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MEDIA SURVEY REPORT: MOLDOVA



Audience Analysis & Market Profile

September–October 2008

Media Report • 3669/09

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Project Manager: Mark Rhodes

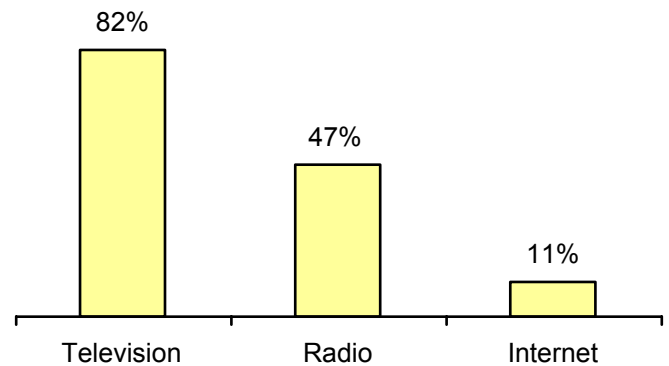
This report, prepared for OSC by InterMedia, presents results of an InterMedia national survey of adults (15 and older) in Moldova (excluding Transnistria and Bender. InterMedia commissioned IMAS, Inc., which conducted 2,011 interviews from 1 September to 6 October 2008. Given a sample of this size, the range of error with a 95 percent confidence interval would be $\pm 2.13\%$.

The data presented in this paper has been funded through the U.S. Broadcasting Board of Governors (BBG) International Audience Research Project and is provided through agreement with the BBG.



- Reporters Without Borders' 2008 Press Freedom Index ranks Moldova 98th, a significant drop from its 2007 spot (81). The year was characterized by continued attempts by the government to control the media and by increased harassment of journalists and media organizations critical of the government. The problem is less the legal framework, which is generally adequate, than it is inconsistent implementation. Pro-government media receive preferential treatment. In several instances in 2007 and 2008, journalists from more critical organizations were hindered from attending or covering events. More recently, the entry of Romanian journalists into Moldova to cover protests after the 5 April 2009 elections was blocked.

Yesterday Media Use in Moldova (percent of adults using)



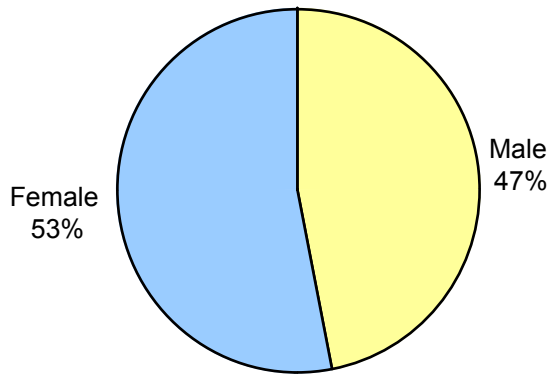
Base: n = 2,011 (adults 15 and older) in Moldova

- Opposition media have accused the regulatory body, the Broadcasting Coordinating Council (BCC), of political partisanship. They argue that the allocation of radio and TV frequencies in May 2008 was done in closed-door proceedings and favored pro-government media outlets. Observers argue that BCC's political partisanship stands in the way of expanded coverage by independent media outlets such as ProTV and Vocea Basarabiei, which are unable to obtain additional local broadcasting licenses.
- According to the latest information available on the BCC website, there are 26 terrestrial TV stations, six satellite channels and 162 cable stations licensed, as well as 44 radio stations. Many of these media outlets—either Moldovan- or Russian-based—broadcast in Russian.
- The government routinely harasses and intimidates independent media. Partisanship and self-censorship in both public and private media are commonplace. Investigative journalism is rare; many reporters embrace a protocol-style of covering events. Bribery of journalists has been reported. The level of professionalism is low; biased reporting is commonplace and use of multiple sources is rare.
- Most media outlets are not profitable, not least due to a small advertising market. Private media are hence not run with return on investment as a primary objective, but with the goal of buying influence and using the outlets as mouthpieces for their owners.
- The bulk of radio and TV news is based on agency feeds. Few broadcasters produce their own news programming. Channels with their own news programming include Pro TV and Moldova 1; Vocea Basarabiei; and the Russian channels Prime TV/ORT and NIT.
- Teleradio Moldova has failed to transform itself from a state organ into a public broadcaster. Teleradio Moldova and the pro-government private station NIT are the only TV stations with nationwide coverage. However, Teleradio Moldova does distinguish itself by being exclusive in bringing live video reports from remote areas in Moldova. Generally, reporting is largely centered on the capital; there are few stories from rural areas.

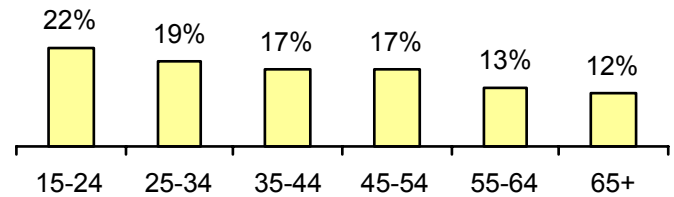
- Due to economic and infrastructure problems, access to multiple news sources remains out of reach for many, especially the rural population. In parts of the country, Teleradio Moldova has a monopoly; cable television remains limited in villages although it is on the rise nationwide, and radio coverage is spotty. Domestic broadcasters' low technical standards and outdated equipment interfere with broadcast quality. Unlike domestic channels, Russian and Romanian programming available in Moldova is of much better quality and is produced with superior technical standards.



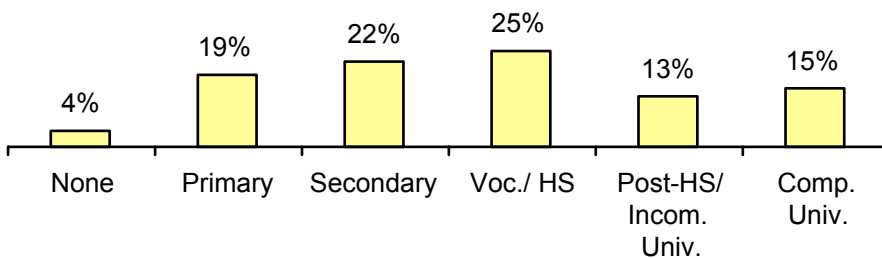
Sex



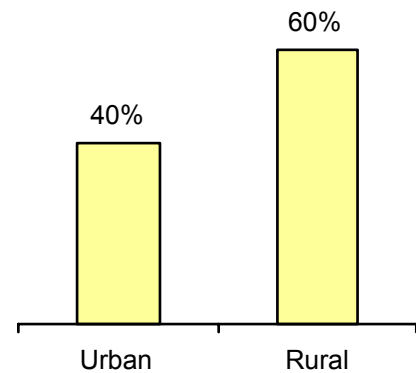
Age



Education



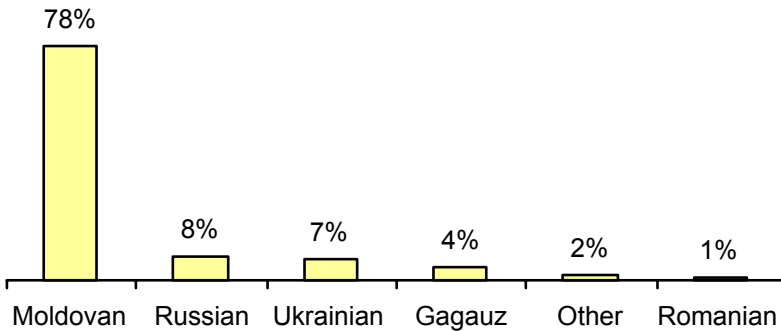
Urban/Rural



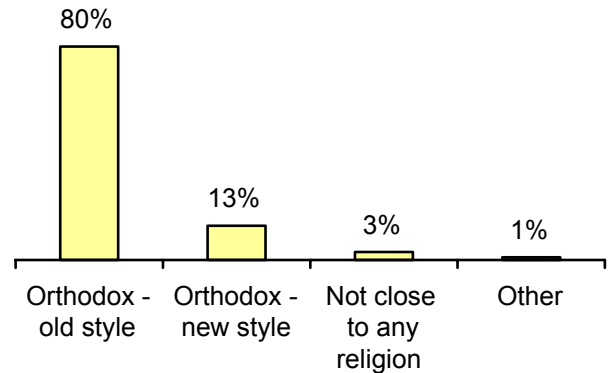
Base: n = 2,011 (adults 15 and older) in Moldova

- The sample is relatively young, with four in 10 (41 percent) 34 or younger. Respondents are also relatively well educated, with more than one-half (53 percent) having completed secondary school.

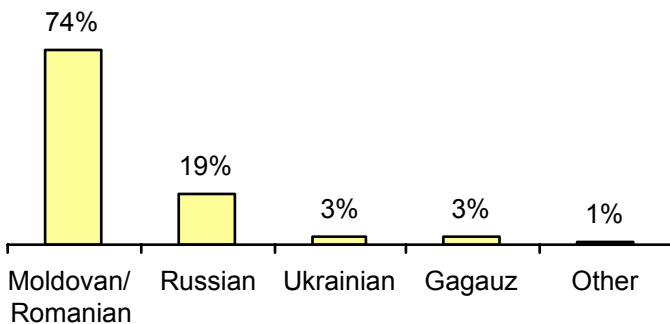
Nationality



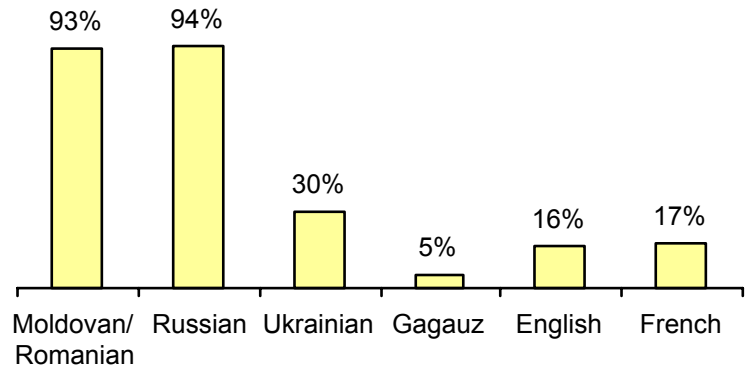
Religion



Language Spoken at Home



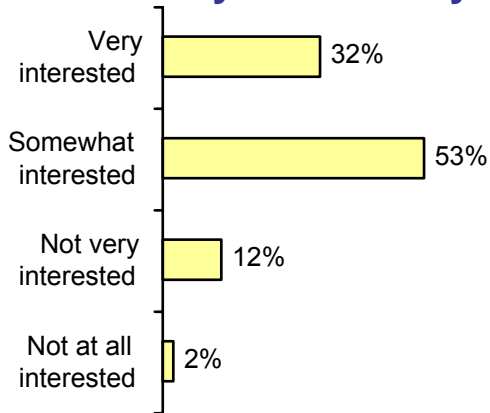
Language Knowledge



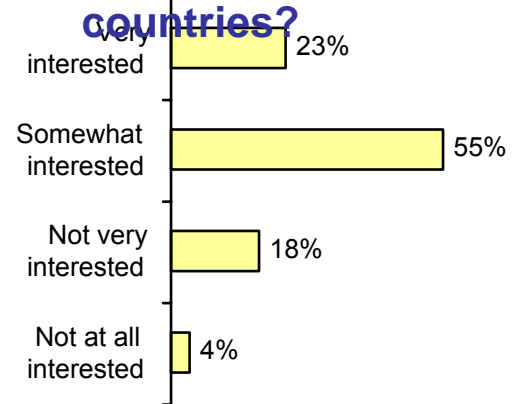
Base: n = 2,011 (adults 15 and older) in Moldova

- Most people in Moldova speak Moldovan at home and are Orthodox (most are old-style Orthodox). Most Moldovans are bilingual; they are fluent in both Moldovan and Russian. With the exception of Ukrainian, other languages are much less widely known.

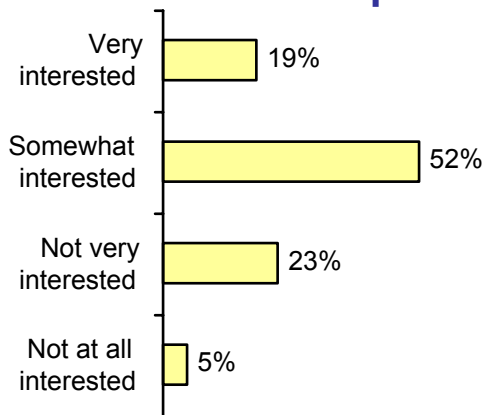
How interested are you in news about your country?



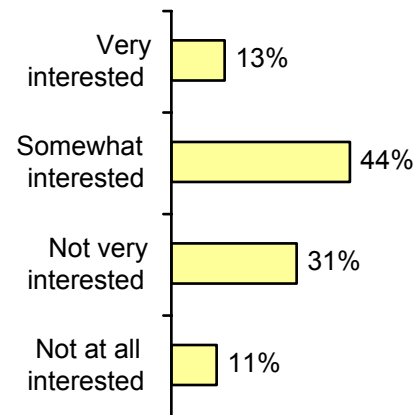
How interested are you in news about neighboring countries?



How interested are you in news about Europe?



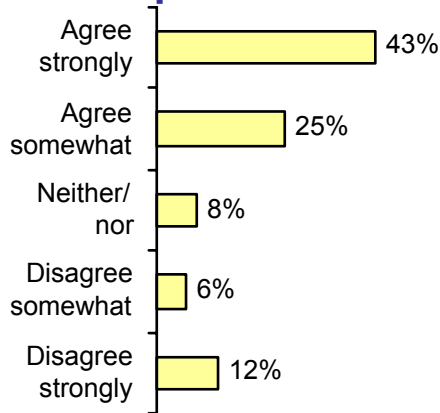
How interested are you in news about the United States?



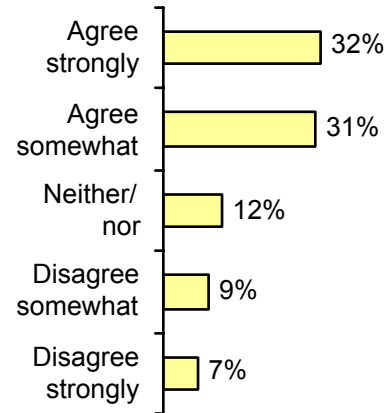
Base: n = 2,011 (adults 15 and older) in Moldova

- Interest in current events is high, with 78 percent of respondents either “somewhat” or “very interested” in staying informed about current events. This is an increase from levels recorded in 2007 and may be linked to widely covered events of interest to Moldovans, such as the Georgian crisis, the recognition by Russia of the separatist regions of Abkhazia and South Ossetia (where the situation resembles the problems in Moldova’s own break-away region of Transnistria) and the elections of 2009.
- Eighty-five percent are interested in news about Moldova (up from 75 percent in 2007), 78 percent are interested in news about neighboring countries (up from 68 percent), and 71 percent are interested in news from Europe. Interest in news from the United States also increased to 57 percent from 45 percent.

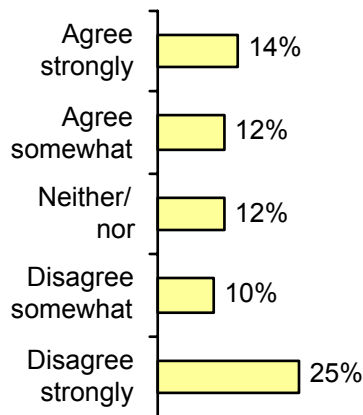
Moldova should join the European Union?



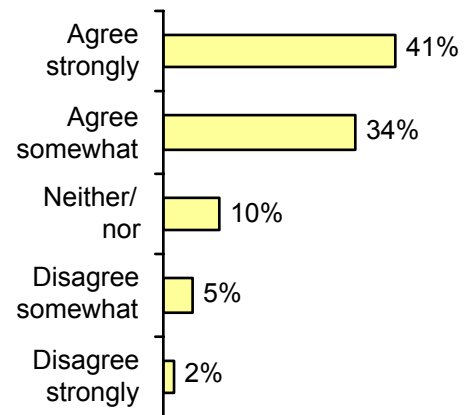
Moldova should seek closer relations with Romania?



Moldova should join NATO?



Moldova should seek closer relations with Russia?

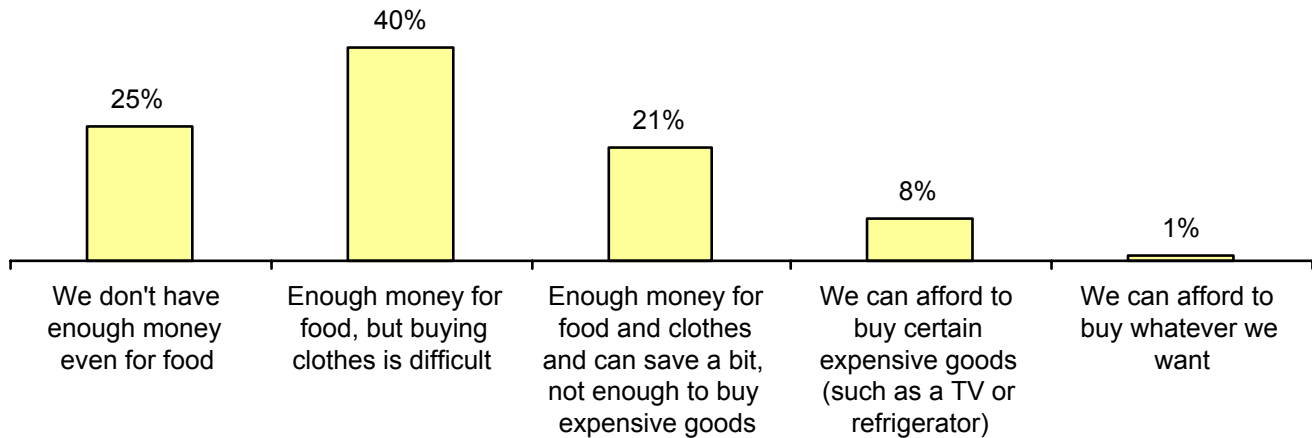


Base: n = 2,011 (adults 15 and older) in Moldova

- As in the previous survey, close to two-thirds (68 percent) are in favor of joining the European Union. Those in favor of joining NATO are far fewer (26 percent, up slightly from the 22 percent recorded in 2007).
- Many Moldovans feel their country should seek closer relations with Romania and Russia, with a tendency to favor Russia. Three-quarters (75 percent) are in favor of seeking closer relations with Russia; 63 percent agree Moldova should seek closer relations with Romania.
- Only 24 percent are in favor of leaving the CIS.



Income



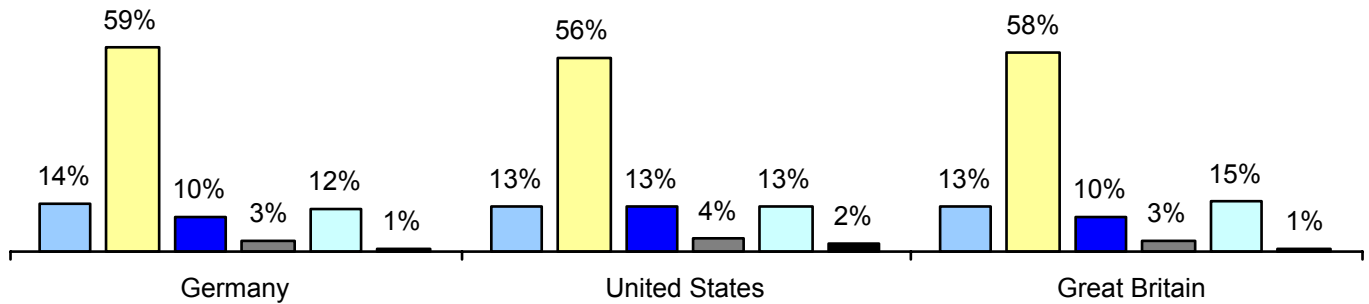
Base: n = 2,011 (adults 15 and older) in Moldova

- The majority of Moldovans feel they are just getting by economically, with two-thirds claiming to have only enough money to buy food or not having enough even for that. Another 21 percent say they can afford the essentials but have little or nothing left over for extras. Fewer than one in 10 say they can afford any luxuries.

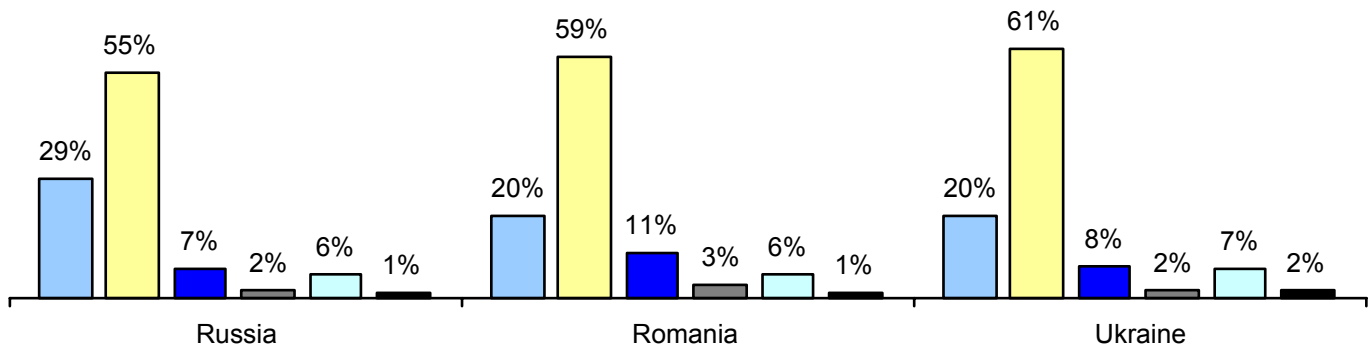


How favorably inclined are you toward the following countries?

Very favorably Somewhat favorably Neither/nor Somewhat unfavorably Very unfavorably DK/NS



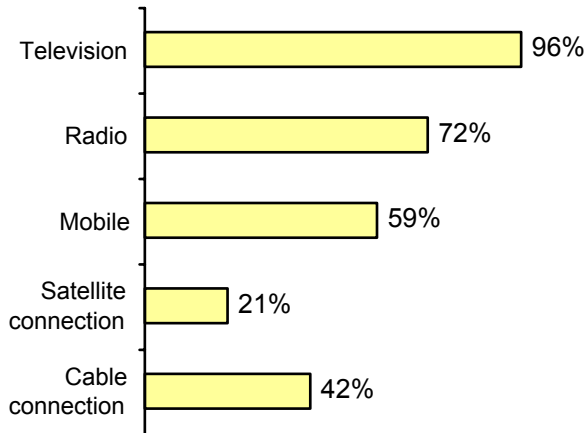
Very favorably Somewhat favorably Neither/nor Somewhat unfavorably Very unfavorably DK/NS



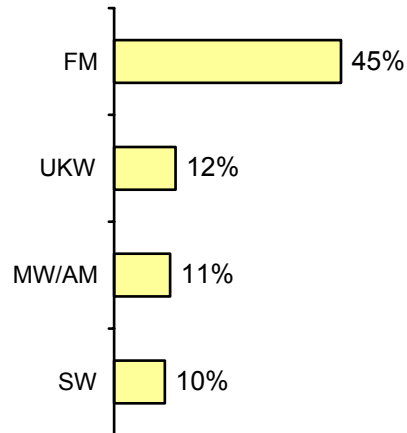
Base: n = 2,011 (adults 15 and older) in Moldova

- Four out of five Moldovans (84 percent) are favorably inclined toward Russia. In comparison, 69 percent are favorably inclined toward the United States.
- There has been a slight decline in those who want to see Transnistria reintegrated and placed under Moldovan law. In 2007, 66 percent agreed with such a statement; now the figure is at 61 percent. Qualitative research indicates the lack of progress on the issue leaves some people without hope of seeing Transnistria under Moldovan control again.

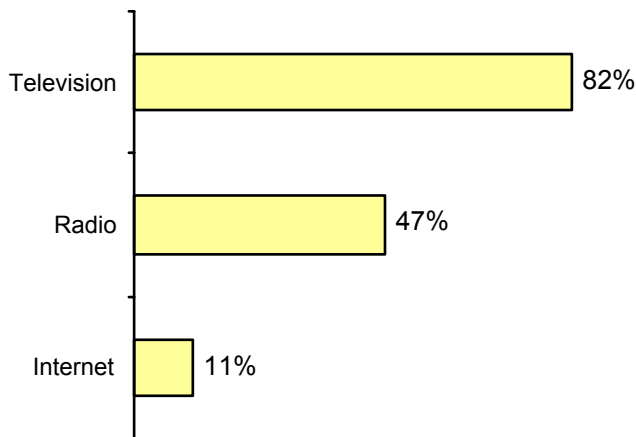
Ownership



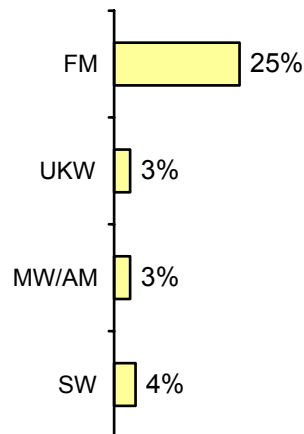
Access to Waveband



“Yesterday” Use



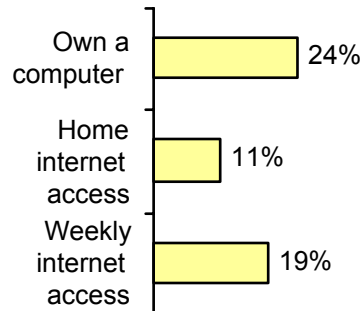
“Yesterday” Waveband Use



Base: n = 2,011 (adults 15 and older) in Moldova

- Television ownership is nearly universal. Radio ownership, on the other hand, declined from 77 percent in 2007. In contrast, mobile telephone ownership has gained substantially (from 45 percent in 2007) and cable access has grown as well (from 36 percent in 2007). Anecdotal evidence suggests that Moldovans spend remittances from migrant family members on purchasing expensive TV sets.
- “Yesterday” television viewing has increased from 70 percent in 2005; “yesterday” radio listening remained the same. “Yesterday” internet use increased from 3 percent in 2005 to 11 percent in 2008.

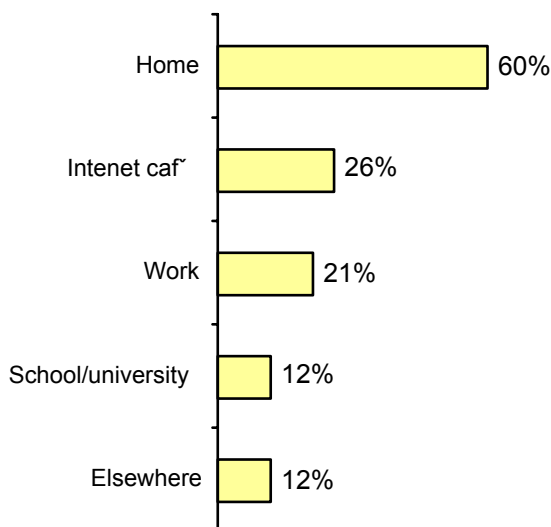
Computer Ownership/Internet Access and Use



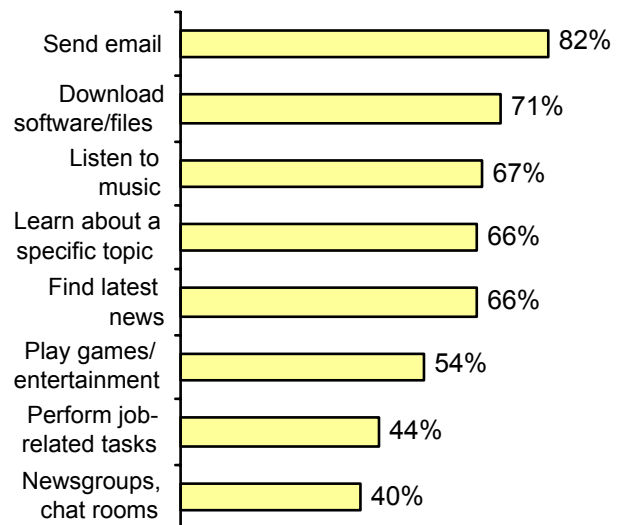
Base: n = 2,011 (adults 15 and older) in Moldova

Internet Activity Among Users

Where most often used?



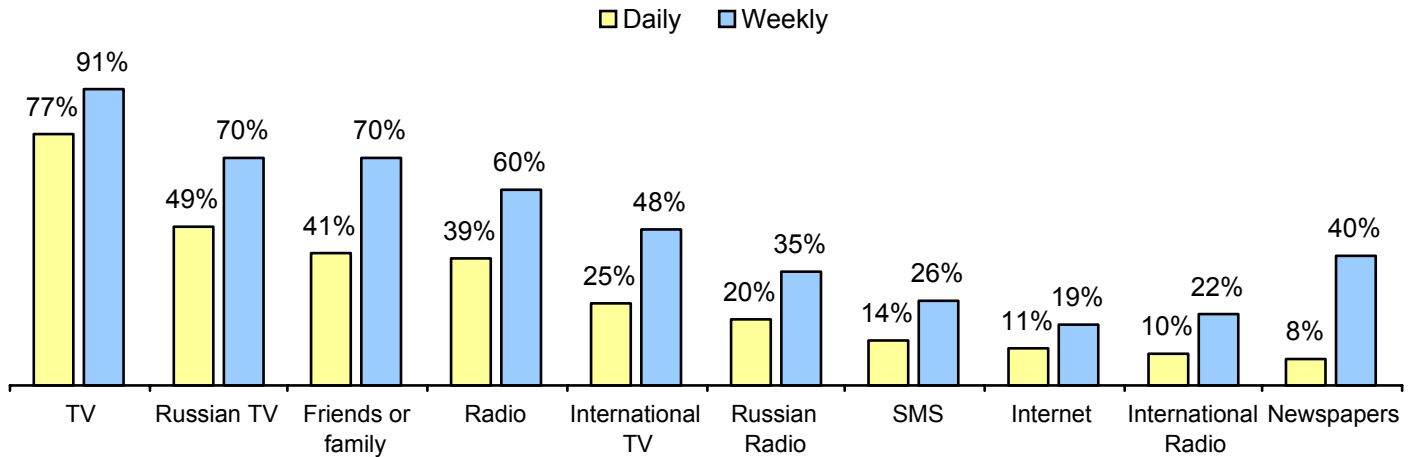
Which activities used in last four weeks?



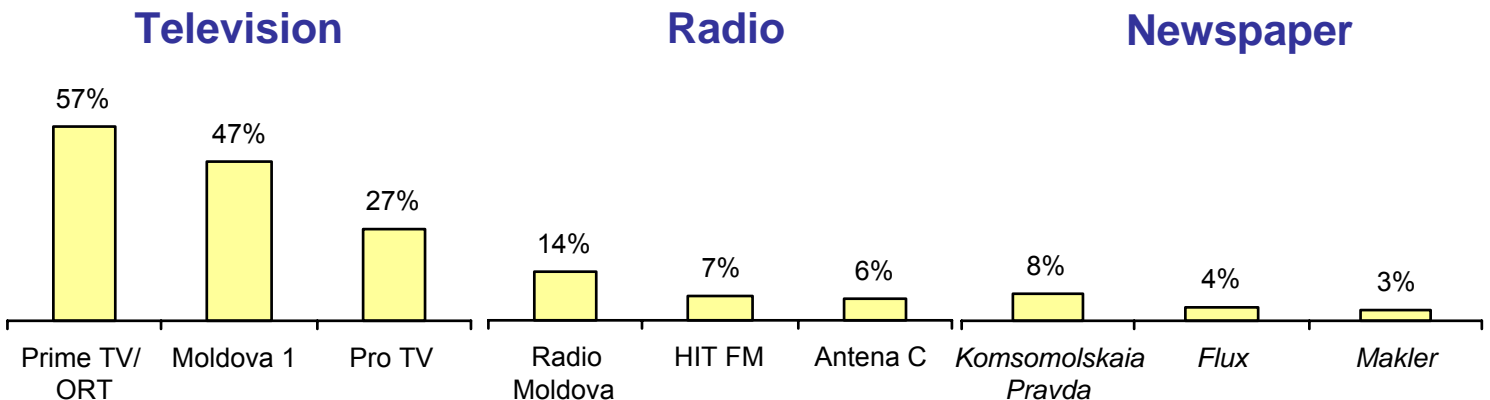
Base: n = 380 annual internet users (adults 15 and older) in Moldova

- Computer ownership has increased significantly in recent years, climbing from 7 percent in 2005 to 24 percent in 2008. Home internet access has also increased, and now stands at 60 percent.
- Sending email remains the most popular activity, followed by downloading files and software, listening to music or conducting research. Among “last-week” users with home access, 66 percent have some form of dial-up connection, 24 percent have broadband and 3 percent report satellite access. Nineteen percent state they use their cell phones for internet access. 3G services have been launched in the past year and cell phone data service prices have dropped in line with increased user rates.

How often do you use the following sources to get news about current events?



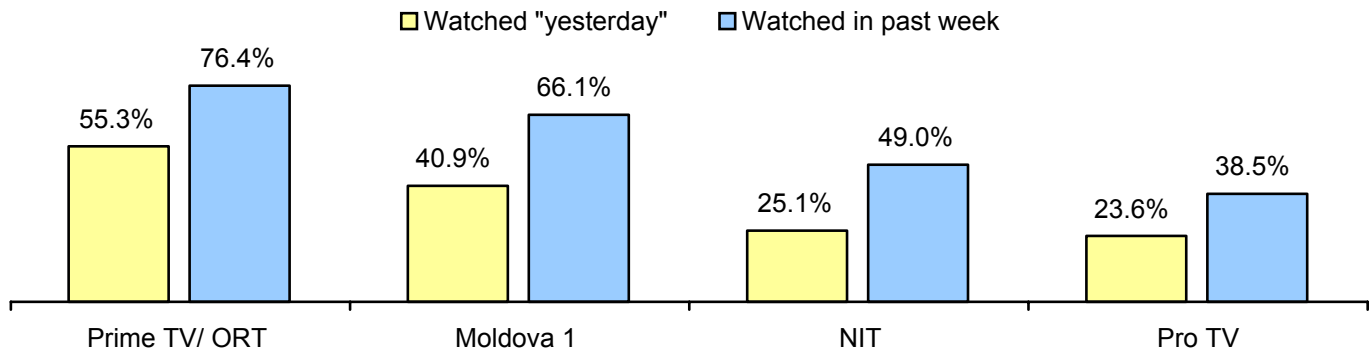
Which television stations, radio stations or newspapers are your most important sources of information?



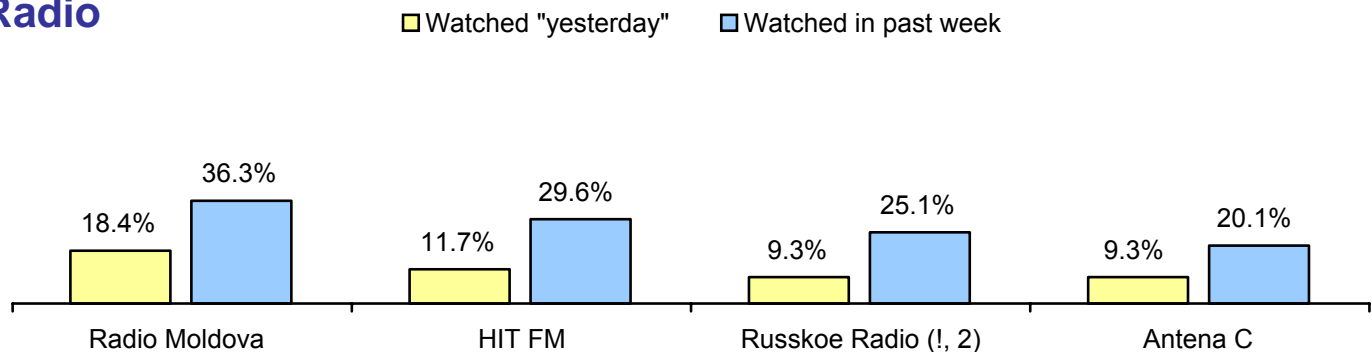
Base: n = 2,011 (adults 15 and older) in Moldova

- Television is the most important source of news and information for Moldovans: nine in 10 Moldovans watch television at least weekly (nearly eight in 10 watch daily) for news. Friends and family are also an important source of news, followed by radio. SMS and the internet are relatively unimportant now but their use is growing.
- When asked to identify their three most important sources of news and information, respondents were much more likely to point to television stations than to radio stations or newspapers. For example, as the graphs above show, almost six in 10 respondents identified Prime TV/ORT as one of their three most important sources, compared with fewer than one in six who identified Radio Moldova as one of their most important sources.

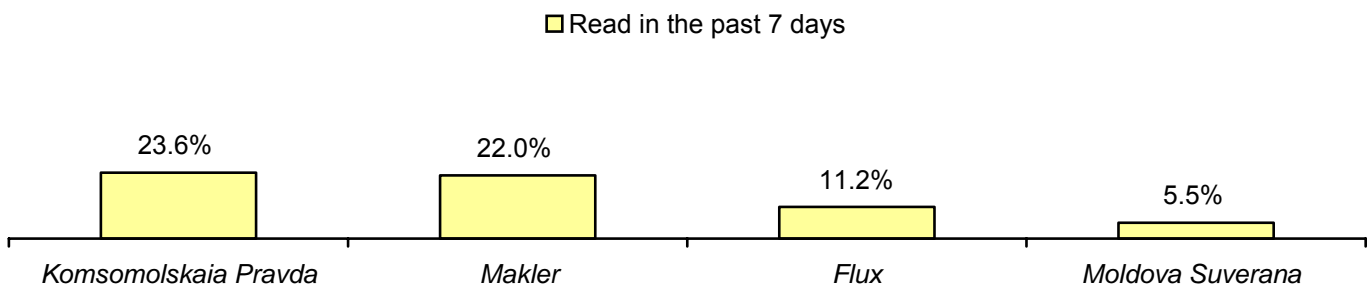
Television



Radio



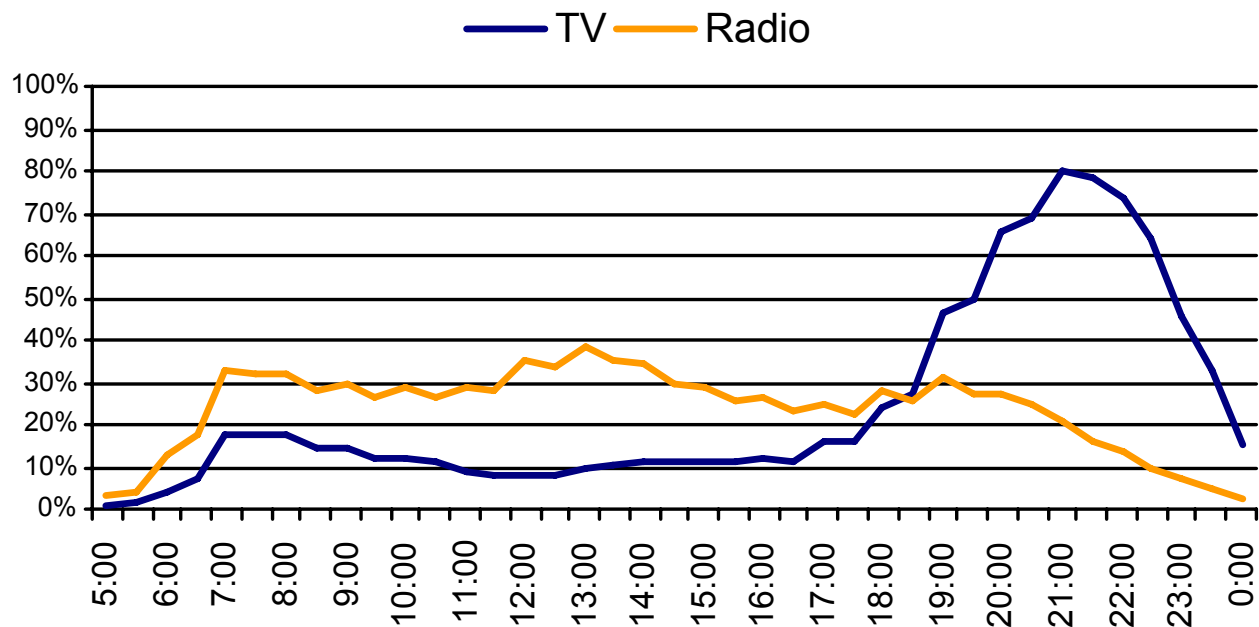
Newspapers (Read in the past 7 days)



Base: n = 2,011 (adults 15 and older) in Moldova

- Prime TV/ORT remains the most important “local” source of news and information (“local” because Prime rebroadcasts the Russian ORT’s programs), with three-quarters of respondents watching it at least weekly. Both it and Moldova 1’s viewership has not changed from 2005. In contrast, the proportion of respondents watching NIT and Pro TV weekly has increased significantly, from 33 percent and 20 percent in 2005, respectively.
- In contrast, Radio Moldova’s weekly listenership declined from 46 percent in 2005, as did Russkoe Radio’s (from 32 percent); HIT FM and Antena C remain unchanged. *Makler*’s weekly readership nearly doubled from 12 percent in 2005; other newspapers’ readerships remained static.

TV/Radio Reach at Various Times of Day Percentage of Adults Listening/Viewing “Yesterday”



Base: n = 2,011 (adults 15 and older) in Moldova

- Radio listening and television viewing follow patterns found in many other countries. Radio listening peaks early in the morning as people get up to prepare for the day, then remains stable throughout most of the rest of the day with small peaks at lunchtime and again at dinner before tailing off. In contrast, television viewing is low throughout most of the day before climbing quickly in the early evening, peaking at around 21:00, when approximately eight in 10 Moldovans are watching. From there it falls off equally quickly.
- Eighteen percent of Moldovans spend more than 60 minutes a day gathering news; 27 percent devote between 31 and 60 minutes to news; and 35 percent spend between 16 and 30 minutes.
- The remainder (15 percent) spends 15 minutes or less with news.



- Television plays a pivotal role in Moldovans' newsgathering; about nine out of 10 adults use it at least weekly to get news and information. Almost all (96 percent) households have a television and four in five adults watch television on a daily basis. Cable penetration is at 42 percent.
- The Russian broadcaster ORT (rebroadcast on Prime TV in Moldova) and Moldova 1, the public broadcaster, remain the leading channels in Moldova. Moldova 1 has programs in Russian, Ukrainian, Bulgarian, Gagauz and Yiddish.
- Pro-government Russian-language NIT is in 3rd place owing to Romania 1's stark 8 percent drop in "yesterday" and weekly reach from 2007. Romania 1 was a victim of license revocation in October 2007, a process greatly criticized by media NGOs. ProTV, in 4th place and one of the few media outlets critical of the Moldovan government, is subject to continuing intimidation from the government. In October 2008, opposition party members issued statements highlighting intimidation attempts against ProTV.



Rank	Station	Yesterday Reach	Weekly Reach
1	Prime TV / ORT	55.3	76.4
2	Moldova 1	40.9	66.1
3	NIT	25.1	49.0
4	Pro TV	23.6	38.5
5	NTV	22.6	40.8
6	Rossia (RTR)	16.4	34.7
7	Romania 1	16.3	37.6
8	Muz TV	16.2	31.8
9	Ren-TV	9.4	24.7
10	Discovery	6.9	18.6
11	EuroNews	6.5	15.4
12	Prima	6.4	13.2
13	TV 1 + 1	6.3	15.1
14	Euro TV (EU TV)	6.1	15.6
15	National Geographic	4.5	13.4

Base: n = 2,011 (adults 15 and older) in Moldova

Please think about all of the sources you use to get news about current events. Which stations or publications are your most important sources of information? (Respondents were allowed to name three sources)

Rank	Station	First choice as most important	Total (selected as one of three most important sources)
1	Prime TV / ORT	26.3	56.8
2	Moldova 1	26.4	46.5
3	Pro TV	17.8	26.9
4	NIT	2.7	15.4
5	Romania 1	2.5	14.7
6	NTV	2.8	10.6
7	Rossia (RTR)	1.8	10.0
8	TV 1 + 1	0.5	1.5

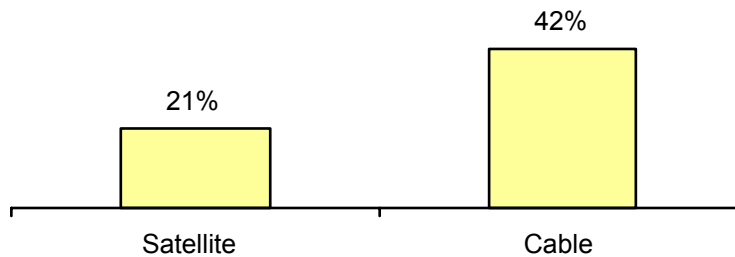
How reliable do you think the news and information on (channel) is?

Rank	Station (yesterday reach)	percent of annual viewers rating station's news as very trustworthy/somewhat trustworthy
1	Prime TV / ORT (55.3)	67
2	Moldova 1 (40.9)	57
3	NIT (25.1)	40
4	Romania TV (16.3)	39
5	Pro TV (23.6)	36
6	Rossia (RTR) (16.4)	31
7	EuroNews (6.5)	17
8	Prima (6.4)	10

Annual viewers for each broadcaster: Prime TV/ORT n = 1,692, Moldova 1 n = 1,611, NIT n = 1,170, Romania TV n = 1,068, Pro TV n = 885, Rossia (RTR) n = 898, EuroNews n = 445, Prima n = 336



Which kind of antennas do you have to receive foreign TV? (percent adults 15+)

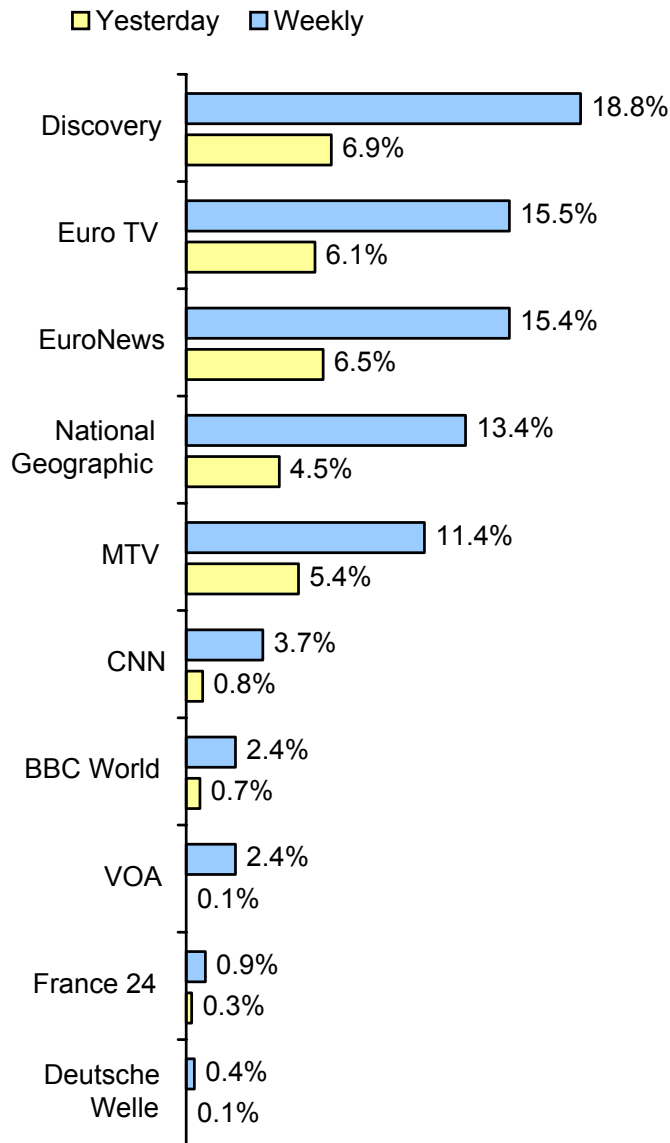


Base: n = 2,011 (adults 15 and older) in Moldova

- Both satellite dish ownership and cable access have increase significantly from 2005, rising from 3 percent for satellite ownership and from 23 percent for cable. In late 2007, the Broadcasting Coordinating Council (BCC) published data that showed that 20 percent of Moldova's 1,500 villages have cable television access.



International TV Stations' Nationwide Reach



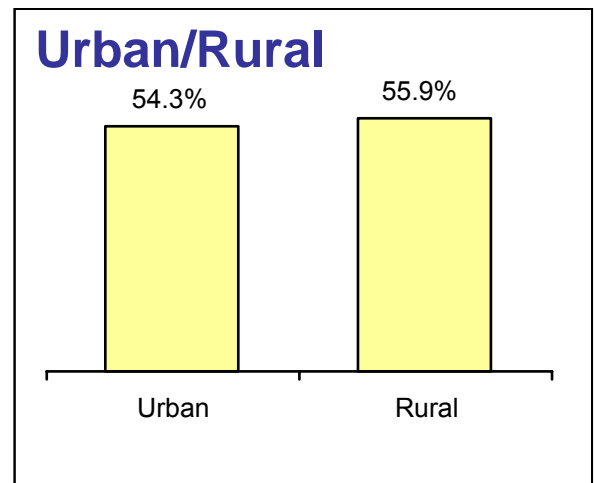
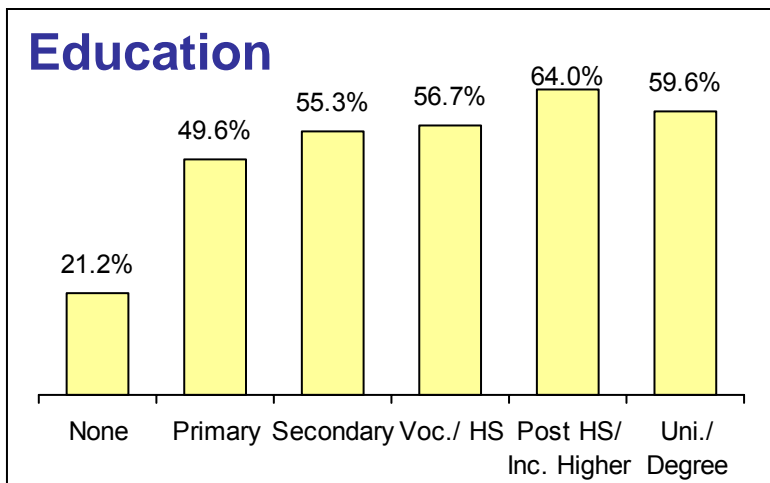
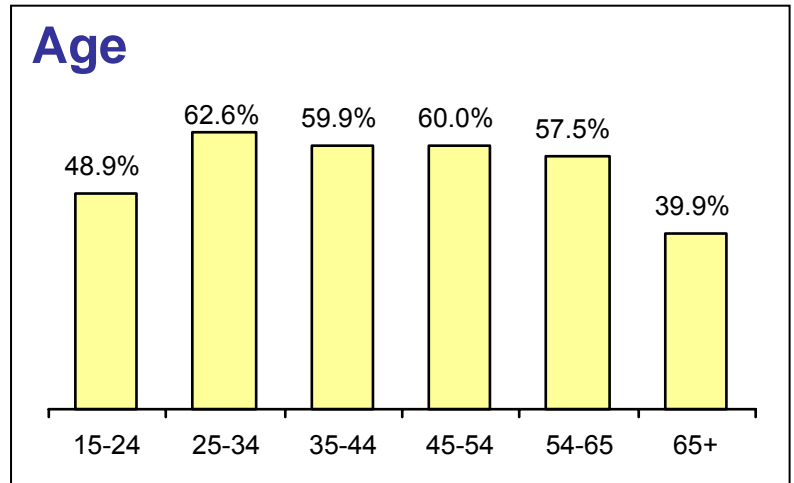
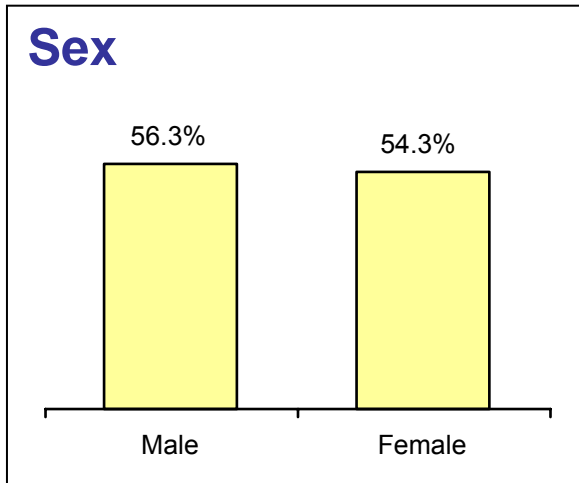
Base: n = 2,011 (adults 15 and older) in Moldova

- Probably as a direct result of the increases in satellite dish ownership and cable access, viewership of international television broadcasters have increased since 2005. Discovery Channel's weekly reach, for example, nearly doubled from the 10.1 percent recorded in 2005. Euronews and National Geographic also recorded significant increases in weekly viewership. However, news providers BBC World and CNN International continue to have very small weekly reach.



Prime TV/ORT Audience “Yesterday” Reach Among Demographic Segments

“Yesterday” Reach:
55.3%



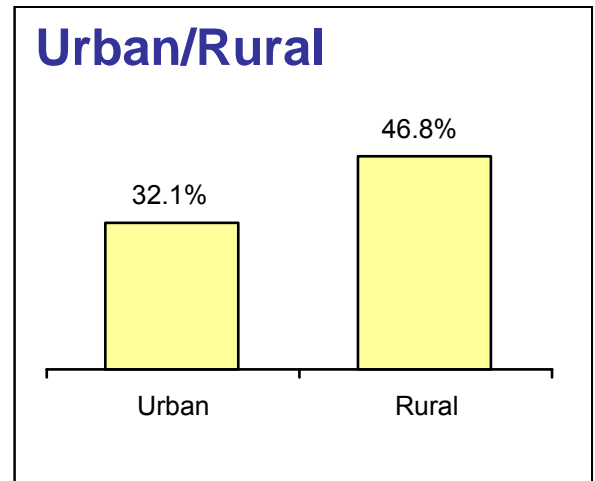
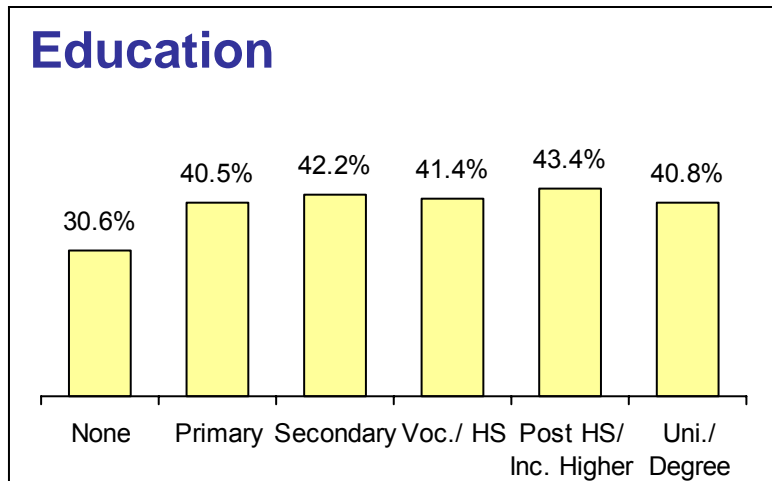
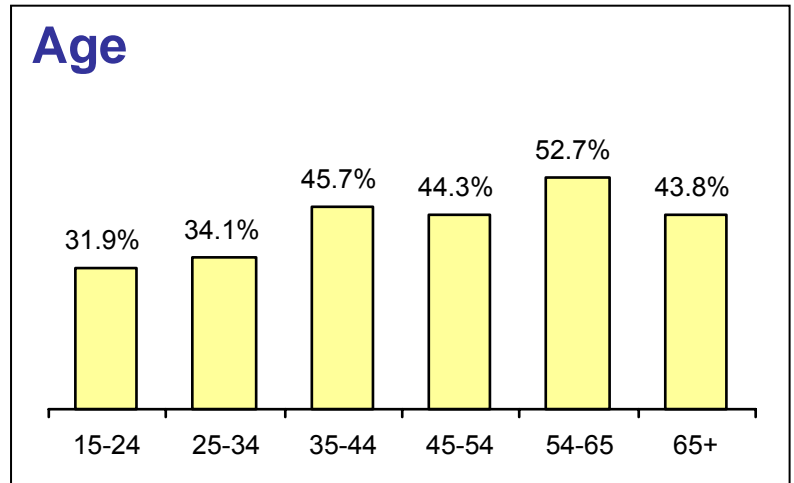
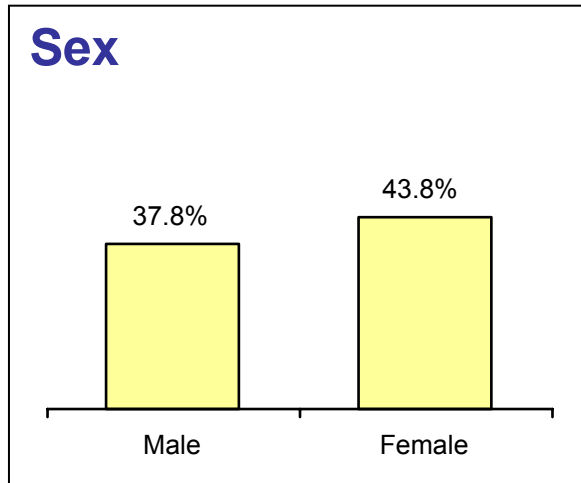
Base: n = 2,011 (adults 15 and older) in Moldova

- Prime TV/ORT is a domestic station rebroadcasting much of ORT’s content. The station remains the leading television broadcaster in Moldova and its “yesterday” reach remains unchanged from 2005. The station appeals to men and women and to urban and rural viewers in equal measure.



Moldova 1 Audience “Yesterday” Reach Among Demographic Segments

“Yesterday” Reach:
40.9%



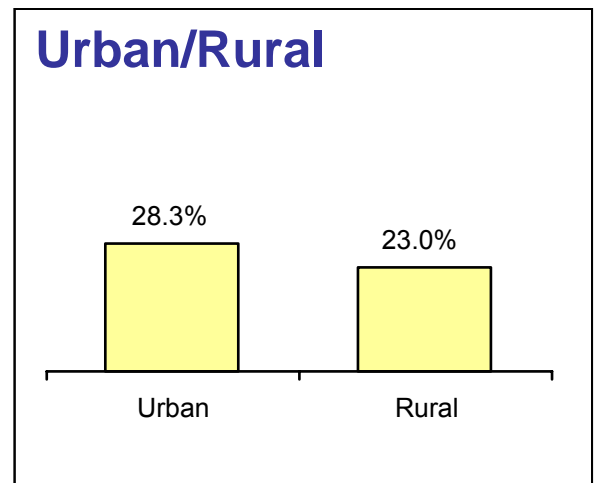
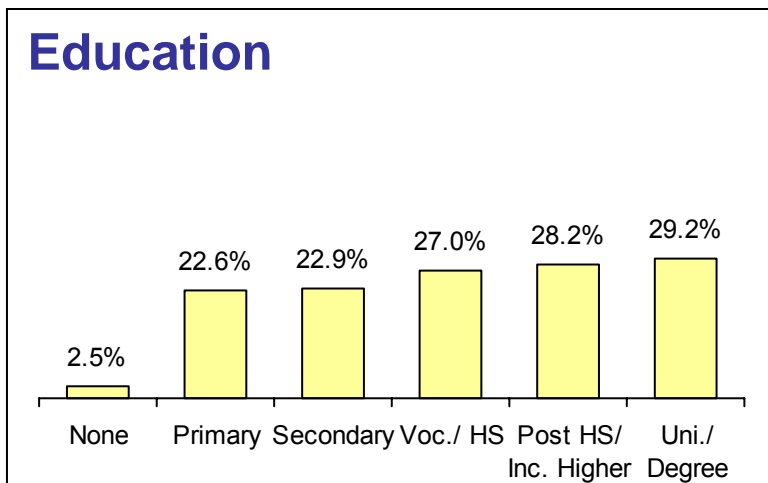
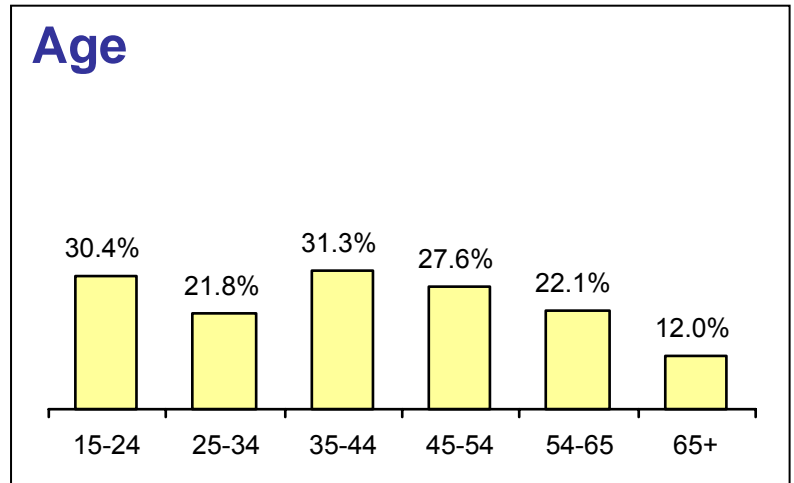
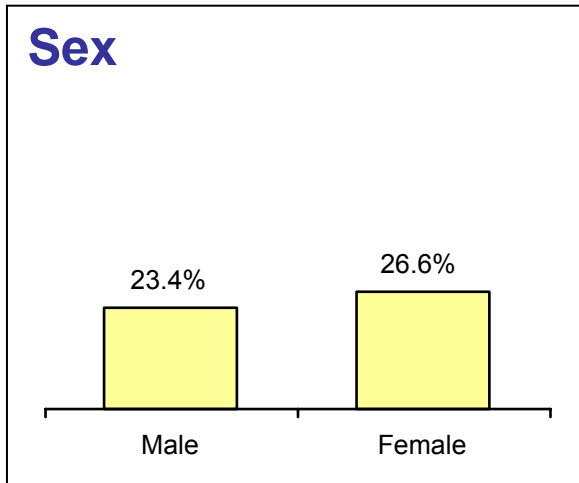
Base: n = 2,011 (adults 15 and older) in Moldova

- Moldova 1, the public TV channel, provides broadcasting to all of Moldova. Its “yesterday” reach also remains unchanged from 2005 levels. Women and those living in rural areas are more likely to tune to the station. In some parts of rural Moldova, Moldova 1 has a virtual monopoly. Viewers also tend to be older.



NIT Audience “Yesterday” Reach Among Demographic Segments

“Yesterday” Reach:
25.1%



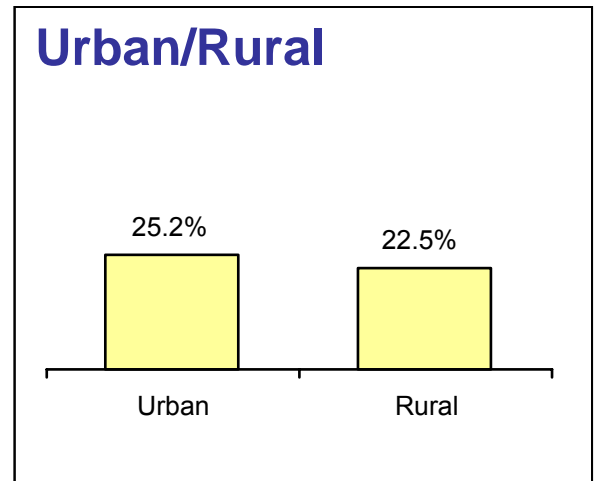
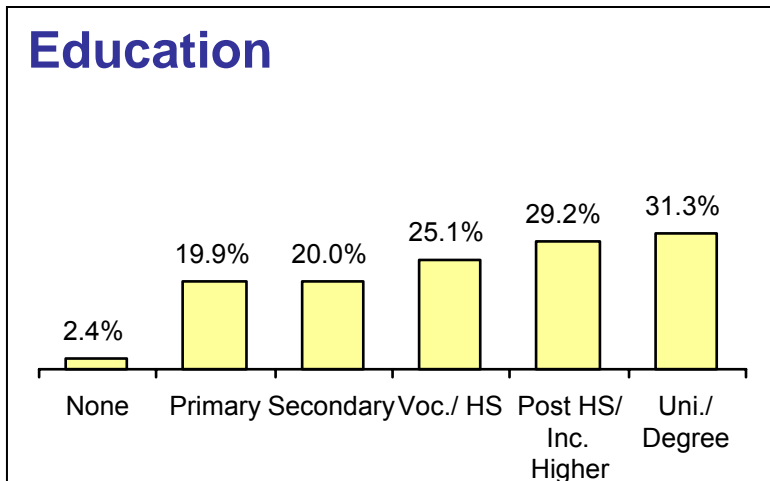
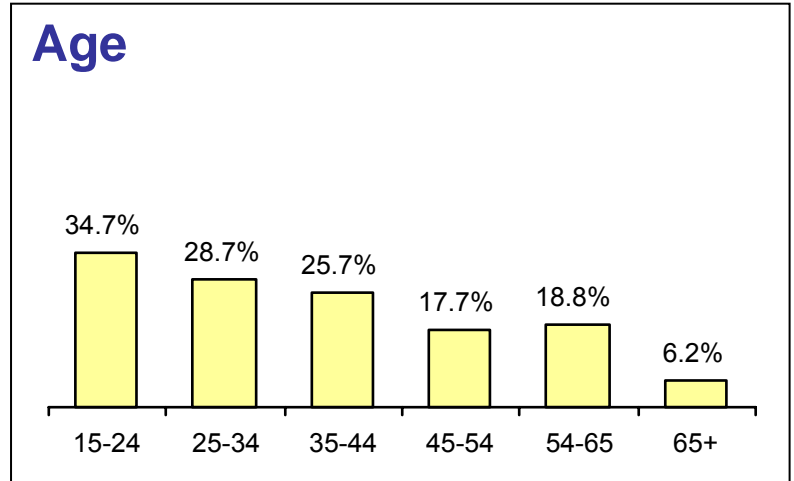
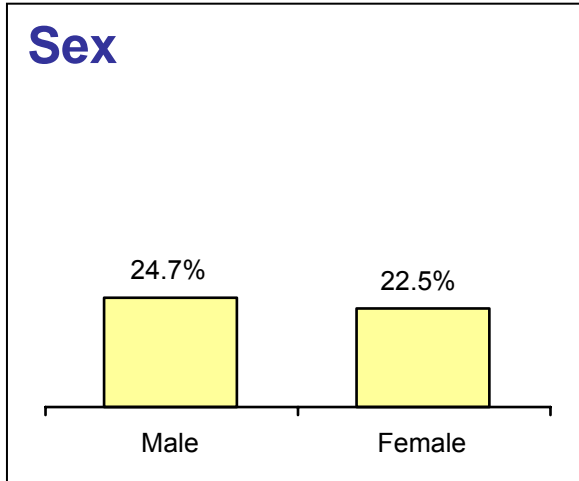
Base: n = 2,011 (adults 15 and older) in Moldova

- NIT is a privately owned Russian-language television station based in Chisinau. NIT’s “yesterday” reach has increased in the past four years, rising from 17.8 percent. It appeals less to older Moldovans and attracts more women and urban dwellers. It is notable for providing its own news programming and for providing national coverage.



Pro TV Audience “Yesterday” Reach Among Demographic Segments

“Yesterday” Reach:
23.6%



Base: n = 2,011 (adults 15 and older) in Moldova

- Pro TV is a privately owned broadcaster, part of the Romanian broadcasting group Pro TV. Its “yesterday” reach has more than doubled since 2005, rising to 23.6 percent from 10.0 percent. It appeals to younger Moldovans.

How favorably or unfavorably inclined are you personally toward the United States?

Rank	Station (Number of yesterday viewers)	Very favorably inclined percent	Somewhat favorably inclined percent	Somewhat unfavorably inclined percent	Very unfavorably inclined percent	Don't know-refused percent
Top 5	Survey sample average (Total = 2,011)	13	56	13	4	14
1	RTV (65)	27	46	11	5	12
2	TV7 (86)	26	52	7	9	7
3	N4 (TV RIF) (106)	23	50	11	4	12
4	National Geographic (90)	22	51	15	4	8
5	EuroNews (131)	20	54	15	5	6
Bottom 5						
1	TV 1 + 1 (127)	9	55	16	4	16
2	Prima (128)	10	62	15	4	9
3	TV26 (35)	13	56	6	5	20
4	Romania 1 (327)	13	58	14	4	12
5	Prime TV/ ORT (1,111)	13	58	14	4	11

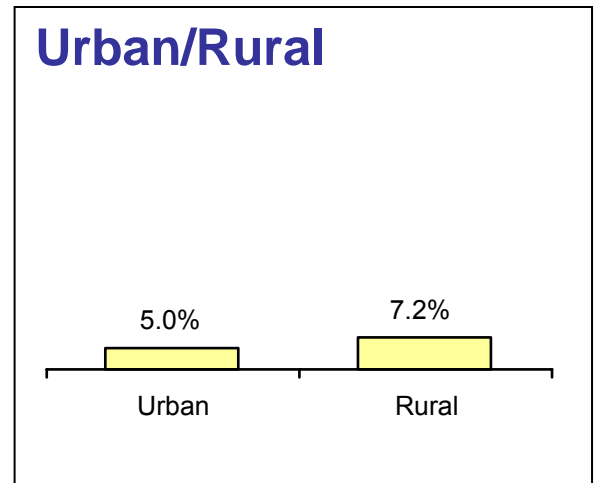
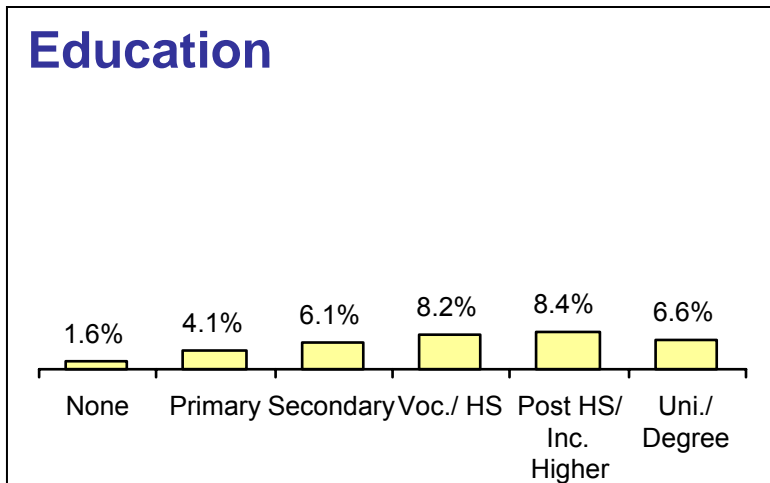
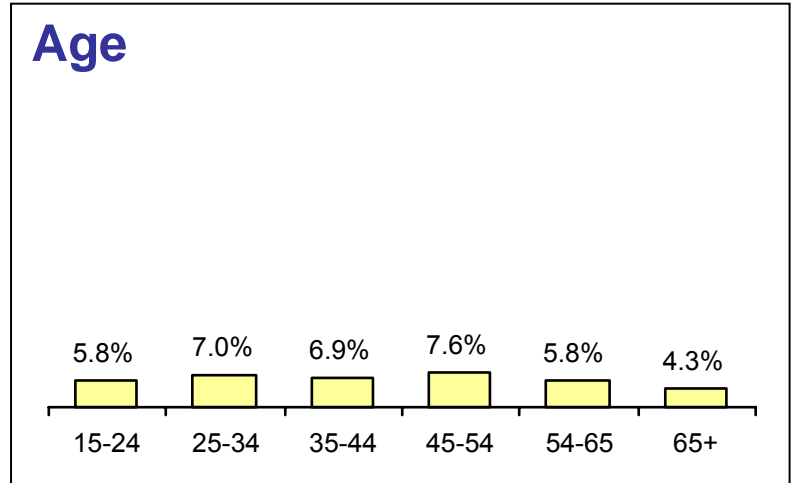
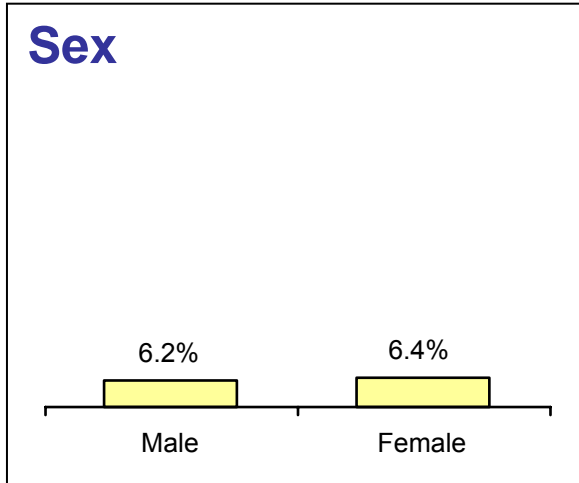
- The table shows attitudes toward the United States by yesterday viewers of TV broadcasters.
- The stations are ranked by the percentage of “very favorable” responses among viewers; rows add to approximately 100 percent.
- This cross tab is presented as part of the audience profile for media outlets. Although often suggestive, these tabulations do not prove causality.



TV 1 + 1 Audience

“Yesterday” Reach: 6.3%

“Yesterday” Reach Among Demographic Segments



Base: n = 2,011 (adults 15 and older) in Moldova

- TV 1+1 rebroadcasts in Moldova the programs of Romanian channel Antena Internațional.



- In comparison to TV, radio plays a minor role as a source of news and information. Sixty percent of Moldovans use radio weekly to gather news, down from 68 percent in 2007. Forty-seven percent listen to the radio on a daily basis; however, participants note they listen to radio to hear music and relax.
- The three leading stations are Radio Moldova (the only radio station to cover the entire country), the music station HIT FM and Russkoe Radio.

Rank	Station	Yesterday Reach	Weekly Reach
1	Radio Moldova	18.4	36.3
2	HIT FM	11.7	29.6
3	Russkoe Radio (1,2)	9.3	25.1
4	Antena C	9.3	20.1
5	Radio Noroc	8.8	19.6
6	Radio Sanatatea	7.9	18.4
7	Kiss FM	4.5	13.0
8	Radio Retro	3.6	12.7
9	Radio Romania Actualitati	4.3	12.2
10	Radius Sanson	4.4	11.2
11	Evropa Plus	3.0	9.6
12	Micul Samaritean	2.4	5.6
13	Radio Nova	1.2	4.8
14	Vocea Basarabiei	1.3	4.2
15	Radio Plai	1.3	4.0

Base: n = 2,011 (adults 15 and older) in Moldova

Please think about all of the sources you use to get news about current events. Which stations or publications are your most important sources of information? (Respondents were allowed to name three sources)

Rank	Station	First choice as most important	Total (selected as one of three most important sources)
1	Radio Moldova	4.0	14.4
2	HIT FM	1.0	7.3
3	Antena C	0.8	5.8
4	Russkoe Radio (1,2)	0.7	5.0
5	Kiss FM	0.3	2.1
6	Radio Sanson	0.0	1.3
7	Micul Samaritean	0.5	1.0
8	Radio Romania Actualitati	0.2	1.0

Base: n = 2,011 (adults 15 and older) in Moldova

How trustworthy do you think the news and information on (channel) is?

Rank	Station (yesterday reach)	percent of all respondents rating station's news as very trustworthy/ somewhat trustworthy	percent annual listeners rating station's news as very trustworthy/ somewhat trustworthy
1	Radio Moldova (18.4)	37	77
2	Russkoe Radio (1,2) (9.3)	28	76
3	Radio Retro (3.6)	15	74
4	Radio Europa Libera (1.3)	9	85
5	BBC (0.5)	6	82
6	Radio Nova (1.2)	4	67
7	Radio Svoboda (0.4)	3	85
8	VOA (0.2)	3	80
9	Univers FM (0.7)	3	71
10	Deutsche Welle (0.1)	1	87

Base: n = 2,011 (adults 15 and older) in Moldova

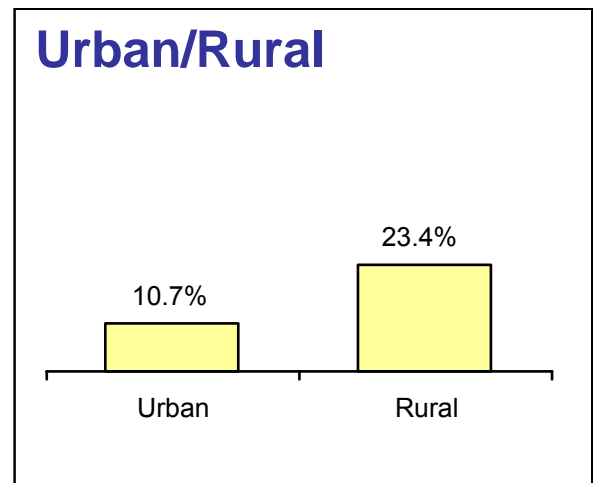
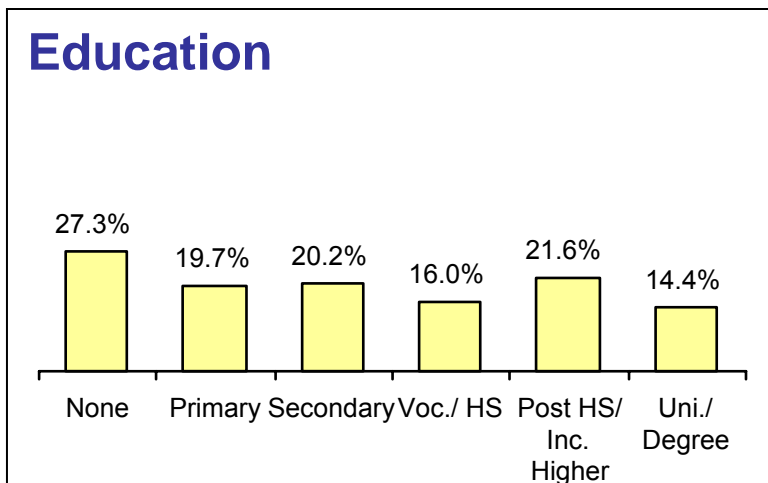
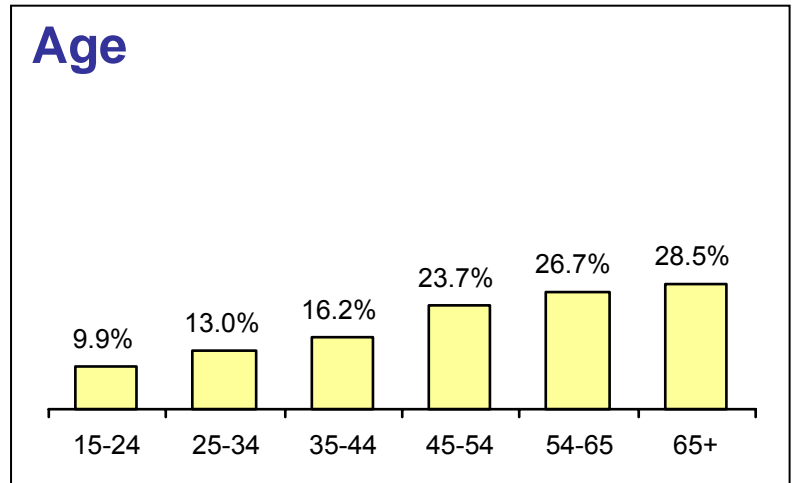
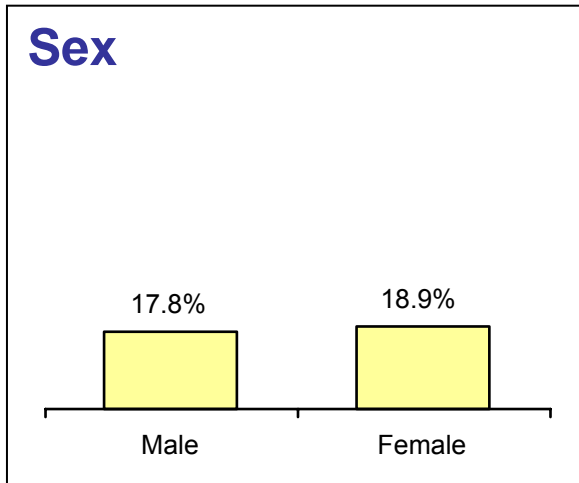
Annual listeners for each broadcaster, September 2008.

Deutsche Welle n=92, Radio Svoboda n=73, Radio Europa Libera n=202, BBC n=85, VOA n=65, Radio Moldova n=998, Russkoe Radio n=685, Radio Retro n=318, Univers FM n=49, Radio Nova n=112



Radio Moldova Audience “Yesterday” Reach Among Demographic Segments

“Yesterday” Reach:
18.4%



Base: n = 2,011 (adults 15 and older) in Moldova

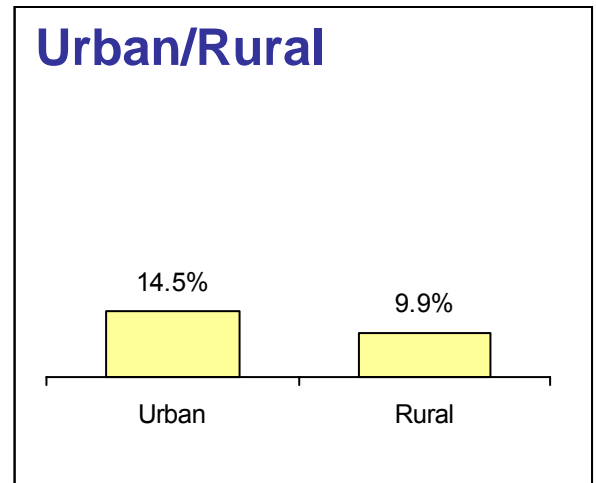
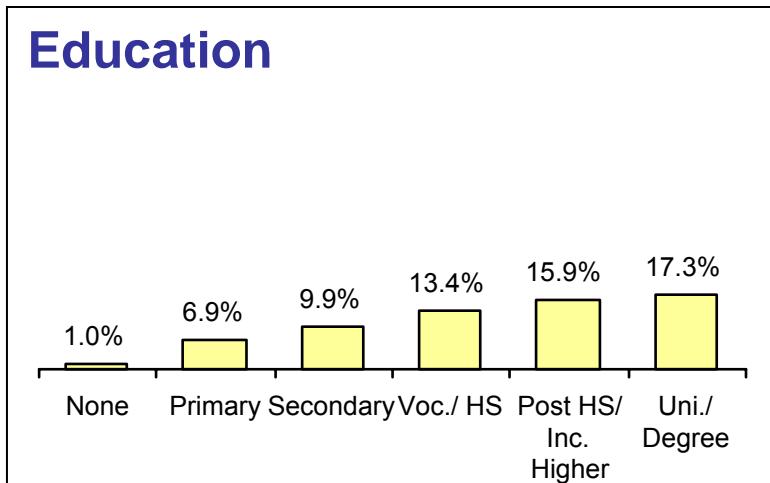
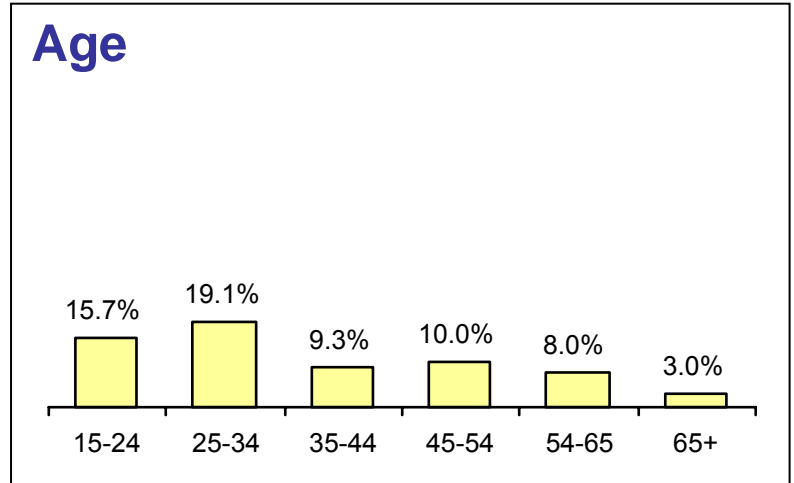
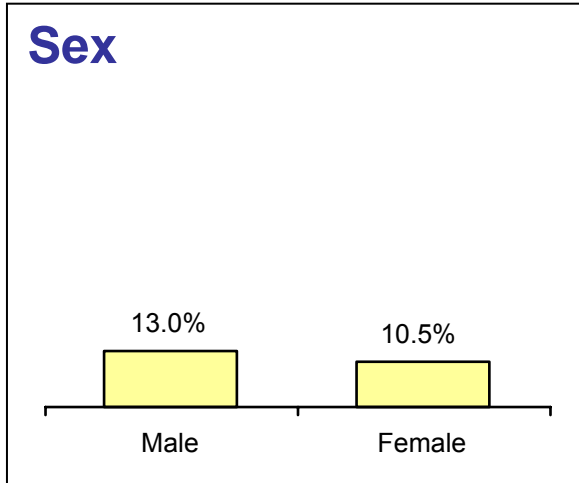
- Radio Moldova is the state-owned public broadcaster and the only radio station with national coverage. It is the most important radio source of news and information. Its listeners tend to be older, less well-educated rural dwellers.



HIT FM Audience

“Yesterday” Reach Among Demographic Segments

“Yesterday” Reach:
11.7%



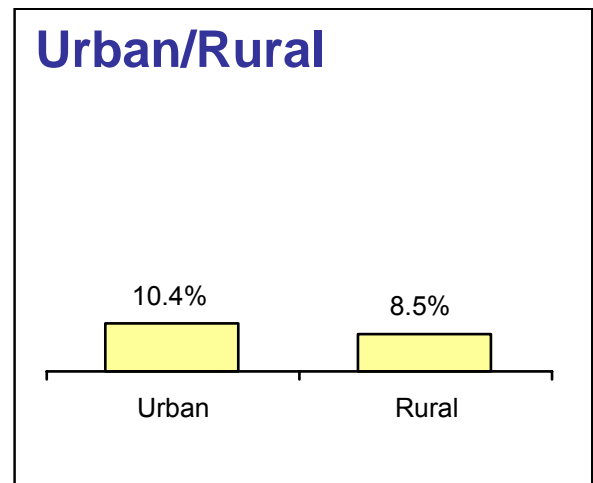
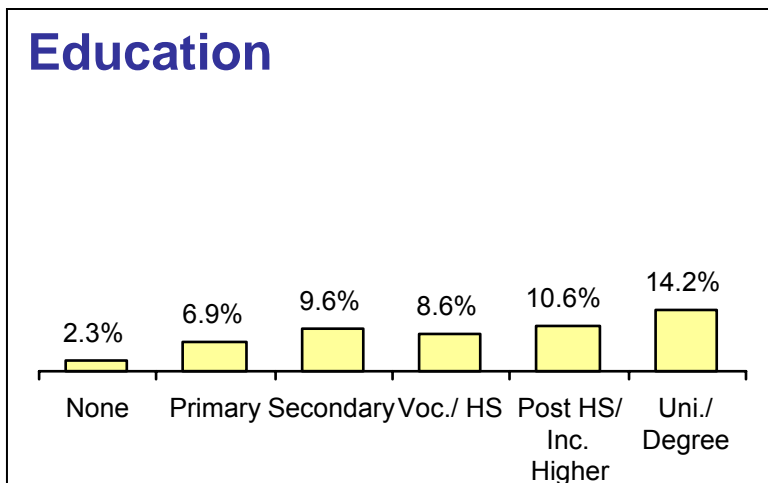
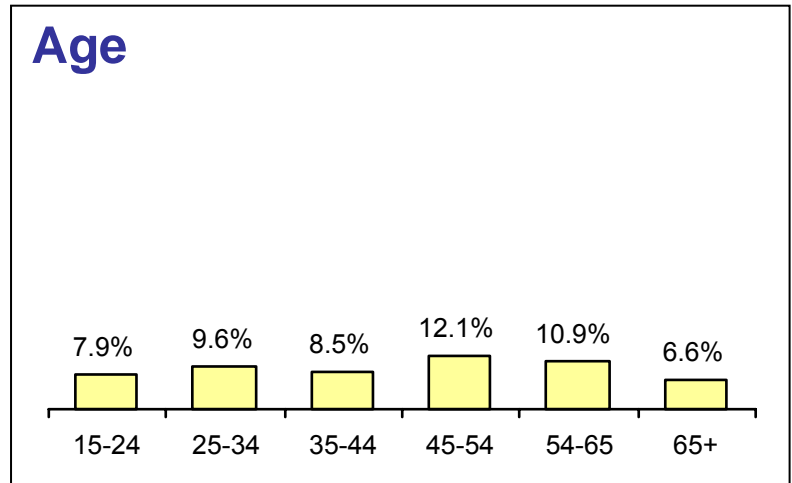
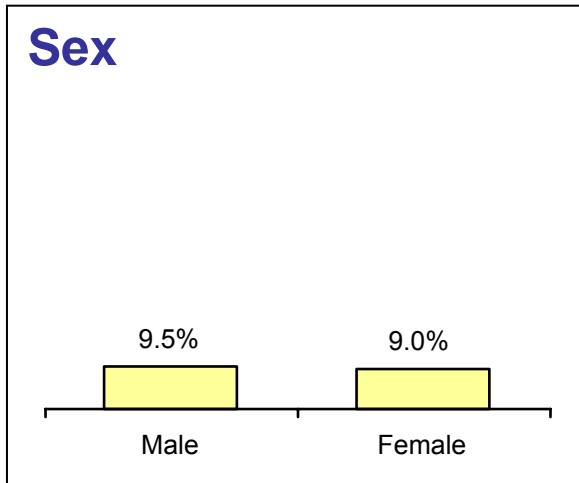
Base: n = 2,011 (adults 15 and older) in Moldova

- HIT FM is a privately owned music station that appeals most to younger, better-educated urban dwellers.



Russkoe Radio (1,2) Audience “Yesterday” Reach Among Demographic Segments

“Yesterday” Reach: 9.3%



Base: n = 2,011 (adults 15 and older) in Moldova

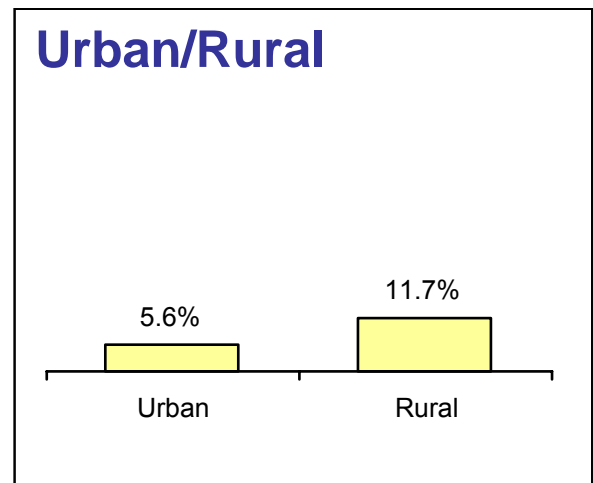
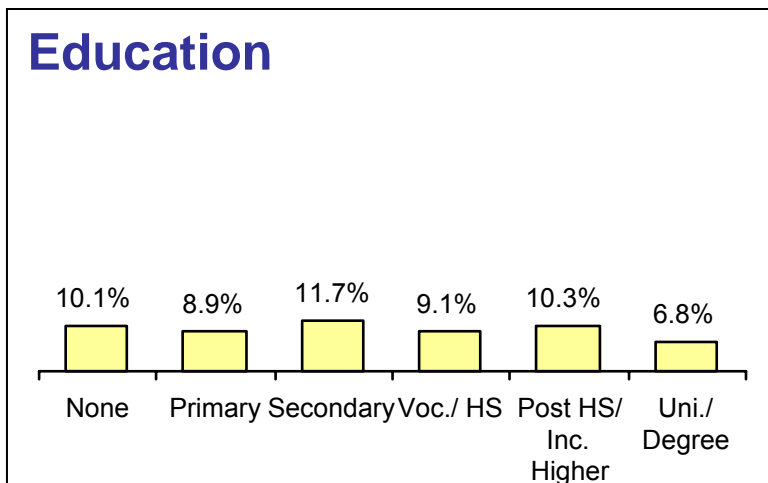
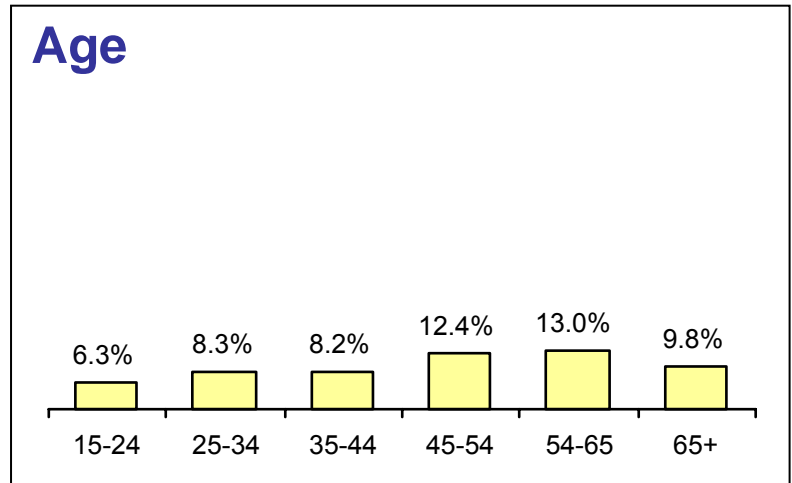
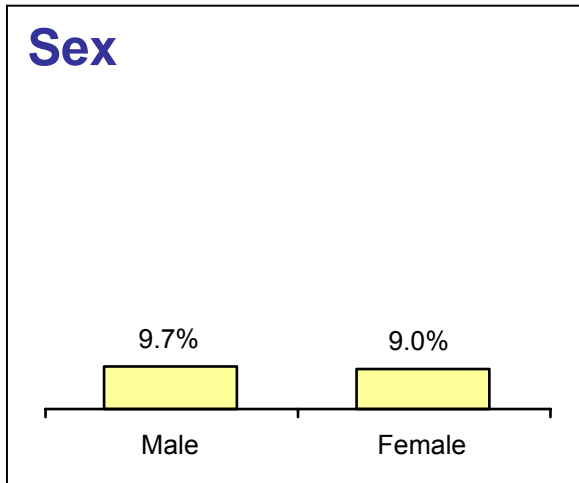
- Russkoe Radio is a privately owned Russian station broadcasting in Russian.



Antena C Audience

"Yesterday" Reach: 9.3%

"Yesterday" Reach Among Demographic Segments



Base: n = 2,011 (adults 15 and older) in Moldova

- Antena C is a privately owned radio broadcaster with nearly national coverage. Its listeners tend to be older rural dwellers.

How favorably or unfavorably inclined are you personally toward the United States?

Rank	Station (Number of yesterday listeners)	Very favorably inclined percent	Somewhat favorably inclined percent	Somewhat unfavorably inclined percent	Very unfavorably inclined percent	Don't know-refused percent
Top 5	Survey sample average (Total = 2,011)	13	56	13	4	14
1	Evropa Plus (61)	25	51	6	10	8
2	Radio Retro (73)	24	53	10	4	9
3	Russkoe Radio (1,2) (186)	19	53	10	4	13
4	Radio Sanson (89)	15	57	10	2	16
5	Radio Noroc (178)	14	56	13	4	14
Bottom 5						
1	Micul Samaritean (49)	3	72	9	0	16
2	Radio Sanatatea (158)	7	56	18	5	13
3	Antena C (188)	7	58	21	3	12
4	Radio Moldova (369)	8	57	13	5	18
5	Romania Actualitat (86)	8	65	8	7	12

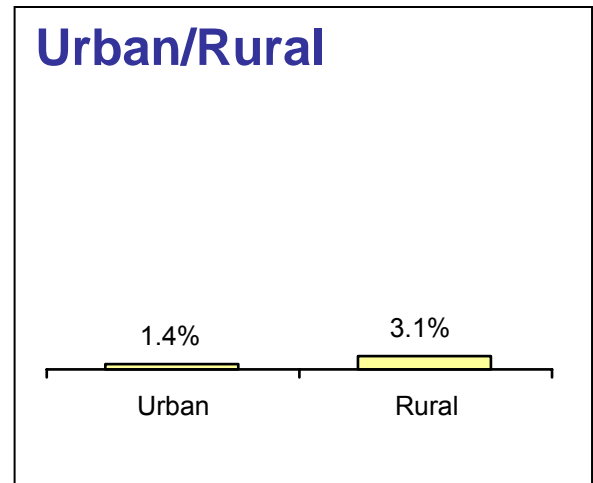
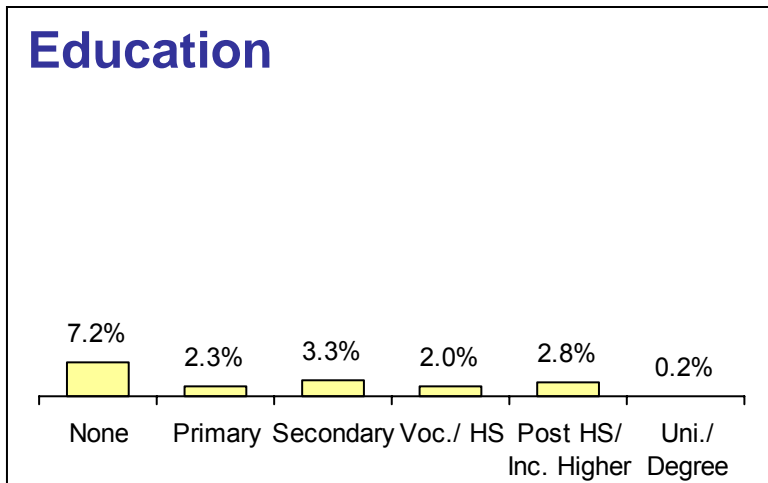
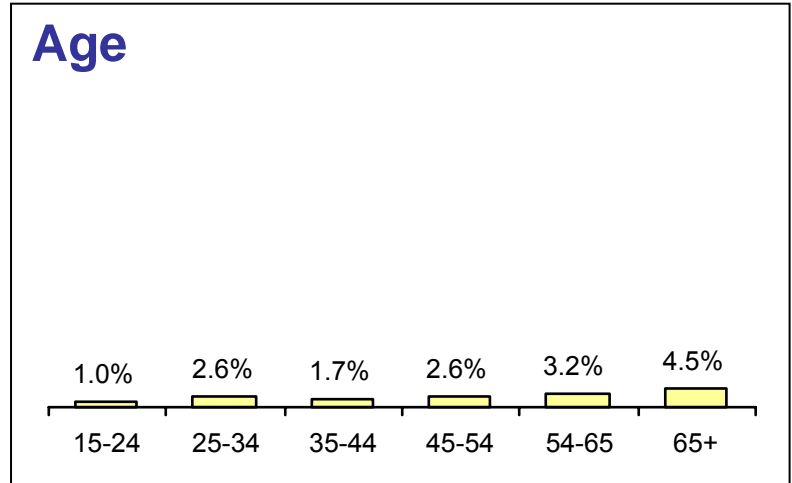
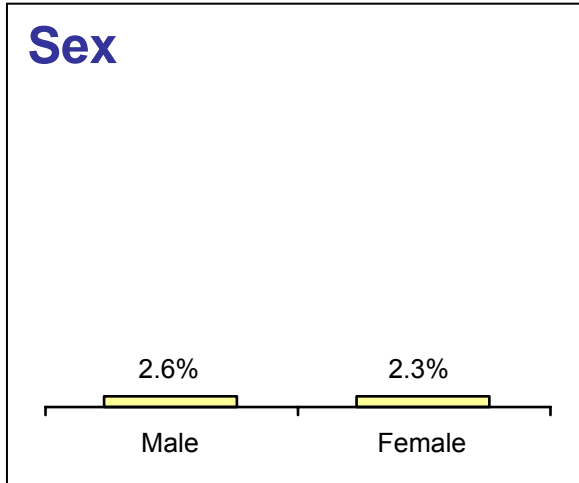
- The table shows attitudes toward the United States by yesterday listeners of radio broadcasters.
- The stations are ranked by the percentage of “very favorable” responses among listeners; rows add to approximately 100 percent.
- This cross tab is presented as part of the audience profile for media outlets. Although often suggestive, these tabulations do not prove causality.



Micul Samaritean Audience

“Yesterday” Reach: 2.4%

“Yesterday” Reach Among Demographic Segments



Base: n = 2,011 (adults 15 and older) in Moldova

- Micul Samaritean is a Christian radio station operated by the Little Samaritan Mission in Chisinau.

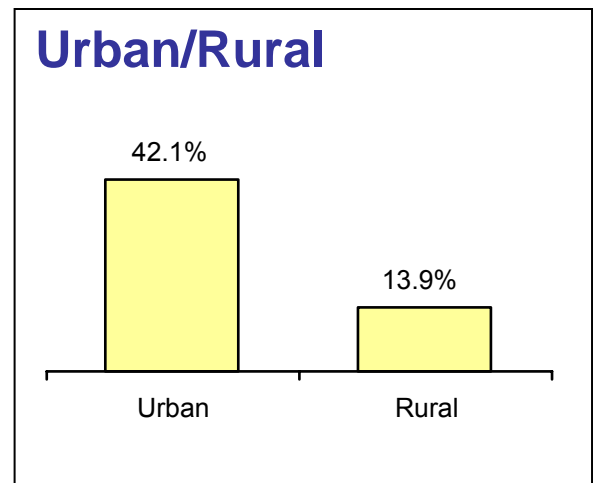
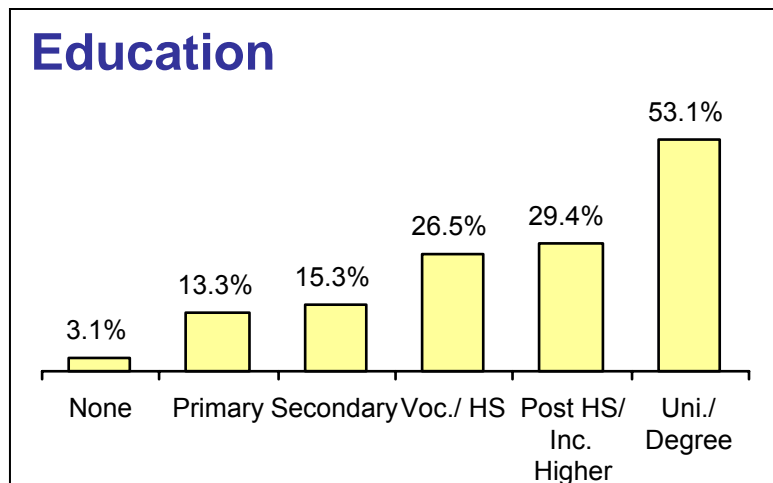
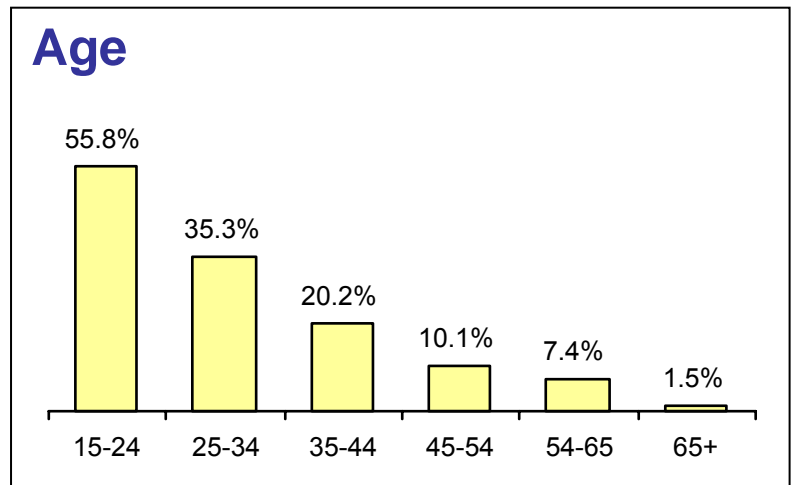
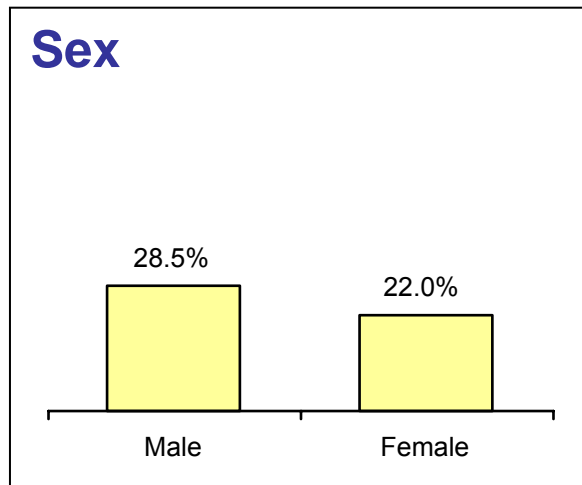
- According to the National Regulatory Agency for Electronic Communications and Information Technology (ANRCETI), in 2008 the internet access and data transport market had 56 providers. The most popular providers of internet are: “Moldtelecom,” “Starnet,” “Telemedia Group” and “Sun Communications.”
- Weekly internet use is now at 19 percent, up from 8 percent in 2005. In Chisinau, 50 percent of respondents accessed the internet in the last seven days. Fifty percent of regular internet users reside in Chisinau; regular access is highly concentrated in the capital.
- Among weekly users, 71 percent have home access, a substantial increase from 2005. 3G services have been launched in the past year and cell phone data service prices have dropped in line with increased user rates.
- Russian remains the most-commonly used language to access information online (77 percent of regular users), followed by Moldovan/Romanian (62 percent) and English (39 percent).
- Although email remains the most popular use of the internet among regular users (four out of five send or receive emails), about two-thirds use the internet to learn about a specific topic or to find out about the latest news. Twenty-eight percent listen to the radio online and 40 percent and 26 percent, respectively, partake in interactive activities, such as posting comments on discussions boards/forums or reading/writing a blog.
- Web 2.0 applications are popular. Moldovans embrace blogs, social networking and communication sites—which allow information dissemination outside established media sources using citizen-to-citizen contacts and word-of-mouth. The Spring 2009 “Twitter revolution”—a series of protests in the wake of the April parliamentary elections organized mainly through Twitter—is a case in point. During the height of the protest, the government blocked numerous social networking and news sites. There are close to 1,000 in Moldova—many politicians have blogs and use them for election campaigns.
- Google, rambler.ru, and Yahoo! remain the most popular news and information websites in Moldova. Google was identified by 50 percent of regular web users as the leading site.
- Cell phone penetration in Moldova has increased. In 2005, 26 percent of Moldovans had a cell phone in their household; this figure is now at 59 percent. Eighty-five percent of respondents in Chisinau have cell phones. Among those with a cell phone in their household, 57 percent report that they receive SMS text messages from official news providers. More than two-thirds of these respondents (69 percent) are under 35.
- In 2008, four providers offered mobile services: “Orange – Moldova,” “Moldcell” and “Eventis Mobile” in GSM standard, and “Moldtelecom” (under the brand “Unite”) in CDMA 2000 standard, 450 MHz frequency. In 2008, ANRCETI issued licenses to the first three providers (“Orange – Moldova,” “Moldcell” and “Moldtelecom”), based on their applications, for provision of 3G mobile communications services.



- Twenty-four percent listen to the radio on their cell phone. About three-quarters of cell phone owners who use their phone to listen to the radio are under 35. Cell phone owners are gender balanced, tend to have at least a secondary education and are under 45. However, cell phone ownership is no longer as concentrated among the very young and very educated as it was even as recently as 2007.
- The development of alternative broadband internet service providers outside Chisinau municipality is more difficult because of the lack of alternative long-distance optic fiber infrastructure and high prices for leased lines. Also, the development of competition of this market is restricted by the lack of effective access of alternative providers to the local loop. The development of broadband access services in rural areas requires considerable efforts to reduce the existing digital divide.



Monthly Reach Among Demographic Segments



Base: n = 2,011 (adults 15 and older) in Moldova

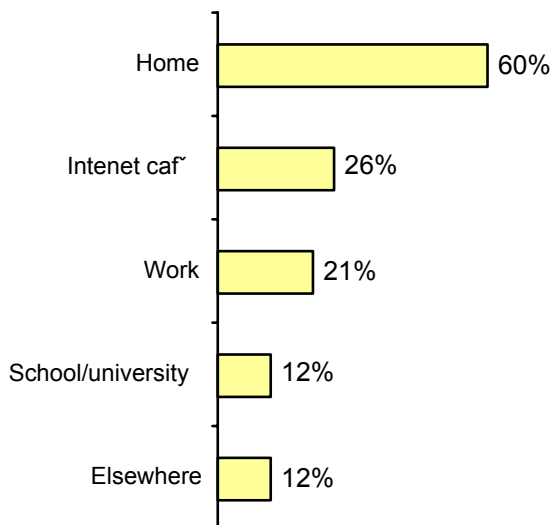
- The internet audience reflects a typical pattern of use before access reaches out into the general population, as it has in Russia, for example. The user community tends to be male, young, urban, well-educated and relatively well-to-do. Fifty-seven percent of regular web users are male. Regular users are far more likely to have a university degree than the total population. Fifty percent of regular users are younger than 25; just more than three-quarters are under 35.

Rank	Site	percent accessed in past 12 months
1	Google	19.7
2	Yahoo!	13.3
3	rambler.ru	10.0
4	999.md	8.9
5	Hotmail	3.9
6	moldova.md	3.0
7	newsmoldova.ru(md)	2.9
8	allmoldova.com	2.7

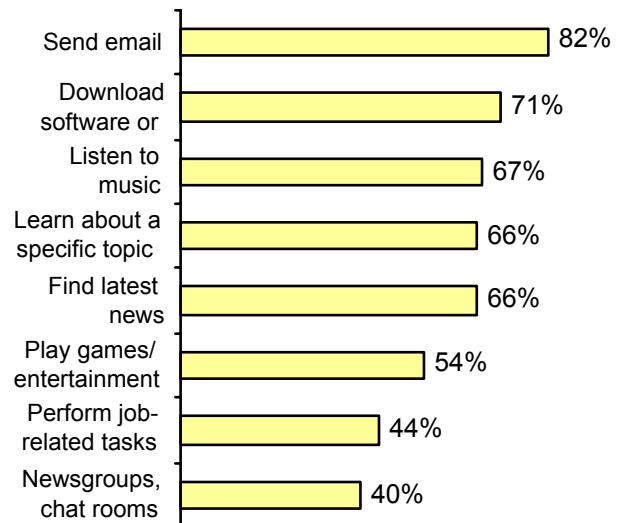
Base: n = 2,011 (adults 15 and older) in Moldova

Internet Activity Among Users

Where most often used?



Which activities used in last four weeks?

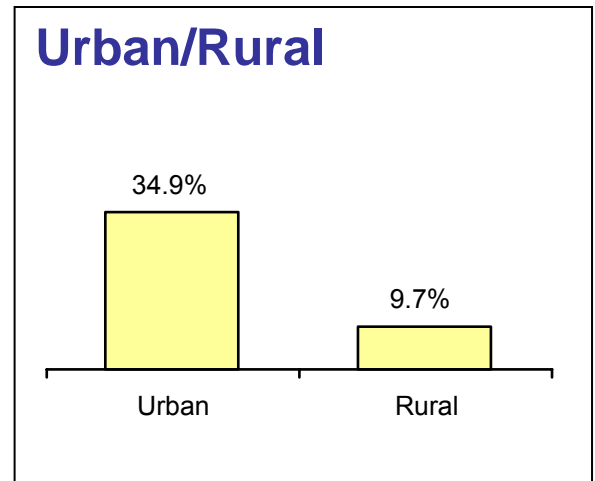
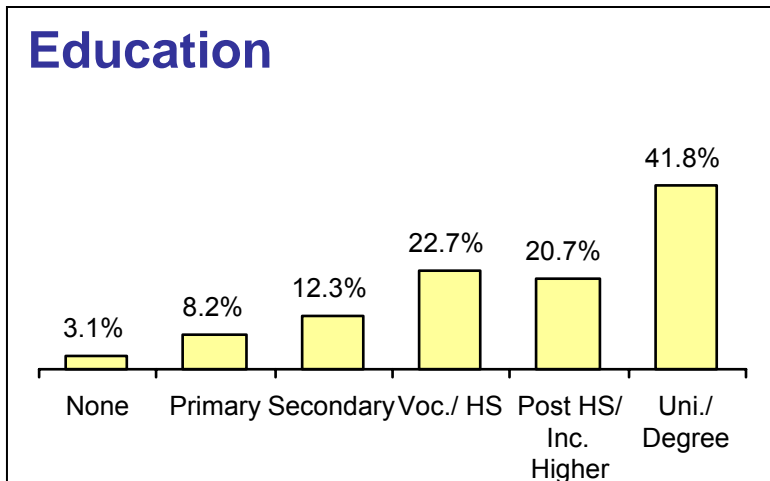
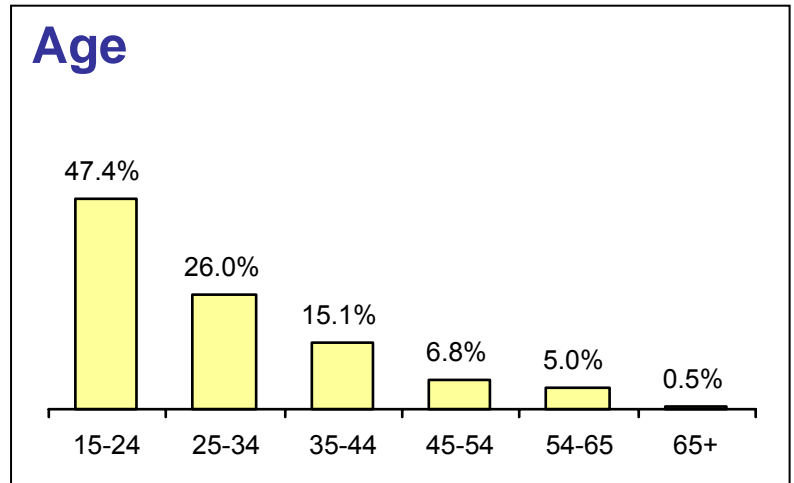
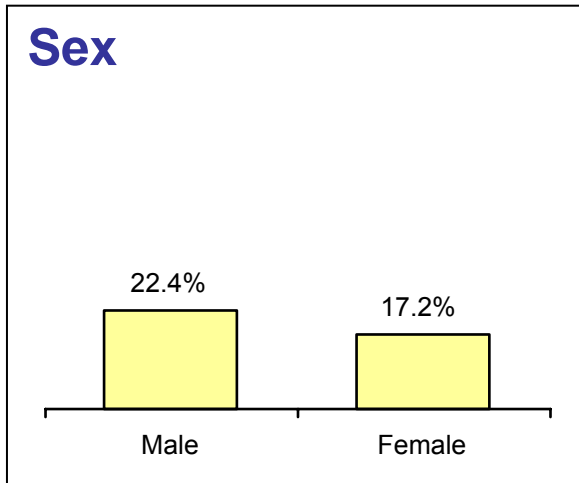


Base: n = 380 annual internet users (adults 15 and older) in Moldova



Access in Past 12 Months Among Demographic Segments

Past 12 Months Reach: 19.7%



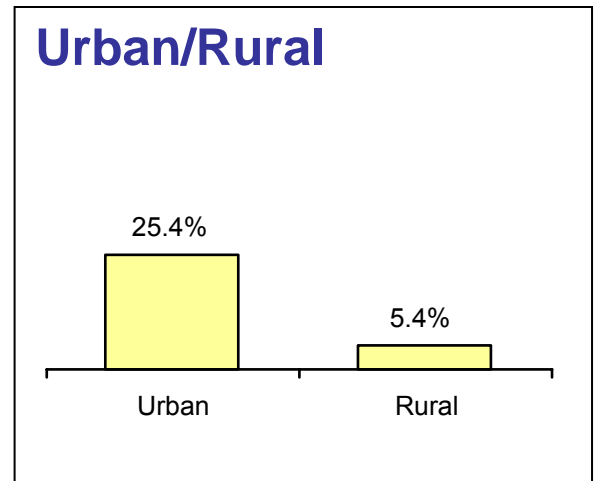
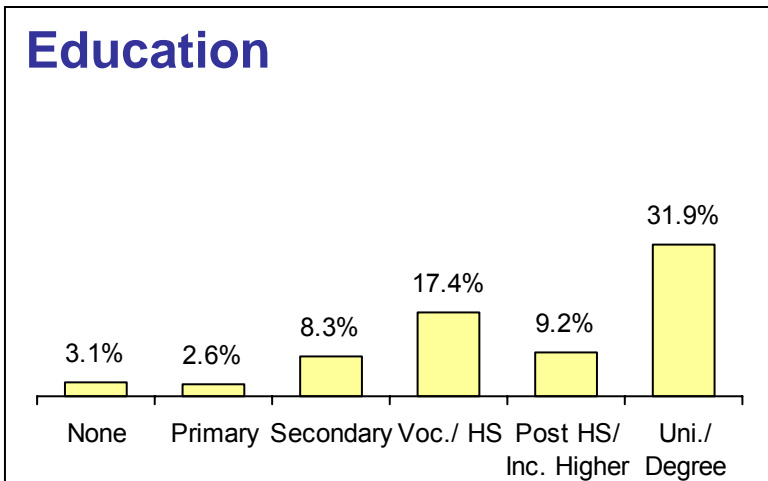
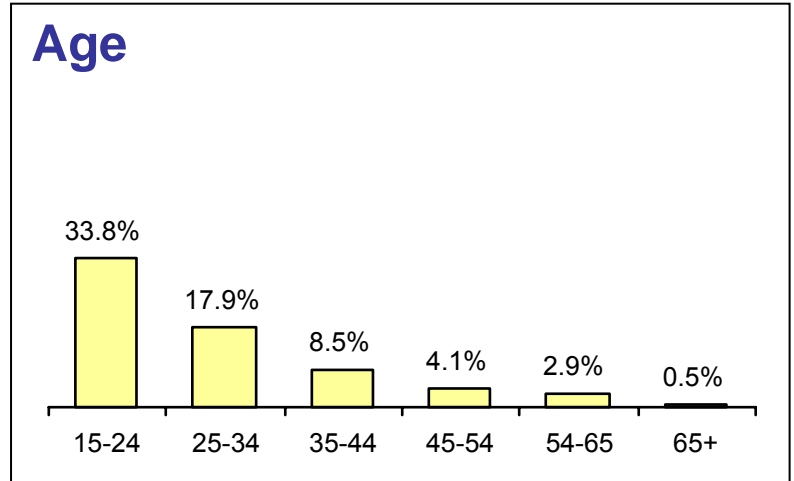
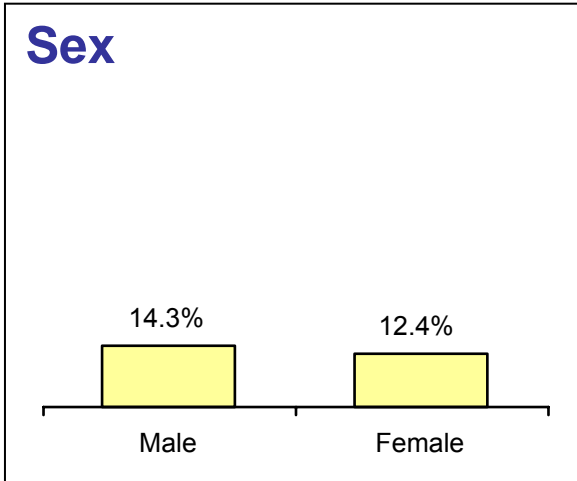
Base: n = 2,011 (adults 15 and older) in Moldova

- Google is the U.S.-based internet search site.



Access in Past 12 Months Among Demographic Segments

Past 12 Months Reach: 13.3%



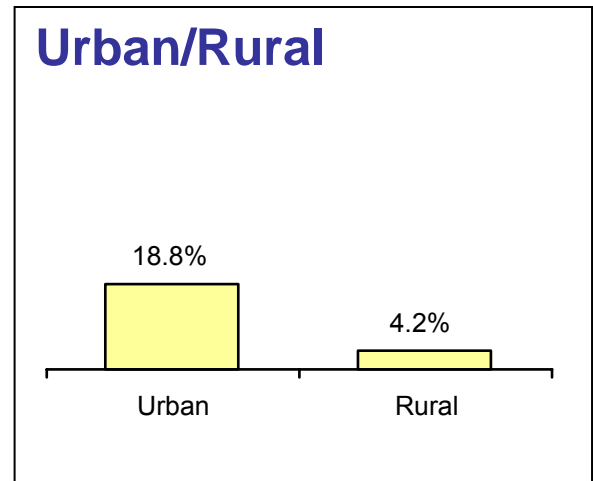
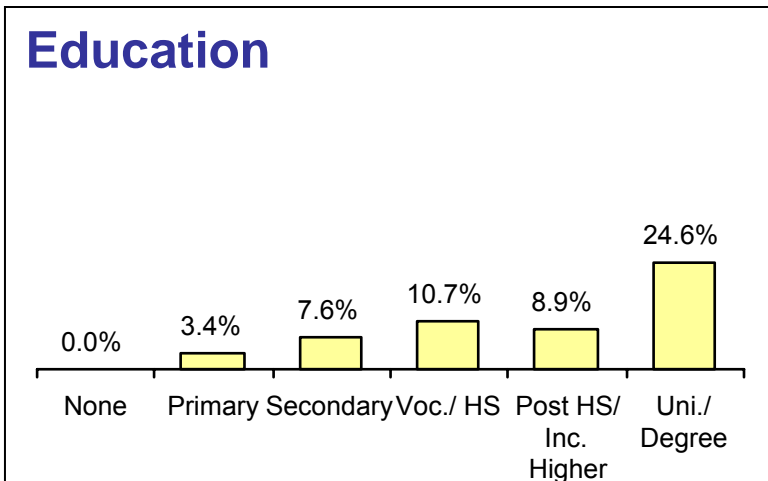
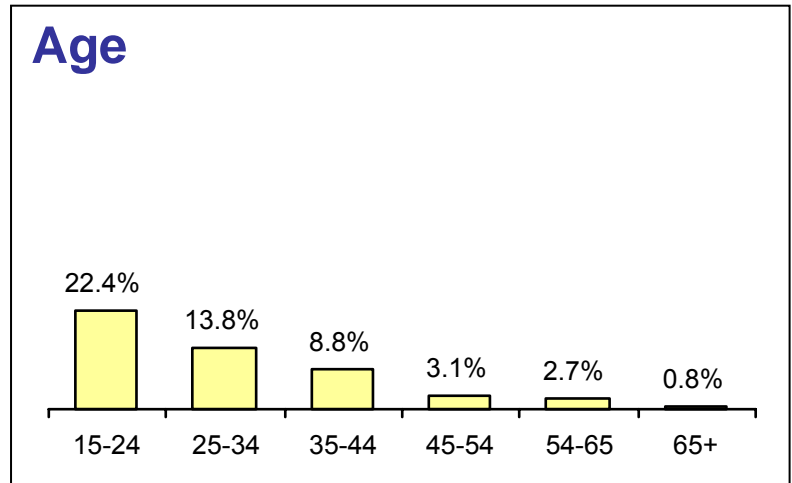
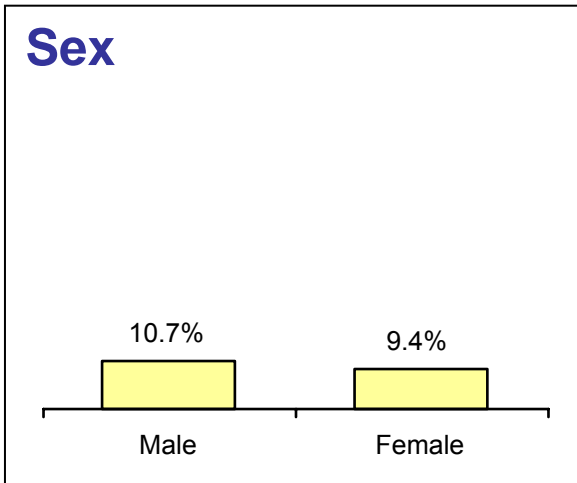
Base: n = 2,011 (adults 15 and older) in Moldova

- Yahoo! is a U.S.-based internet portal.



Access in Past 12 Months Among Demographic Segments

Past 12 Months Reach: 10.0%



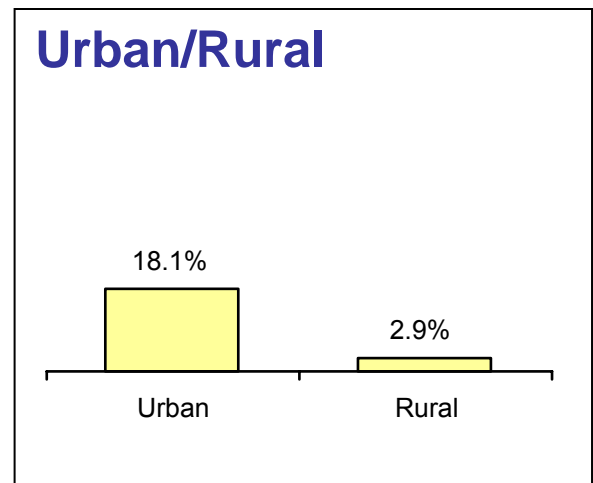
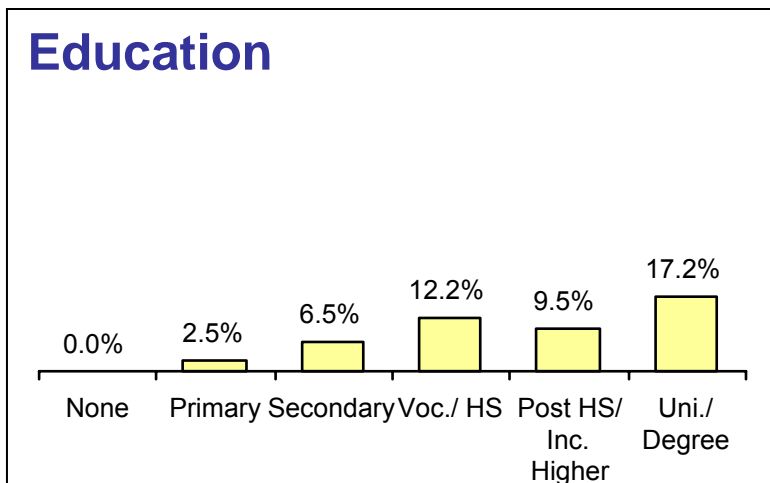
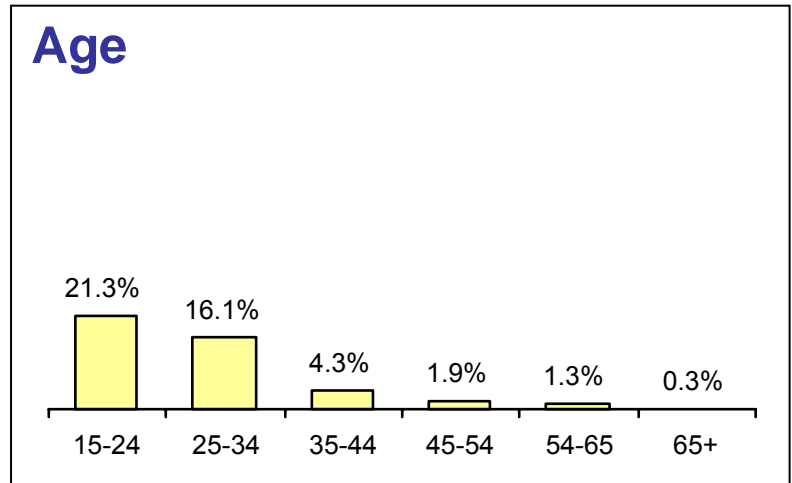
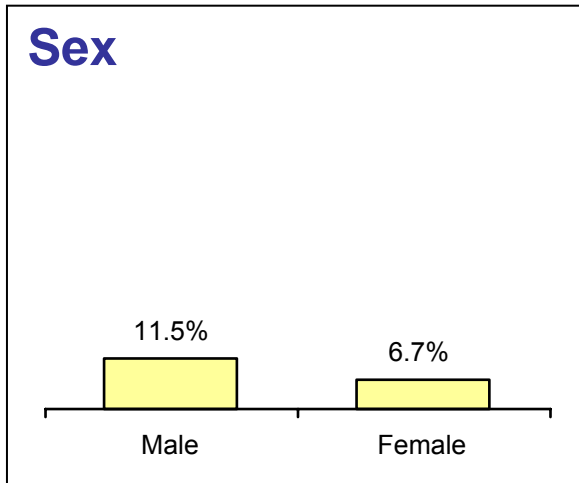
Base: n = 2,011 (adults 15 and older) in Moldova

- Rambler.ru is a Russian-language internet portal.



Access in Past 12 Months Among Demographic Segments

Past 12 Months Reach: 8.9%



Base: n = 2,011 (adults 15 and older) in Moldova

- Created in December 1999, 999.md is a Russian-language portal site. It is Moldova's largest portal dedicated to trading goods and services.

How favorably or unfavorably inclined are you personally toward the United States?

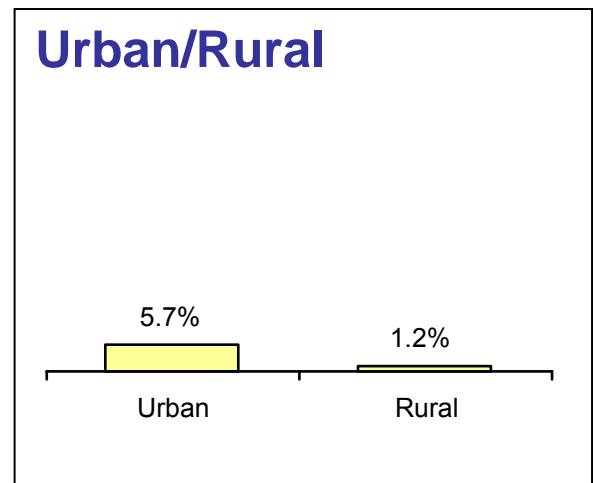
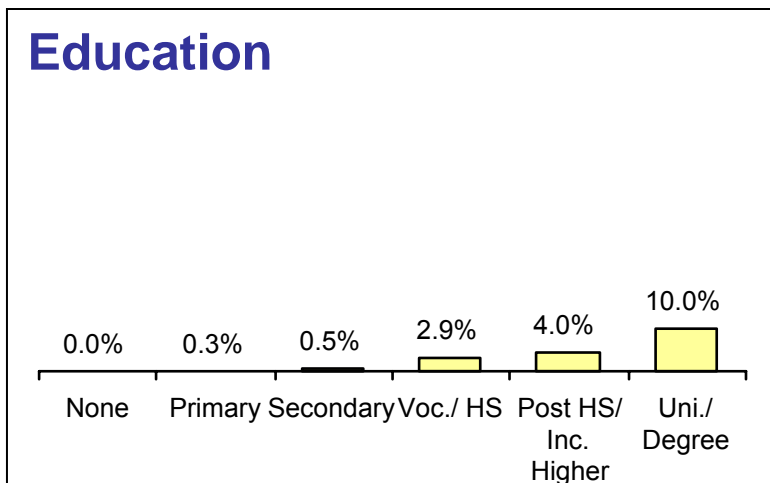
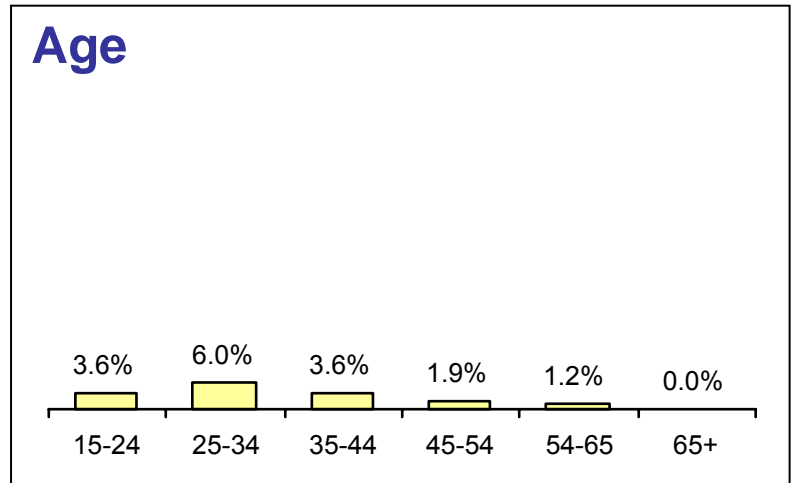
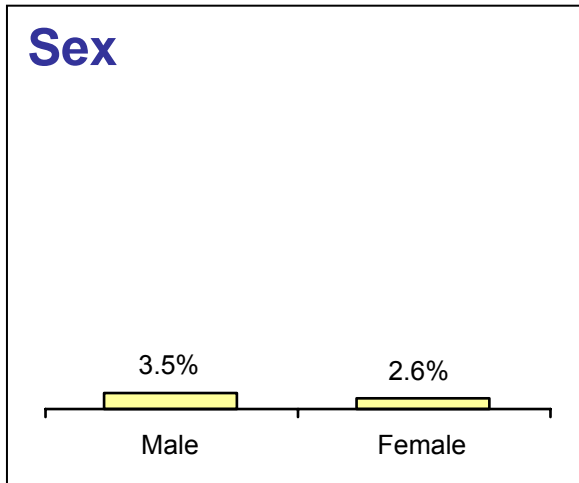
Rank	Website (Number of monthly users)	Very favorably inclined percent	Somewhat favorably inclined percent	Somewhat unfavorably inclined percent	Very unfavorably inclined percent	Don't know-refused percent
Top 5	Survey sample average (Total = 2,011)	13	56	13	4	14
1	timpul.md (47)	33	46	13	4	5
2	newsmoldova.ru(md) (48)	29	59	9	4	0
3	Hotmail (57)	28	53	11	2	7
4	reporter.md (40)	28	51	20	0	2
5	Yahoo! (198)	27	56	10	2	5
Bottom 5						
1	moldova.md (49)	12	68	20	0	0
2	asi.md (38)	15	66	13	0	6
3	allmoldova.com (40)	17	63	11	5	4
4	999.md (123)	23	55	16	0	6
5	Google (292)	23	56	12	4	6

- The table shows attitudes toward the United States by monthly users of the internet.
- The sites are ranked by the percentage of “very favorable” responses among users; rows add to approximately 100 percent.
- This cross tab is presented as part of the audience profile for media outlets. Although often suggestive, these tabulations do not prove causality.



Access in Past 12 Months Among Demographic Segments

Past 12 Months Reach: 3.0%



Base: n = 2,011 (adults 15 and older) in Moldova

- Moldova.md is a Moldovan-language internet portal and news site.

- Print media in Moldova lack modern printing facilities, photographic equipment and publishing software. Given their budgets, it is difficult for them to subscribe to picture databases. As a result, their production values are generally low. The quality of those media outlets located in places other than Chisinau tend to be lower still. The importance of print media has not changed in the past year: about 40 percent still read a newspaper at least once per week for news and information. The 2007 *Newspaper and Magazine Catalogue* published by Posta Moldovei listed 70 Moldovan-language newspapers and 60 Russian-language newspapers available in Moldova.
- The Russian-language *Komsomolskaia Pravda* remains the leading newspaper; 24 percent read the paper on a weekly basis. *Makler*, in second place, is now at 22 percent; *Flux* has also gained readers and its weekly readership is at 11 percent. Forty-seven percent of respondents had not read a newspaper in the past seven days.
- Newspapers in Moldova are distributed mainly by subscription. This type of distribution is the most popular because it is less expensive and rural residents can be served through the mail. The average monthly subscription to a weekly newspaper, for example, varies between 7 and 9 lei compared to 2–4 lei for a weekly issue sold through Moldpres Agency distributors. Managers state that subscription rates are convenient for readers but disadvantageous for editors; editors try to cover expenses by selling copies through commercial outlets. They may also look for and accept financial support from various external sources, which undermine the principles of independence and accountability to society.
- The newspaper distribution system outside of Chisinau for periodicals is a *de facto* monopoly of Posta Moldovei. Posta Moldovei charges monopolistic rates and often delivers newspapers late. Private distributors operate in Chisinau and Balti; most newsstands are affiliated with Moldpresa. Small print runs make it unlikely that private distribution companies could afford to operate outside of Chisinau.
- Many newspapers are owned by political figures and party newspapers are published on a regular basis. The oldest party newspapers in Moldova are *Comunistul*, the press outlet of the Party of Communists of the Republic of Moldova (PCRM), and *Flux* whose founder is the leader of Christian Democratic People's Party (PPCD). Iurie Rosca holds all or almost all shares of newspaper and news agency *Flux* and the periodical *Flux Continuu*, The vice-chair of the PPCD Vlad Cubreacov holds about half the shares of *Gazeta LTD*. The chairman of Democratic Party Dumitru Diacov owns all shares of *Novoe vremea*.
- Seven higher education institutions provide journalism training, as do other institutes. For example, the Chisinau School of Advanced Journalism opened in September 2006. This project was initiated by the Independent Journalism Center (IJC) in partnership with the Missouri School of Journalism and Paris-based Journalism School and Training Center. Nevertheless, there is a deficit of well-qualified journalists in the Moldovan media market. Many periodical publications and radio and TV stations feel forced to teach the fundamentals of journalism. The quality of education offered by the universities leaves much to be desired. The small salaries and large amount of work are not attractive for field specialists. Faculties include old-time professors who do not know the new principles of media and young professors who do not have experience in mass media.

Rank	Newspaper	Read in past 7 days
1	<i>Komsomolskaia Pravda</i>	23.6
2	<i>Makler</i>	22.0
3	<i>Flux</i>	11.2
4	<i>Moldova Suverana</i>	5.5
5	<i>Nezavisimaia Moldova</i>	4.7
6	<i>Capitala</i>	3.3
	Did not read newspapers	46.5

Base: n = 2,011 (adults 15 and older) in Moldova

Please think about all of the sources you use to get news about current events. Which stations or publications are your most important sources of information?
(Respondents were allowed to name three sources)

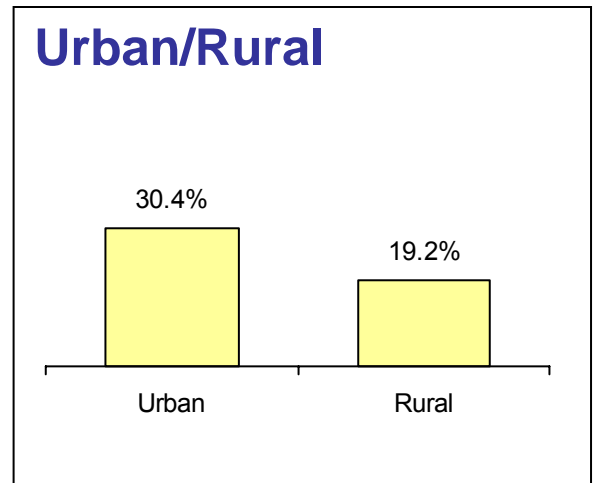
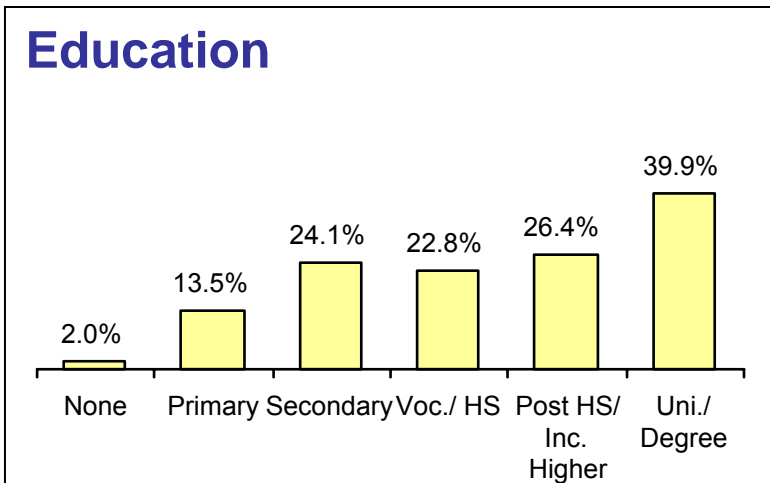
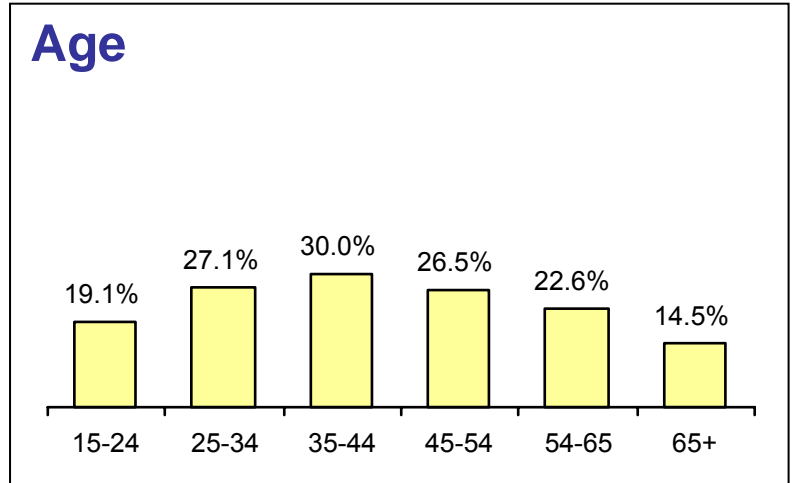
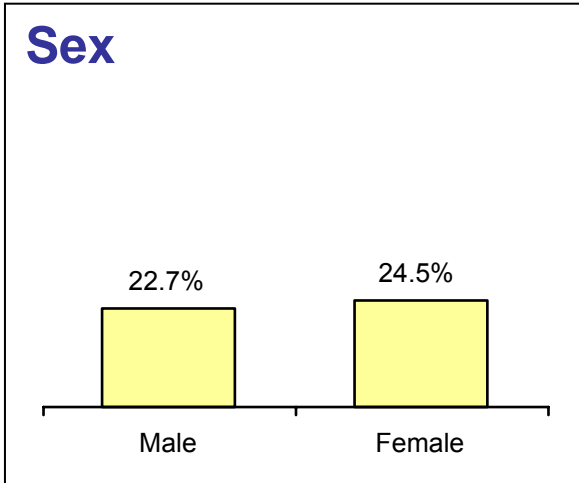
Rank	Newspaper	First choice as most important	Total (selected as one of three most important sources)
1	<i>Komsomolskaia Pravda</i>	0.8	7.5
2	<i>Flux</i>	0.6	3.7
3	<i>Makler</i>	0.4	3.3
4	<i>Moldova Suverana</i>	0.2	1.2

Base: n = 2,011 (adults 15 and older) in Moldova



Komsomolskaia Pravda Readers Weekly Reach Among Demographic Segments

Weekly Reach: 23.6%



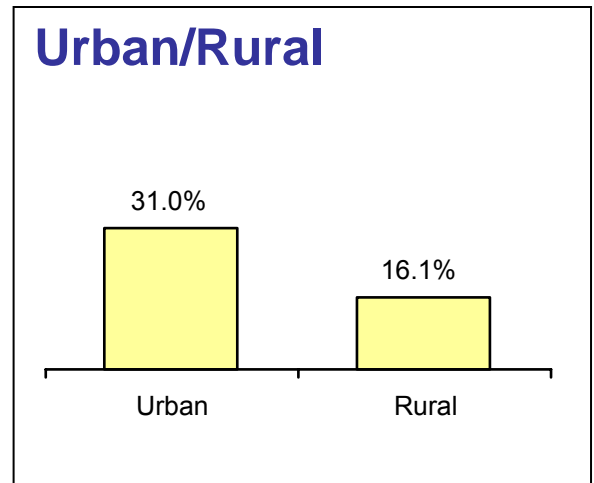
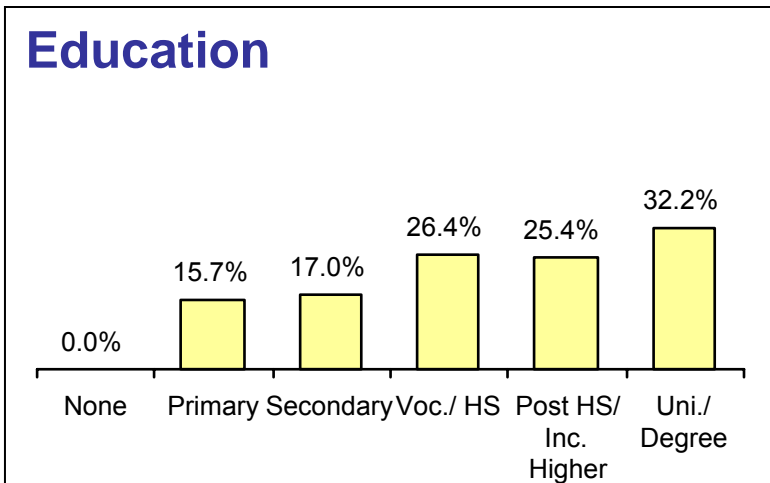
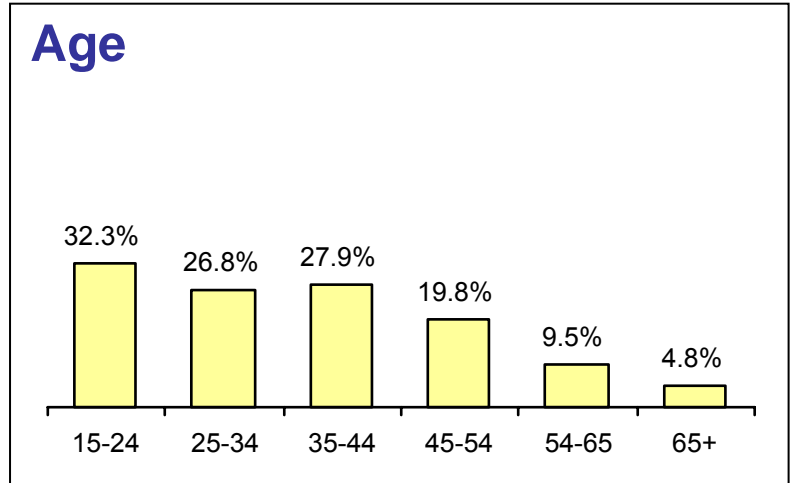
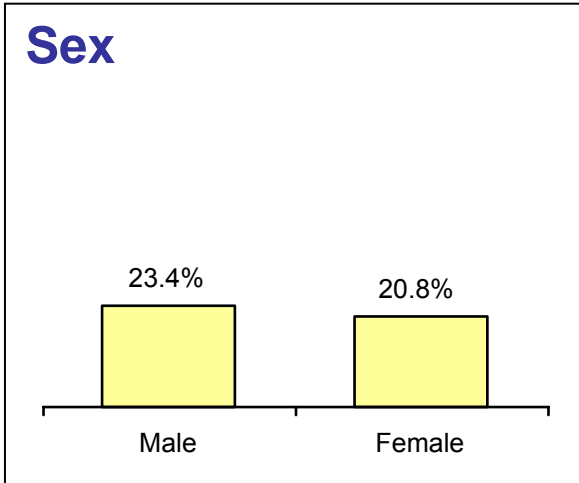
Base: n = 2,011 (adults 15 and older) in Moldova

- This Russian-language daily newspaper remains the most widely read newspaper in Moldova. Its weekly reach has not changed from the level recorded in 2005. It appeals to better-educated urban dwellers.



Makler Readers Weekly Reach Among Demographic Segments

Weekly Reach: 22.0%



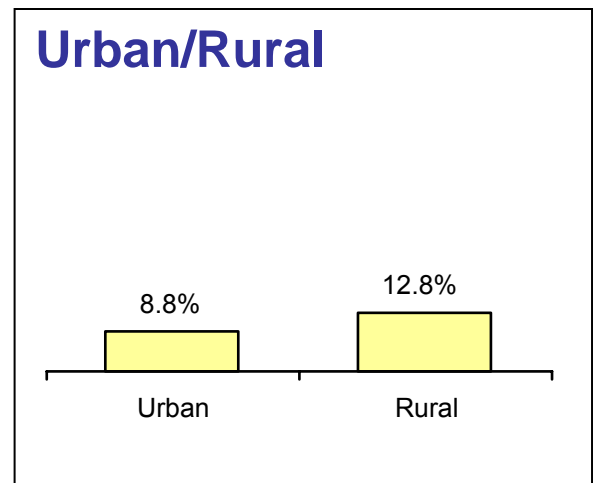
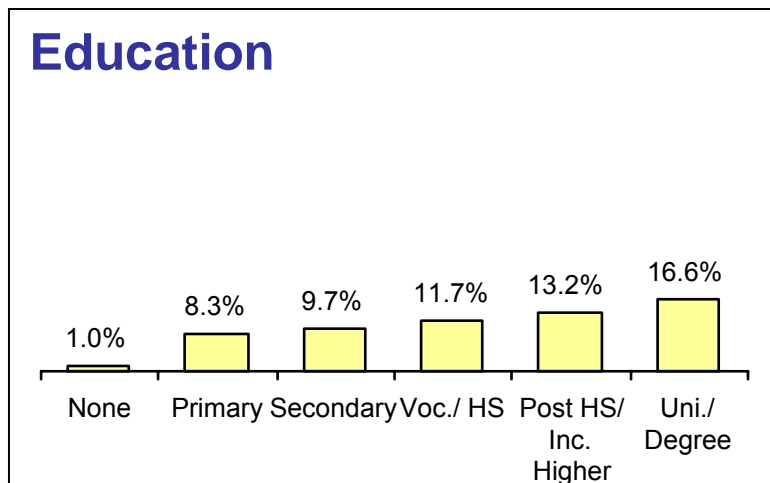
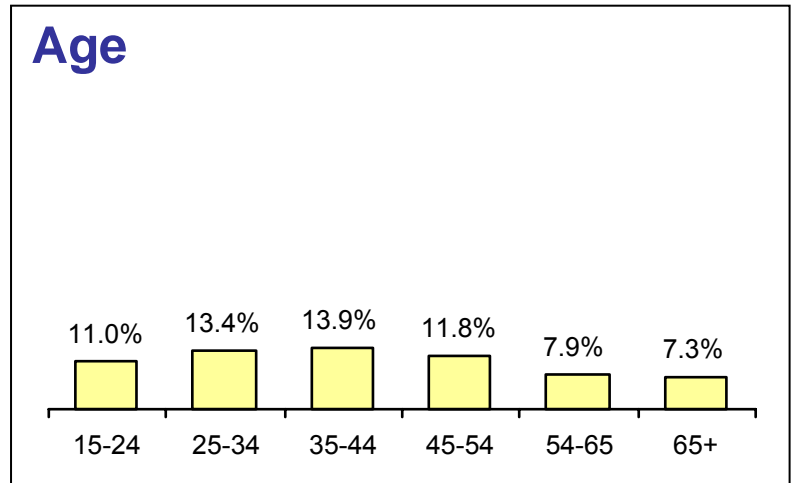
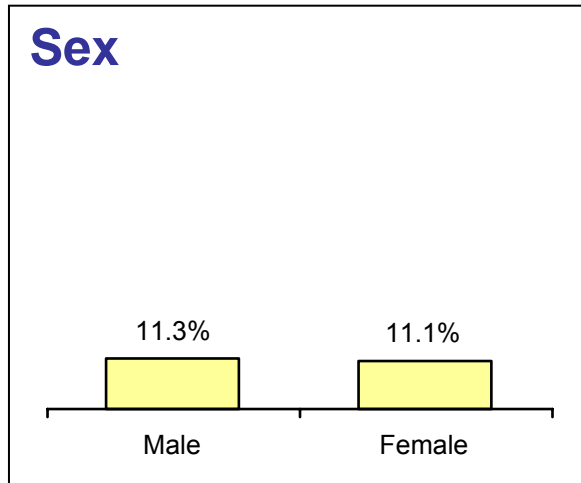
Base: n = 2,011 (adults 15 and older) in Moldova

- This Russian-language paper is based in Chisinau. Its focus is on classified ads. Its widespread popularity has led to charges that its large audience makes it attractive for human traffickers.



Flux Readers Weekly Reach Among Demographic Segments

Weekly Reach: 11.2%



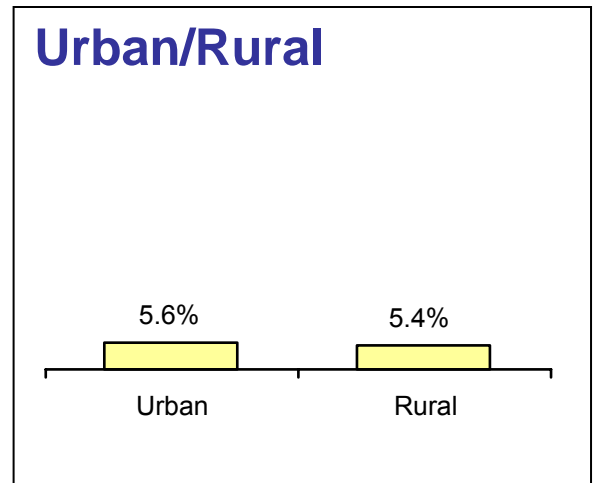
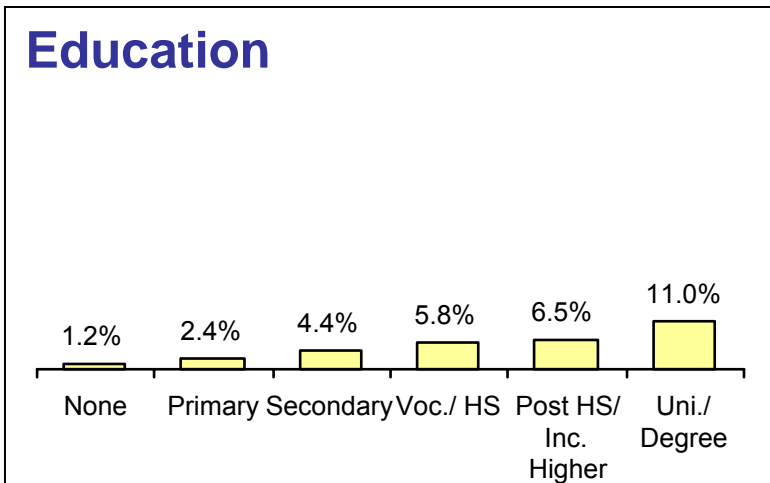
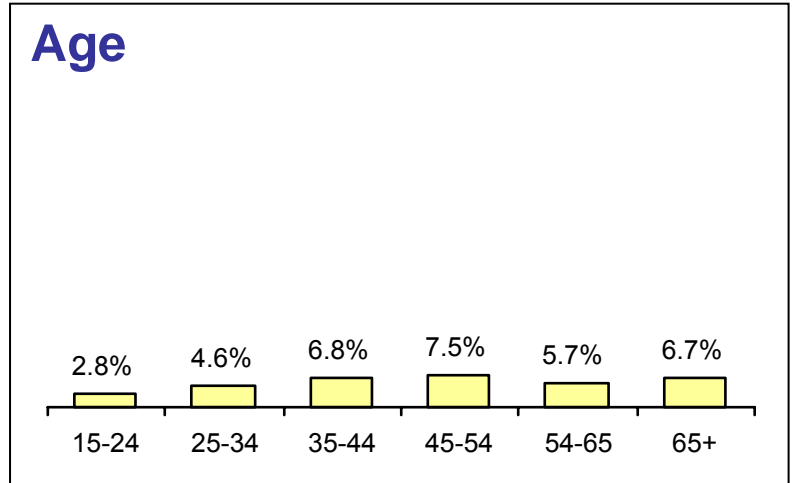
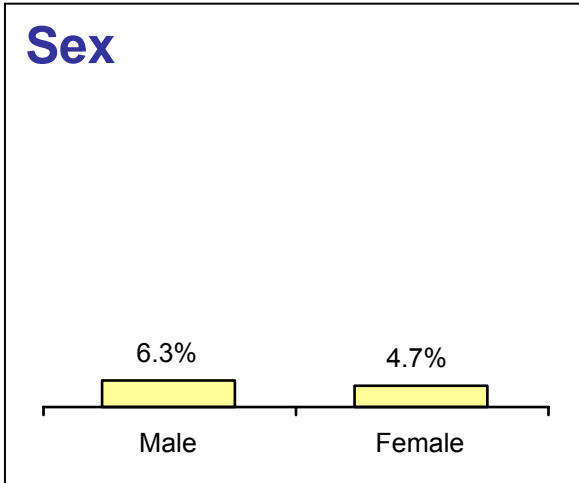
Base: n = 2,011 (adults 15 and older) in Moldova

- According to the income and property statement provided to the Central Electoral Commission, Iurie Rosca, chairman of the Christain Democratic People's Party, owns 99 percent of *Flux*'s shares, along with 99 percent of the shares of Flux News Agency, among other holdings.
- *Flux* readers are the least favourably inclined toward the United States.



Moldova Suverana Readers Weekly Reach Among Demographic Segments

Weekly Reach: 5.5%



Base: n = 2,011 (adults 15 and older) in Moldova

- *Moldova Suverana* is a privately owned newspaper, having been privatised in 2005. It generally supports the government in its editorial policy.

How favorably or unfavorably inclined are you personally toward the United States?

Rank	Newspaper (Number of weekly readers)	Very favorably inclined percent	Somewhat favorably inclined percent	Somewhat unfavorably inclined percent	Very unfavorably inclined percent	Don't know-refused percent
Top 5	Survey sample average (Total = 2,011)	13	56	13	4	14
1	<i>Capitale</i> (63)	24	65	3	2	6
2	<i>Moldova Suverana</i> (116)	20	61	8	1	10
3	<i>Nezavisimaia Moldova</i> (101)	19	54	14	4	9
4	<i>Komsomolskaia Pravda</i> (466)	18	55	14	4	10
5	<i>Makler</i> (278)	17	54	15	3	10
Bottom 5						
1	<i>Flux</i> (214)	14	56	12	4	14

- The table shows attitudes toward the United States by weekly readers of newspapers.
- The newspapers are ranked by the percentage of “very favorable” responses among readers; rows add to approximately 100 percent.
- This cross tab is presented as part of the audience profile for media outlets. Although often suggestive, these tabulations do not prove causality.