media coverage of relations between different ethnic groups in the Republic of Moldova?	0.5	0.0	4.5	9.0	10.5	10.5	18.5	16.5	10.5	17.5	2.0

Table B2. On a scale of 1 to 10, where 1 means "very little" and 10 means "very much", please rate to what extent you consider mutual knowledge of journalists from various regions of Moldova necessary/useful. (%)

Categories		Values 1-3	Values 4-7	Values 8-10	DK/NA
Type	Online portals	8.5	37.3	50.8	8.5
	Magazines	3.3	50.0	46.7	3.3
	Newspapers	6.4	48.9	44.7	6.4
	TV	5.9	35.3	55.9	5.9
	Radio	4.0	68.0	28.0	4.0
	Agencies	20.0	20.0	60.0	20.0
Size (no. of employees)	0-4	9.8	43.9	43.9	9.8
	5-9	6.8	44.1	49.2	6.8
	10+	5.9	42.6	48.5	5.9
	NA	3.1	53.1	43.8	3.1
Region	Chisinau	6.4	51.1	41.1	6.4
	Rest of the country	6.8	30.5	61.0	6.8
Year of establishment	Before 2000	3.4	42.4	50.8	3.4
	2001-2010	6.2	51.6	42.2	6.2
	2011 and later	9.1	40.0	49.1	9.1
	NA	9.1	45.5	45.5	9.1
Form of ownership	Private	5.8	46.2	46.2	5.8
	Public	8.5	37.3	50.8	8.5
Total		6.8	44.6	47.3	6.8

Table B3. On a scale of 1 to 10, where 1 means "very little" and 10 means "very much", please rate to what extent you consider better collaboration between journalists from various regions of Moldova necessary. (%)

Categories		Values 1-3	Values 4-7	Values 8-10	DK/NA
Type	Online portals	11.9	39.0	47.5	1.7
	Magazines	10.0	46.7	43.3	0.0
	Newspapers	17.0	38.3	44.7	0.0
	TV	14.7	23.5	58.8	2.9
	Radio	16.0	48.0	36.0	0.0
	Agencies	20.0	40.0	40.0	0.0
Size (no. of employees)	0-4	19.5	43.9	34.1	2.4
	5-9	8.5	39.0	52.5	0.0
	10+	17.6	35.3	45.6	1.5
	NA	9.4	37.5	53.1	0.0
Region	Chisinau	17.0	42.6	39.7	0.7
	Rest of the country	6.8	28.8	62.7	1.7
Year of establishment	Before 2000	10.2	37.3	50.8	1.7
	2001-2010	14.1	43.8	42.2	0.0
	2011 and later	18.2	32.7	47.3	1.8
	NA	13.6	40.9	45.5	0.0
Form of ownership	Private	13.5	36.5	50.0	0.0
	Public	11.9	39.0	47.5	1.7
Total		14.2	39.2	45.3	1.4

Table B4. On a scale of 1 to 10, where 1 means "very little" and 10 means "very much", please rate to what extent you consider teamwork necessary in the production of materials for the media. (%)

Categories		Values 1-3	Values 4-7	Values 8-10	DK/NA
Type	Online portals	18.6	39.0	40.7	1.7
	Magazines	13.3	43.3	40.0	3.3
	Newspapers	14.9	48.9	36.2	0.0
	TV	5.9	26.5	64.7	2.9
	Radio	12.0	40.0	48.0	0.0
	Agencies	0.0	60.0	40.0	0.0
Size (no. of employees)	0-4	19.5	51.2	26.8	2.4
	5-9	8.5	44.1	47.5	0.0
	10+	13.2	36.8	47.1	2.9
	NA	15.6	28.1	56.2	0.0
Region	Chisinau municipality	16.3	41.1	41.1	1.4
	Rest of the country	6.8	39.0	52.5	1.7
Year of establishment	Before 2000	6.8	40.7	50.8	1.7
	2001-2010	18.8	42.2	37.5	1.6
	2011 and later	14.5	38.2	45.5	1.8
	NA	13.6	40.9	45.5	0.0
Form of ownership	Private	9.6	51.9	36.5	1.9
	Public	18.6	39.0	40.7	1.7
Total		14.9	36.5	47.3	1.4

Table B5. On a scale of 1 to 10, where 1 means "very little" and 10 means "very much", please rate to what extent you consider it necessary to know journalistic practices in other countries. (%)

Categories		Values 1-3	Values 4-7	Values 8-10	DK/NA
Type	Online portals	6.8	23.7	67.8	1.7
	Magazines	0.0	40.0	60.0	0.0
	Newspapers	0.0	44.7	53.2	2.1
	TV	5.9	23.5	67.6	2.9
	Radio	0.0	24.0	72.0	4.0
	Agencies	40.0	0.0	60.0	0.0
Size (no. of employees)	0-4	0.0	43.9	53.7	2.4
	5-9	1.7	30.5	66.1	1.7
	10+	5.9	30.9	60.3	2.9
	NA	9.4	12.5	78.1	0.0
Region	Chisinau municipality	5.7	29.1	63.1	2.1
	Rest of the country	0.0	33.9	64.4	1.7
Year of establishment	Before 2000	0.0	33.9	62.7	3.4
	2001-2010	7.8	32.8	57.8	1.6
	2011 and later	1.8	27.3	69.1	1.8
	NA	9.1	22.7	68.2	0.0
Form of ownership	Private	0.0	32.7	67.3	0.0
	Public	6.8	23.7	67.8	1.7
Total		5.4	29.7	62.2	2.7

Table B6. On a scale of 1 to 10, where 1 means "very little" and 10 means "very much", please rate to what extent you consider it necessary to improve your journalistic style. (%)

Categories		Values 1-3	Values 4-7	Values 8-10	DK/NA
Type	Online portals	6.8	32.2	59.3	1.7
	Magazines	0.0	26.7	73.3	0.0
	Newspapers	2.1	36.2	61.7	0.0
	TV	2.9	26.5	67.6	2.9
	Radio	0.0	36.0	60.0	4.0
	Agencies	20.0	40.0	40.0	0.0
Size (no. of employees)	0-4	2.4	36.6	58.5	2.4
	5-9	5.1	30.5	62.7	1.7
	10+	4.4	33.8	60.3	1.5
	NA	0.0	25.0	75.0	0.0
Region	Chisinau municipality	2.8	33.3	62.4	1.4
	Rest of the country	5.1	28.8	64.4	1.7
Year of establishment	Before 2000	1.7	27.1	69.5	1.7
	2001-2010	4.7	34.4	59.4	1.6
	2011 and later	3.6	32.7	61.8	1.8
	NA	4.5	36.4	59.1	0.0
Form of ownership	Private	0.0	34.6	65.4	0.0
	Public	6.8	32.2	59.3	1.7
Total		4.7	31.1	62.2	2.0

Table B7. On a scale of 1 to 10, where 1 means "very little" and 10 means "very much", please rate to what extent you consider it necessary to frequently produce journalistic investigations. (%)

Categories		Values 1-3	Values 4-7	Values 8-10	DK/NA
Type	Online portals	1.7	27.1	69.5	1.7
	Magazines	0.0	40.0	56.7	3.3
	Newspapers	0.0	34.0	66.0	0.0
	TV	0.0	20.6	76.5	2.9
	Radio	0.0	24.0	76.0	0.0
	Agencies	0.0	40.0	60.0	0.0
Size (no. of employees)	0-4	0.0	29.3	68.3	2.4
	5-9	0.0	30.5	69.5	0.0
	10+	1.5	32.4	63.2	2.9
	NA	0.0	21.9	78.1	0.0
Region	Chisinau municipality	0.7	34.0	63.8	1.4
	Rest of the country	0.0	18.6	79.7	1.7
Year of establishment	Before 2000	0.0	23.7	74.6	1.7
	2001-2010	1.6	37.5	59.4	1.6
	2011 and later	0.0	27.3	70.9	1.8
	NA	0.0	27.3	72.7	0.0
Form of ownership	Private	0.0	30.8	67.3	1.9
	Public	1.7	27.1	69.5	1.7
Total		0.7	29.1	68.9	1.4

Table B8. On a scale of 1 to 10, where 1 means "very little" and 10 means "very much", please rate to what extent you consider it necessary to frequently cover topics of diversity. (%)

Categories		Values 1-3	Values 4-7	Values 8-10	DK/NA
Type	Online portals	3.4	39.0	54.2	3.4
	Magazines	0.0	36.7	60.0	3.3
	Newspapers	4.3	42.6	53.2	0.0
	TV	0.0	38.2	58.8	2.9
	Radio	4.0	36.0	60.0	0.0
	Agencies	0.0	60.0	40.0	0.0
Size (no. of employees)	0–	4.9	43.9	46.3	4.9
	5-9	0.0	42.4	57.6	0.0
	10+	4.4	30.9	61.8	2.9
	NA	0.0	46.9	53.1	0.0
Region	Chisinau municipality	2.8	41.8	53.2	2.1
	Rest of the country	1.7	33.9	62.7	1.7
Year of establishment	Before 2000	3.4	30.5	64.4	1.7
	2001–2010	3.1	43.8	51.6	1.6
	2011 and later	1.8	43.6	50.9	3.6
	NA	0.0	40.9	59.1	0.0
Form of ownership	Private	3.8	36.5	57.7	1.9
	Public	3.4	39.0	54.2	3.4
Total		2.0	40.5	55.4	2.0

Table B9. On a scale of 1 to 10, where 1 means "very little" and 10 means "very much", please rate to what extent you consider it necessary to cover in the media the relationships between various ethnic groups in Moldova. (%)

Categories		Values 1-3	Values 4-7	Values 8-10	DK/NA
Type	Online portals	3.4	45.8	49.2	1.7
	Magazines	3.3	40.0	53.3	3.3
	Newspapers	10.6	51.1	38.3	0.0
	TV	0.0	50.0	47.1	2.9
	Radio	8.0	56.0	32.0	4.0
	Agencies	0.0	60.0	40.0	0.0
Size (no. of employees)	0–4	14.6	39.0	43.9	2.4
	5-9	3.4	54.2	42.4	0.0
	10+	2.9	45.6	48.5	2.9
	NA	0.0	56.2	40.6	3.1
Region	Chisinau municipality	5.0	50.4	43.3	1.4
	Rest of the country	5.1	44.1	47.5	3.4
Year of establishment	Before 2000	5.1	42.4	50.8	1.7
	2001–2010	6.2	51.6	40.6	1.6
	2011 and later	5.5	49.1	43.6	1.8
	NA	0.0	54.5	40.9	4.5
Form of ownership	Private	7.7	40.4	50.0	1.9
	Public	3.4	45.8	49.2	1.7
Total		4.1	51.4	42.6	2.0