Armenia 2013 Media Public Opinion and Preference Survey

Alternative Recourses In Media Project
(implemented by a consortium of Internews, YPC, EPF)

Caucasus Research Resource Centers-ARMENIA

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Yerevan

Outline

1. Traditional Media

- **General Overview (TV, Radio, Newspapers)**
- **Concerns**
- **Opportunities**

2. Alternative/online Media

- **General overview (Internet usage and access, Social networking)**
- **Concerns**
- **A look forward**

Survey parameters

- Sampling frame: 2013 comprehensive list of electricity users
- Sample size: 1403 households
- Sampling approach: multistage cauterized random sampling of households
- Area coverage: Yerevan, other urban and rural areas in all marzes of RA (proportionate-to-population)
- Respondent sampling criteria: The upcoming birthday method among adults (16+) within the household
- Margin of error: ± 2.5%, with a 95% confidence interval
- Field work period: May-June 2013
- Interview method: face to face interviews

Implementing team

- **Sona Balasanyan: - Questionnaire review and study implementation coordinator, PPT file developer;**

- **Ruben Yeganyan - questionnaire adviser and fieldwork plan developer,**

- **CRRC-Armenian all staff including junior fellows**

- **49 supervisors and interviewers**

  CRRC-Armenia team acknowledges generous advice by Manana Aslamazyan, Gevorg Ter-Gabrielyan, Boris Navasardian and many others from EPF, MIC and YPC

QA1. The most important source of information on current events and news (%)

■ 2013　■ 2011

TV
- 2013: 79
- 2011: 90

Internet
- 2013: 17
- 2011: 6

Neighbors, friends and relatives
- 2013: 2
- 2011: 0.5

Radio
- 2013: 1
- 2011: 2

Newspapers
- 2013: 1
- 2011: 1
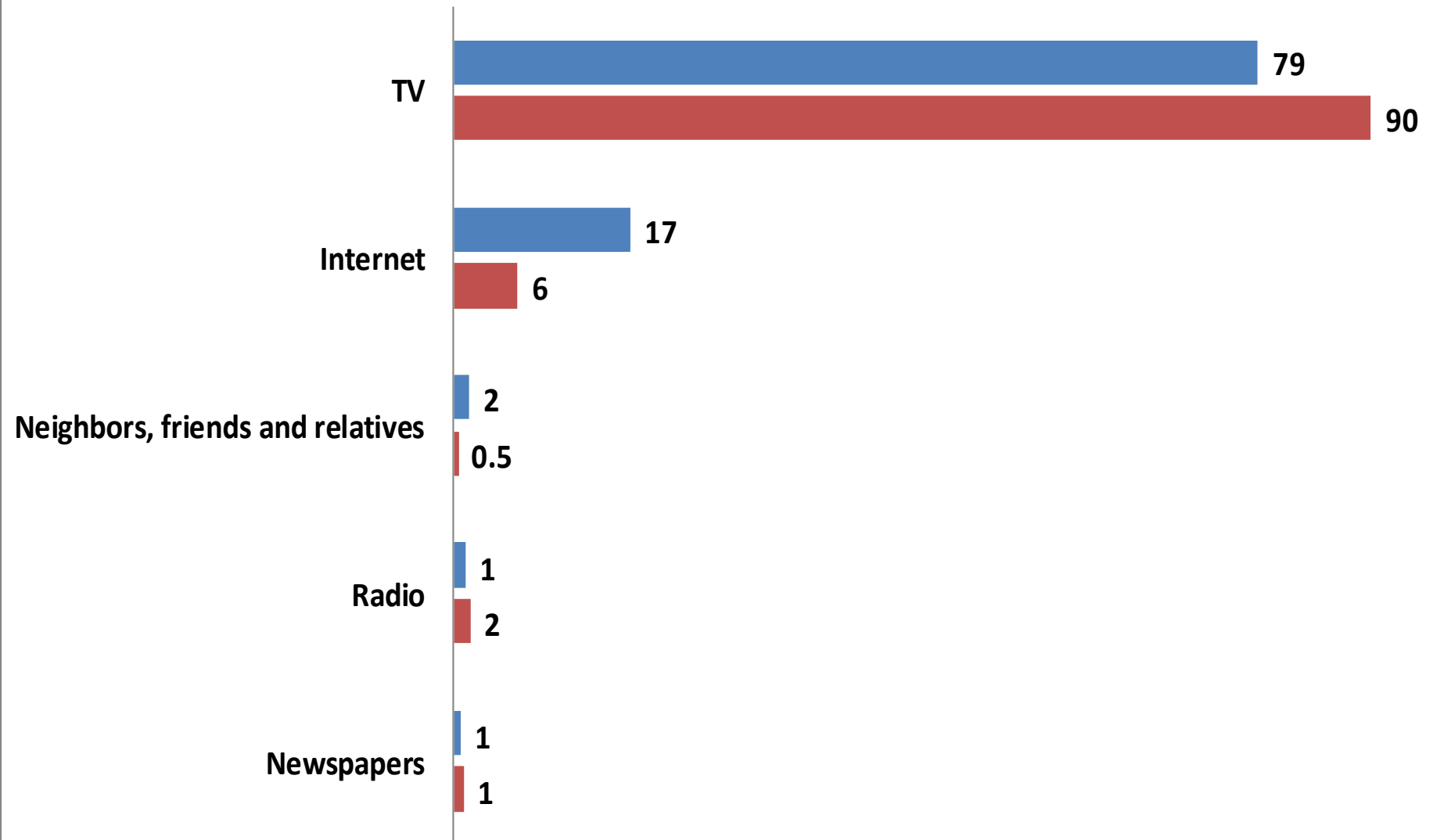
Traditional Media| General Overview: availability, usage, trust, content

QE1. Which of the following do you have at home? (% of total, by item, the list updated, **2013**)

Item	%
TV set	98
DVD device	58
Desktop computer	42
Digital photo/video	27
Notebook	25
Cable TV device	18
Netbook	6
Game device	5
Planshet	4
None	0.2
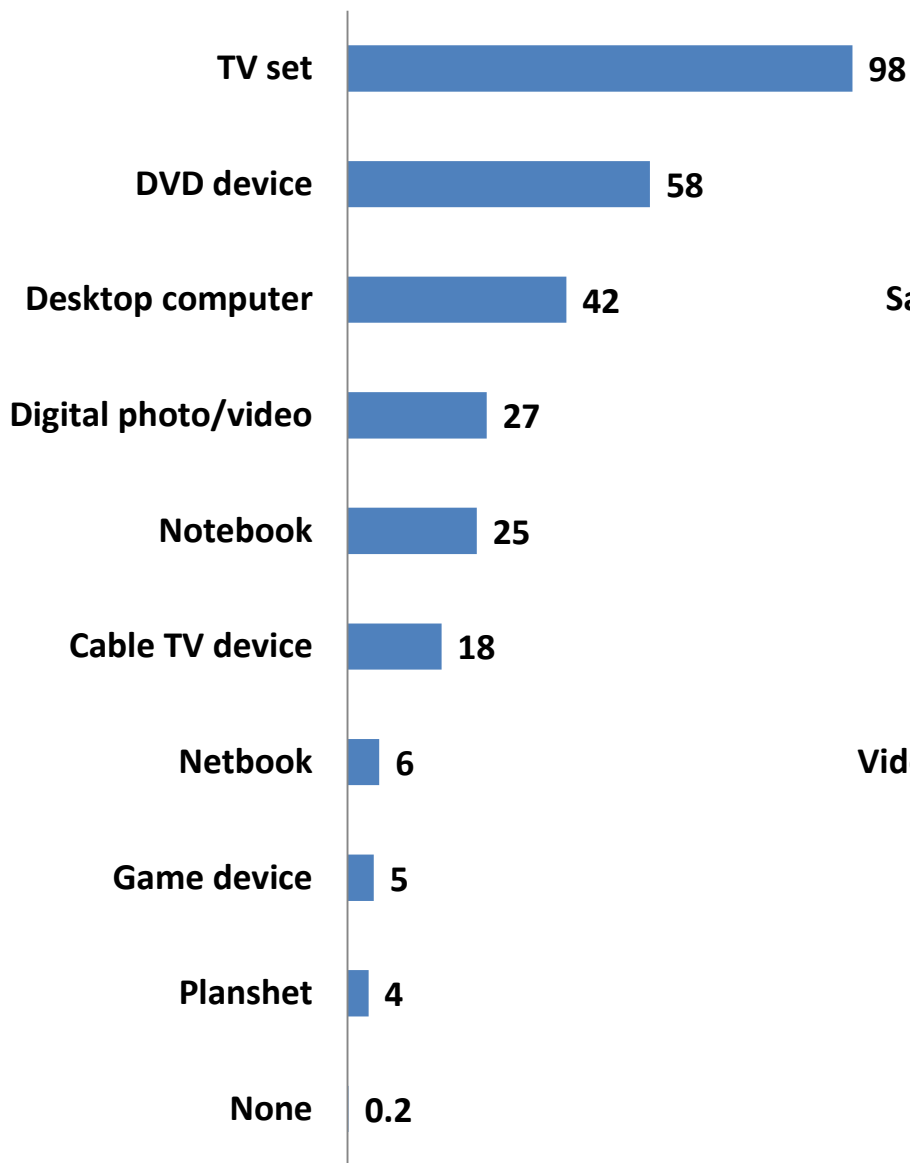
QE6. Household working appliance ownership (% of total by item, **2011**)

Item	%
TV set	97
Radio in the car	88
Satellite TV antenna/Cable TV	64
Internet connection	32
Mobile phone	27
Radio	26
Videotape recorder/DVD player	20
Computer	15
All	2
None	0.2
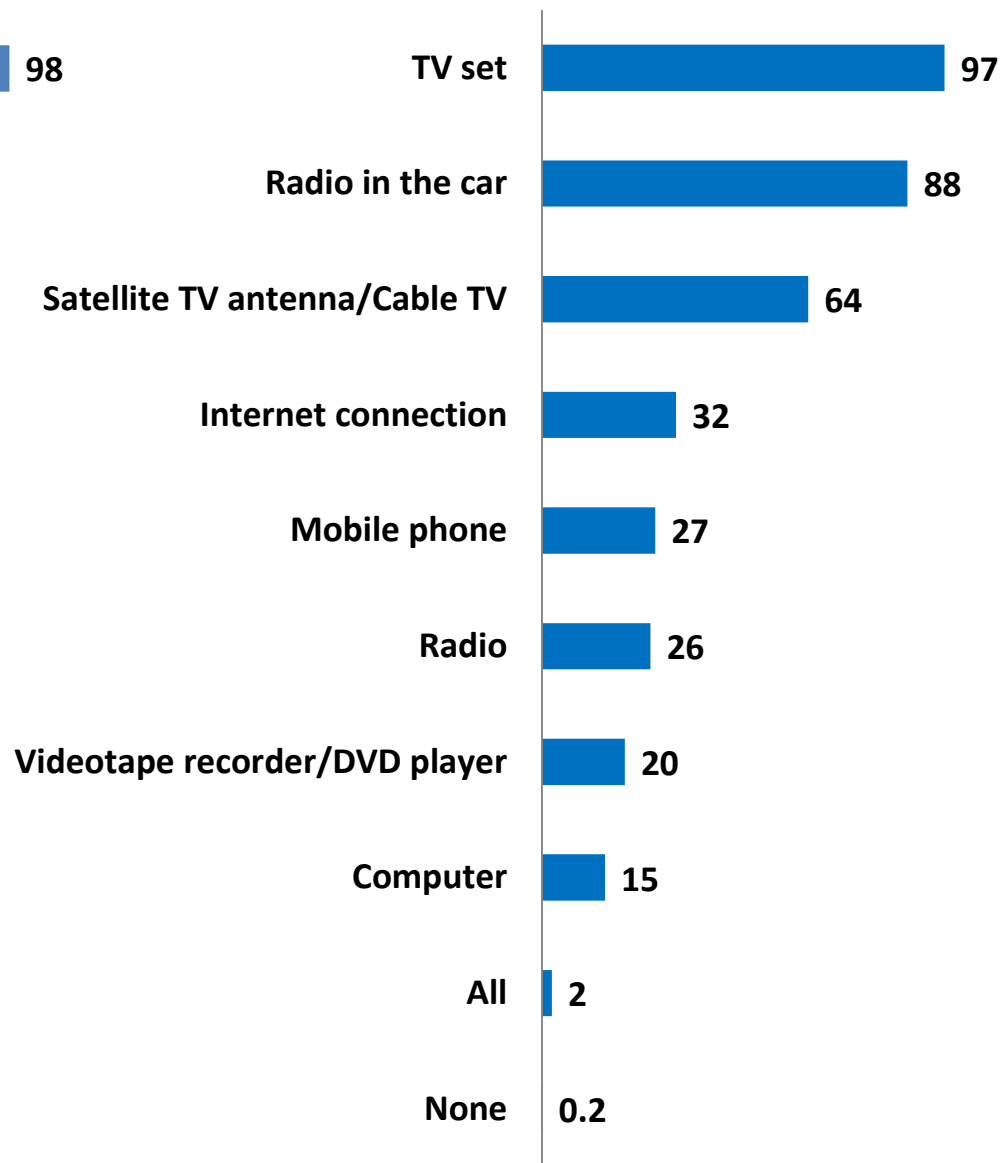
QB1. During the last 12 months, have you watched TV or listened to the radio? (%)

■ 2013 ■ 2011

- Watched only TV: 82 (2013), 76 (2011)
- Watched TV and listened to Radio: 16 (2013), 23 (2011)
- Listened to radio only: 0.4 (2013), 0.6 (2011)
- Didn't watch TV and didn't listen to radio: 1 (2013), 0.3 (2011)
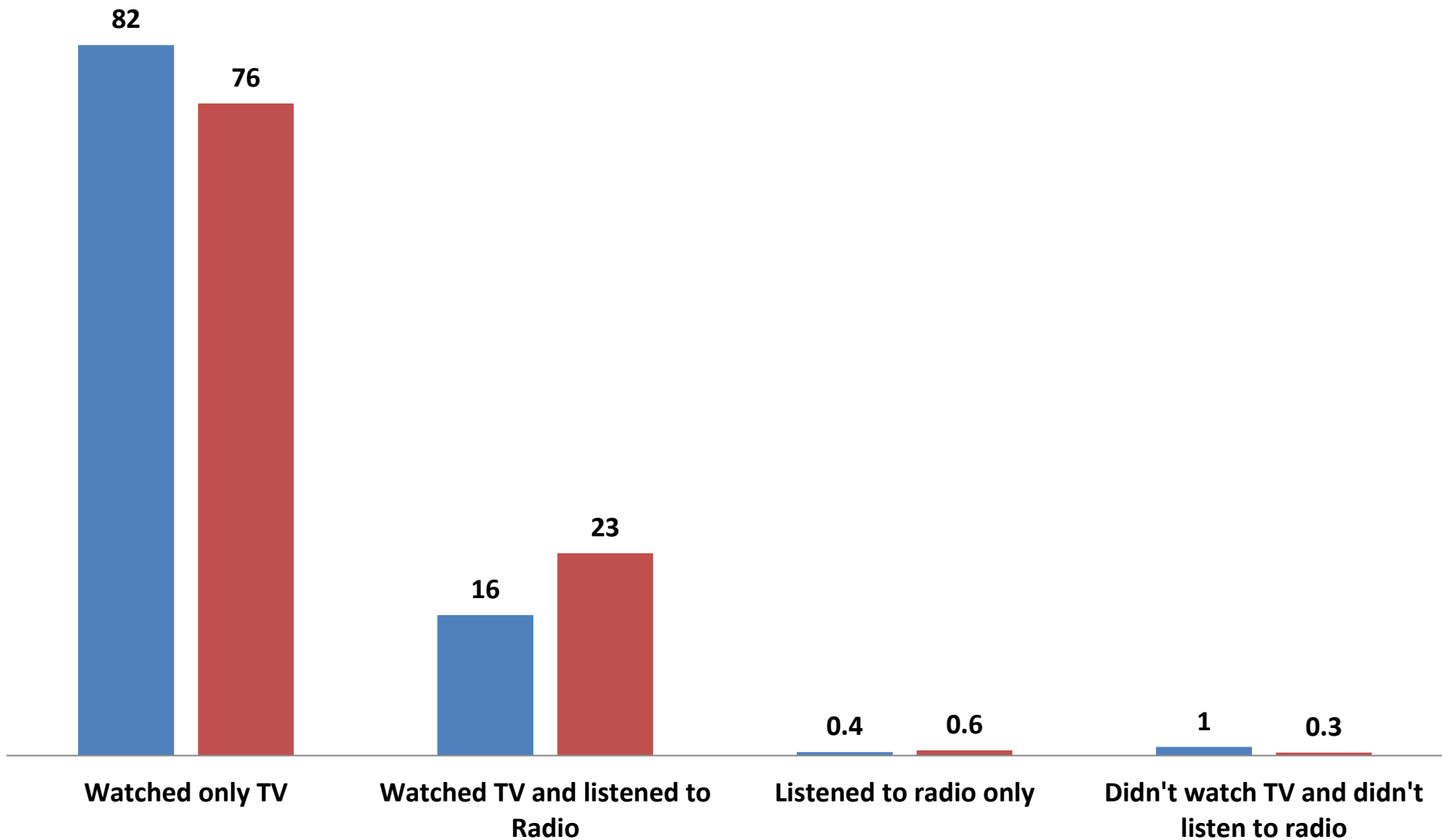
QB2. The average time spent for watching TV per day (%)

	2013	2011
12 hours and more	2	9
9-12 hours	4	11
7-9 hours	8	13
5-7 hours	19	23
3-5 hours	31	25
1-3 hours	31	16
Less than 1 hour	5	2
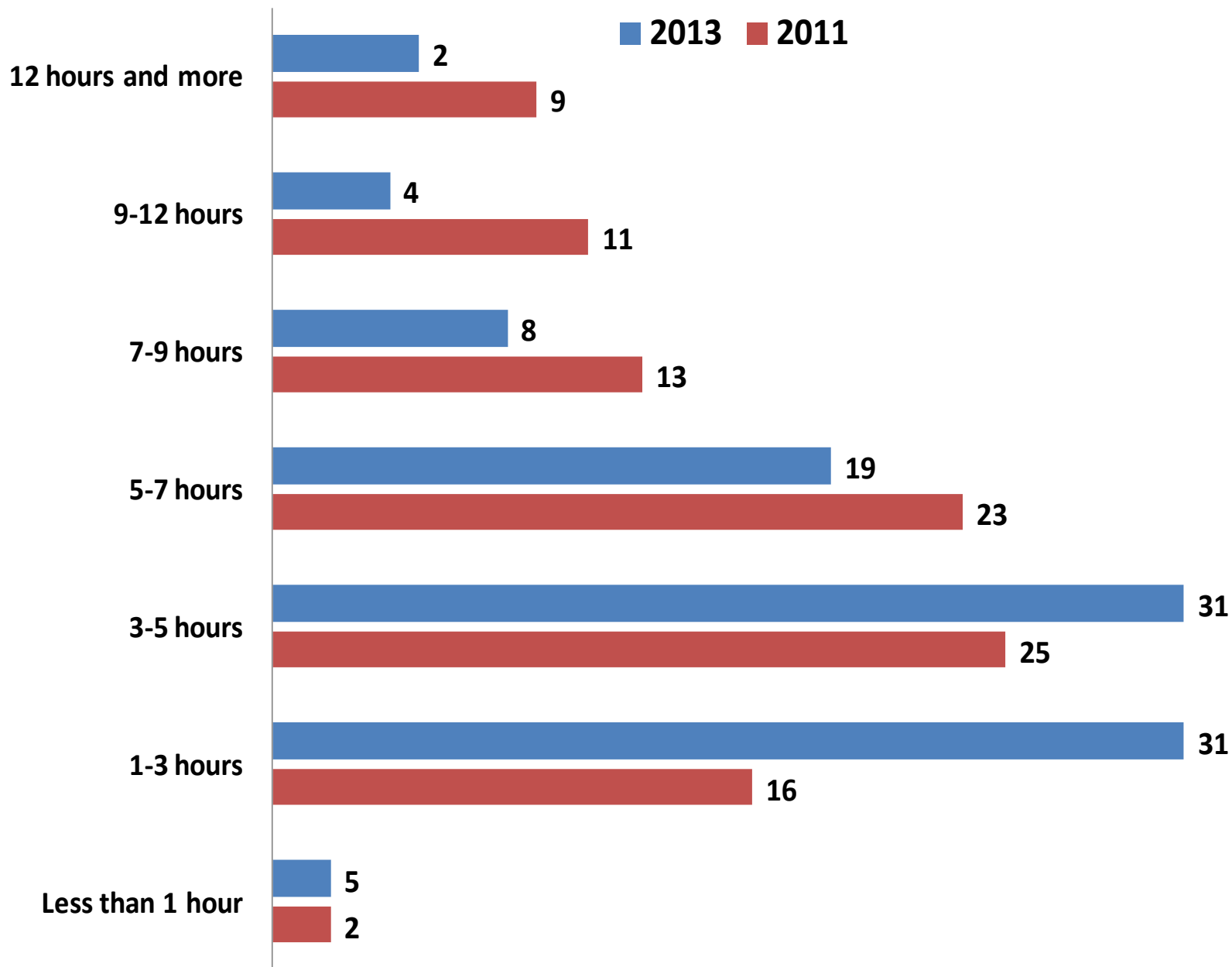
QB4. Availability of TV channels and the frequency of watching on every day bases (%)

■ **Access** ■ **Frequency of watching**

Channel	Access	Frequency of watching
H1	99	71
Armenia TV	96	76
Shant TV	96	77
H2	91	34
Kentron TV	93	29
Rossia/RTR/RTR planeta	86	29
Yerkir Media	75	16
Russian 1st/ORT	75	28
Shoghakat TV	66	8
ATV	57	11
Armnews	57	21
Yerevan TV	56	4
AR	56	4
Dar21	55	10
Laym	55	8
Kultura	55	11
Local TV	28	12
Cabel TV channels	22	16
Other	9	4
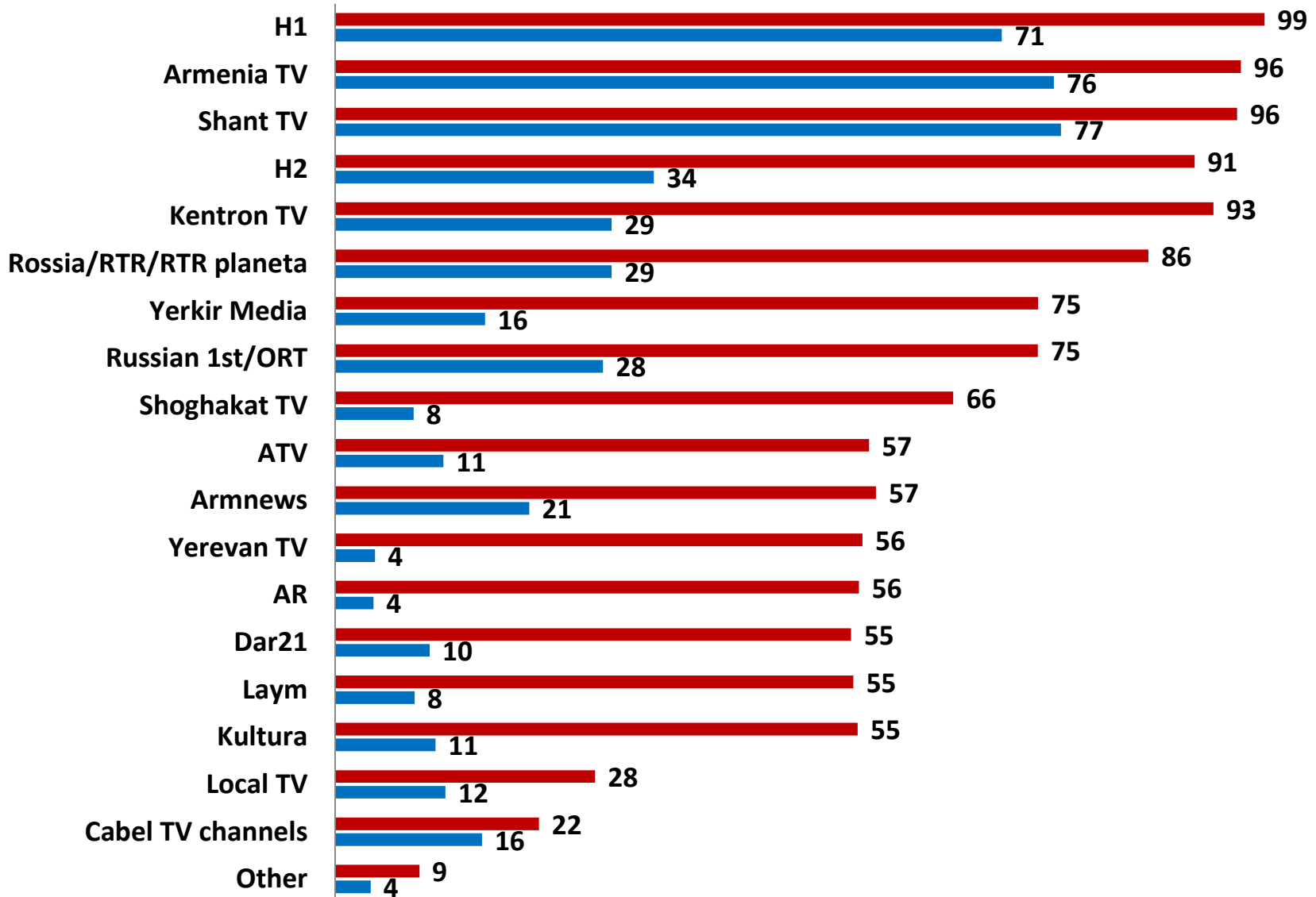
QA2. How often do you use these sources to get information about current events and news? (%), 2013

■ Every day ■ Several times a week ■ Once a week ■ Once or twice per month ■ Never ■ Don't know

Source	Every day	Several times a week	Once a week	Once or twice per month	Never	Don't know
Armenian TV channels	83	10	3		3	
Russian TV channels	43	22	9	6	21	
International TV channels	42	21	5	4	28	
Radio	24	7	3	1	63	2
Newspapers/weekly newspapers	19	9	4	2	64	2
Online media	8	5	2	3	79	3
Social networks	7	6	3	4	78	2
Neighbors, friends and relatives	3	7	7	7	74	2
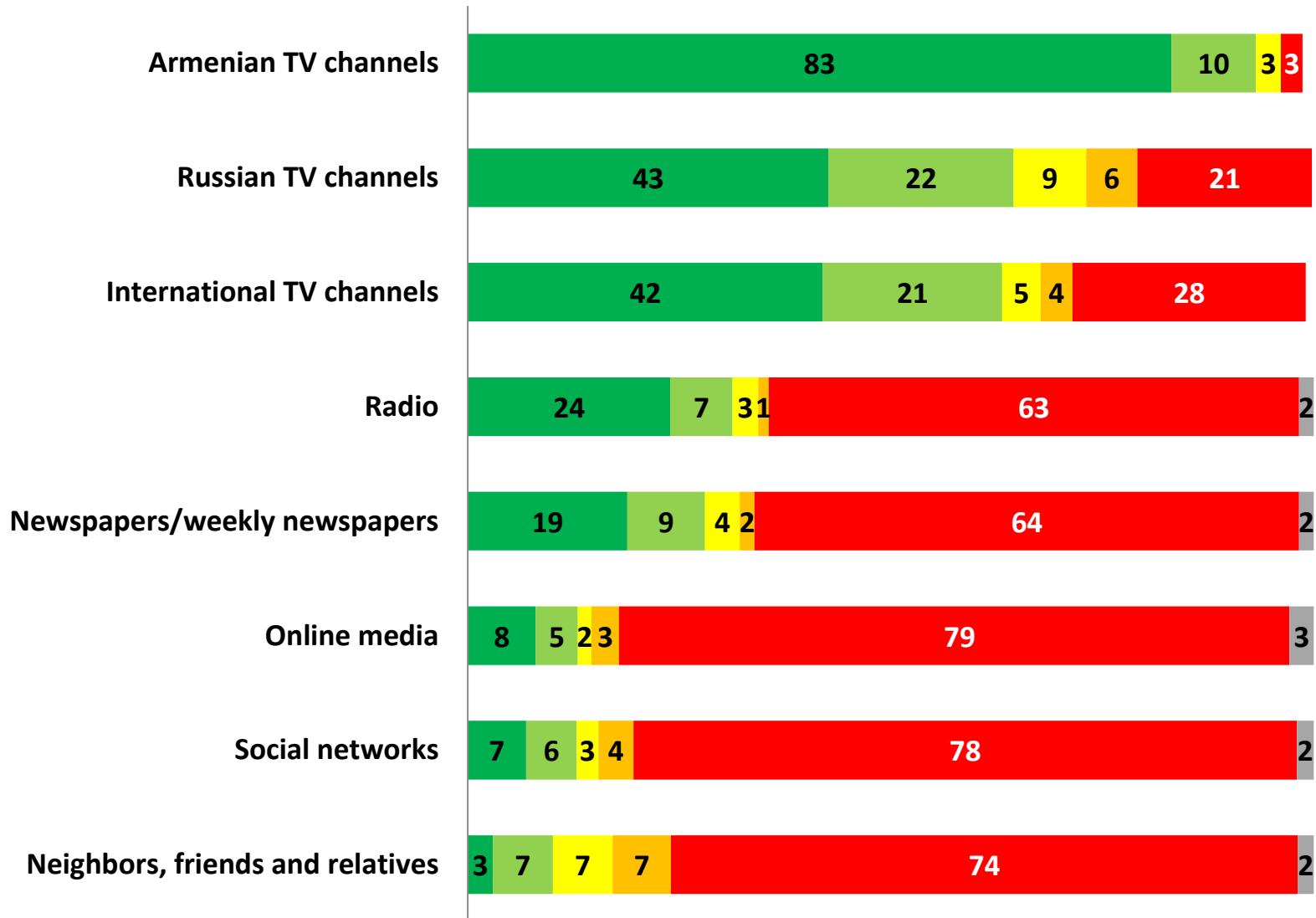
QA6. The level of trust towards each of the sources (%, 2013)

Legend: ■ Trust very much ■ Somewhat trust ■ Don't trust ■ Don't trust at all ■ Don't know

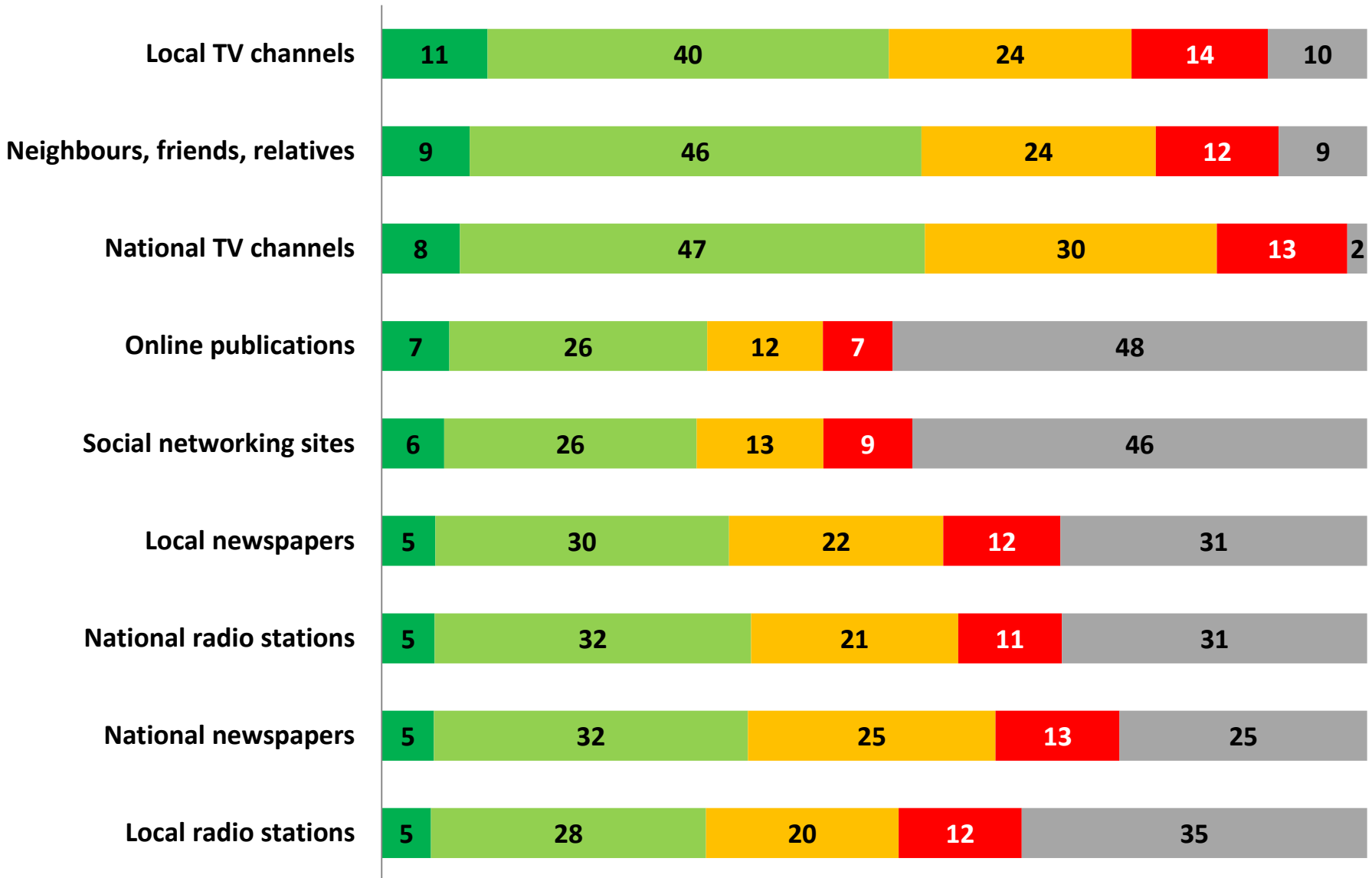| Source	Trust very much	Somewhat trust	Don't trust	Don't trust at all	Don't know
Neighbors, friends and relatives	14	39	16	14	17
Local TV channels	10	47	20	10	14
Online media	9	31	11	7	41
Social networks	8	28	12	9	43
National TV channels	7	51	26	13	3
National radio stations	4	22	15	10	48
Local radio stations	4	20	13	12	51
Local newspapers	4	19	15	13	50
National newspapers	3	21	19	13	44
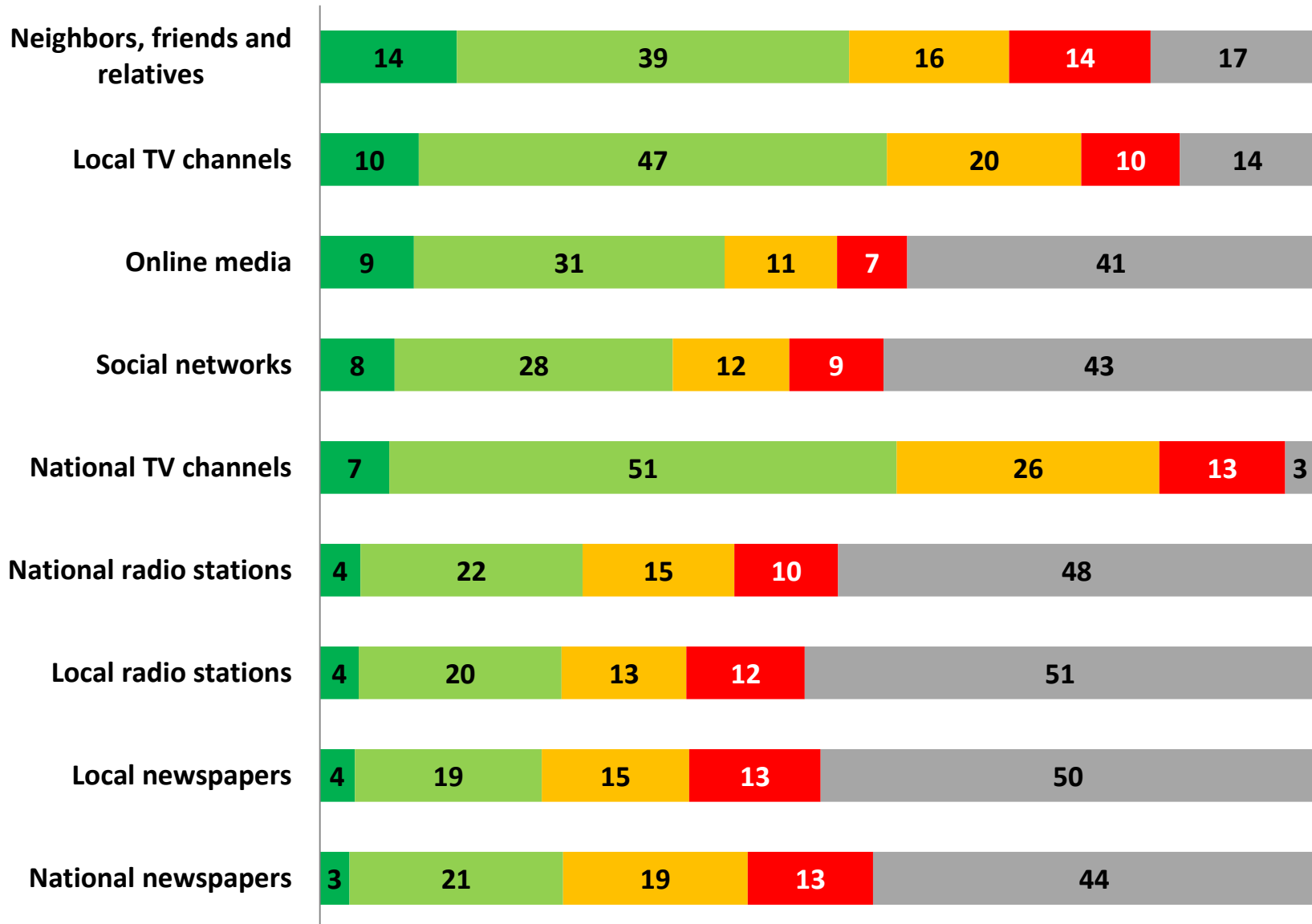
QA6. The level of trust toward each of the sources (2011)

■ **Trust very much** ■ **Somewhat trust** ■ **Don't trust** ■ **Don't trust at all** ■ **DK**

Source	Trust very much	Somewhat trust	Don't trust	Don't trust at all	DK
Local TV channels	11	40	24	14	10
Neighbours, friends, relatives	9	46	24	12	9
National TV channels	8	47	30	13	2
Online publications	7	26	12	7	48
Social networking sites	6	26	13	9	46
Local newspapers	5	30	22	12	31
National radio stations	5	32	21	11	31
National newspapers	5	32	25	13	25
Local radio stations	5	28	20	12	35

QB10. Do you agree or disagree? (NEW, % of total for each statement)

■ Agree ■ Disagree ■ Don't know

| Statement	Agree	Disagree	Don't know
TV should be regulated in providing sexual life related "open" information/programs	84	8	8
TV channels should provide news and ideas based on national benefit, security	81	9	10
TV should be regulated in providing religious campaign related information/programs	79	10	11
TV channels should have the right to broadcast news and ideas without government control	77	15	8
TV channels should have the right to broadcast news and ideas without business representatives control	75	11	14
The government should have the right to prevent TV channels from broadcasting news that it thinks will be destabilizing	74	16	10
The society, citizens should have leverage to control/criticize/reform the news and ideas provided by TVs	71	14	15
TV channels should be totally free	60	30	11

QB8. TV programs watched (multiple choice, % of total by item, the list for 2013 was updated and edited)

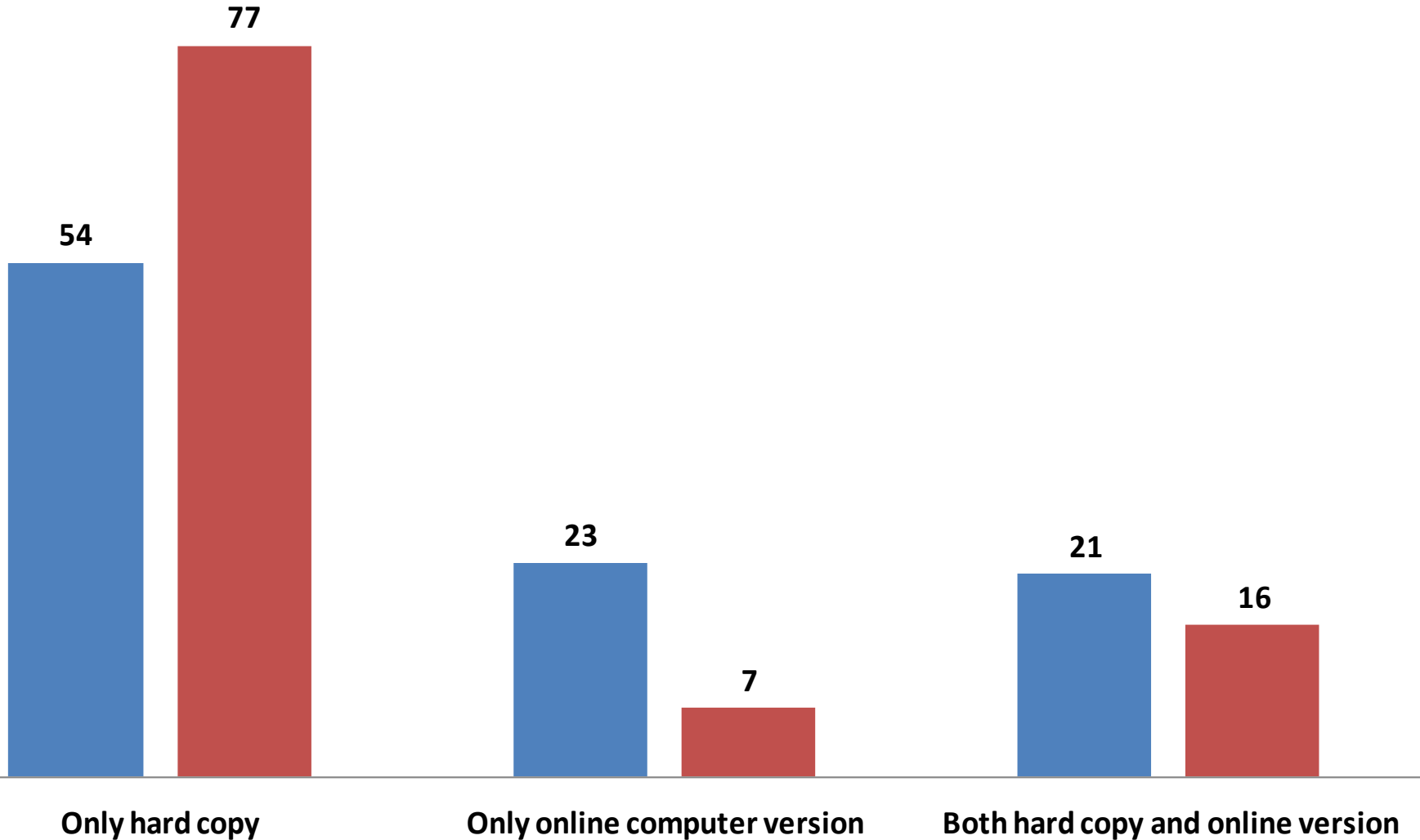| TV programs	2013	2011
News	65	69
Soap Operas	35	37
Music	34	40
Humor programs	26	NA
Films	25	42
Sports	16	23
Political debates	14	14
Informative programs	13	18
Interviews with guests	11	NA
Talk shows	8	NA
Documentaries or special broadcasting	7	NA
Publicist programs	4	NA
Popular scientific programs	4	NA
Programs on showbussiness stars	3	NA
Interactive programs	3	3
Games, quizzes	3	NA
Entertainments programs	NA	17
Analysis of current political events	NA	6
Religious programs	1	2
Reality shows	1	NA
Other	1	2

QB15. What do you like to listen to the most on the radio? (% of the listeners, multiple choice, N2013=225, N2011=327)
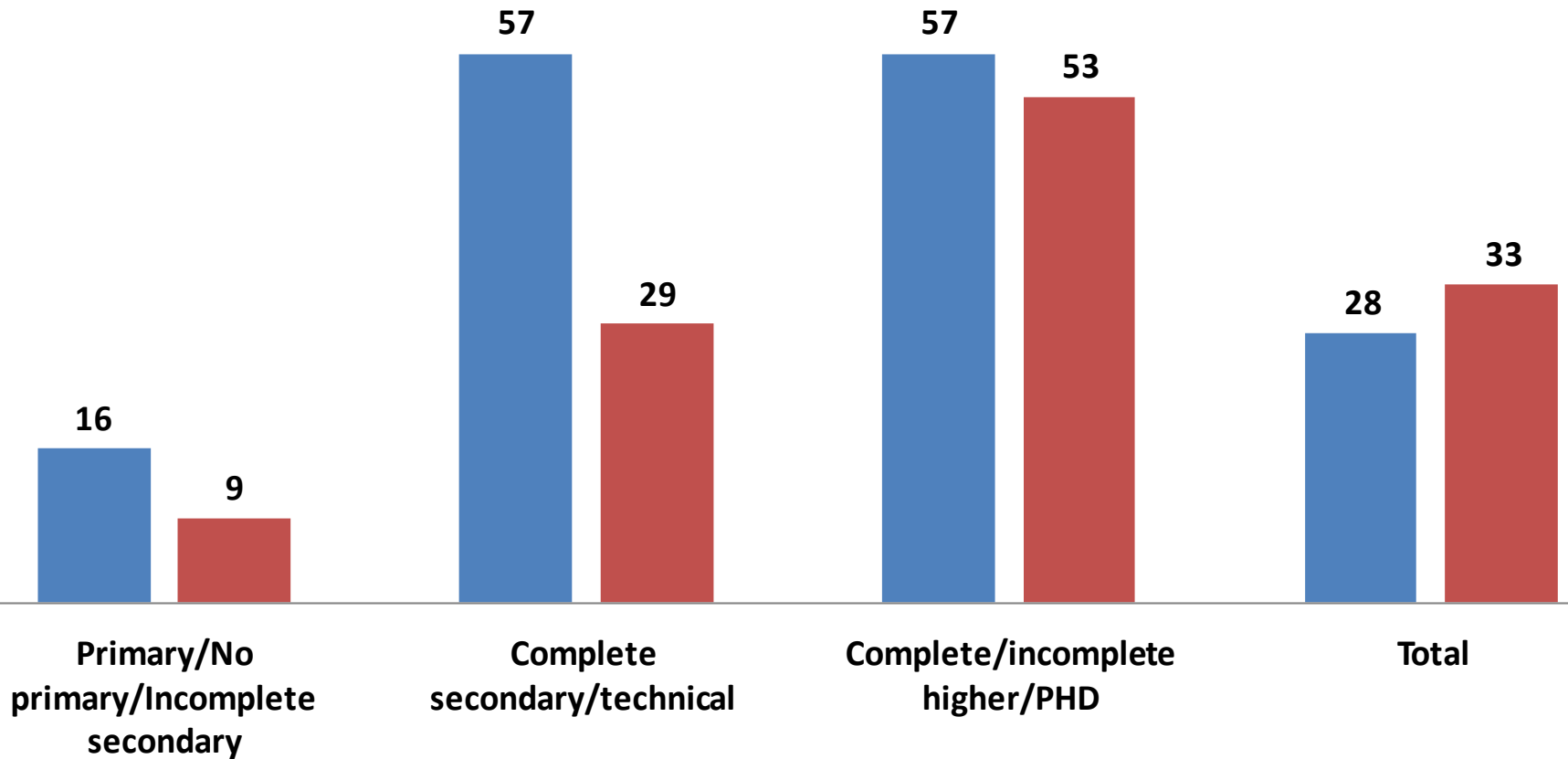
■ 2013 ■ 2011
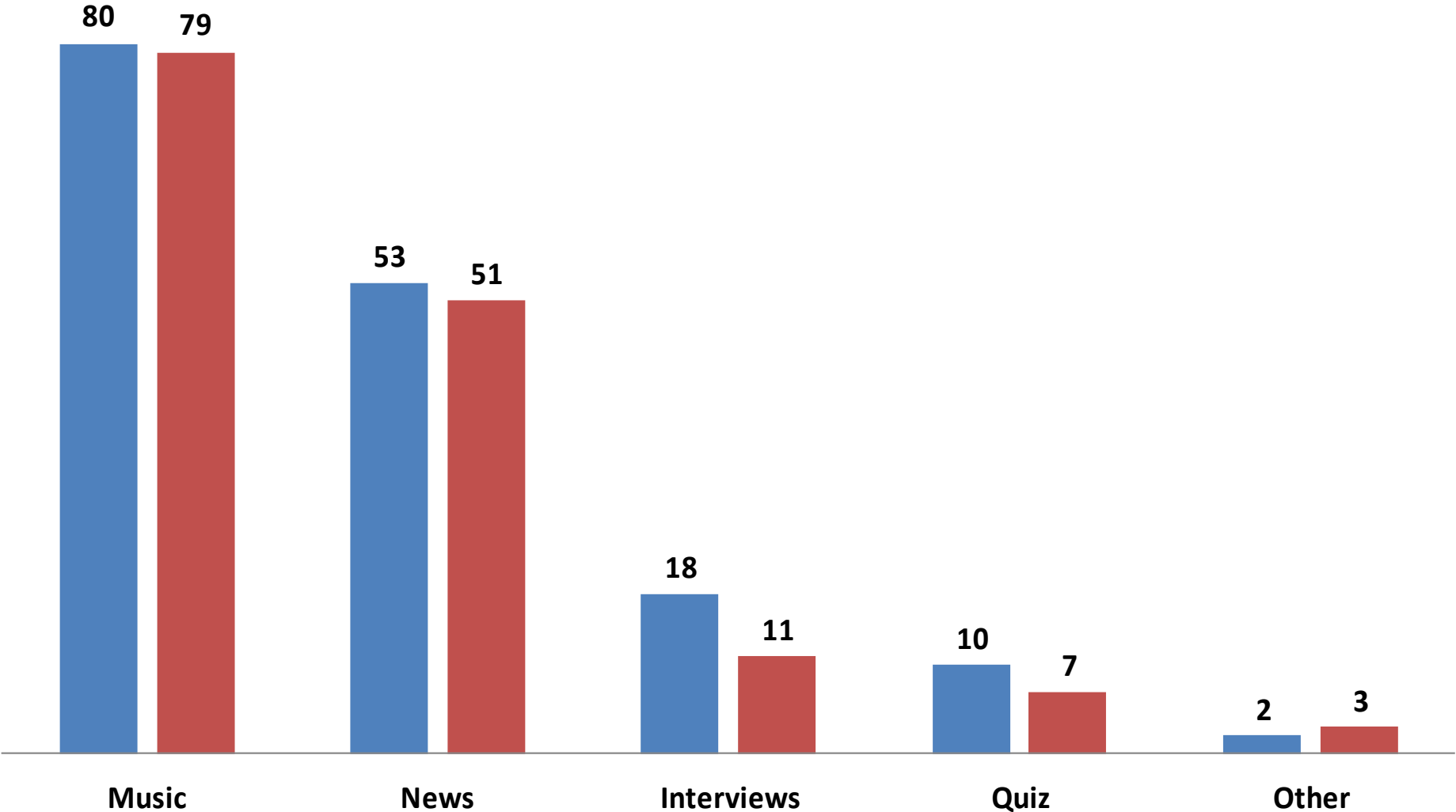
Category	2013	2011
Music	80	79
News	53	51
Interviews	18	11
Quiz	10	7
Other	2	3

QD2. In which form do you usually read newspapers? (% of the readers, $N_{2013}=399$, $N_{2011}=485$)

2013 **2011**

Category	2013	2011
Only hard copy	54	77
Only online computer version	23	7
Both hard copy and online version	21	16

QD1. Do you read newspapers? By education (% of newspaper readers, $N_{2013}=399$, $N_{2011}=485$)

■ 2013 ■ 2011

Education	2013	2011
Primary/No primary/Incomplete secondary	16	9
Complete secondary/technical	57	29
Complete/incomplete higher/PHD	57	53
Total	28	33

QD2. In which form do you usually read newspapers? (% of the readers, N$_{2013}$=399, new answer choices added)

Only hard copy	54
Only online computer version	23
Both hard copy and online version	21
Only online smartphone version	1
Only online tablet version	1
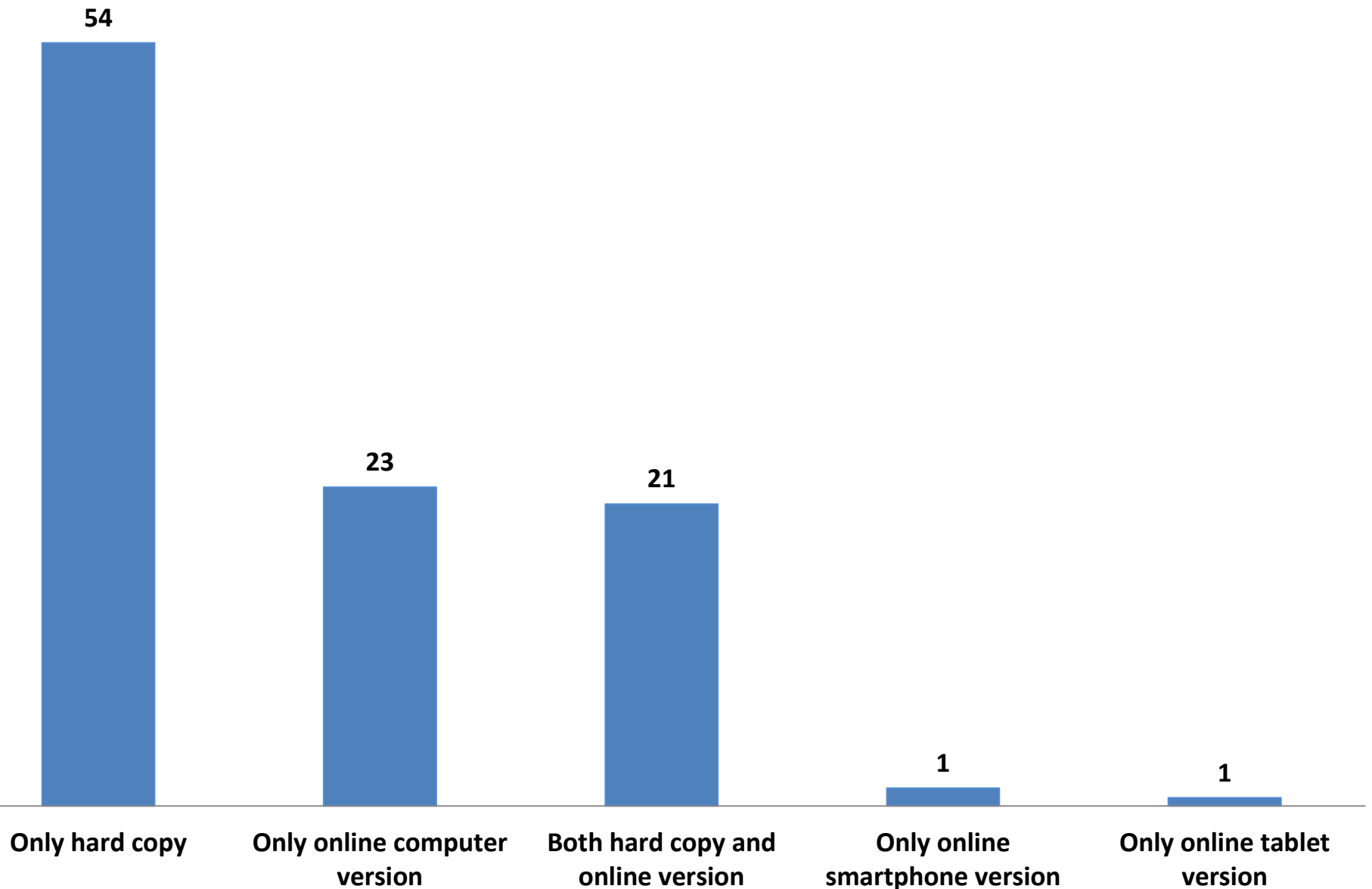
Major concern on Media

QA19. How much do you trust each of these institutions? (new answer choices added, 2013)

Legend: ■ Trust very much ■ Somewhat trust ■ Don't trust ■ Don't trust at all ■ Don't know ■ Refused

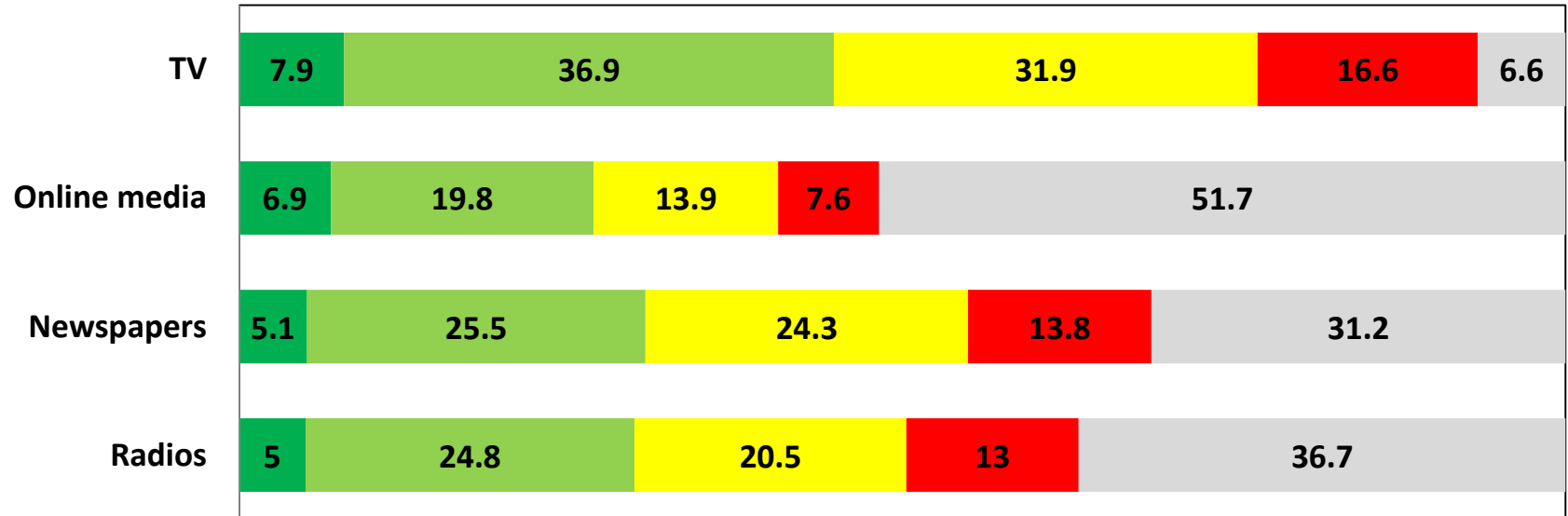| Institution	Trust very much	Somewhat trust	Don't trust	Don't trust at all	Don't know	Refused
Army	54	31	6	7	2	
Church	49	33	8	8	3	
Non governmental organizations	6	31	26	20	16	
Executive power (president, government)	6	30	26	32	4	2
Legislative power (national assembly)	5	27	27	34	5	2
Judicial power/courts	5	26	24	34	8	2
Mass media	5	45	28	16	5	
Political parties	3	21	31	37	7	

QA4. How much do you agree that media covers news and events objectively? (%)

Legend: ■ Strongly agree ■ Agree ■ Disagree ■ Strongly disagree ■ Don't know

2013

Media	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
Online media	9.3	28.1	16.5	9.8	36.3
TV	8.9	35.4	33.6	13.9	8.2
Radios	5.4	23.5	18.9	10.7	41.4
Newspapers	5	24.4	20.8	12.1	37.7

2011

Media	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
TV	7.9	36.9	31.9	16.6	6.6
Online media	6.9	19.8	13.9	7.6	51.7
Newspapers	5.1	25.5	24.3	13.8	31.2
Radios	5	24.8	20.5	13	36.7

QA4. How much do you agree that media covers news and events objectively? (%, excluded DK/RA)

Legend: ■ Strongly agree ■ Agree ■ Disagree ■ Strongly disagree

2013

Media	Strongly agree	Agree	Disagree	Strongly disagree
Online media	15	44	26	15
TV	9	39	37	15
Newspapers	8	39	33	19
Radios	9	40	32	18

2011

Media	Strongly agree	Agree	Disagree	Strongly disagree
Online media	14	41	29	16
TV	9	40	34	18
Newspapers	7	37	35	20
Radios	8	39	32	20

QA5. Main reason for non-objective coverage
(N2013=635, N2011=728)

■ 2013 ■ 2011

Reason	2013	2011
Political affiliation	62	65
Cencorship	7	8
Business affiliation	8	6
Financial limitations	4	4
Low professionalism of journalists	6	2
Self-censorship	0.5	1
Other	1	5
DK	11	10
RF	1	1
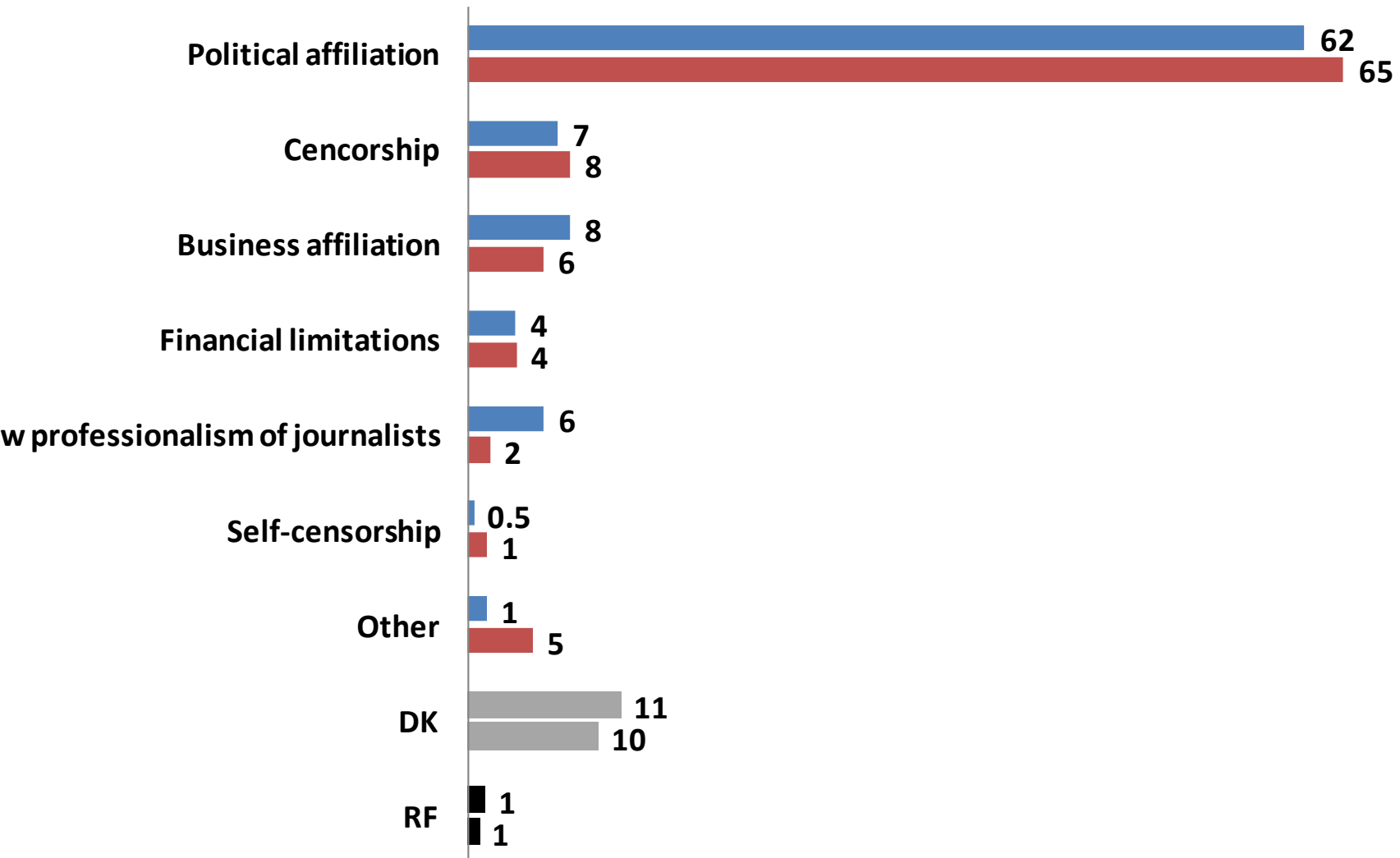
QA9. Are you informed who are the media owners in particular?/Specify the media name and type (number of cases)

■ Media name and type specified   **■ The owner specified**

Category	Media name and type specified	The owner specified
Kentron TV/Gagik Tsarukyan	12	12
Yerkir Media TV/Armenian Revolutionary Federation	3	3
Armenia TV/Bagrat Sargsyan	3	2
Shant/Arthur Yerznkyan	2	2
Ar TV	2	2
Armenian national channel/Armen Amiryan	1	1
Refused	2	2
Don't know	40	41
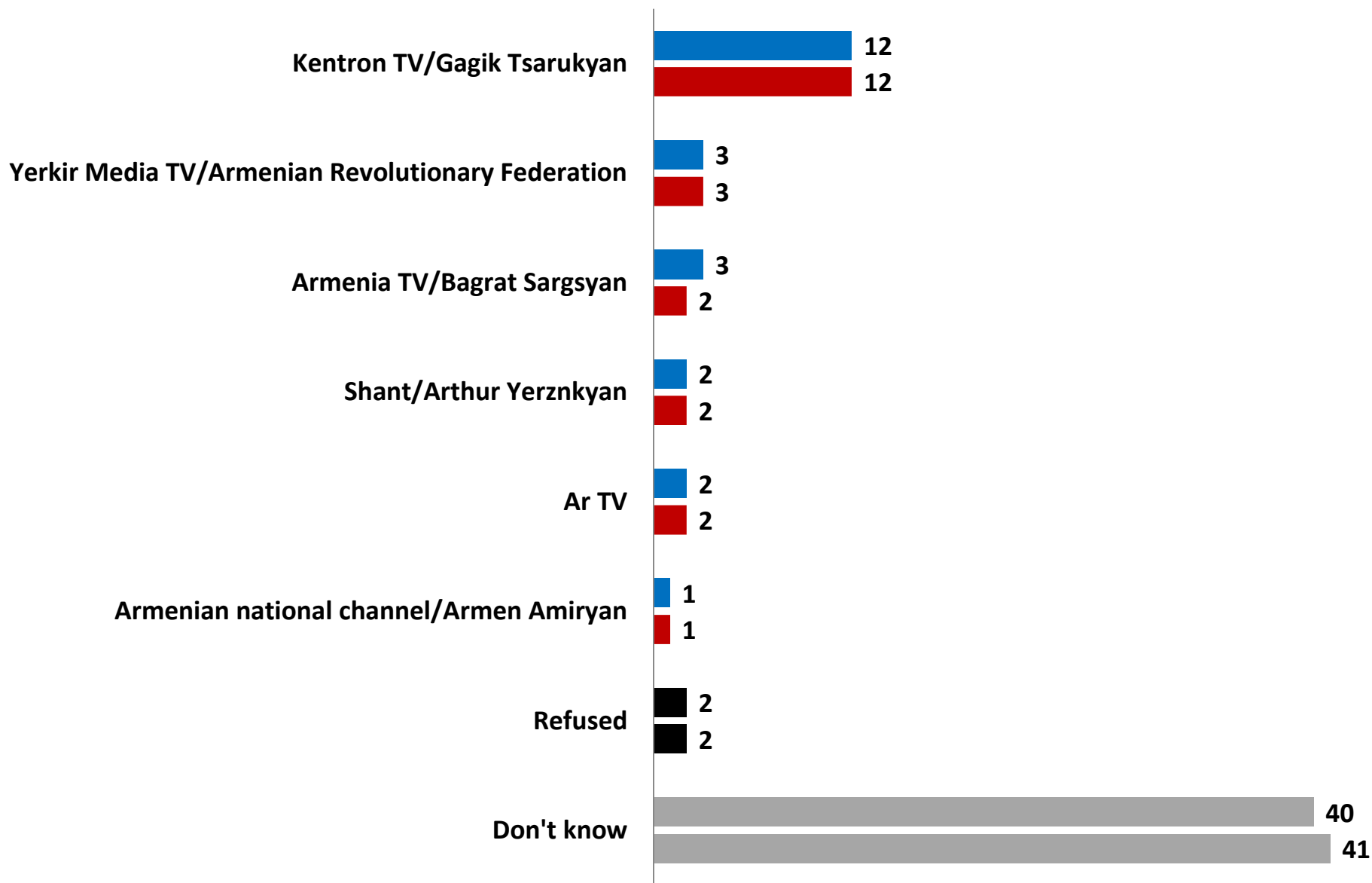
QA7. The independence of media from government and business control in Armenia (2013)

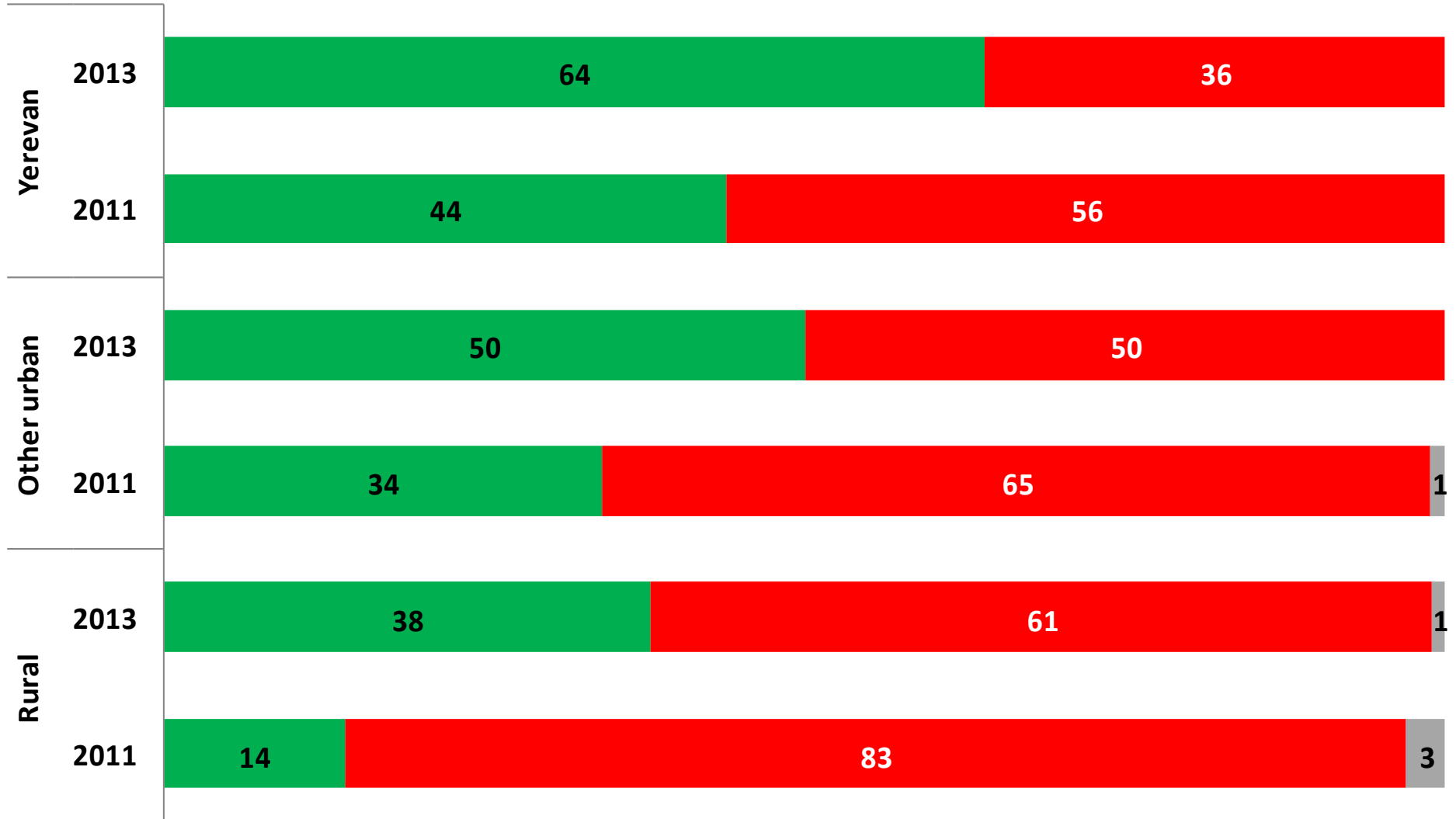**Legend:** ■ A lot ■ Some ■ Not much ■ Not at all ■ Don't know

Media type	A lot	Some	Not much	Not at all	Don't know
Online media	11	25	16	13	35
Social networks	11	24	15	13	36
National TV channels	6	31	26	28	10
Local TV channels	6	30	24	24	16
National radio stations	3	18	20	21	37
Local radio stations	3	18	17	24	38
National newspapers	3	20	20	23	34
Local newspapers	3	18	17	24	37

Alternative media: General overview

QE2. Have you used the Internet in the last 12 months? (by age)

■ Yes   ■ No   ■ Don't know

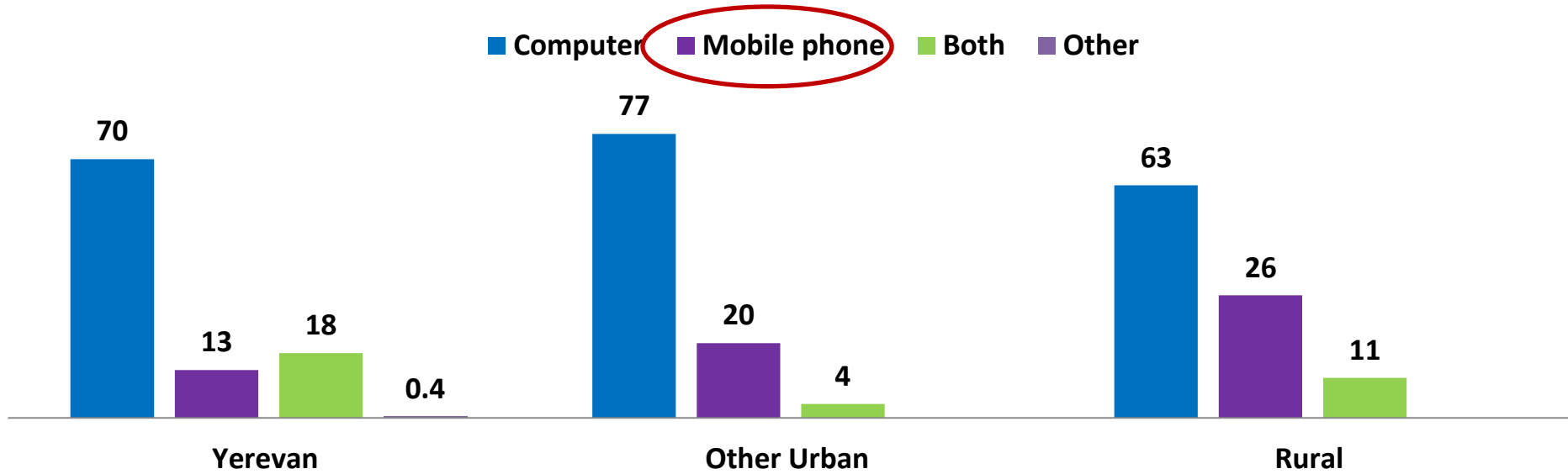| Age	Year	Yes	No	Don't know
16-20	2013	90	10	
16-20	2011	67	31	3
21-25	2013	80	21	
21-25	2011	57	43	
26-30	2013	81	19	
26-30	2011	41	57	2
31-45	2013	59	41	
31-45	2011	33	66	0.2
46-60	2013	41	59	
46-60	2011	18	81	1
60+	2013	16	83	1
60+	2011	6	90	4
Total	2013	51	49	0.2
Total	2011	31	68	1
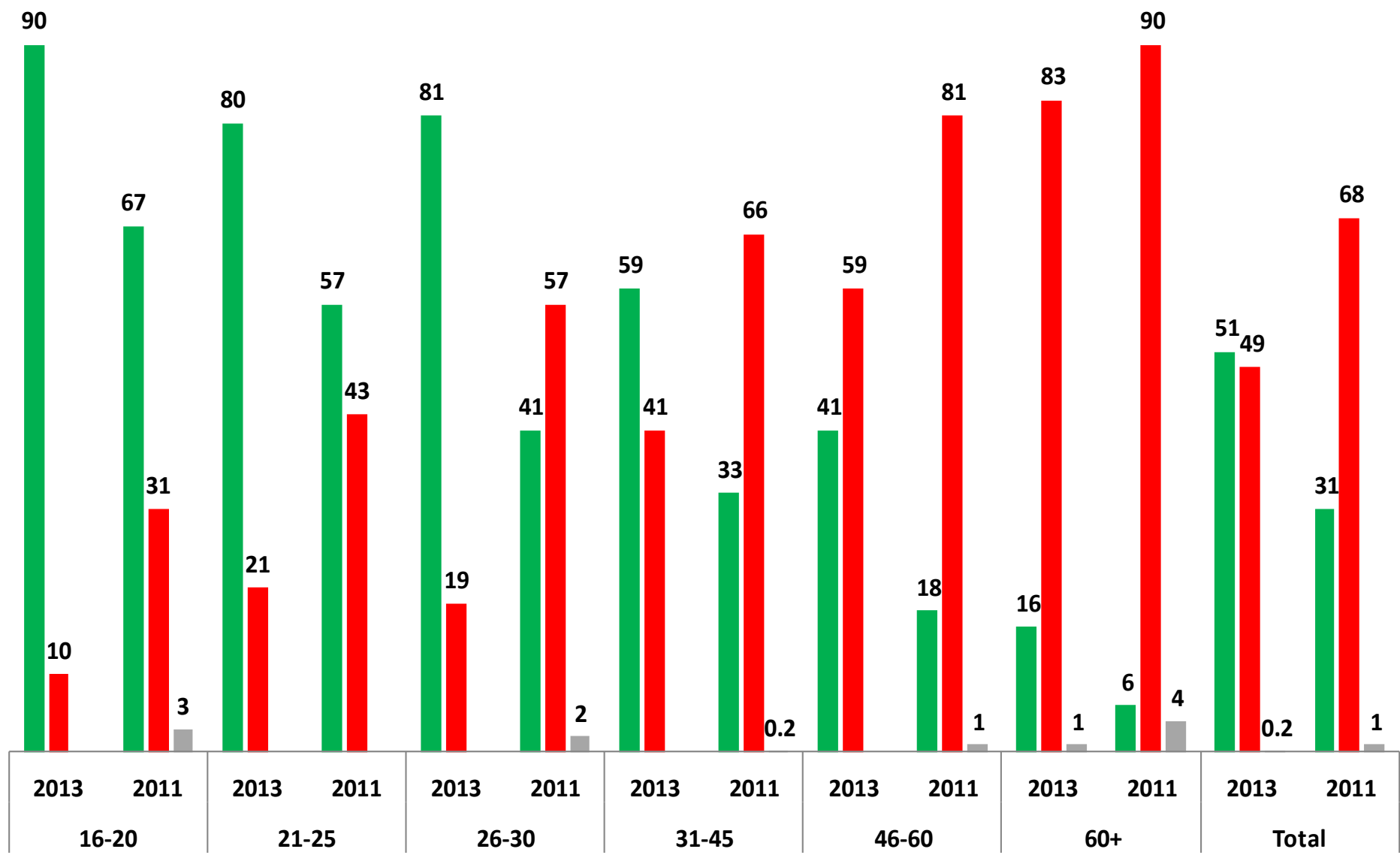
QE2. Have you used the Internet in the last 12 months?
(by settlement type)

Legend: ■ Yes ■ No ■ Don't know what the Internet is

Settlement	Year	Yes	No	Don't know what the Internet is
Yerevan	2013	64	36	
Yerevan	2011	44	56	
Other urban	2013	50	50	
Other urban	2011	34	65	1
Rural	2013	38	61	1
Rural	2011	14	83	3

QE4. Internet access primary device, **2011**

Legend: **Computer** — (**Mobile phone**) — **Both** — **Other**

Yerevan
- Computer: 70
- Mobile phone: 13
- Both: 18
- Other: 0.4

Other Urban
- Computer: 77
- Mobile phone: 20
- Both: 4

Rural
- Computer: 63
- Mobile phone: 26
- Both: 11

QE9. Internet access primary device, **2013**

Legend: **Desktop computer** — **Laptop/notebook/netbook** — **Tablet** — (**Phone**)

Yerevan
- Desktop computer: 61
- Laptop/notebook/netbook: 36
- Tablet: 1
- Phone: 2

Other urban
- Desktop computer: 62
- Laptop/notebook/netbook: 33
- Tablet: 0.2
- Phone: 4

Rural
- Desktop computer: 58
- Laptop/notebook/netbook: 28
- Tablet: 3
- Phone: 12
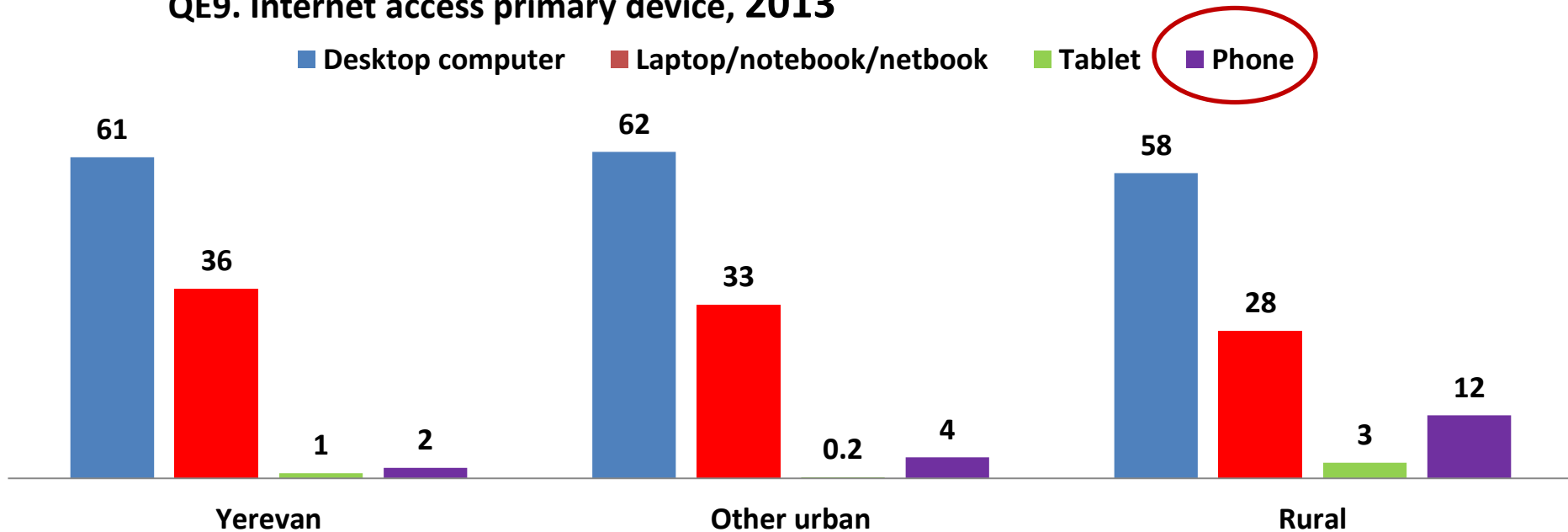
QE7. Places the Internet is most frequently used (% of users, N_{2013}=656, N_{2011}=422)

■ 2013 ■ 2011

Place	2013	2011
At home	90	65
At workplace	3	14
Anywhere from my mobile phone	3	13
At Internet café	0.2	3
At university/school	0.6	1
Other	2	5
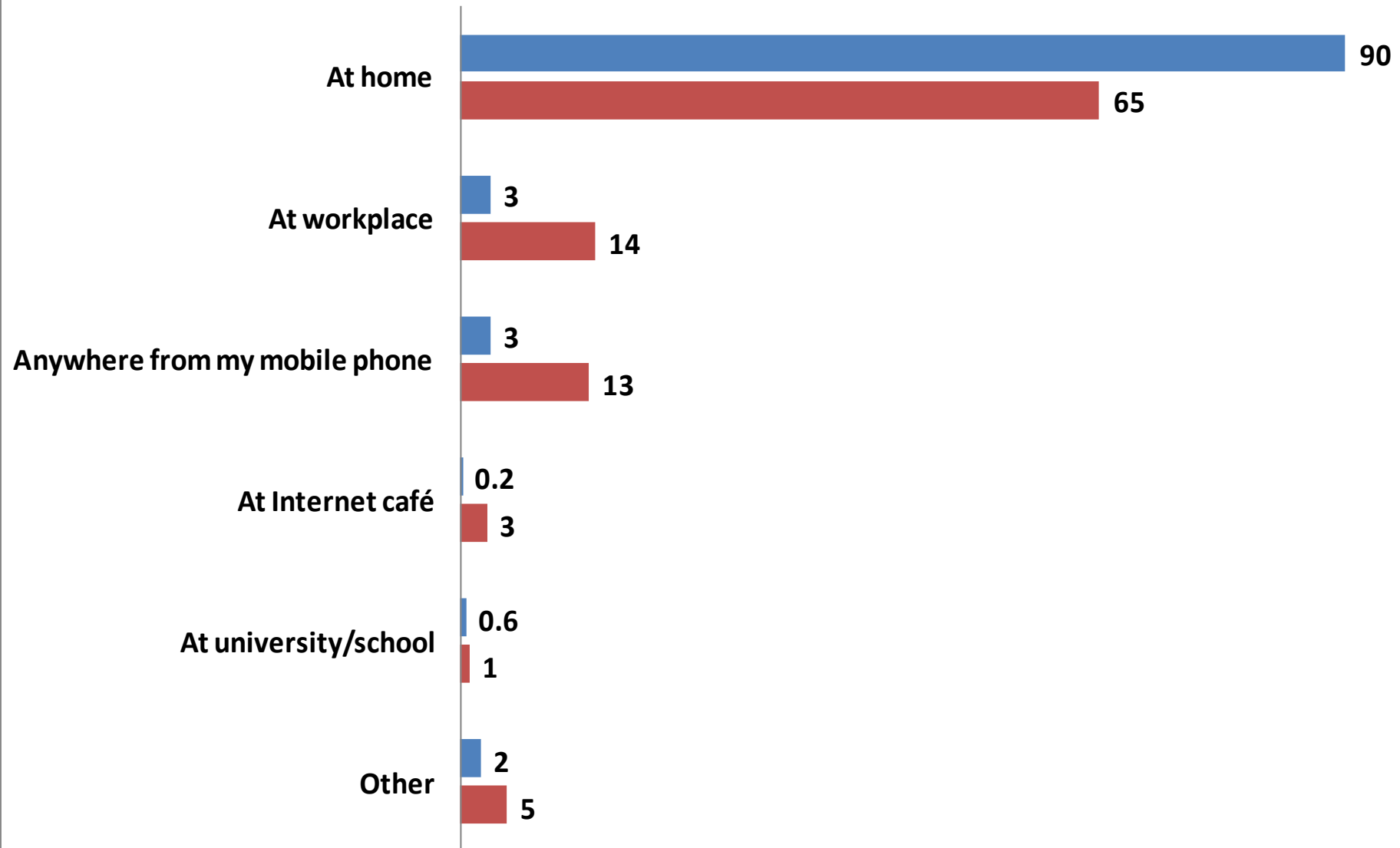
The reason for not using the Internet (% of cases, QE48, N=749, 2013; QE37, N=976, 2011)

■ 2013 ■ 2011

Reason	2013	2011
Limited or no access to a computer/mobile phone	29	33
Age reasons/seniors	24	20
No interest	17	11
Not enough time	11	10
Internet or computer too difficult to use	6	8
No need/not useful	8	8
High prices for the Internet	4	7
Other	1	1
DK	1	0.3
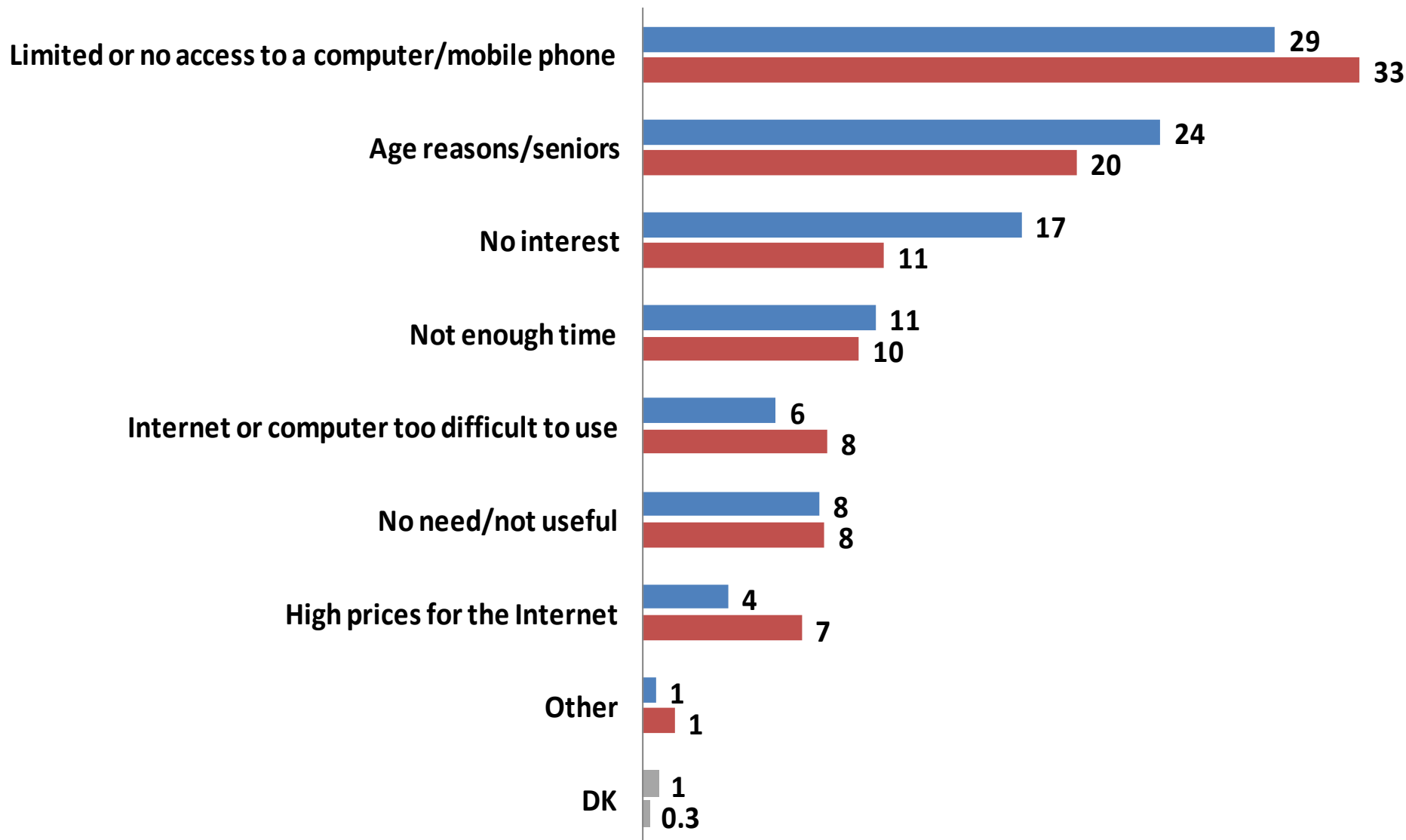
How many hours daily on an average do you spend using the Internet?
(QE4, N2013=655, QE6, N2011=383)

2011 2013

	Up to 30 minutes	From 30 minutes-1 hour	2-3 hours	4-6 hours	7-12 hours	12 hours and more
2011	9	24	33	23	10	1
2013	13	35	34	12	4	2
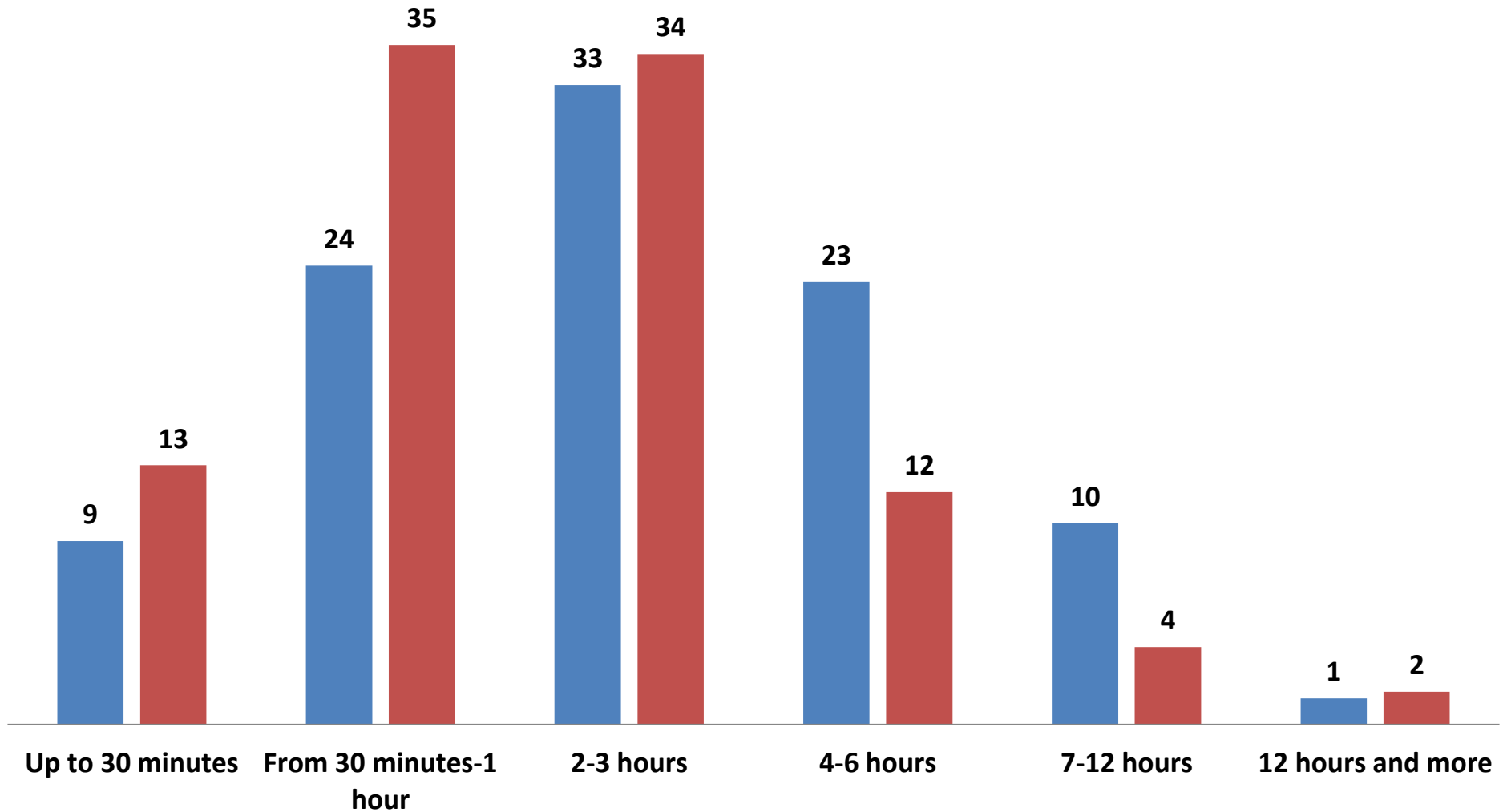
Activities performed in social networking sites (QE28, N2013=458, QE21, N2011=894, multiple choices)

■ 2013 ■ 2011

Activity	2013	2011
Communicate with friends	90	88
Post photos, videos, music	41	26
Keep in touch with old friends from school or university	31	36
Satisfy freedom of expression and desire for information	3	5
Get information	54	32
Meet new people and be entertained	13	26
Messaging	54	34
Share information	31	18
Take quizzes	3	2
Play games	36	28
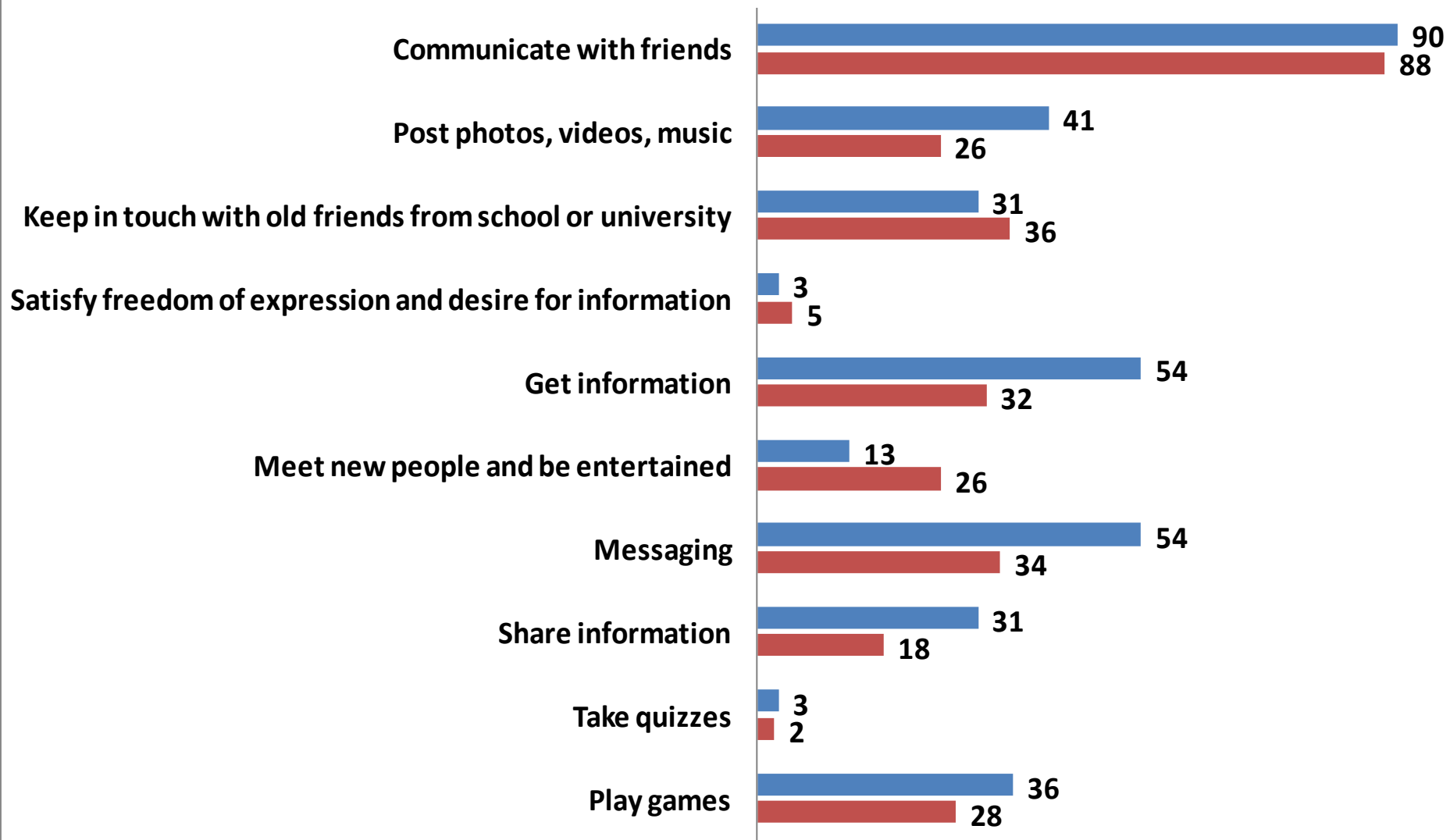
QE26. Mostly used social networking sites
(% among social networking site users, N2013=458, the list was updated)

Odnoklassniki	Facebook	Moy Mir	MySpace	Twitter	Other
65	33	1	1	0.3	0.2
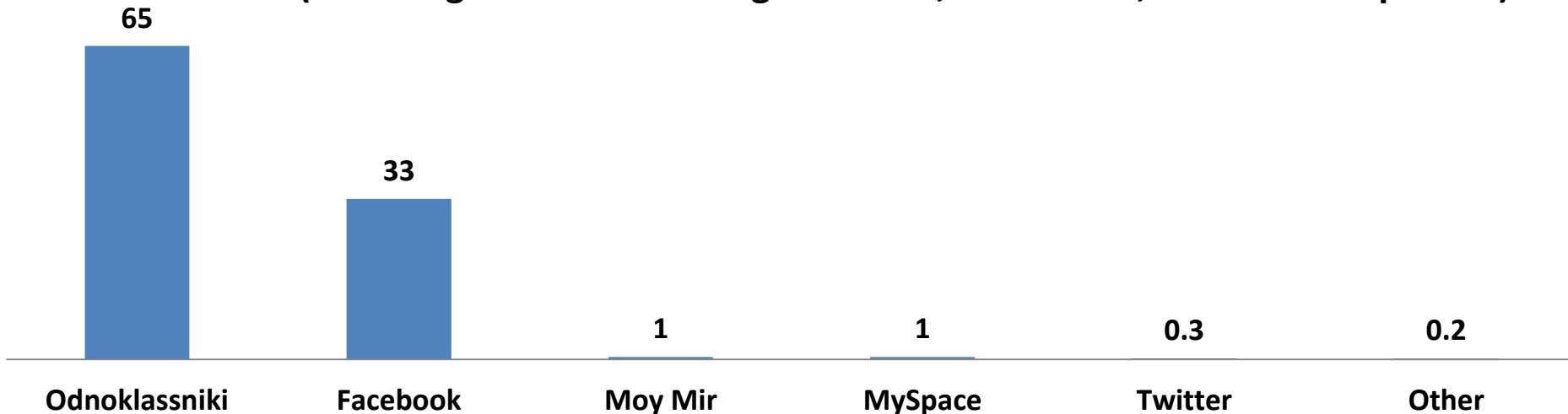
QE19. Mostly used social networking sites
(% among social networking site users, N2011=298)

■ Odnoklassniki ■ Facebook ■ Moy Mir ■ Other ■ DK ■ Refuse

Odnoklassniki	Facebook	Moy Mir	Other	DK	Refuse
81	12	2	4	1	1
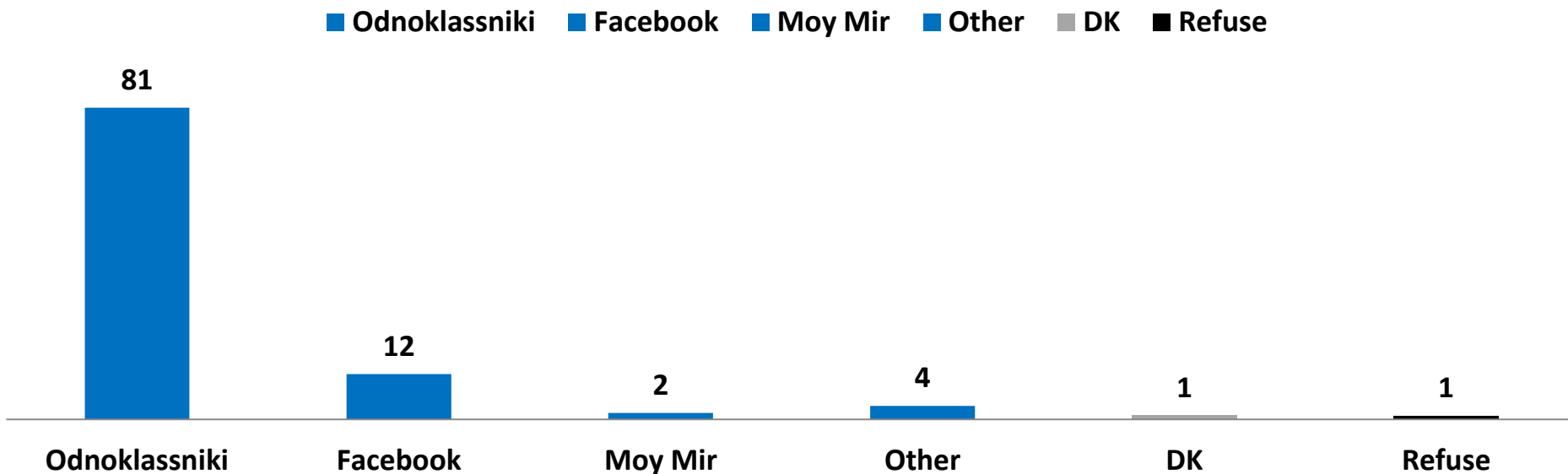
QE30. Do you use social networking sites to share political or social news? (%) (N2013=459)

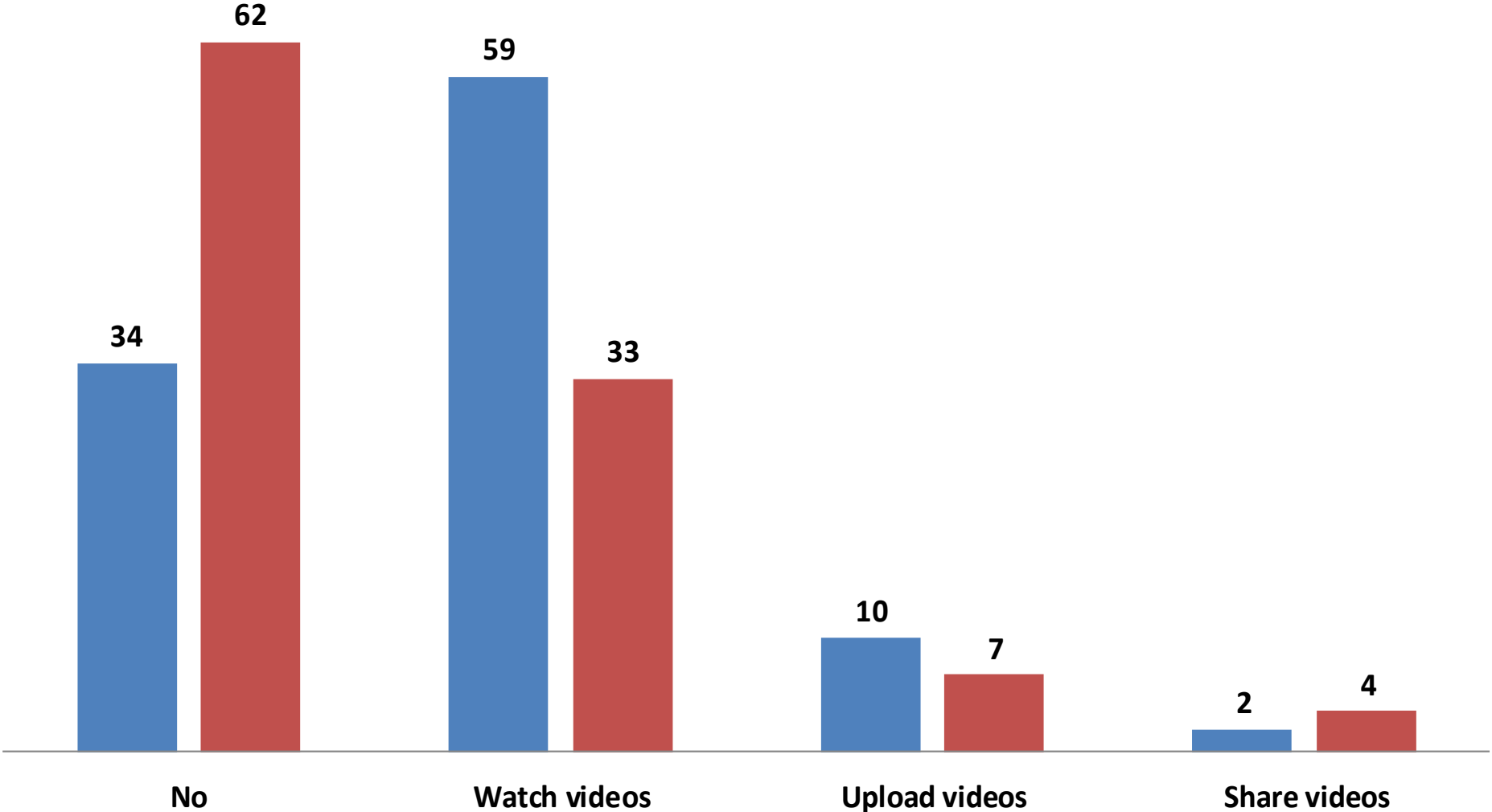■ **Yes, both**   ■ **Yes, only political**   ■ **Yes, only social**   ■ **No**

Yes, both	Yes, only political	Yes, only social	No
13	2	6	78
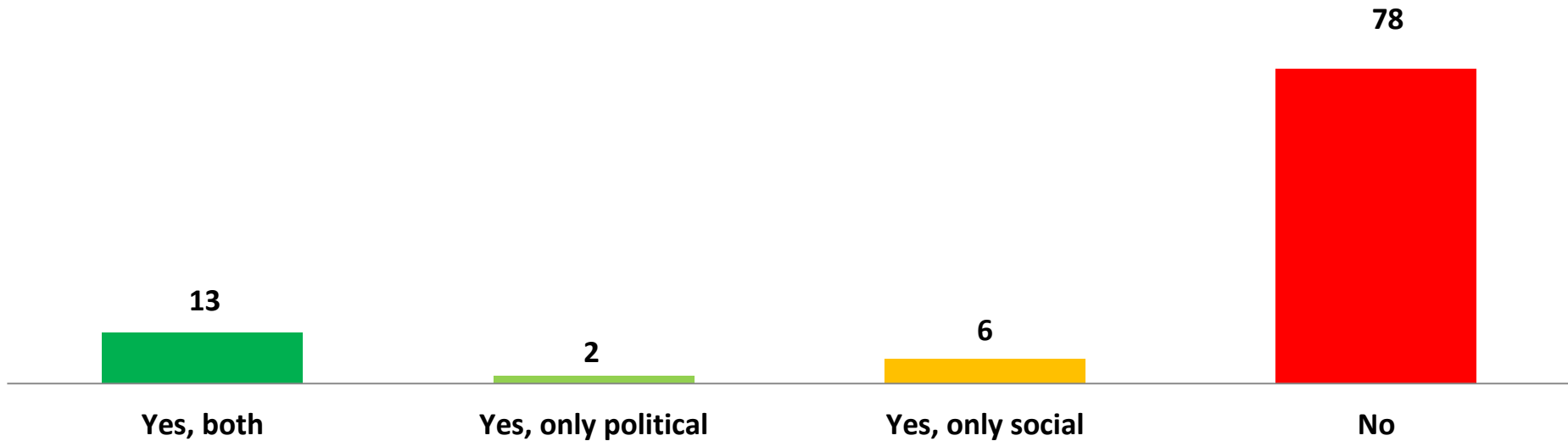
QE23. Do you use social networking sites to share political or social news? (%) (N2011=300)

Yes, both	Yes, only social	No
7	9	84
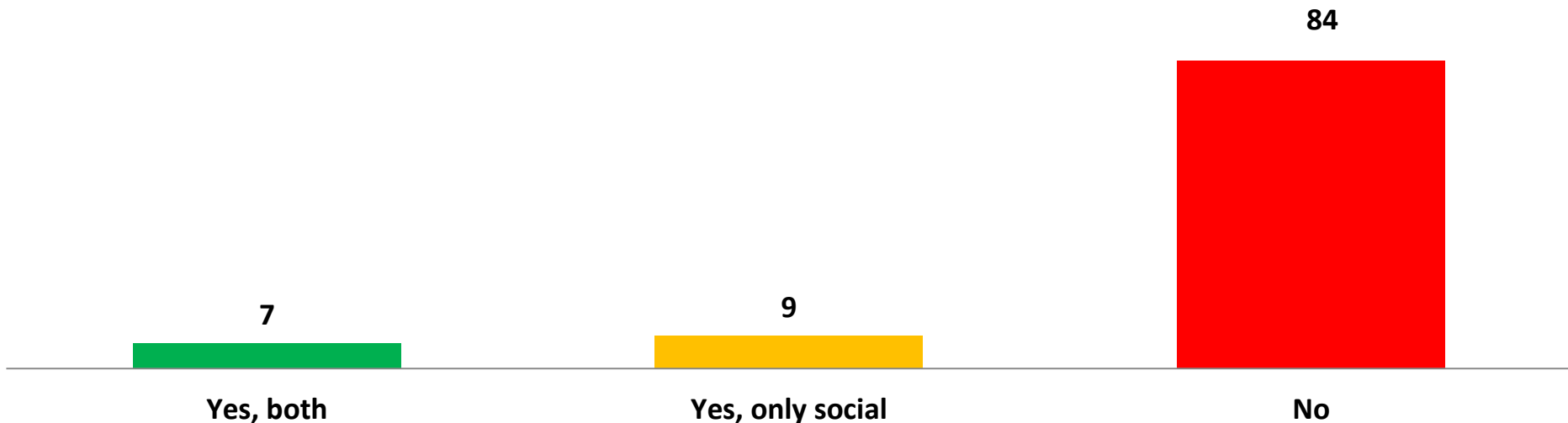
Do you watch, upload or share videos on the Internet? (QE39, N2013=656, QE29, N2011=442)

■ 2013 ■ 2011

	No	Watch videos	Upload videos	Share videos
2013	34	59	10	2
2011	62	33	7	4

Videos watched on the sites (QE41, N2013=424, QE31, N2011=342, multiple choice)

■ 2013 ■ 2011

	Music	Fun videos	Films	Sports	Political content videos	News programs	Social content videos	Other
2013	81	63	51	14	13	23	14	4
2011	79	53	47	14	10	9	4	3
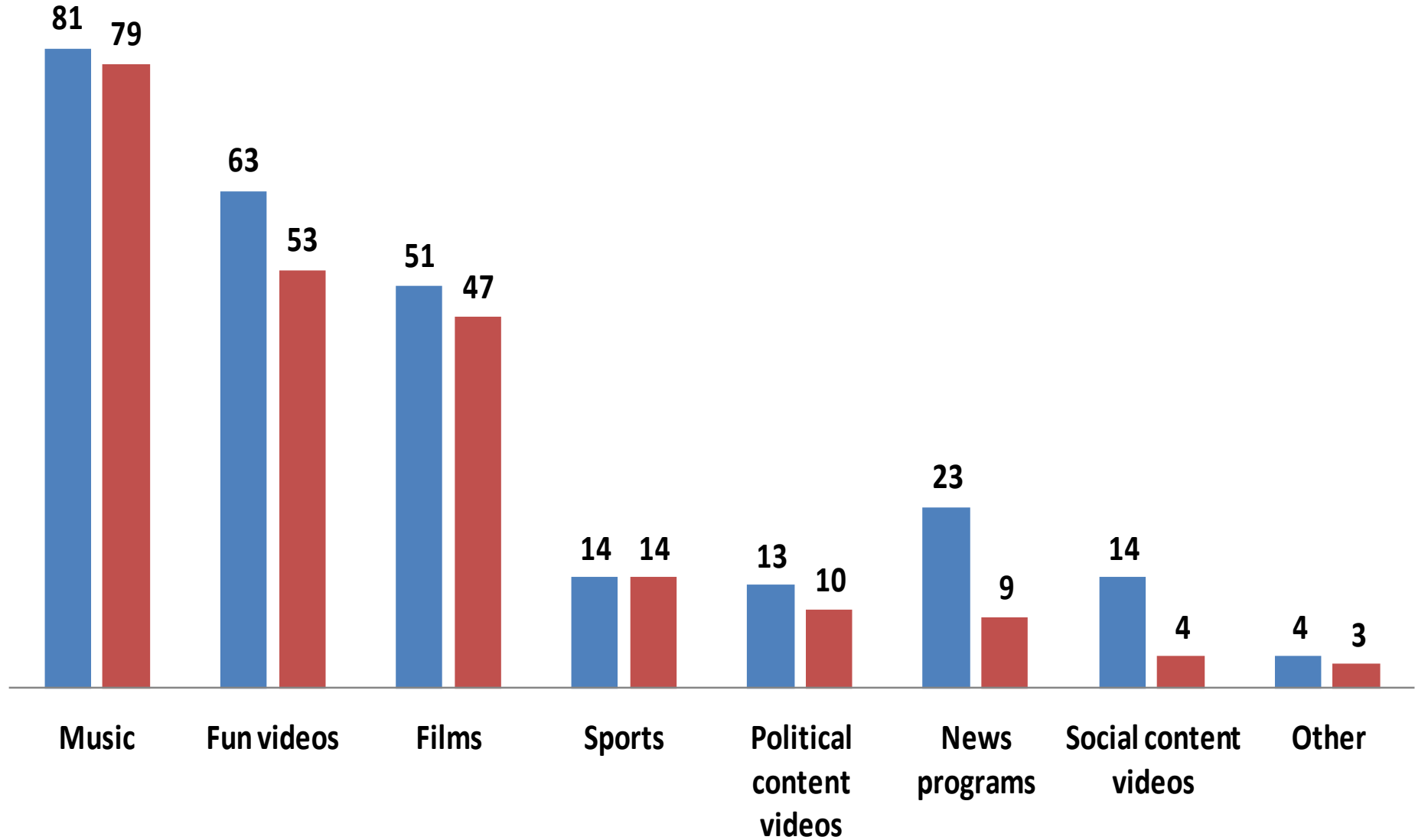
Have you ever made a political or social comment and posted online ?
(QE42, N2013=424, QE32, N2011=422, share of "yes"s)

3

6

2011

2013

Do you read or write blogs? (QE34, N2013=656, QE27, N2011=421)

Legend: ■ 2013 ■ 2011

Category	2013	2011
Don't use blogs	70	64
Don't know what blog is	20	26
Read blogs	8	7
Both read and write blogs	3	2
Write blogs	0.2	0.1
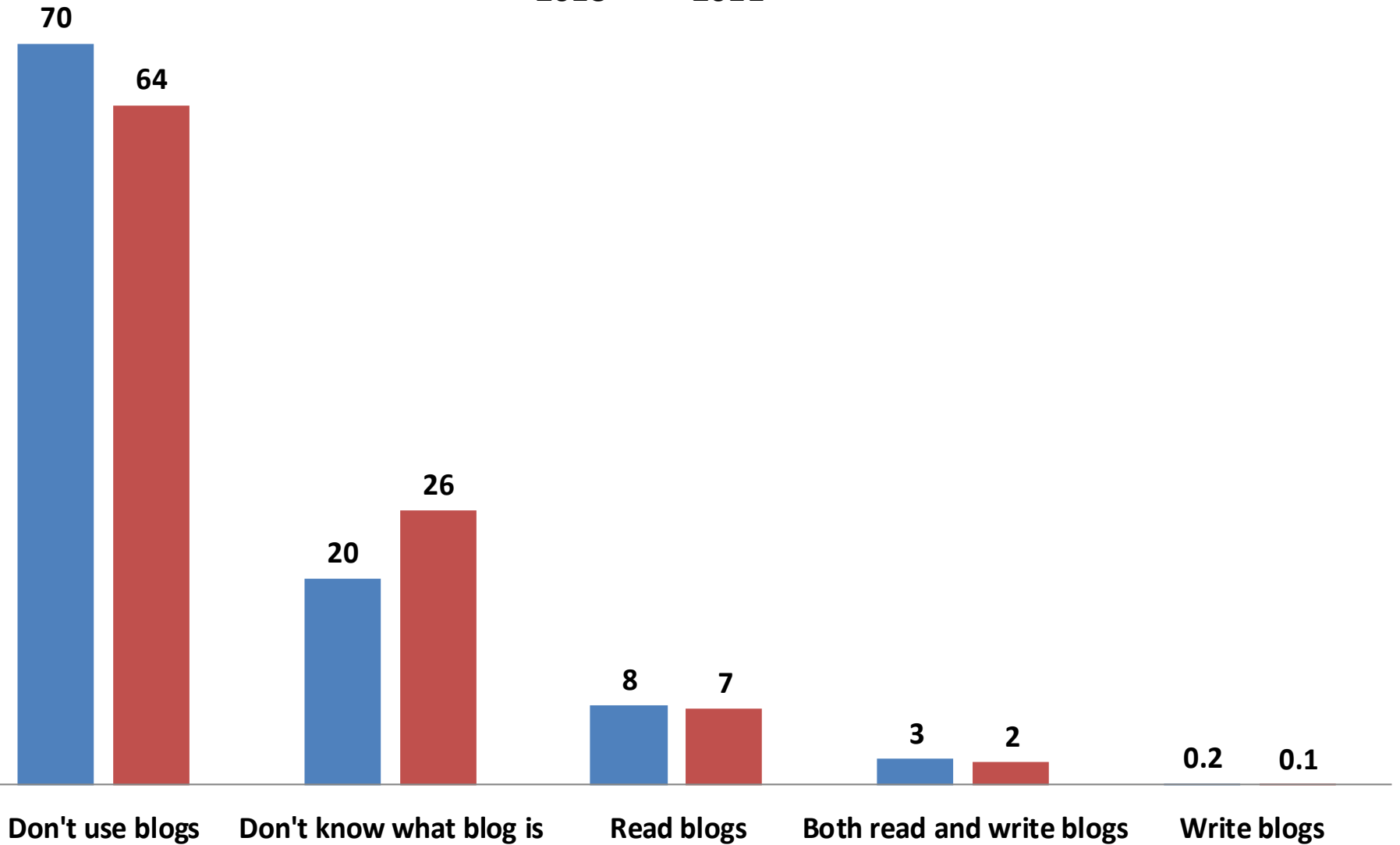
Concerns about the privacy on the Internet (QE46, N2013=656, QE36, N2011=421)

■ 2013 ■ 2011

	Not at all concerned	Somewhat concerned	Concerned	Very concerned	DK	Refused
2013	27	19	19	27	7	1
2011	19	20	24	32	3	2
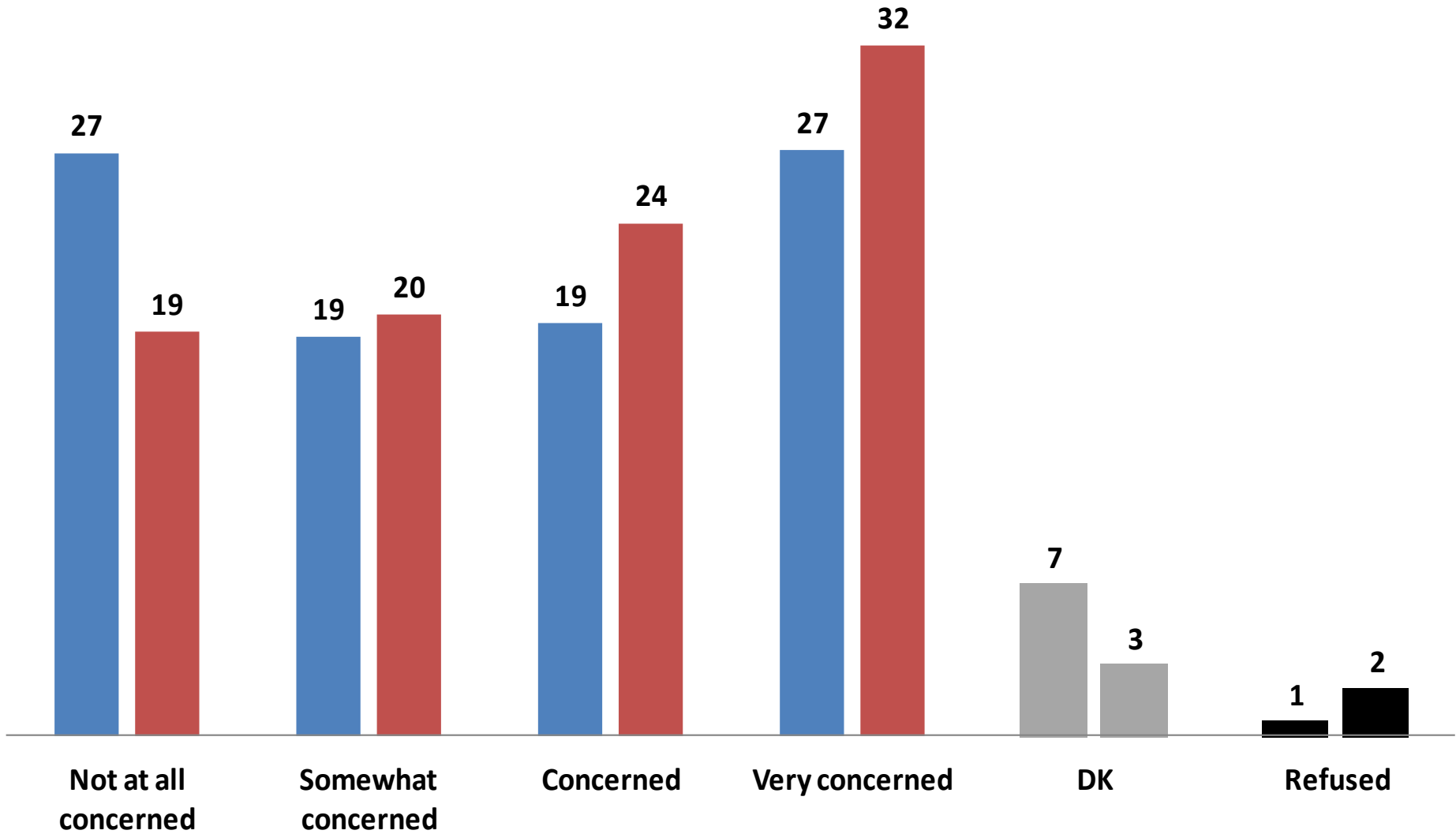
QE19. The best advantage of online media (N2013=318)

Category	Value
Timeless/timesaving	37
Convenient to access	19
Free of charge	17
Available diversity of sources	15
The urgency/operativeness	8
The freedom of speech, the absence of censorship	2
Environmentally friendly	0.3
Don't know	2
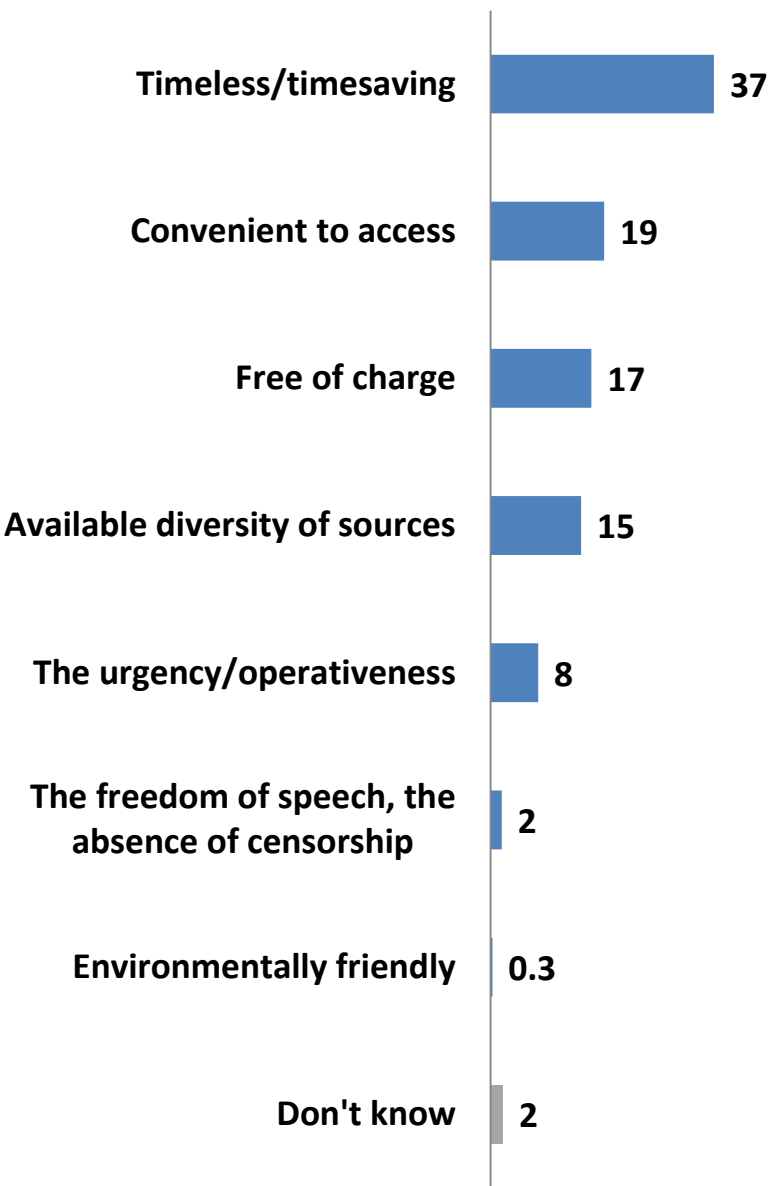
QE12. The best advantage of online media(N2011=173)

Category	Value
Timeless/timesaving	25
Convenient to access	25
Available diversity of sources	24
Free of charge	16
Environmentally friendly	0.8
Other	7
DK	2
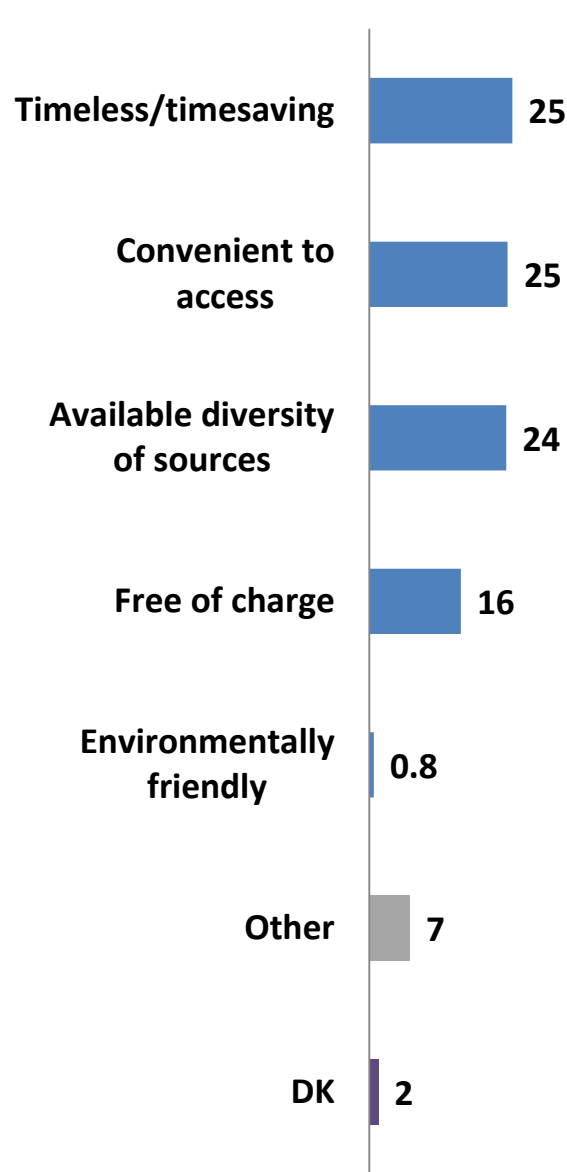
What topics do you prefer to read in online newspapers/media? (% in total of online newspapers/news readers, QE20, 318 respondents in 2013; QE13, 175 in 2011; multiple-response question)		
Topics preferred	**2013**	**2011**
Politics	64	56
Society	49	33
Art/culture/literature	47	43
Sport	26	38
Fashion	28	35
Economics/Business news	18	23
Science/Technology	29	31
Celebrity news	42	41
Jobs/announcement	9	23
Other	3	5

Thank you