



Media Consumption and Media Coverage of Reforms in Armenia

Analytical Report

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Yerevan

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Abbreviations

CELoG	Civic Engagement in Local Governance
CRRC	Caucasus Research Resource Center
CSO	Civil society organization
DK/RA	Do not know/Refuse to answer
EPF	Eurasia Partnerships Foundation
LSG	Local self-government
MIC	Media Initiatives Center
MICE	Media for Informed Civic Engagement
NA	Not applicable
NGO	Non-governmental organization
USAID	The United States Agency for International Development
YPC	Yerevan Press Club

Summary

- National television is the most popular media source in Armenia, with 82 percent of respondents watching it on a daily basis. In comparison with residents of Yerevan, those in urban and rural areas are more likely to use the National television on a daily basis.
- The Internet is used on a daily basis by 32 percent of the respondents. Everyday usage of the Internet is connected with the age and education level of respondents. In particular, younger respondents and respondents with high level of education are more likely to use the Internet. Yerevan is ahead of other settlements in terms of respondents' daily usage of the Internet.
- Around 43 percent of the respondents reported using social networking sites or platforms. "Facebook" and "Odnoklassniki" appear to be the most popular social networking platforms. Of the "Facebook" and "Odnoklassniki" users, some 39 and 33 percent reported sharing political and social news via these networks, respectively. Unsurprisingly, respondent age and education level are connected with the usage of social networking platforms in Armenia. Particularly, younger respondents and respondents with high level of education are more likely to use social networking platforms.
- Around three-fourths of the respondents attach importance to the role of the media in covering the reforms. However, only few respondents show personal interest in specific reforms such as power decentralization, integrated social services, or anti-corruption policy reforms.
- Television appears to be the leading source which informs people about local self-governance and social reforms. Some 36 percent of the respondents report receiving information about these reforms from "National television" on a daily basis. Majority of the respondents (53 percent) consider the "National television" as the best for the provision of such information.
- However, the vast majority of the respondents are dissatisfied with the information on social reforms provided by the media. Only few respondents are completely satisfied with the ethics of the journalists covering the social reforms.
- Very few respondents trust the media sources that they usually use to obtain information on social reforms. Furthermore, the majority of the respondents consider the abovementioned media sources to be under the control of the government, political parties or businesses.
- Boycotting a media source appears to be the most accepted reaction to its improper and unprofessional behavior.
- Almost half (46 percent) of the respondents opine that people in Armenia have the opportunity to publicly express their opinion.

Introduction

Media Initiatives Center implements the USAID-funded Media for Informed Civic Engagement project, in partnership with Eurasia Partnerships Foundation, Internews Media Support NGO, Caucasus Research Resource Center-Armenia, and Yerevan Press Club.

The project aims at improving the quality of journalism and of alternative content about the Government of Armenia's policies and planned reforms (with an emphasis on USAID-supported reforms on decentralization, transparency and accountability, and social-sector policy reforms); increasing citizens' and CSOs' knowledge and skills to make them savvy media consumers; engaging journalists and active citizens in the production of multimedia content that stimulates a vibrant discussion in society about the reforms; and equipping media with skills to conduct reliable fact-based reporting and digital storytelling.

The impact of the project will be assessed through a number of tools, including three (baseline, mid-term, and end-line) quantitative surveys conducted by CRRC-Armenia about citizens' awareness of the reforms and their attitudes toward the media coverage of the reforms. The present report introduces the results of the baseline survey. These results will be compared to the ones of the mid- and end-line surveys to track the dynamics of MICE performance against the outcome indicators.

A note on the survey methodology

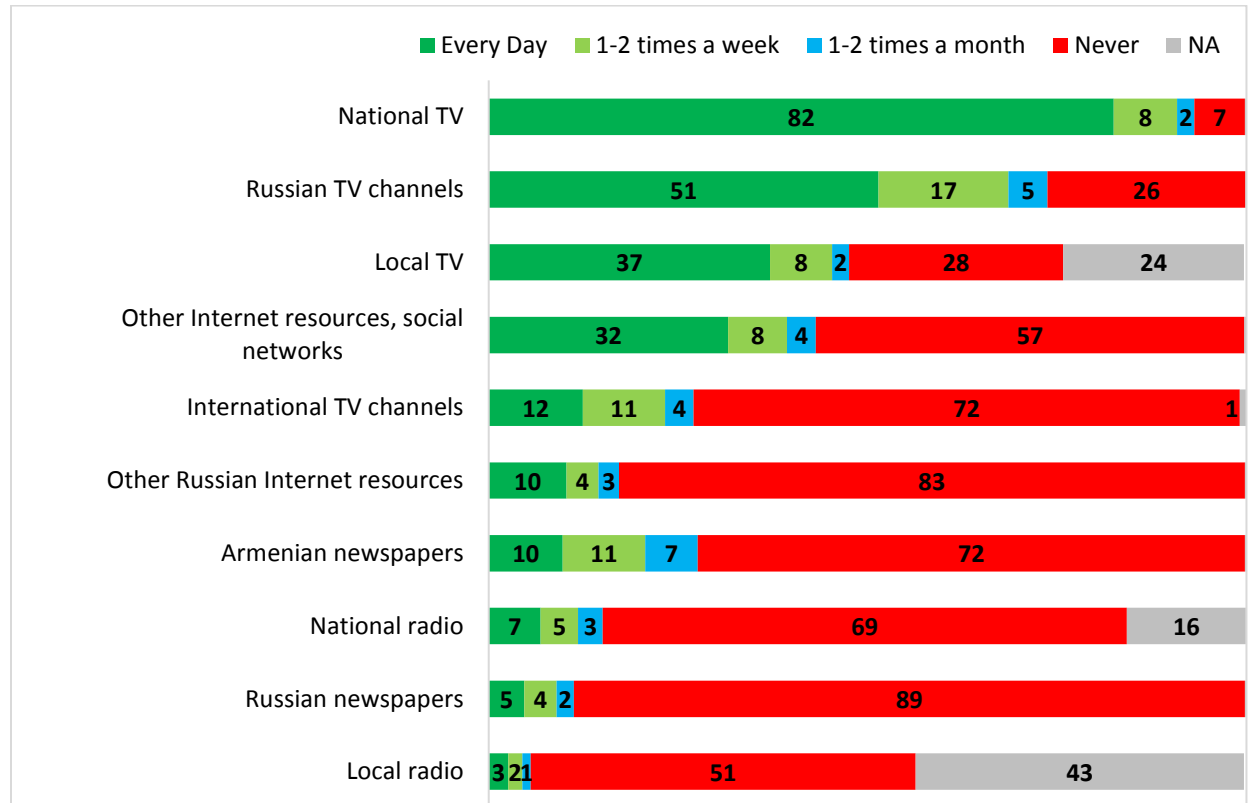
The report draws on the results of a countrywide household survey (N=1443) of civic engagement implemented by CRRC-Armenia in July 2015, within the USAID-funded Civic Engagement in Local Governance (CELoG) Program. More specifically, the report uses a batch of indicators which were included by MIC in the survey to disclose the role of the media in covering social and local self-governance reforms in Armenia¹. These indicators refer to general media consumption patterns in Armenia, respondents' interest in social and local self-governance reforms, respondents' satisfaction with the information the Armenian media provides about these reforms, and other related issues. The current report uses not only descriptive statistics, but also cross tabulation analysis, to reveal the bivariate relationship between the sociodemographic and media consumption variables.

¹ For the detailed methodology of the countrywide household survey, see: Caucasus Research Resource Center-Armenia. *On the Long Way of Reforms: The System of RA Local Government in the Eyes of Citizens*. Yerevan, 2015.

1. Sources of citizens' information

According to the survey, television is the most frequently used source of information in Armenia. The large majority (82 percent) of the Armenians surveyed reported watching “National television” each day. “Russian television channels” and “Local television” are watched on a daily basis by 51 and 37 percent of the respondents, respectively. The fourth most frequently consumed source of information is “Other Internet resources and social networks,” with 32 percent admitting to using it every day (Chart 1).

Chart 1. How often do you use the following sources? (% of total by type of source)

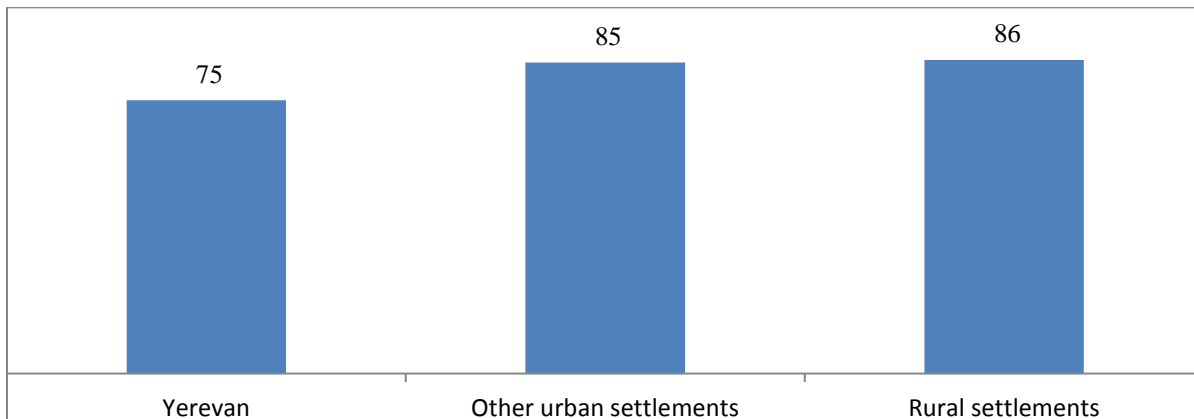


Everyday consumption of the media by sociodemographic characteristics

This section presents the sociodemographic characteristics of everyday users of the National television and the Internet. These characteristics include respondents' type of settlement, age, gender, and education level.

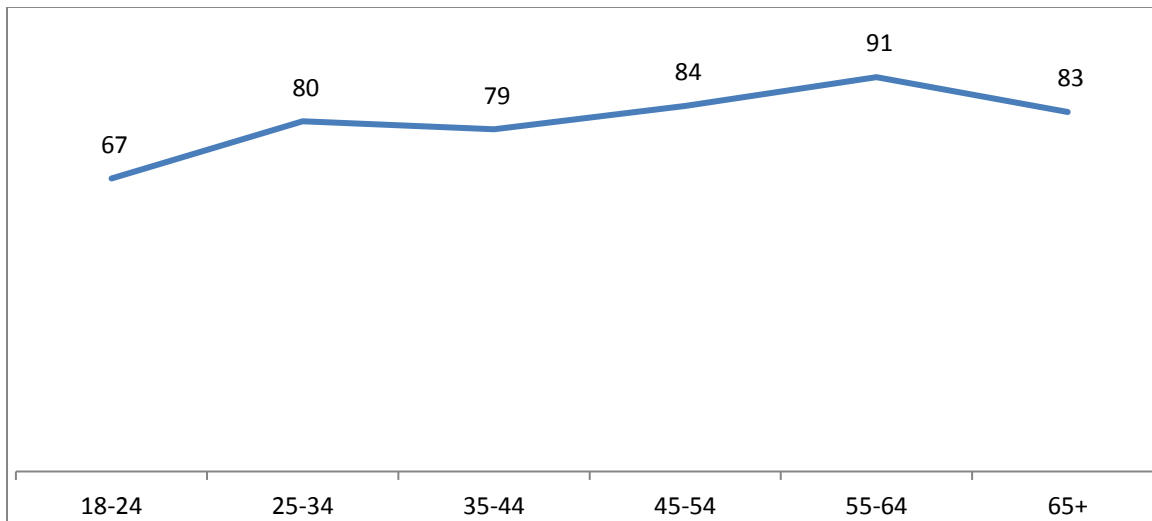
The number of Armenians surveyed, who watched the **National television on a daily basis**, was the lowest in Yerevan, totaling 75 percent. The vast majority of the inhabitants in urban and rural settlements (85 and 86 percent, respectively) reported watching National television every day (Chart 1.1).

Chart 1.1. Everyday consumption of National television by settlement type (share of everyday users, %)



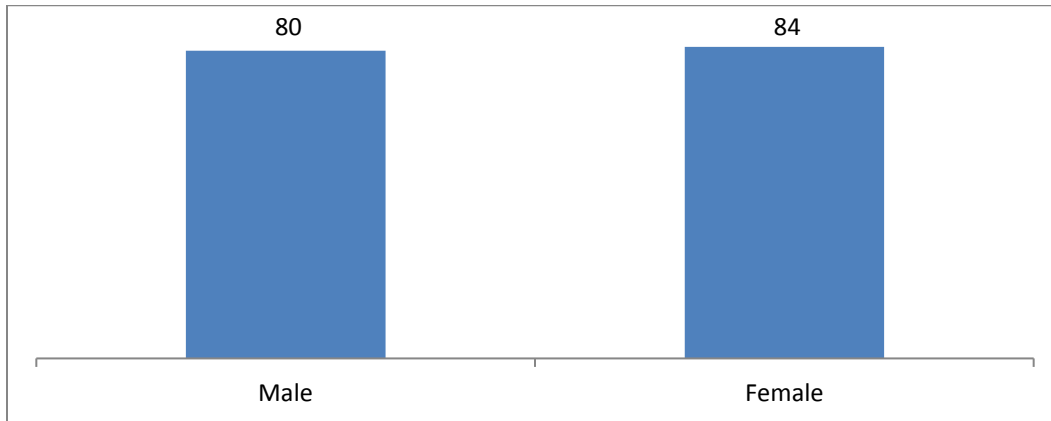
Respondent age appears to be an important variable affecting the consumption of the National television. More specifically, older respondents seem to be more inclined toward watching the National television on a daily basis. For instance, while only 67 percent of the youngest respondents reported watching the National television every day, this number reached 91 percent for the respondents in the 55-64 age group (Chart 1.2).

Chart 1.2. Everyday usage of National television by age groups (share of everyday users, %)



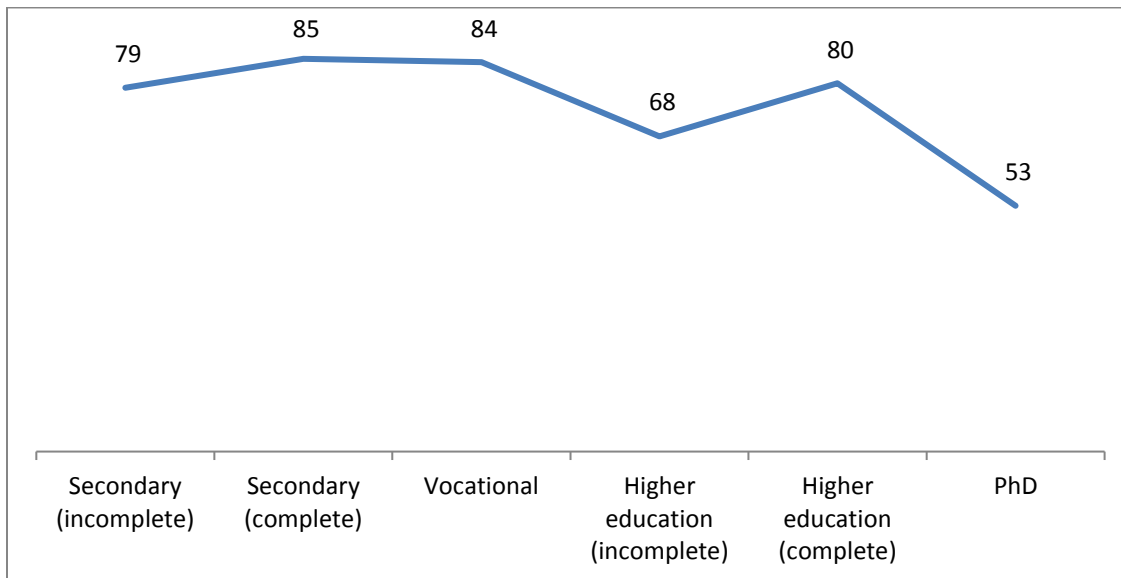
Males and females are almost equally likely to watch the National television on a daily basis. In particular, of the female and male respondents, respectively 84 and 80 percent reported watching the National television every day (Chart 1.3).

Chart 1.3. Everyday usage of National television by gender (share of everyday users, %)



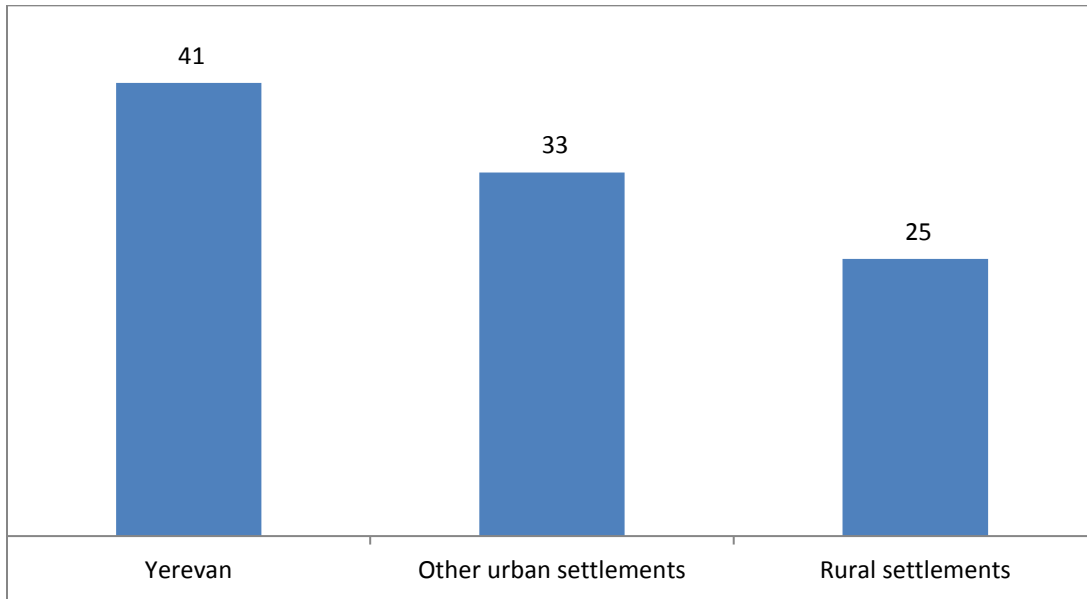
Similar to gender, the level of the respondents' education does not seem to influence the daily consumption of the National television either. In particular, roughly 79 and 80 percent of the respondents with respectively secondary incomplete and higher education report watching the National television each day. The National television appears to be least watched among the respondents with doctoral degrees (53 percent; Chart 1.4).

Chart 1.4. Everyday usage of National television by education (share of everyday users, %)



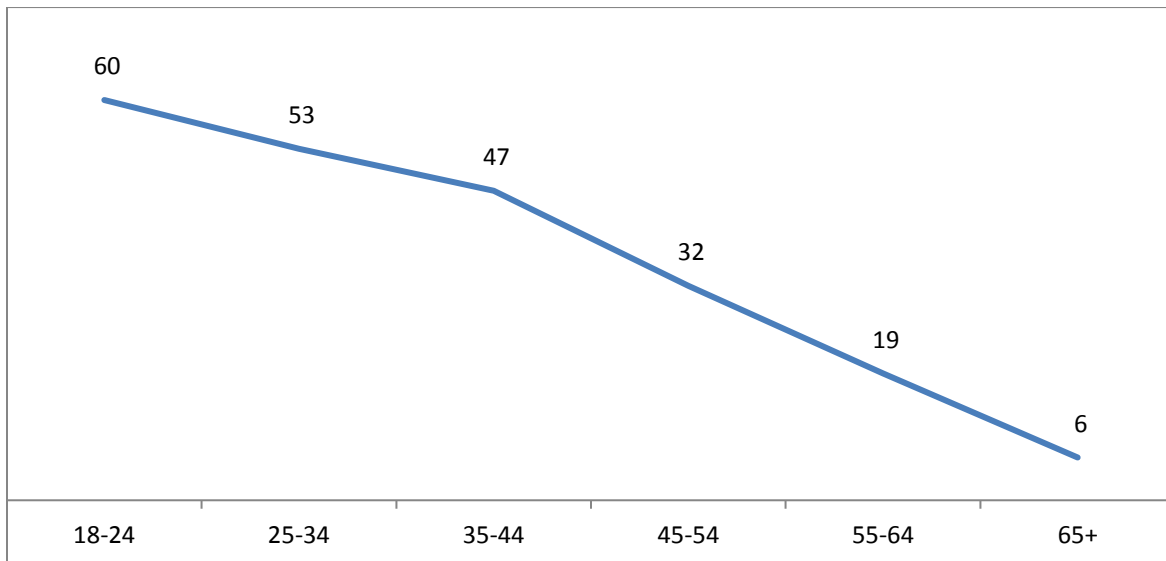
Regarding **usage of the Internet**, it seems to be the highest in Yerevan compared to other settlements. Particularly, around 41 percent of the respondents residing in Yerevan report using the Internet on a daily basis. The capital is followed by the dwellers of other urban areas, with the daily Internet consumption of 33 percent. Only 25 percent of the residents of rural areas report using the Internet every day (Chart 1.5).

Chart 1.5. Everyday usage of Internet resources and social networks by settlement type
(share of everyday users, %)



Respondent age appears to be an important determinant of daily consumption of the Internet in Armenia. As depicted in Chart 1.6, the older the respondent's age, the fewer the number of the users of the Internet on a daily basis. In particular, 10 times as many respondents at the age of 65+ use the internet as at the age of 18-24 (Chart 1.6).

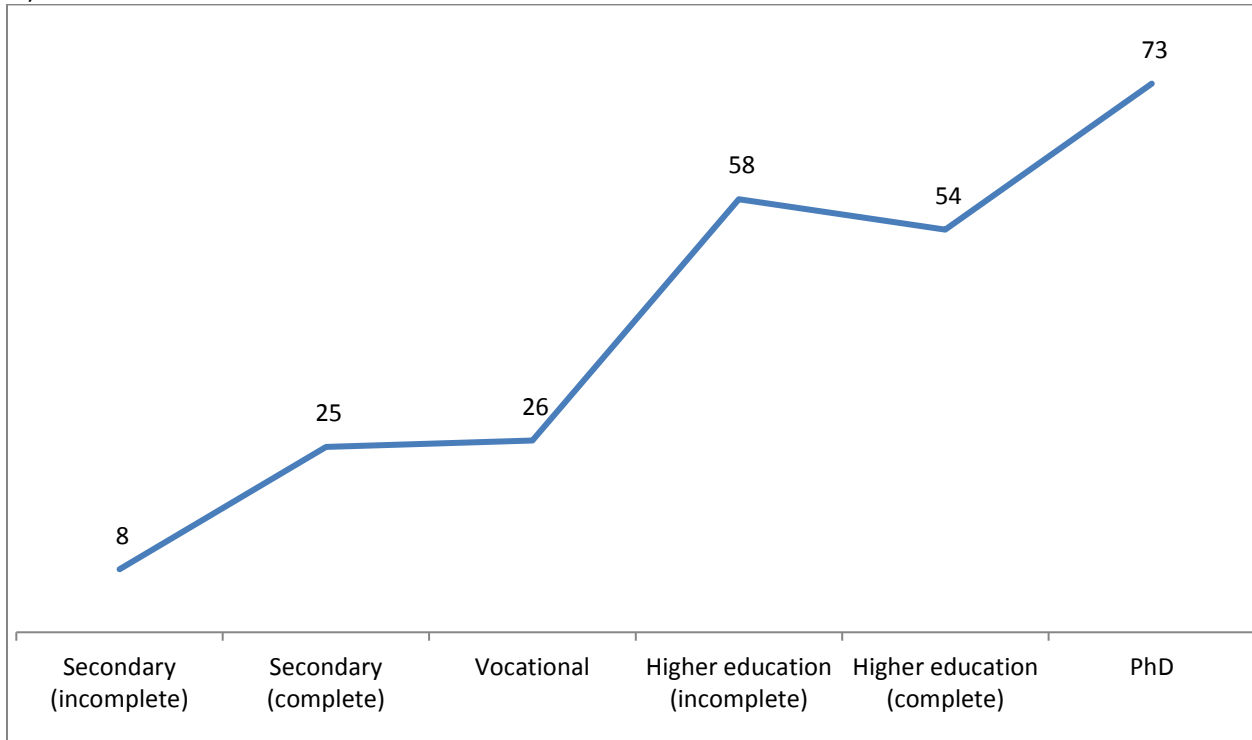
Chart 1.6. Everyday usage of Internet resources and social networks by age groups
(share of everyday users, %)



Gender does not seem to affect the usage of the Internet, as equal number of males (31 percent) and females (32 percent) report using the Internet on a daily basis.

Results also showed that respondents' level of education positively correlates with daily usage of the Internet. For instance, only 8% of the respondents with incomplete secondary education report using the Internet every day, while this statistics primes to 73% for the respondents with a doctoral degree (Chart 1.7).

Chart 1.7. Everyday usage of Internet resources and social networks by education (share of everyday users, %)



2. Usage of social networking platforms

The survey results showed that some 43 percent of the respondents reported using social networking sites or platforms (Chart 2). Among others, “Facebook” and “Odnoklassniki” appeared to be the most popular in Armenia, with 69 percent of the respondents using the former and 66 percent, the latter. Meanwhile, “Twitter” and “Linkedin” are far behind, with only 6 and 3 percent of the respondents using these platforms, respectively (Chart 2.1).

Chart 2. Do you use social networking sites or platforms? (% of total)

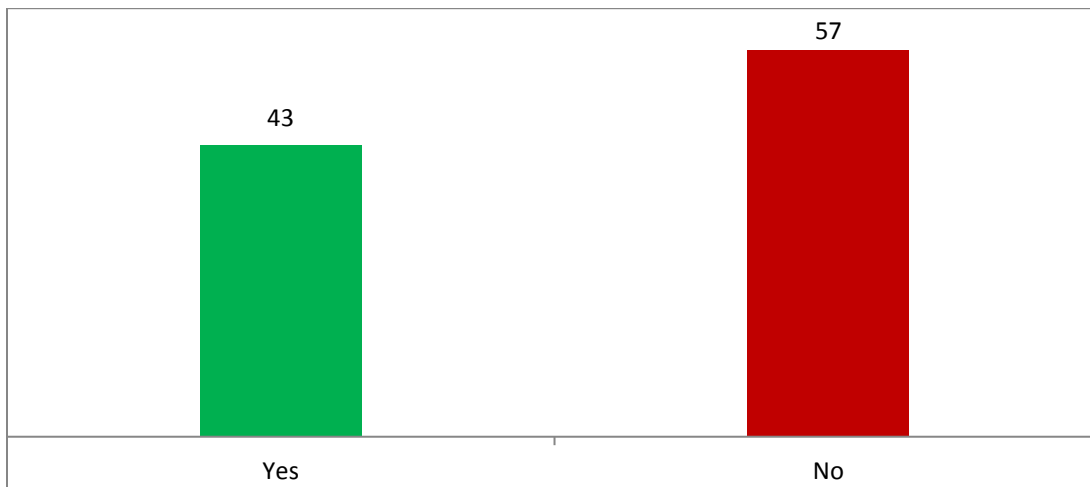
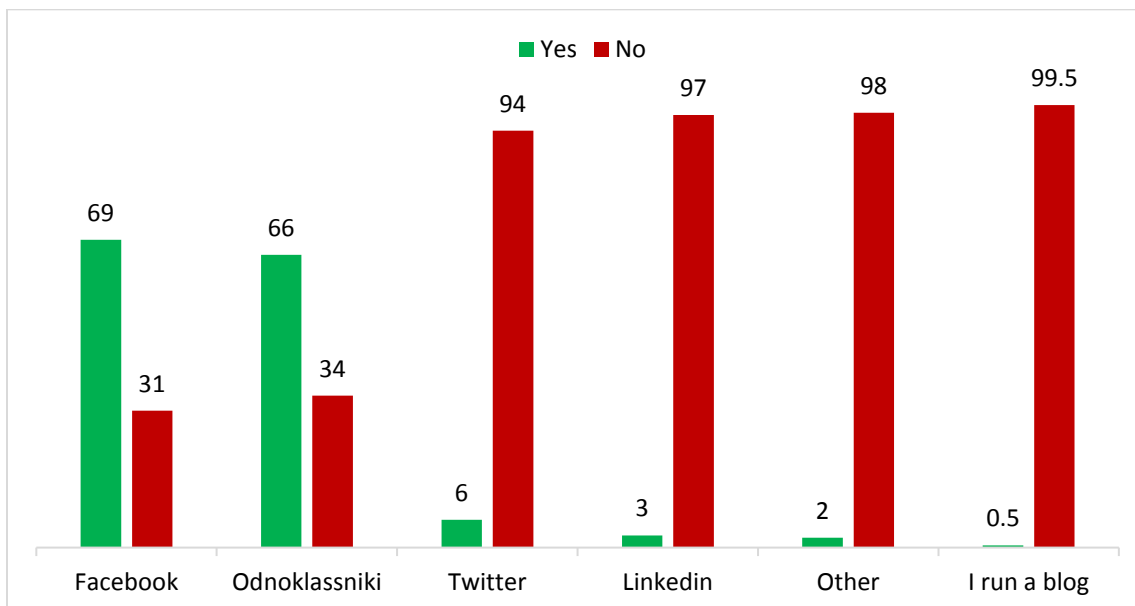
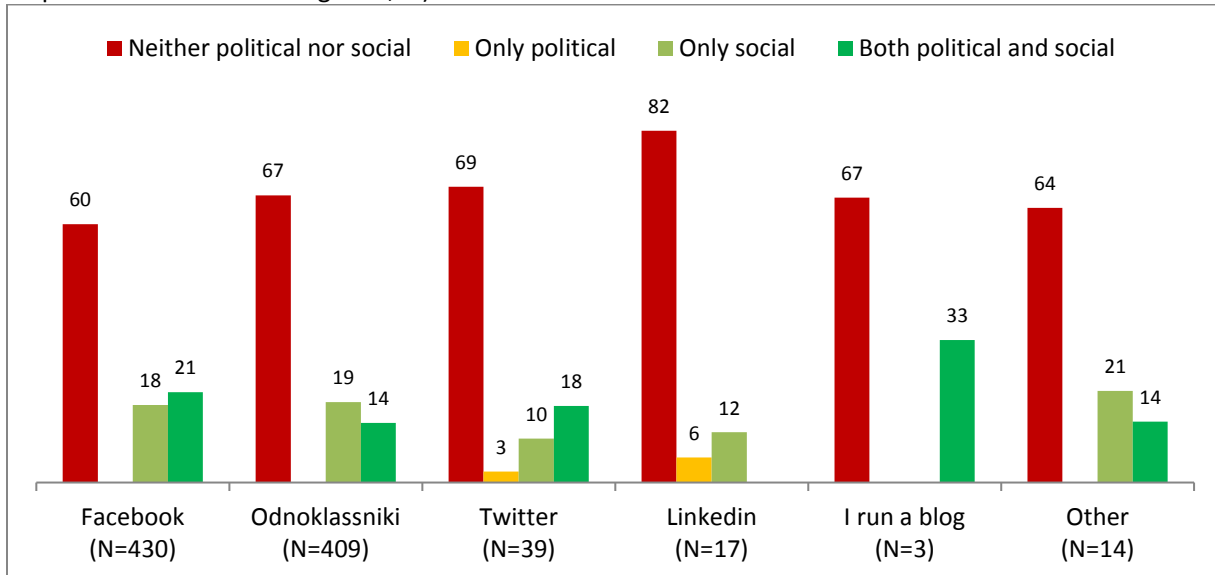


Chart 2.1. The most often used social networking sites (% of total, among the users of respective network N=621)



Thirty-nine percent of “Facebook” users and thirty-three percent of “Odnoklassniki” users report sharing political or social news via these platforms. More than half of the users of these platforms (60% for “Facebook” and 67% for “Odnoklassniki”) share neither political nor social news via these platforms (Chart 2.2).

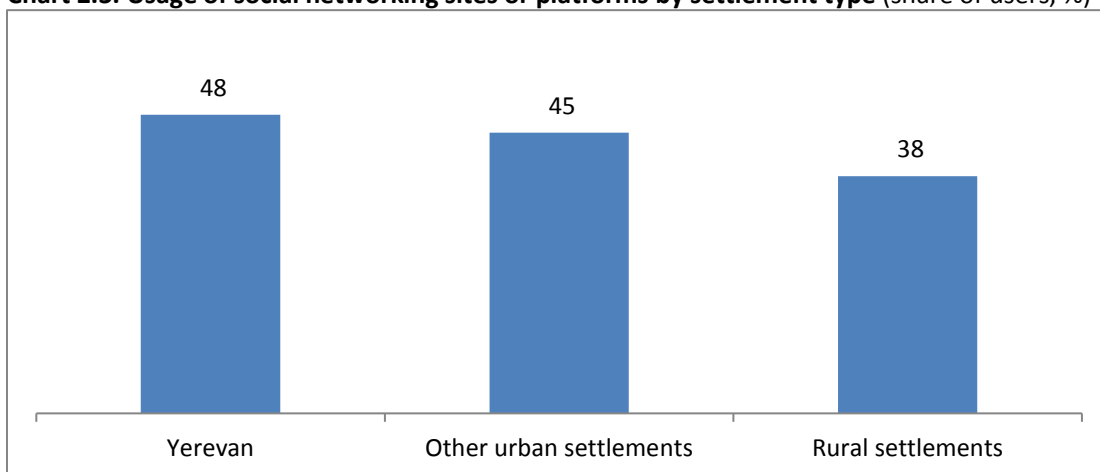
Chart 2.2. Do you use the social networking sites to share political or social news? (among the users of respective social networking sites, %)



Usage of social networking platforms by sociodemographic characteristics

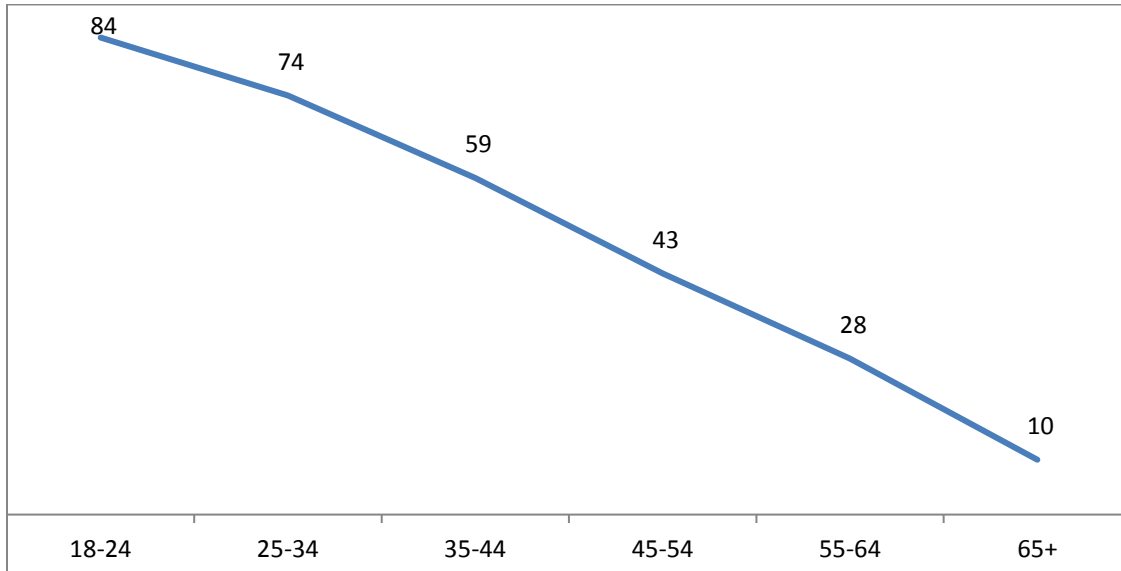
In this section the social networking platform usage rate is provided in relation to such sociodemographic variables, as age, gender, level of education and settlement type. While the rate of social networking platform usage seems to be comparable in the capital and other urban areas (48 and 45 percent, respectively), it is lower in the rural areas (38 percent) (Chart 2.3).

Chart 2.3. Usage of social networking sites or platforms by settlement type (share of users, %)



The age of the respondents is in a negative relation with the rate of usage of social networking platforms. Particularly, the respondents in the 18-24 age group are in the first place with an 84% usage rate, which is 8 times as high as that of the respondents in the 65+ age group (Chart 2.4).

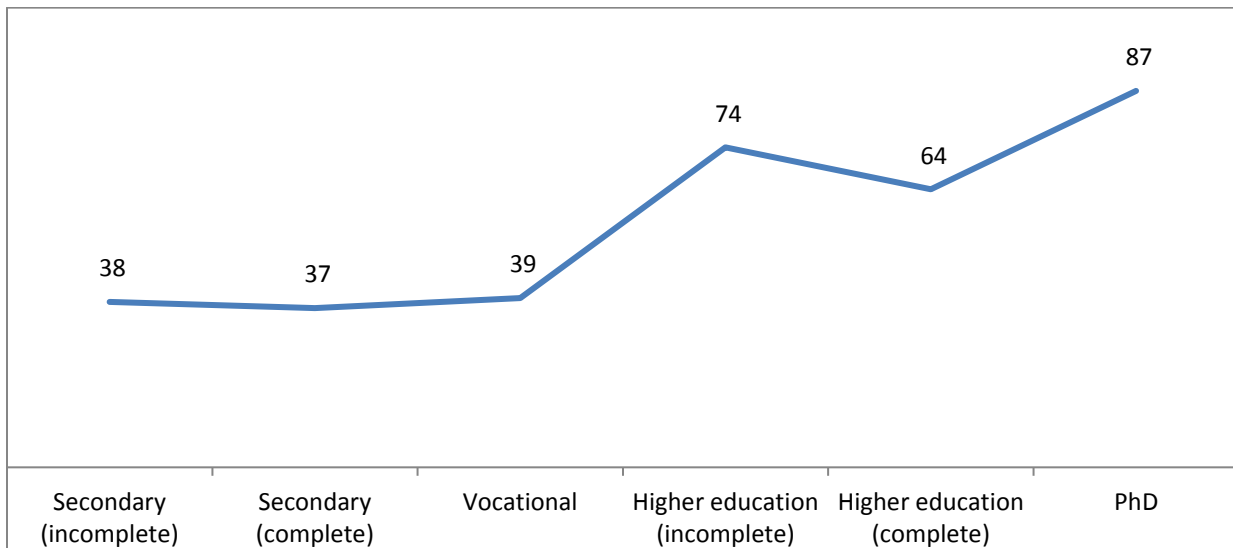
Chart 2.4. Usage of social networking sites or platforms by age groups (share of users, %)



Respondents' gender does not seem to play a role in the usage of social networking platforms. As many females (42%) report using social networking platforms, as males do (45%).

Meanwhile, results show that the respondents' level of education is positively connected with the usage of social networking platforms. In particular, only 1/3 of the respondents with incomplete or complete secondary education report using such platforms, while this statistics primes to 87% percent for the respondents with a doctoral degree (Chart 2.5).

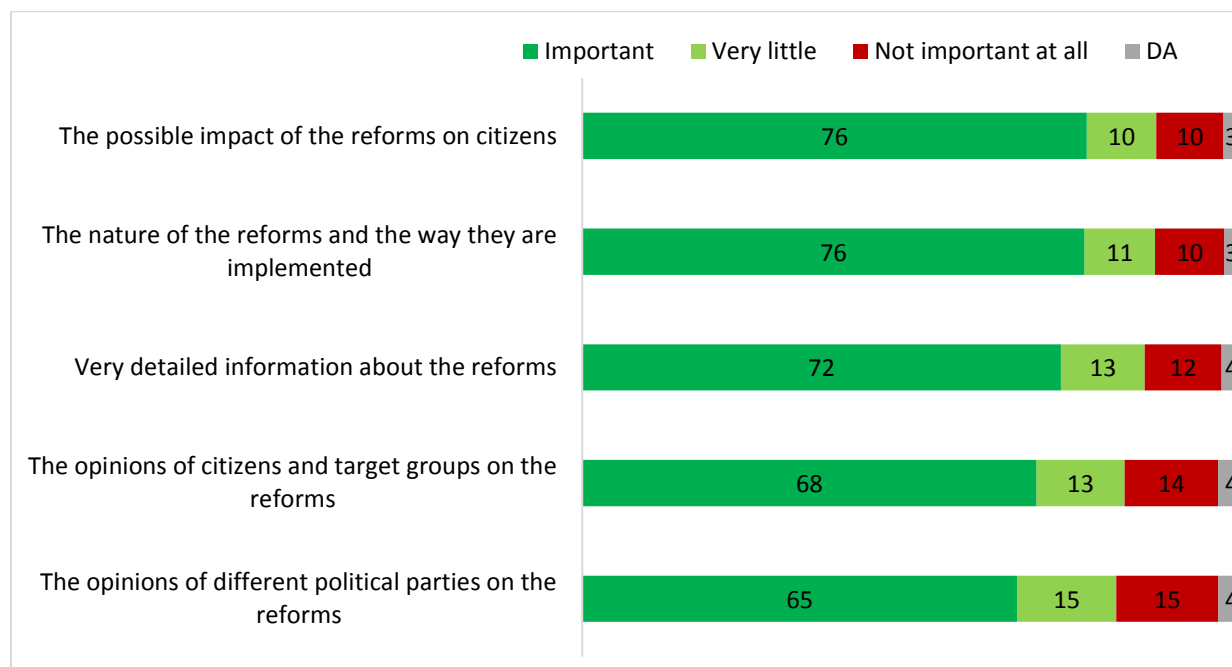
Chart 2.5. Usage of social networking sites or platforms by education (share of users, %)



3. Media coverage of reforms

According to the survey, over three-fourths of surveyed Armenians attached importance to the media’s role in covering reforms. In particular, 76 percent of the respondents stated that it was important that the media provided information regarding reforms and the ways these reforms were implemented. Another 76 percent thought it was important that the media provided information on the possible impacts reforms might have on citizens. Meanwhile, 68 percent of the respondents stated that it was important that the media covered citizens and target groups’ opinions on reforms (Chart 3).

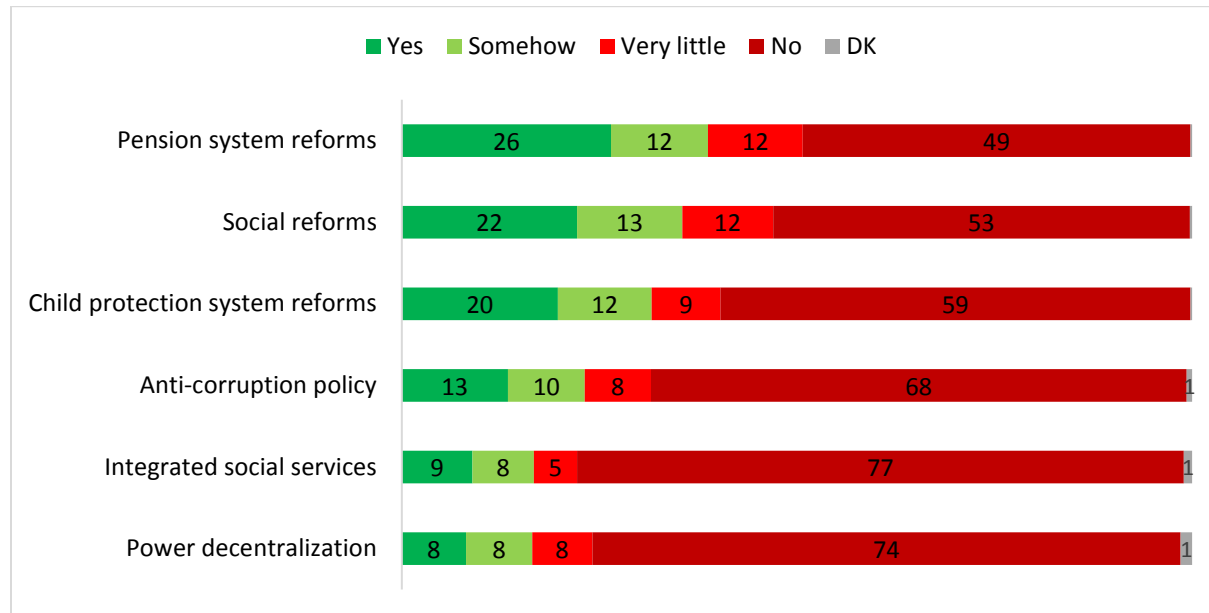
Chart 3. How important it is that media provides the following information about reforms? (% of total)



Despite a solid majority of the respondents state that it is important for the media to provide information on reforms, only a small fraction of the respondents express interest in particular reforms introduced to them in the questionnaire. For instance, around 82 percent had very little or no interest in the power decentralization reforms. Another 82 percent expressed no interest in the integrated social services reforms. The process of anti-corruption policy reforms was almost as unpopular as the abovementioned reforms: a little over three-fourths (76 percent) of the respondents declared no or very little interest in it (Chart 3.1).

The survey found that the respondents were interested in the social protection reform the most. In particular, around 38 percent of the respondents were either “interested” or “somehow interested” in the pension system reform. Meanwhile, roughly 32 percent were either “interested” or “somehow interested” in the child protection system reforms (Chart 3.1).

Chart 3.1. Are you interested in the processes of the following reforms? (% of total)



Among respondents interested in the pension system reforms, 49 percent state they are aware (“yes” and “somehow” answers are aggregated) of these reforms (Chart 3.2), while 37 percent consider these reforms as effective (“effective” and “to some extent” answers aggregated) (Chart 3.3). Among those interested in the social reforms, 37 percent stated they are aware (“yes” and “somehow” answers aggregated) of these reforms (Chart 3.2), meanwhile 44 percent consider these reforms as effective (“effective” and “to some extent” answers aggregated) (Chart 3.3).

Chart 3.2. Are you aware of the following reforms? (among those who are interested, %)

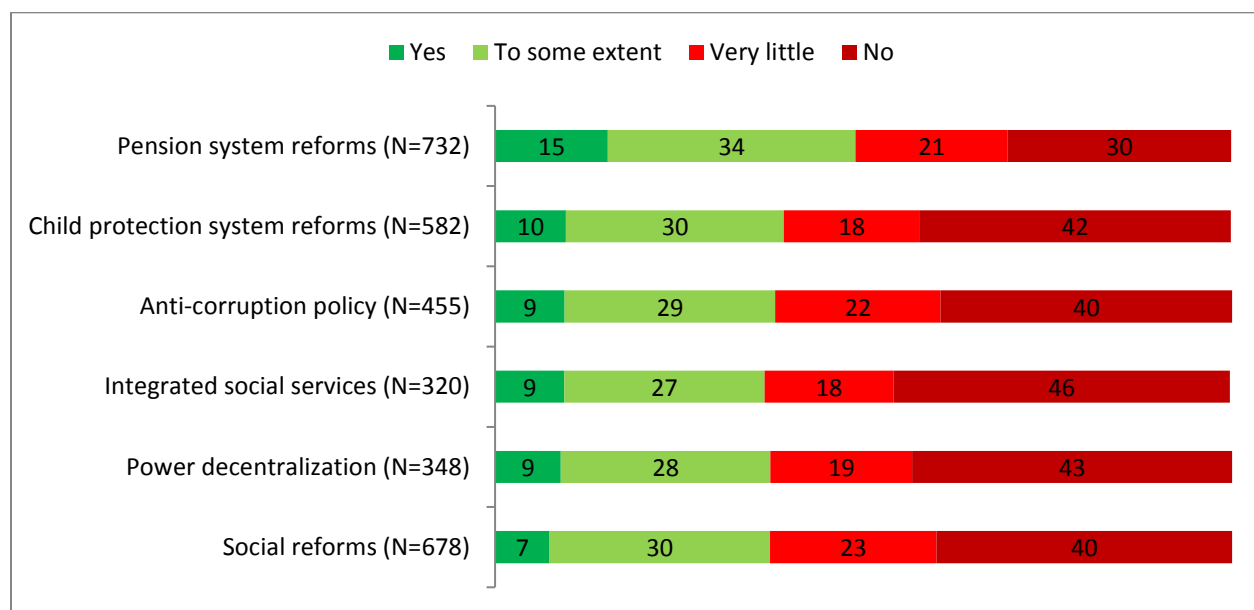
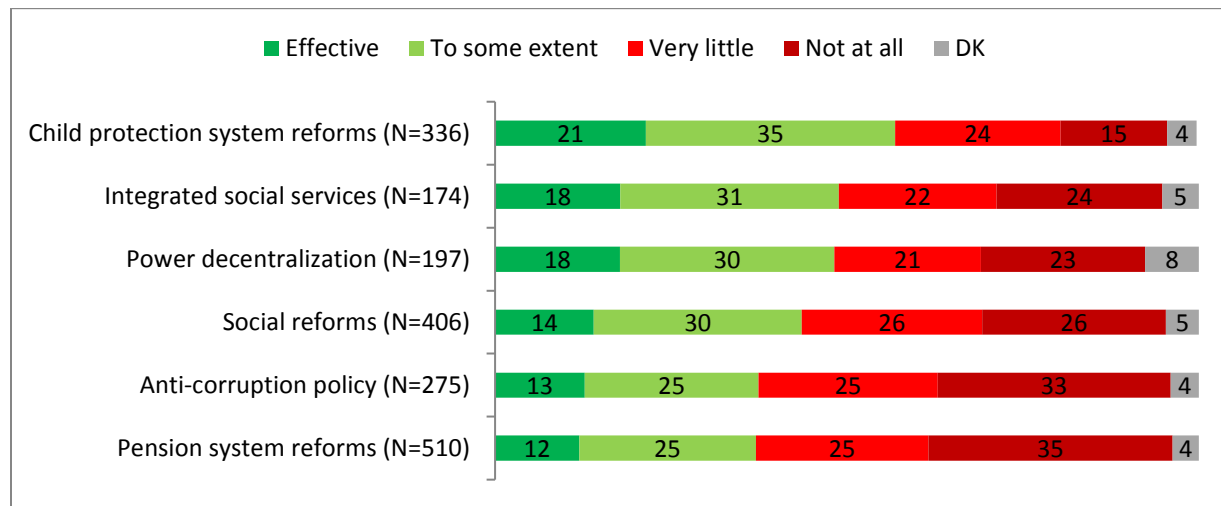
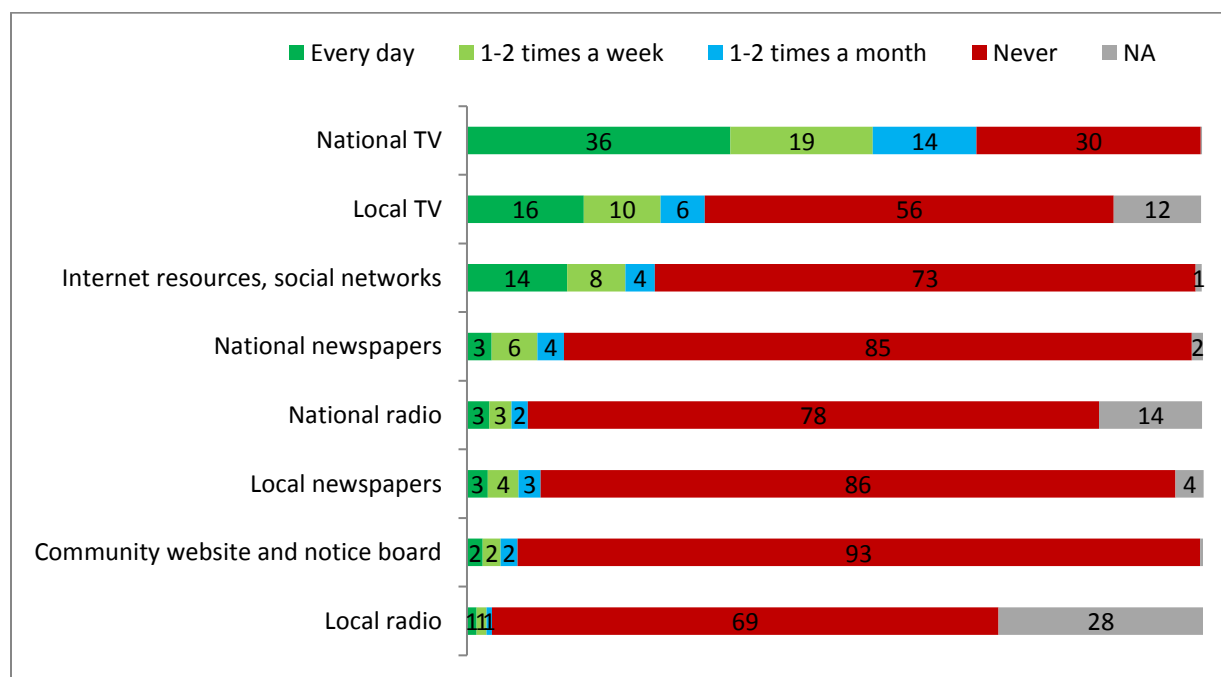


Chart 3.3. How effective are these reforms? (among those who are aware, %)



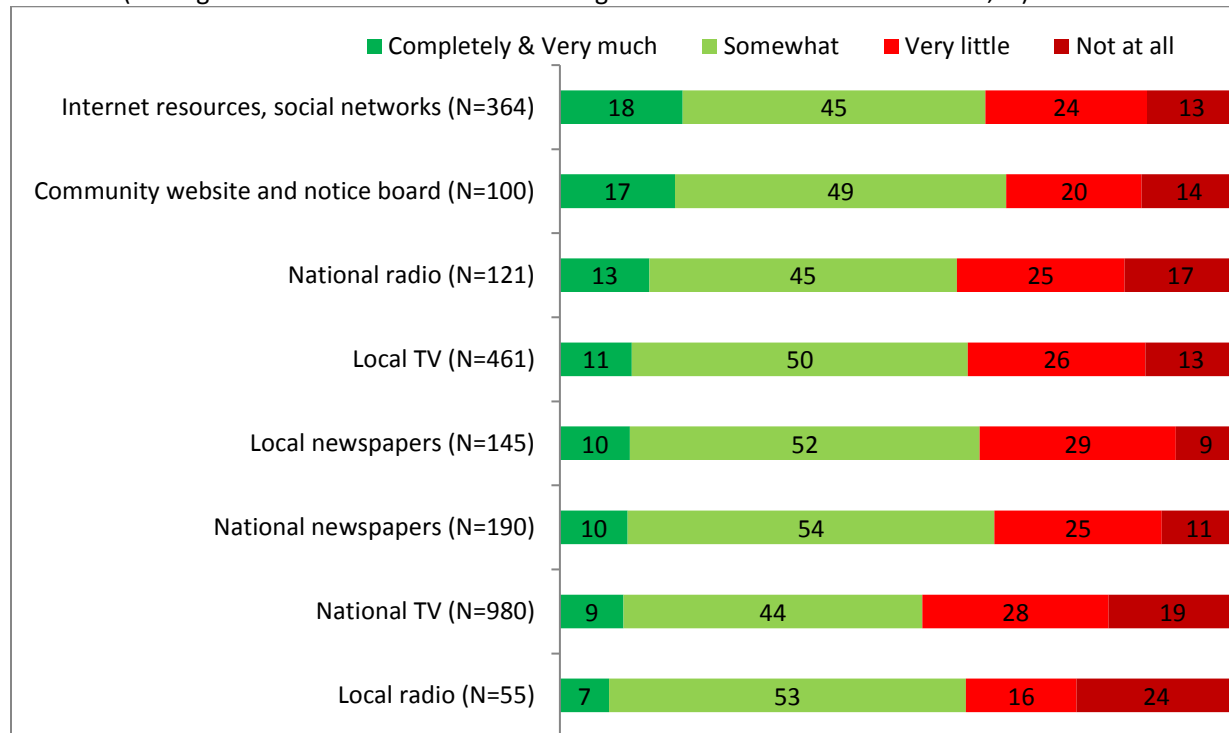
The survey revealed that TV channels were the leading information source for the respondents to learn about the local self-governance and social reforms. When asked “How often do you get information about LSG bodies, social services, and anti-corruption reforms from the following sources?” respectively 36 and 16 percent of the respondents indicate “National television” and “Local Television” as an everyday source of information. “Internet resources and Social Media” are an everyday source of information for 14 percent of the respondents, only. Meanwhile, more traditional forms of the media such as “National newspapers,” “Local newspapers,” and “National radio” have the least share of the respondents (3 percent each) (Chart 3.4).

Chart 3.4. How often do you get information about the reforms of the LSG bodies, social services, and anti-corruption policies, from the following sources? (% of total)



Overall, the survey results highlight a very high level of dissatisfaction with the information on social reforms provided by various sources of media. Among those who use either “National television” or “Local television” to learn about social reforms, only 9 and 10 percent are satisfied (“completely” or “very much”) with the information provided by these sources, respectively. The highest level of satisfaction (18 percent) was recorded among those who used “Internet resources and social media” to get information on social reforms (Chart 3.5).

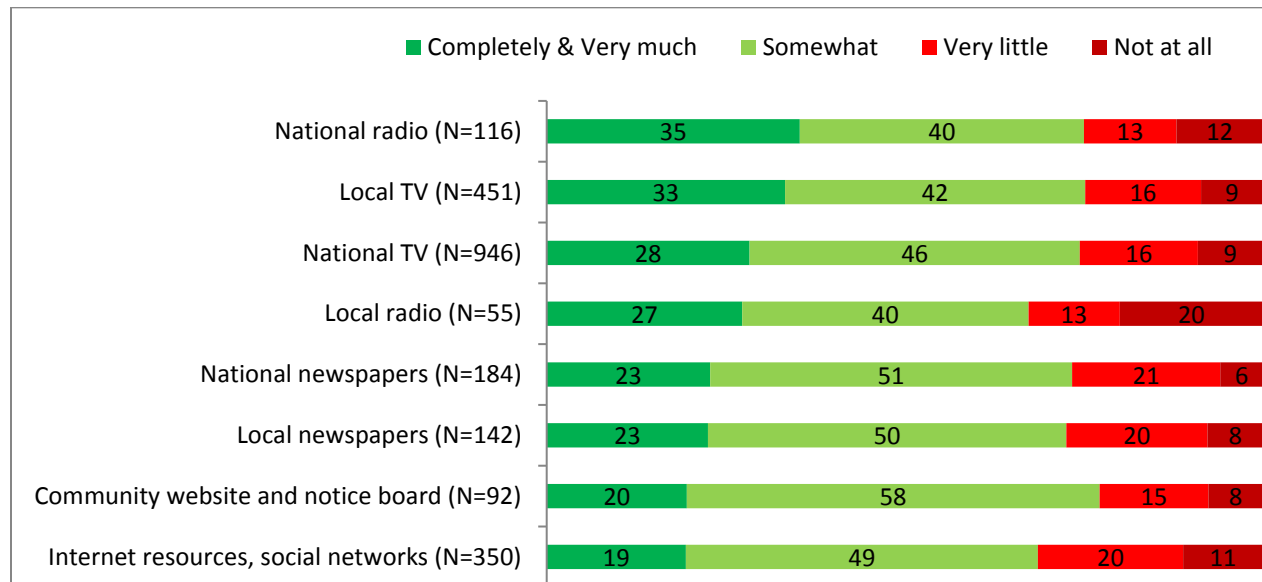
Chart 3.5. How satisfied are you with the information that the following sources provided about social reforms? (among those who used these sources to get information about the reforms, %)



Despite the dissatisfaction with the “National television,” when posed the question “In your opinion which media source best covers the information about reforms?” majority of the respondents (53 percent) consider it to be the best for the provision of such information. Meanwhile, of the television channels with national coverage, “Shant,” “Kentron,” and “H1,” are indicated as best sources of information on reforms.

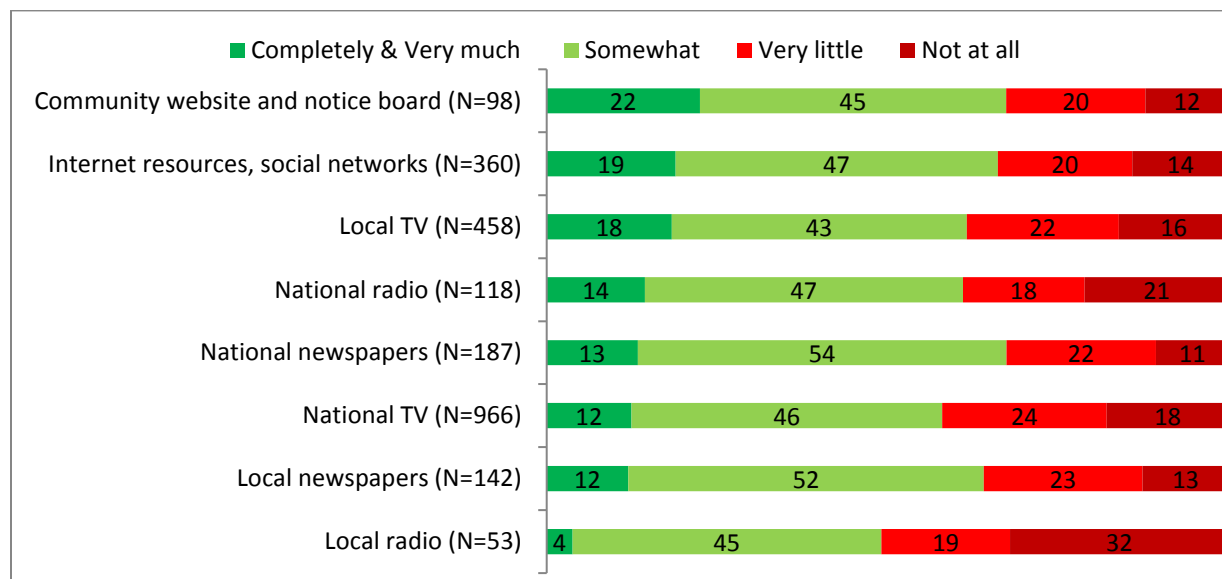
According to the survey, the level of respondents’ satisfaction with the ethics of the journalists is not high either. The highest level of satisfaction is among the respondents who get information on social reforms from “National radio,” with 35 percent of the respondents indicating as being either “completely” or “very much” satisfied. Similarly, around 33 and 28 percent of the respondents who get information on the social reforms from “Local television” and “National television,” respectively, indicate as being satisfied (“completely” or “very much”) with the ethics of the journalists representing these sources of media (Chart 3.6).

Chart 3.6. How satisfied are you with the ethics of the journalists from the following sources? (among those who used these sources to get information about the reforms, %)



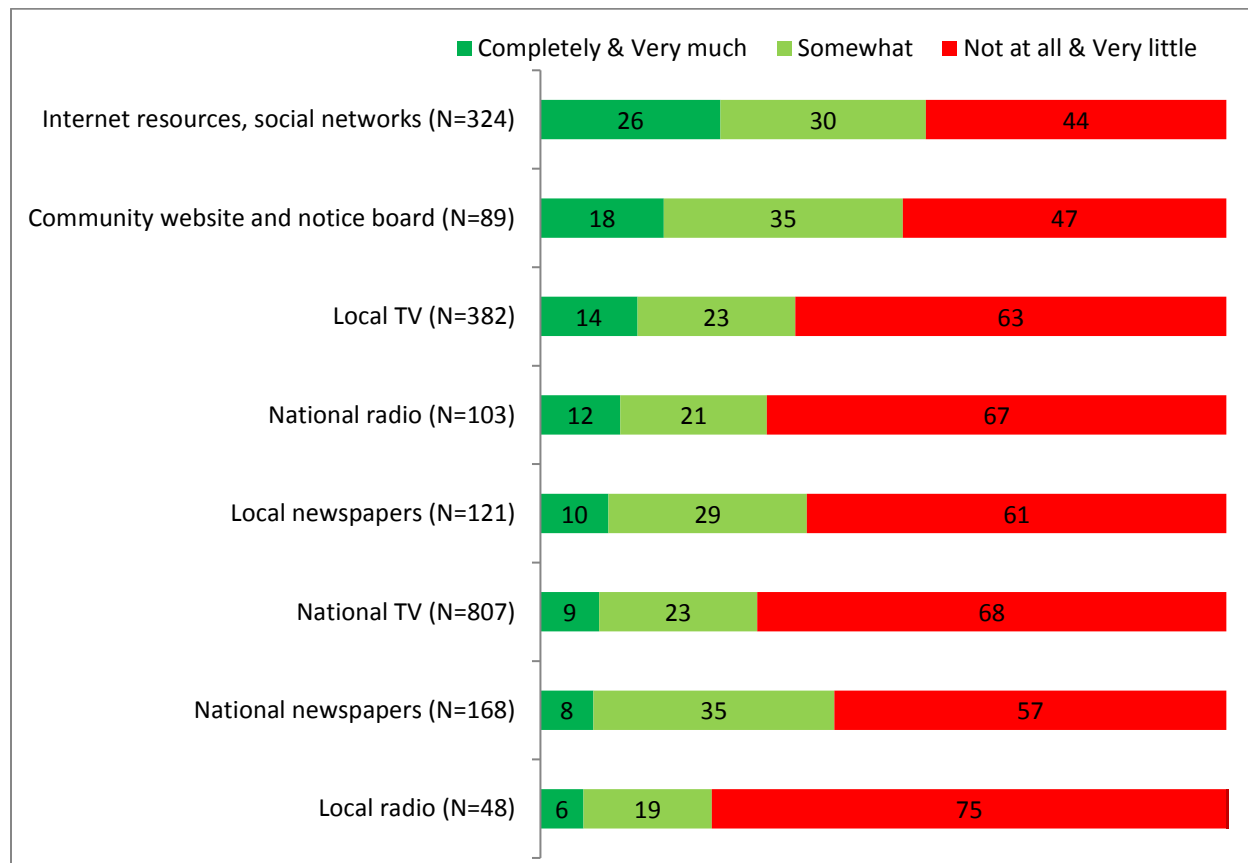
Results reveal that only a tiny number of respondents trust the media they indicate as the main source of information on social reforms. For example, “Community website and notice board” enjoys the highest level of trust, with 23 percent of the respondents stating that they trust this source either “completely” or “very much.” The second most trusted source of information is “Local television,” with 18 percent trusting it either “completely” or “very much.” The “National radio” and “National newspapers” occupy the third place, with 14 percent of the respondents trusting each of them either “completely” or “very much” (Chart 3.7).

Chart 3.7. Please assess the level of your trust towards each of information source (among those who used these sources to get information about the reforms, %)



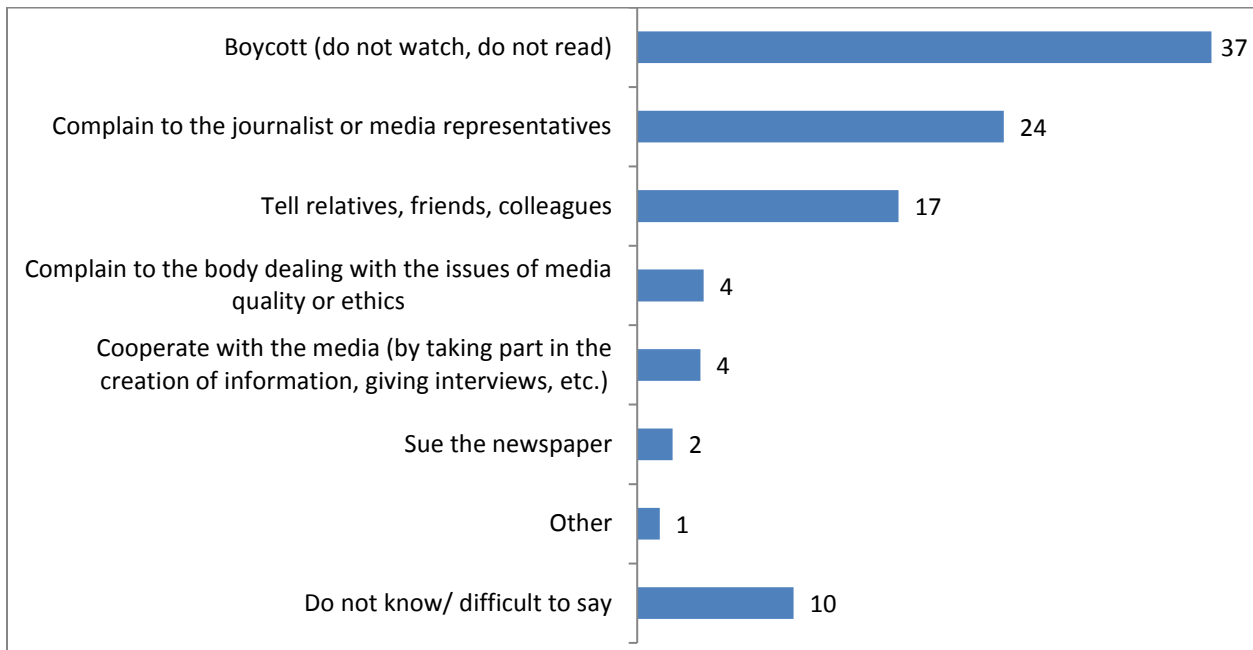
When posed the question regarding the extent of independence of the media serving as sources of information about social reforms, majority of respondents opine that these media are under the control of “the government, political parties or business.” Among national electronic media sources, the “National television” and the “National Radio” are perceived to have no or very little independence by 68 and 67 percent of the respondents, respectively. “Internet resources and social media” are considered as the most independent media, with only 44 percent of the respondents stating this media source enjoys no or very little independence (Chart 3.8).

Chart 3.8. To what extent are the media sources independent from the government, political parties or business control? (among those who used respective source to get information about the reforms, %)



The results also show that the respondents would most likely decline to use a source of information in case the latter fails to comply with conventional ethical norms and morals. When asked the question “How to react on the Armenian media’s wrong, misleading or violating ethical norms information?” 37 percent prefer boycotting (not watching or reading) the media. Complaining to the journalist or media representatives comes in second, with 24 percent giving preference to this form of reaction. A tiny percentage of the respondents prefer complaining to appropriate bodies dealing with the media (4 percent) or applying to court (2 percent) (Chart 3.9).

Chart 3.9. How to react on the Armenian media’s wrong, misleading or violating ethical norms information? (% of total)



Freedom of expression

Almost half (46 percent) of the respondents indicate that people in Armenia have the opportunity to publicly express their views. Another 22 percent point out that their fellow citizens have this opportunity to some extent. Roughly 30% of the respondents consider that people in Armenia have no or very little opportunity to publicly express their opinion (Chart 3.10).

Chart 3.10. In your opinion, do people in your country have the opportunity to publicly express their opinion? (% of total)

