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Armenian Media Landscape

Formative Research for the Alternative Resources in Media Program

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This report aims to contribute to a broader public understanding of Armenian use of, attitudes toward, and perceptions of a diverse range of media. The study presents a detailed picture of the media landscape in Armenia. Based on a comprehensive survey of the Armenian population and eight complementary focus group discussions conducted in 2011, it provides in-depth data on trust in the media, attitudes towards media freedom and news consumption. It also provides a thorough investigation of the ownership and usage of various media technologies, including TV, radio, mobile phones, computers and the Internet.

By Katy Pearce

In addition to CRRC staff members, the following individuals contributed greatly: Gayane Mamikonyan designed the survey, developed the questionnaire, integrated feedback from many colleagues, and then provided extensive analysis of the data; William Dunbar edited the final report; Marlen Heide provided most charts and formatting.

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INTRODUCTION

Armenians are evenly divided when it comes to trusting the media. Almost half of Armenians (47%) partially or fully trust it, 48% partially or fully distrust it. This polarization is seen again when it comes to specific information sources, with national television (TV) being trusted by 55% and distrusted by 42%, making it simultaneously the most trusted and the most distrusted source of information in Armenia. Furthermore, 55% of Armenians say that national TV is not independent from the government. A similar picture emerges when it comes to the second most trusted source, personal contacts, which are trusted by half the population, but distrusted by a third.

About two thirds of Armenians either have never used online information sources, or don't know whether to trust them. However, amongst those that do use them, trust is much higher, as is satisfaction with their content.

Armenians are similarly divided in terms of whether media report objectively, but 77% say media owners influence content, and political affiliation is seen as a prime mover in this. Nevertheless, Armenians have a strong desire for a free media, and 80% say that TV should be able to broadcast what it wants.

In terms of news sources, television is by far the most important, with almost all Armenians households possessing a TV, and most Armenians watching several hours a day. Besides Armenian programs, Russian channels are popular, watched by almost half of Armenians. In comparison to television, other sources of information pale into insignificance. Two thirds of Armenians do not read a newspaper, three-quarters have not listened to the radio in the last twelve months, and three quarters have never accessed a social networking site.

However, the situation may be changing. Not only do almost all Armenians have mobile phones, many are using them to access the Internet. Furthermore, a third of Armenians have a personal computer, and a quarter have an Internet connection, showing that these technologies are being adopted rapidly, albeit mainly in the capital. For Internet users, the primary activity is social, and 60% of Armenians Internet users have a social network profile, which most visit at least daily. This, coupled with the fact that Internet users trust and are satisfied with online news content, and also use social networking to share information, suggests that the adoption of new media technologies in Armenia could lead to a dramatically different media environment in the years to come.

This report is based on a comprehensive survey of the Armenian population conducted in 2011 as well as eight complementary focus group discussions. Additional data from CRRC's Caucasus Barometer 2007-2010 was considered for illustrating developments over time. A detailed methodology of the 2011 Armenia Media survey can be found on pages 39-42.

MEDIA TRUST

Armenians are evenly divided when it comes to trusting the media. The same proportion of Armenians (48%) says they somewhat or full trust the media as say they fully or somewhat distrust it. However, the level of strong distrust is more pronounced than the level of strong trust: over three times more Armenians say they fully distrust the mass media (18%) than say they fully trust it (5%) (see Table 1).

Table 1: Trust in the mass media (%)

Fully trust	5
Somewhat trust	43
Somewhat distrust	30
Don't trust at all	18
DK	3
RA	1

It might seem paradoxically that Armenians, despite their mixed levels of trust in the mass media, are watching TV very frequently and for long hours. In fact, it is not uncommon for people who do not trust their news sources to continue viewing them, possibly seeking to understand what everyone else is watching, to familiarize themselves with the political issues of the day, or to get necessary information for their daily lives, in particular weather (Tsfati & Capella, 2005).

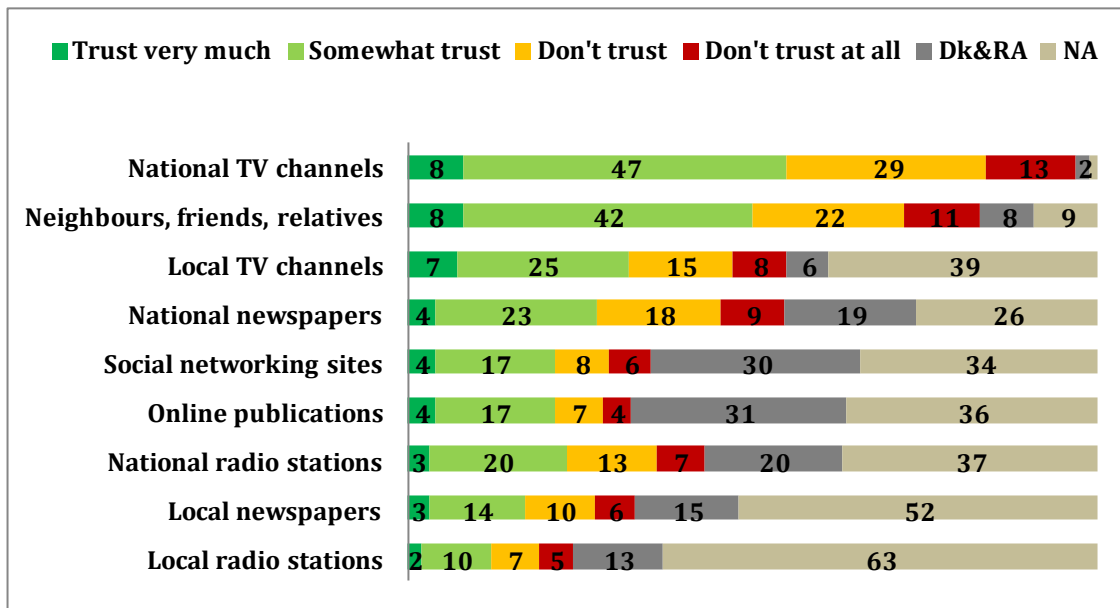
Trust in Information Sources

As well as being split in terms of trust in the mass media in general, Armenian attitudes are also divided when it comes to trusting specific information sources (Figure 1 below) as well as assessing the independence of those information sources from government and business interests (Figure 2 below).

National TV is considered the most trustworthy source of information, and is fully or partially trusted by 55% of Armenians (see Figure 1 below). However, there is a significant split in opinion, as a large minority of Armenians (42%) partially or fully distrusts national TV, making national TV also the most distrusted source of information. Focus groups confirmed this polarization, with some participants seeing TV as a “distorted reality.” Opinions are also divided with regard to the second most trusted source of information: friends, neighbors and relatives. Here, 50% somewhat or fully trust this source, while a third partially or completely distrusts it.

It might seem paradoxically that Armenians, despite their mixed levels of trust in the mass media, are watching TV very frequently and for long hours. In fact, it is not uncommon for people who do not trust their news sources to continue viewing them, possibly seeking to understand what everyone else is watching, to familiarize themselves with the political issues of the day, or to get necessary information for their daily lives, in particular weather (Tsfati & Capella, 2005).

Figure 1: Trust toward different sources of information



When it comes to other sources of information, large numbers of Armenians either do not use them, or do not know whether they are trustworthy or not. That makes it difficult to judge what the most trustworthy sources outside of national TV and interpersonal relationships truly are. Over two-thirds of Armenians (67%) either do not use online newspapers or do not know whether they are trustworthy, along with 64% for social networking sites. However, Armenians that have an opinion on the trustworthiness of online sources are very likely to say that these sources are trustworthy. Furthermore, of those that do read online news a large majority trusts or somewhat trusts the sources that they read (83%) and they are satisfied with the content (78% satisfied).¹

When it comes to the print media, a large majority of Armenian newspaper readers appear to trust both news content and analysis (see Table 2).

Table 2: Trust in newspaper content and analysis (%)

	News content	News analysis
Fully trust	11	10
Somewhat trust	64	55
Somewhat don't trust	17	21
Don't trust at all	3	4
DK	5	10
RA	1	1

This is in contrast to the way Armenians view the work of TV journalists. According to the 2010 Caucasus Barometer, only 4% of Armenians believe that TV journalists inform the population very well.² Similarly, only 4% believe that TV journalists serve the

¹ Table 19 and 20 Appendix

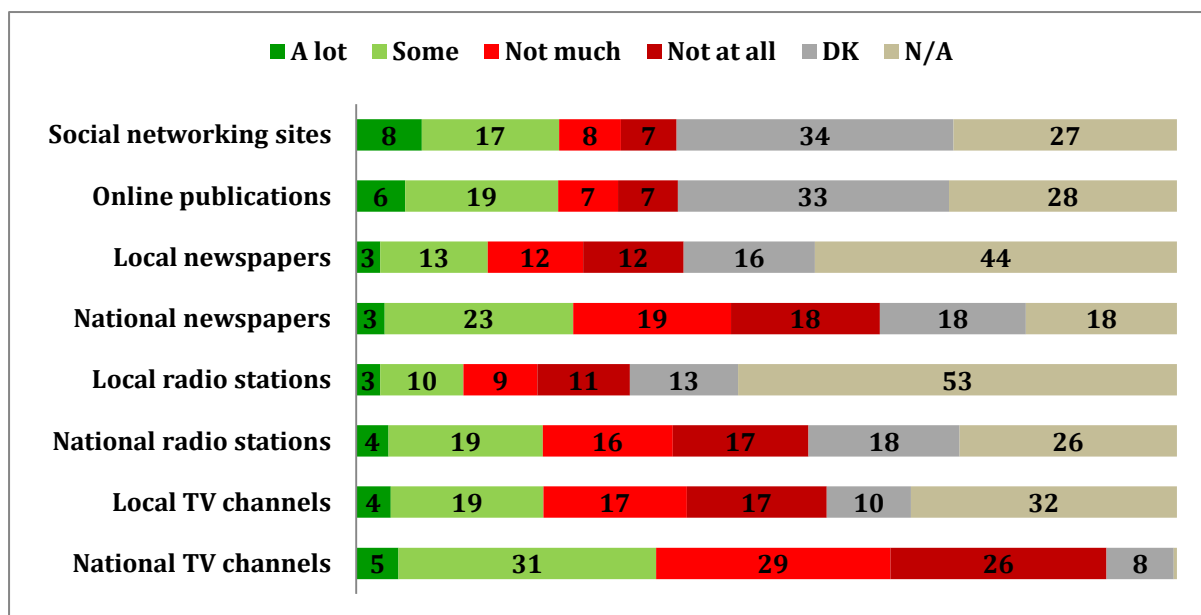
² Table 21 Appendix

interest of ordinary people.³ Furthermore, 12% of Armenians fully distrust TV journalists and another 16% somewhat distrust TV journalists, indicating a significant skepticism about the quality of TV news.⁴

Media Independence

Armenia's media is rated "not free" by leading international watchdogs (Freedom House, 2011). Apart from that, national TV receives a mixed reaction, with 36% of people believing that it is independent and 55% believing that it is not independent from government or business interests (see Figure 2). According to the 2010 Caucasus Barometer, about 59% also felt that major TV channels are not independent from the government.⁵

Figure 2: Perceived independence of media sources from government/business



Armenians are overwhelmingly unsure of the independence of online sources. Almost two-thirds of Armenians (61%) could not offer an opinion on the independence of online newspapers or social networking sites. However, Armenians that did offer an opinion were much more likely to believe online sources to be independence of government and business influence (see Figure 2 above).

Objectivity

Objective reporting is, by definition, accurate, truthful, fair and balanced, and morally neutral although objective reporting is not always good reporting (Cohen-Almagor, 2008). Also, democracy does not guarantee media objectivity, and in fact, weakening state control over media does not necessarily mean that news will become more objective (Tang & Iyengar, 2011).

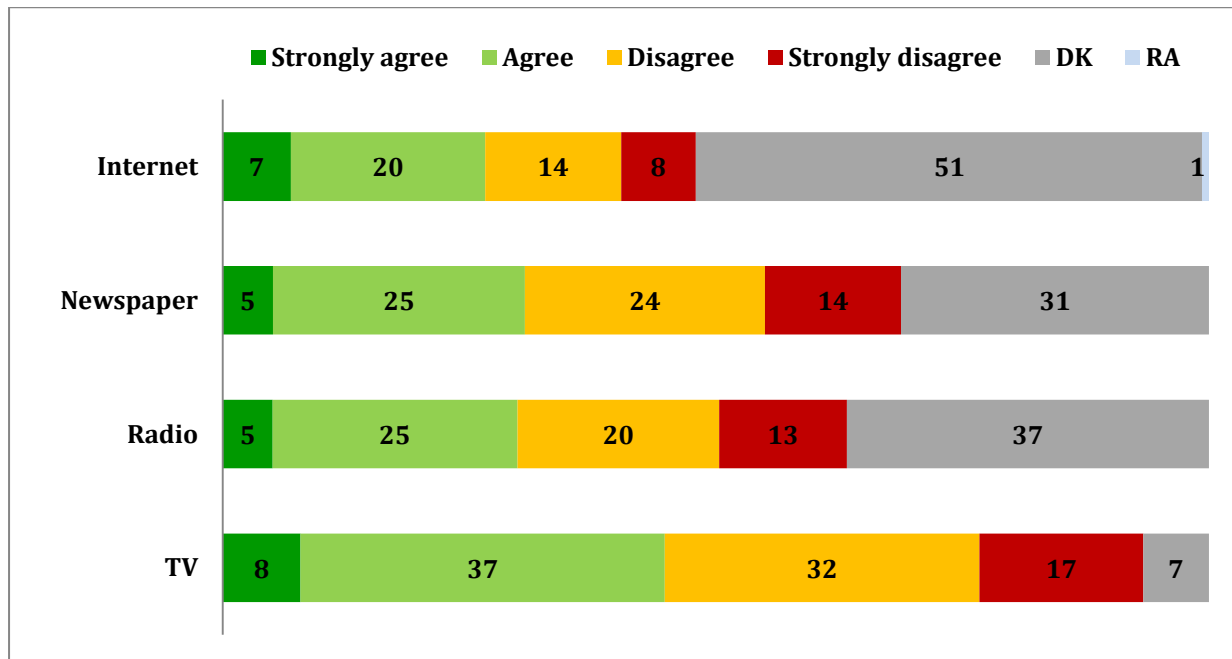
³ Table 22 Appendix

⁴ Table 23 Appendix

⁵ Table 24 Appendix

Other than for TV, Armenians tend not to know whether various media report objectively. More than half (51%) of Armenians do not know whether Internet news sources report objectively. Over one-third of Armenians (37%) don't know if radio stations cover events objectively, while 31% don't know whether newspapers report objectively (see Figure 3 below). Thus more Armenians do not know whether these media are objective than express an opinion either way.

Figure 3: Beliefs about objective reporting



In terms of TV, however, opinions are much more fixed and much more polarized. While 45% of Armenians partially or strongly agree that TV coverage is objective, 49% disagree or strongly disagree (see Figure 3 above). In focus groups, however, there was complete agreement that TV news is not objective. In the words of one participant, “while watching the Armenian TV channels I have an impression that all TVs are governmental TV channels, and there is no independent TV in Armenia.” According to another participant, the only independent TV channel was A1Plus, and currently he gets alternative content from the A1Plus.am website. However, another participant pointed out that A1Plus.am is not independent either, as all media outlets represent various parties’ interests. Participants think that the situation presented by TV news does not represent the reality of Armenian life.

When asked about the reasons for non-objective coverage, nearly two-thirds of Armenians named political affiliation as the primary reason.⁶ Respondents also believe that the owners of media outlets significantly influence content. Over three-quarters (77%) of Armenians believe that owners have some degree of influence on media content.⁷

⁶ Table 25 Appendix

⁷ Table 26 Appendix

The situation is more complex when it comes to newspapers. Most Armenian newspapers are owned by, or have close links to, political parties or wealthy individuals, a situation that creates bias. However, the biases this situation creates means there is a plurality of positions in the Armenian media. Yet, with such low readership, the influence of these alternative voices goes mostly unheard (Kurkchiyan, 2006).

MEDIA FREEDOM

Overwhelming numbers of Armenians say media freedom is important in all media.⁸ In spite of this, many Armenians are deeply unsure as to whether the media really is free in their country.

While the Armenian Constitution protects freedom of speech and freedom of the press, the government restricts full media freedom in the country. **According to Freedom House, the Armenian government maintains tight control over the state-owned Armenian Public Television and virtually all private channels, which are owned by businesspeople loyal to the president (Freedom House, 2006).**

This ownership model is not uncommon in the Former Soviet Union. Discussions of press freedom by politicians are “purely epiphenomenal or instrumental, existing only for effect or to disguise the real substance of ‘inner politics’” (Wilson, 2005, p. 47).

Most newspapers in Armenia are privately owned, but few have full independence from government or business interests, according to Freedom House. “The Armenian newspapers (virtually all of them privately owned) are... more diverse and free, but their low circulation seriously limits their ability to inform the public.” (Danielyan, 2006, p. 28)

An overwhelming majority of Armenians (87%) believes that TV stations should be free to broadcast what they want. Similar results are observed for radio stations (77%), and newspapers (80%). However, when it comes to publishing on the Internet, 68% consider media freedom important; 51% find it very, 17% somewhat important. As much as 21% don’t know whether they find media freedom for the Internet important or not.⁹ When asked whether the government should regulate online content, 82% disagree, and just 16% agree.¹⁰

NEWS CONSUMPTION

The free flow of information is crucial to an active public sphere and, for most people; media – first newspapers, then television, and now the Internet – are the major source of relevant new information (Thorson, 2008). Thus, consumption of news has an important relationship to civil society development. In Armenia, which lacks a

⁸ Table 27 Appendix

⁹ Table 27 Appendix

¹⁰ Table 28 Appendix

developed civil society (Iskandaryan, 2011), any source of awareness and knowledge, including media, are important.

Media Content

According to the Yerevan Press Club's content analysis of Armenian media sources in February and March 2011, the most popular news programs are straightforward informational coverage as well as analytical TV news programs, international news, activities of the government of Armenia, and sports.

Most Armenians are interested in political news in general. The largest number of Armenians (37%) says they have "some interest" in political news, with an additional 20% saying they have a lot of interest. 21% and 22% say they have little or no interest in political news, respectively.¹¹ In Armenia, the appetite for political news varies strongly with educational level. Just 7% of Armenians with lower than secondary education say they have a lot of interest on political news, while 26% of Armenians with a BA, and a further 26% of Armenians with postgraduate education, say they have a lot of interest.¹²

When asked about specific domestic subjects that they wanted covered more in the Armenian media, the top three responses were the election code, the activities of the president and then the activities of the government. In terms of foreign affairs, Armenians wanted more information on the recognition of the Armenian Genocide, the Karabakh conflict and Armenian-Turkish relations, while for social and economic affairs, Armenians want more information on the situation in the army, price rises, social benefits, and healthcare.¹³

Important News Sources

Across the world, television is named as the most important source of news in nearly all countries and contexts, a situation which also pertains in Armenia. A huge majority of Armenians (90%) say that TV is their most important news source, followed by 6% who prefer the Internet, 2% radio, and 1% citing newspapers as the most important source.¹⁴

News Consumption Frequency

Armenians use a variety of news sources. The frequency of news consumption by source shows that national TV is the daily news source for a vast majority of Armenians. Almost half of Armenians also use Russian TV as a news source daily (see Figure 4).

While less than 1% of Armenians cited interpersonal connections as the most important source of news¹⁵, such connections are an important additional source of news, with half of Armenians using these sources at least several times a week (see Figure 4).

¹¹ Table 29 Appendix

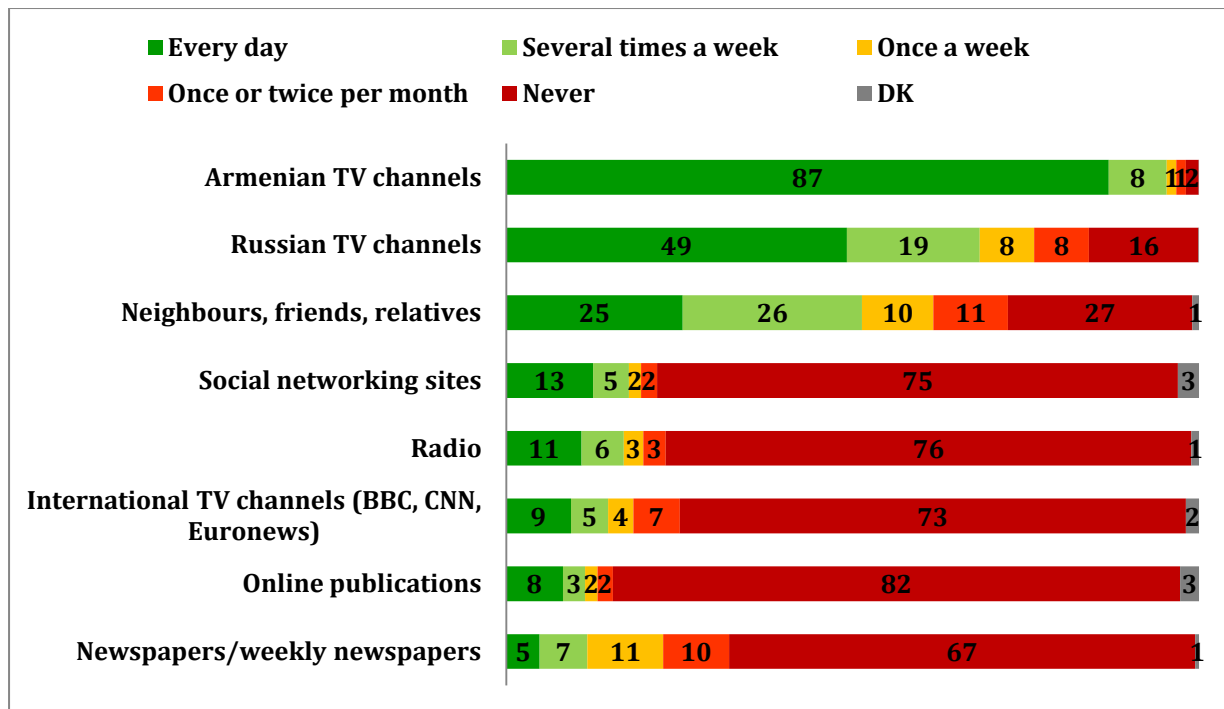
¹² Table 30 Appendix

¹³ Table 31-33 Appendix

¹⁴ Table 34 Appendix

¹⁵ Table 34 Appendix

Figure 4: Frequency of using different sources for information on news and events



Emphasizing the dominance of TV is the fact that nearly three-quarters of Armenians never use the Internet, social networking sites, or the radio as a source of news. Moreover, two-thirds of Armenians never use a newspaper as a news source (see Figure 4 above).

News Types

TV News

Armenians use national TV channels most frequently as a source of news, with 87% of people watching TV news every day. Nearly everyone else watches several times a week (8%), or weekly (2%) (see Figure 4 above). Russian TV news is also a popular source for news for Armenians, with almost half (49%) watching Russian stations for news daily, and many watching them several times a week (19%) or weekly (8%), with a few only watching a few times a month (8%). However, 16% of Armenians do not watch Russian TV news at all (see Figure 4 above).

International English-language TV news stations such as BBC, Euronews, and CNN are not popular news sources for Armenians, with 73% never viewing them (see Figure 4 above). While CNN is available terrestrially in Yerevan, other international channels are only available via satellite dish. Furthermore, only 4% of Armenians reported having advanced English skills, while 15% reported intermediate English language skills in the 2010 Caucasus Barometer¹⁶, indicating that such channels would not be accessible for a large majority of Armenians.

¹⁶ Table 35 Appendix

However, those that watch international English-language TV news watch it regularly. Almost every tenth Armenian (9%) watch these channels daily, 5% watch them a few times a week, and the remainder (4% and 7%) watch them weekly or a few times a month, respectively (see Figure 4 above).

Focus group participants felt that Armenian television news is boring, biased, and only provides the official viewpoint. One focus group participant felt that there is an intentional manipulation of content scheduling in order to increase the viewership of official news. “I have an impression that they have created some vacuum; a citizen has to watch stupid entertainment programs, followed by official news, then the same kind of stupid programs, and again followed by official information.” Furthermore, the emphasis on the activities of the President, the Prime Minister, and the National Assembly within news content was unsatisfactory to focus group participants. Participants want more economic, social, and cultural news.

Radio News

Over three-quarters of Armenians (76%) do not use radio for news purposes. Those that do, however, use it frequently, with 11% of all Armenians listening daily and 6% listening several times a week (see Figure 4 above).

Internet News

Consumption of news via the Internet is currently not common in Armenia. 82% of Armenians do not use formal newspaper websites on the Internet as a source for news (see Figure 4 above). However, some Armenians using social networking sites name these as a frequent news source. Nonetheless, over three-quarters of Armenians (75%) have never used a social networking site for news consumption (see Figure 4 above) and 84% have never shared news content on one.¹⁷

Over half of Armenians (61%) have never read news online. However, of the 39% that have, one third does so daily or more often. On closer examination, it appears that the Yerevan residents are more likely to read online news. However, those rural and urban residents, who read online news, do so almost as frequently as Yerevan online news users. (see Table 3 below).

Table 3: Frequency of reading online news overall and by settlement type (% of respondents, who use the Internet)

	Overall	Yerevan	Urban	Rural
Several times a day	2	3	-	1
Every day	11	12	13	9
Several times a week	12	13	11	11
Once a week	7	10	4	4
Once or twice per month	7	8	5	8
Never	61	55	68	67

¹⁷ Table 36 Appendix

Armenian consumers of online news say that reading online news saves time (25%), offers more diverse sources (24%), is convenient (25%), and is free (16%).¹⁸ A focus group participant comparing Armenian TV news and Internet news said, “It is interesting that when I watch the Armenian TV channel, it seems to me that the virtual life is there, and the real life is on the Internet.” Topics of interest within online news sites vary, but politics is the most popular content type.¹⁹

Online content of Armenian newspapers is dominated by discussions about sports, followed by Armenian government activities, the Nagorno-Karabakh conflict, international news, culture, and regional news, according to the Yerevan Press Club’s February-March 2011 content analysis. Online-only news sites, on the other hand, first focus on regional issues, then international news, the activities of political parties in Armenia, and then Armenian government activities.

Popular online news sites include news.am, Aravot, tert.am, A1+, Haykakan Jamanak, Chorrod Ishxautyun, and Azatutyun, although all of these sites are read by less than 3% of the total Armenian population. However, news.am and Aravot are read by nearly a quarter of those that read online news.²⁰

Newspapers

Reading newspapers is significantly less popular than watching TV. However, in today’s Armenian media landscape, newspapers are one of the most open spaces for public debate.

Kurkchiyan’s (2006) description of Armenian newspapers is helpful in framing the consumption of printed news in Armenia: “the newspapers in Armenia are not big enterprises. Each one is built around the personality of an editor who directs what is written by a small staff, often as few as two or three journalists. By international standards, what they produce is flimsy—a typical format is a four-page broadsheet or an eight-page tabloid.”

Two-thirds of Armenians (67%) do not read newspapers.²¹ Even Armenians that do read newspapers do not purchase them very frequently, only 6% buy a newspaper daily, with the largest proportion, 38%, buying a newspaper weekly.²² Of those that do read, three-quarters (77%) read in hard copy only rather than online.²³

When asked why they do not read newspapers, many (29%) said that they get their news from other sources and some (26%) said that they do not have time to read newspapers. A further 13% said they could not afford to buy them.²⁴

¹⁸ Table 37 Appendix

¹⁹ Table 38 Appendix

²⁰ Table 39 Appendix

²¹ Table 40 Appendix

²² Table 41 Appendix

²³ Table 42 Appendix

²⁴ Table 43 Appendix

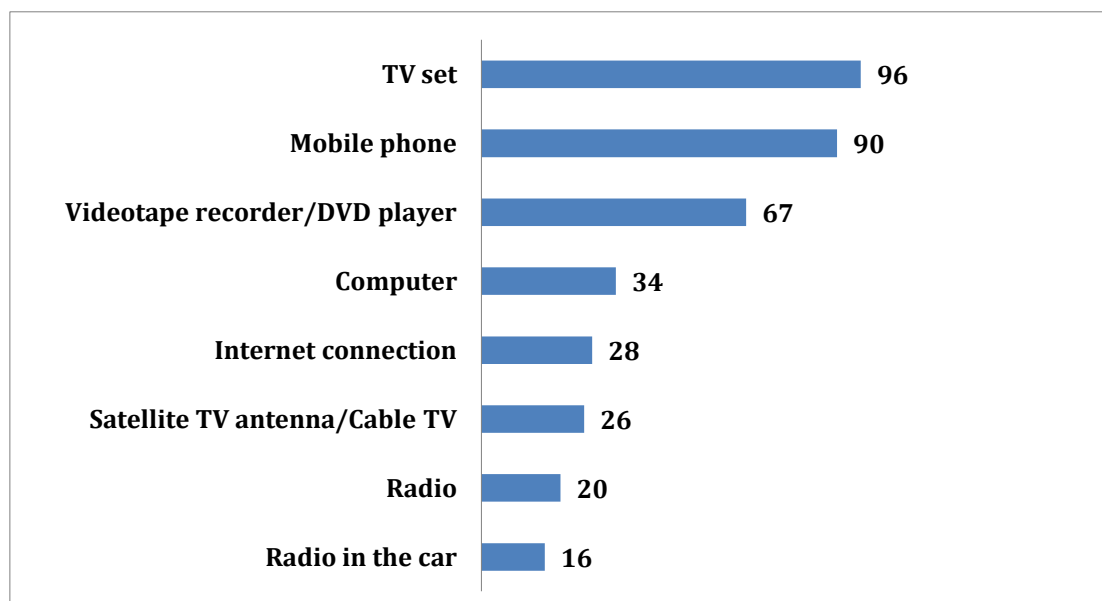
MEDIA AND TECHNOLOGY: USAGE AND OWNERSHIP

Ownership of various media technologies significantly affects how people receive information and spend their leisure time, something seen in the way that VCR and DVD ownership has impacted movie theatre attendance. According to Putnam (2000), radio and television have had influenced how people spend their time at a societal level, and have even influenced civic engagement. More recently, personal computers and the Internet are influencing not only leisure time, but also having a profound impact on how people work, learn, organize, and communicate. Because of the strong influence of these technologies, there have been concerns about the emergence of a “digital divide” in the ownership and use of information and communication technologies, and the outcomes related to ownership and use.

In the Armenian context in particular, concerns about a digital divide between Armenia and the rest of the world, as well as a ‘domestic’ digital divides between socioeconomic groups within Armenia, are of interest to policymakers, educators, activists, social media users, and academics.

With almost all Armenians owning a TV and mobile, (96 and 90% respectively) there is no digital divide when it comes to these technologies. However, when it comes to personal computers and Internet access (owned by 34 and 28% of Armenians respectively), a much clearer digital divide is visible (see Figure 5 below).

Figure 5: Household working appliance ownership



Television

The first non-governmental TV stations started broadcasting in the 1980s. During the early 1990s, as Armenians faced regular electricity outages, TV stations would broadcast while the electricity was working. As such, professional standards were not considered as important as merely getting content on the air. Moreover, television at that time was not viewed as a business opportunity; rather it was a social utility. Most non-governmental stations in the 1990s were based in regional cities because residents did not find that Yerevan-based news covered their local needs and the regional

broadcasters had more independence from the center. At the end of the 1990s, television began to become more of a business and broadcasting stabilized nationally, with privately-owned stations A1+ and Ar TV joining the line-up of government-owned channels. More recently, dozens of TV stations broadcast all over Armenia (Sarkissian, 2003).

As seen in Figure 5, practically all Armenian households own a TV set and two-thirds own a DVD player. Over a quarter of households have some sort of non-terrestrial TV source (satellite or cable). Not only do nearly all Armenians own a TV, nearly all Armenians watch a lot of TV, with an average of 6 hours per day (see Table 4 below). It is striking that 9% of Armenians say that they watch TV for 12 hours and more each day.

Table 4: Numbers of hours watching TV daily (% of respondents who watch TV)

Less than 1 hour	2
1-3 hour	16
3-5 hour	25
5-7 hour	23
7-9 hour	13
9-12 hour	11
12 hours and more	9
DK	1

Most Armenian TV users watch television in the evening hours, the so-called prime time slot, with a large majority of 85% watching TV between 19:00-22:00 and over two-thirds watching from 22:00-24:00 (see Table 5).

Table 5: TV viewing by time period (% of respondents who watch TV)

07:00-10:00	11
10:00-13:00	25
13:00-16:00	24
16:00-19:00	41
19:00-22:00	85
22:00-24:00	71
24:00 and later	22

Digital TV

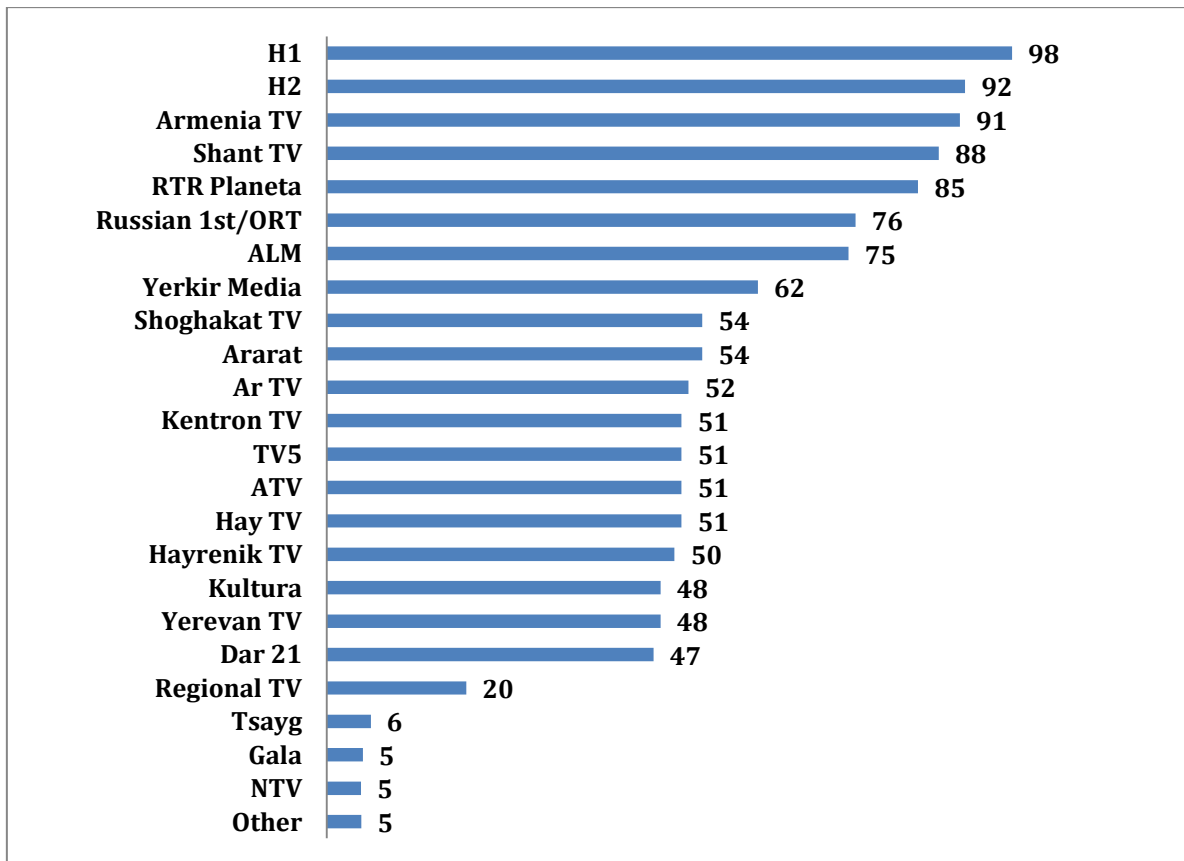
Armenia is making the switch to complete digital broadcasting, and analogue broadcasting should cease by 2015. This switch will free up parts of the broadcast spectrum for other uses such as wireless broadband, and will put Armenian broadcasters in line with an international agreement in 2006. Digital TV provides better quality and more channels to viewers. The switch will require households with analog TV sets to buy a converter, yet Armenian broadcasters will likely broadcast both analog and digital signals for a period of time. Neighboring Azerbaijan began its transition in 2010 and expects to complete it by 2012. Georgia aims to complete its transition by 2015.

Given that the transition is expected to be completed in four years, it is notable that little over half of Armenians (55%) are aware of the switch to digital television switch and even less (33%) are willing to pay the money necessary to upgrade. Similarly, attributes of digital TV are unknown by over half of Armenians: better quality (44% aware) and more channels (44% aware).²⁵

TV Channel Coverage

With only a quarter of Armenian households using satellite or cable for TV, most Armenians receive terrestrially-based TV. Five stations are available nationwide, another seven are available in the vicinity of Yerevan (where over a third of the population lives), and a few stations are based in regional cities. Nearly all households (97%) have access to H1, most have access to H2, Armenia TV, Shant TV, and RTR Planeta (see Figure 6).

Figure 6: Armenian households reached by TV stations
*applicable to those respondents who watched TV during the last 12 months



TV Channel Viewership

Beyond access, viewership of H1 is high, with 80% of Armenian households watching it daily, Shant TV is the most frequently watched single channel, however, with 82% tuning in daily.²⁶

²⁵ Table 44 Appendix

²⁶ Table 45 Appendix

TV Channel Reliability

Source reliability implies that a viewer places trust in a media source to be consistently accurate, current, and comprehensive (Taylor, 1986). A little over half of Armenians say Shant TV is a reliable source, followed by H1 at 44%, and Armenia TV at 39% (see Table 6). It should be noted that many of the stations exclusively show entertainment content and thus may not be considered as “information sources” per se.

Table 6: TOP-10 TV channels trusted as reliable sources of information (% of respondents, who watch TV)

Shant TV	55
H1	44
Armenia TV	39
Russian 1st/ORT	15
H2	11
RTR Planeta	10
Yerkir Media	7
Other	6
ALM	5
Local TV	5

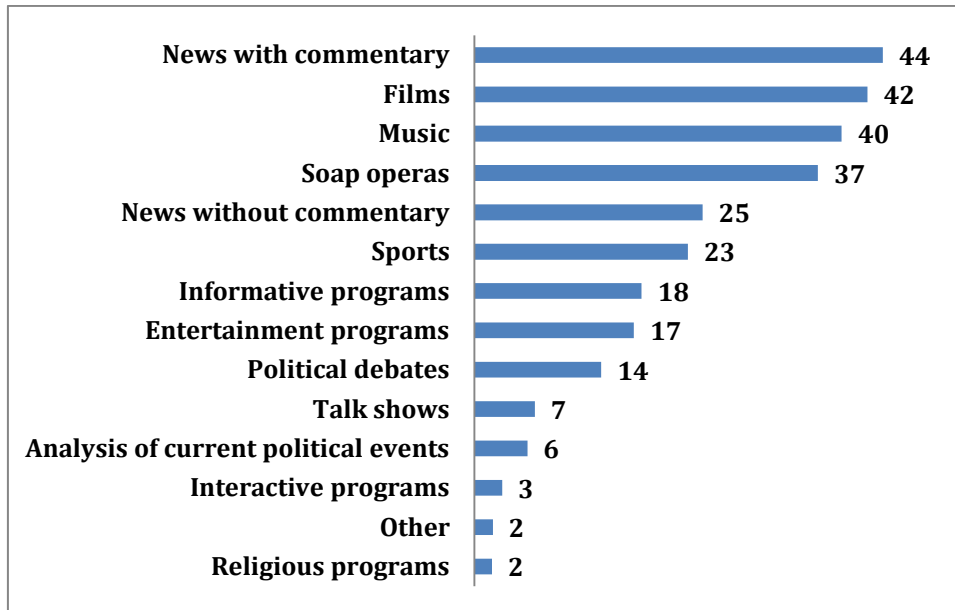
TV Content

The most commonly shown themes on Armenian TV, according to monitoring conducted by the Yerevan Press Club’s in February-March 2011, are cultural programs, serials, entertainment, and religious content. Armenian viewers themselves, however, mostly watch TV for detailed news content, with 39% of Armenians saying they watch news more than any other content. Music and soap operas are also quite commonly watched (see Figure 7 below).

Interestingly, in spite of this appetite for news, only 14% of Armenians watched political debates, while only 6% watched analysis of current political events. Furthermore, 42% of Armenians would like to see more films on Armenian TV.²⁷

²⁷ Table 46 Appendix

Figure 7: Type of TV content watched most
 *applicable to those respondents who watched TV during the last 12 months



Entertainment Content

Focus group participants say they are, with the exception of music programs, generally unsatisfied with the quality of TV content, especially children's programs and entertainment. Participants were particularly concerned about the potential impact low quality children's programs may have. Frequent repeats of programs are also a concern. Moreover, participants said that they want more educational content, including nature and science programs, as well as game shows on Armenian TV.

Viewers agreed that the quality of entertainment content varies greatly and that, in general, Armenian-produced shows are of lower quality. Quite a bit of Armenian and Russian original TV content is based on American or European shows (for example, the Armenian version of "Survivor" or the Russian version of "How I Met Your Mother") that are also available in a dubbed translation. Thus many viewers have seen the American or European original as well as a locally-produced version. This provides an opportunity for comparison and focus group participants felt that often the "new" version does not live up to the quality of the original.

An interesting finding was that focus group participants were concerned about discrimination against the disabled on TV. For example, with regard to an epileptic character on a show, a participant said, "They [the producers or hosts] should be a little more sensitive. It seems to me that they should view this kind of thing as a disease and respect the person. If a person stutters, it doesn't mean he deserves to be joked about."

Soap Operas

Focus groups were conducted with active soap opera viewers, who primarily watch the shows for their entertainment value, especially in the evenings when there are not

“interesting alternatives,” according to participants. Both men and women watch these shows and participants felt that the shows were produced for both genders.

Capital city active viewers felt that Russian soap operas were of the highest quality, followed by “foreign” soaps, then Armenian-produced ones. Rural participants felt that Russian soap operas were the best, then Armenian, and then “foreign”. One notable difference between “foreign” and Armenian produced soap operas is the portrayal of luxury, according to many focus group participants, with foreign soaps often focusing on the lives of the extremely wealthy. Additionally, rural participants felt that village life was not portrayed at all on Armenian soap operas.

The most popular shows are *Dzvar Aprust* (which perfectly represents Armenian reality, said participants of the Yerevan focus group), *Veradardz*, and *Kyanqi Giny*. Participants also mentioned the *Banakum* soap opera as a good educational influence on young people.

The focus group showed that violent content in soap operas was viewed negatively. In particular, the show *Virzharu* was cited as too violent. Likewise, the potential for children to be exposed to (and potentially be influenced by) violent content was of great concern. Participants felt that the government should regulate violence on TV.

New storylines that would be of interest to viewers include patriotic, historical and religiously-oriented soap operas. Rural viewers wanted more educational content within the shows.

Radio

While pirate radio stations existed in Armenia in the 1960s and 1970s, the first legal non-governmental radio stations started broadcasting in the 1990s. The most noteworthy example is Hye-FM, which started in the summer of 1994 by a Peace Corps volunteer and a group of American University of Armenia students and paid for by the Soros foundation. More non-governmental stations emerged in the later 1990s, and by 2000, ten radio stations existed in Yerevan (Sarkissian, 2003).

Radio Listening Frequency and Location

One-fifth of Armenian households have a radio and 16% have a radio in their car (see Figure 5 above). Thus compared to the huge numbers of Armenians who own a TV, comparatively few Armenians have the opportunity to listen to the radio. In addition, over three quarters of the population (76%) say they have not listened to the radio in the last 12 months.²⁸ Amongst those that listen, 35% listening for one to three hours and 28% for less than one hours per day.²⁹ More than half of listeners (59%) listen from home, another 26% in their cars, and 12% listen at work.³⁰ Compared to the huge ownership of TVs, and the amount of time Armenians spend watching them (see Figure 5 and Table 4 above), radio is not a significant medium.

²⁸ Table 47 Appendix

²⁹ Table 48 Appendix

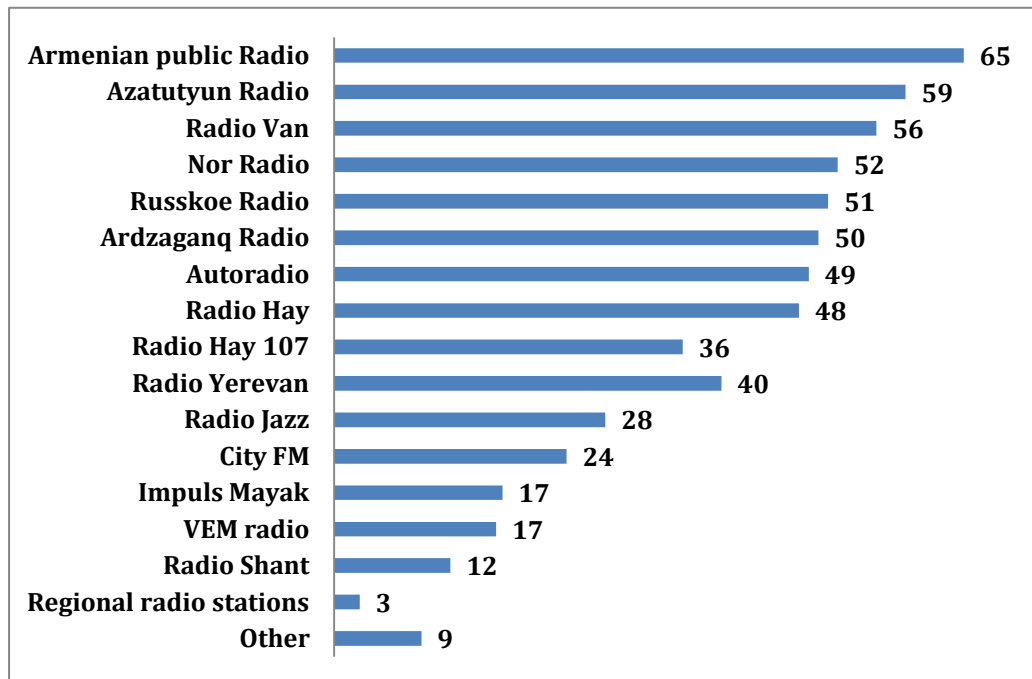
³⁰ Table 49 Appendix

Radio Station Coverage

The coverage of Armenian radio stations is small, with many stations being accessible in the Yerevan area only. However, given such low listenership, it is unknown if asking what stations a household is capable of receiving gives an accurate picture of what they actually do receive. (see Figure 8)

Figure 8: Armenian households reached by radio stations

**applicable to those respondents who listened to the radio during the last 12 months*



Radio Station Listenership

Armenian national radio is the most frequently listened to station, with 13% of the population listening at least once a month.³¹

Radio Station Language and Content

Of the quarter of the population that listens to radio, half (50%) prefer to listen to Armenian language stations, 44% listen to both Armenian and Russian stations, and 6% listen to Russian language stations only.³² Music content is by far the most popular, mentioned by 78% of listeners, followed by news with 51%.³³

Mobile Phone

Mobile phone ownership in Armenia has reached complete saturation quickly. Pearce (2011) finds that the reasons for the mobile phone boom in Armenia were related both

³¹ a detailed breakdown of the listenership can be found in Table 50 Appendix

³² Table 51 Appendix

³³ Table 52 Appendix

to culture and to the transitional economy in which Armenians live. Culturally, Armenians have a great need for ‘reachability’ due to strong kinship ties, and mobile phones meet this need. Economically, mobile phones are a utility device used in lieu of personal computers. Finally, displaying status with one’s mobile phone is common in Armenia.

Mobile Phone Ownership

In the 2011 survey on the Armenian media, 90% stated that their household owns a mobile phone. This number corresponds with the findings of the 2010 Caucasus Barometer, where 91% of Armenia households reported ownership of a mobile phone. This is 10% more than the previous year and 21% more than in 2007 (see Table 7). Many Armenian households even have multiple phones.³⁴

Table 7: Caucasus Barometer 2007-2010: Mobile Phone Adoption in Armenia (%)

2007	2008	2009	2010
70	77	81	91

Mobile Phone Frequency

Armenians are also frequent users of mobile phones. According to the 2010 Caucasus Barometer, nearly three-quarters of Armenians used their mobile phone multiple times a day (see Table 8 below).

Table 8: Caucasus Barometer 2010: Mobile Phone Use Frequency Armenia (%)

Multiple times per day	71
Once a day	7
Multiple times per week	5
Once a week or less frequently	3
Never	13

Personal Computers

Computers have overtaken both workplaces and homes in highly developed countries. In less developed countries, the growth in ownership of personal computers has been slower. As computer use can contribute to economic development, the Armenian government and foreign aid programs have made a priority of increasing computer use throughout the country. The large increase in PC adoption between 2009 and 2010 (see Table 9 below) is likely due to a government subsidy program for PC purchases (Pearce, 2011).

Personal Computer Ownership

According to the study conducted in early 2011, about a third (34%) of Armenian homes have a PC (see Figure 5 above), a finding that is supported by the Caucasus Barometer 2010 (see Table 9 below). PC ownership depends on one's income and educational attainment in Armenia, reflecting a significant digital divide in terms of PC

³⁴ Table 53 Appendix

ownership (Pearce, 2011). According to the Caucasus Barometer 2010, 60% of household with an income of over 400 USD own a PC, as compared to 10% of household with incomes of up to 50 USD. Interestingly, 37% of households with no stated income own a PC.³⁵ Furthermore, 54% of Armenians with higher than secondary education have computers, whereas only 17% of Armenians with secondary or lower education have computers.³⁶

Table 9: Caucasus Barometer 2007-2010: Personal Computer Adoption in Armenia (%)

2007	2008	2009	2010
12	16	18	29

Personal Computer Frequency

According to the Caucasus Barometer, 21% of Armenians used PCs daily or more frequently (see Table 10 below).

Table 10: Caucasus Barometer 2010: Personal Computer Access Frequency in Armenia (%)

Once or multiple times per day	21
Once or multiple times per week	9
Once or multiple times per month/year	10
Never	60

INTERNET

Internet Access

According to the current 2011 study, 28% of Armenian households have an Internet connection, findings also supported in the 2010 Caucasus Barometer. This is a notable increase from 2009 (see Table 11). This may be due to a new addition to the Internet connectivity landscape – accessing the Internet from one's mobile phone, which 13% of Armenians do³⁷, with the vast majority of them adding this service in 2009 and 2010. Despite this growth, there is still a strong digital divide as ownership of a home Internet connection depends on one's income and educational attainment in Armenia (Pearce, 2011).

Table 11: Caucasus Barometer 2007-2010: Home Internet Adoption Armenia (%)

2007	2008	2009	2010
5	8	8	21

Internet Frequency

³⁵ Table 54 Appendix

³⁶ Table 55 Appendix

³⁷ Table 56 Appendix

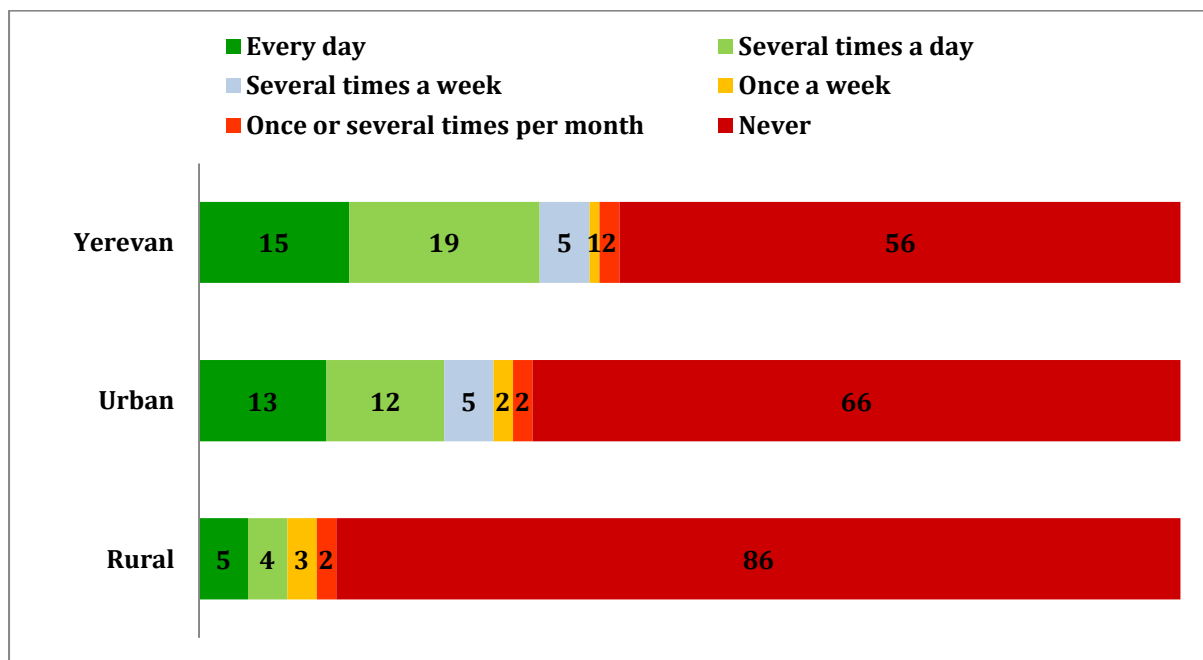
Many users are on the Internet daily (36% of users or 12% of all Armenians), if not several times a day (38% of users, or 11% of all Armenians) (see Table 12 below).

Table 12: Internet access frequency

	% of Internet users	% of Armenians
Several times a day	38	12
Every day	36	11
Several times a week	15	5
Once a week	3	1
Once or several times per month	7	2

But with 86% of rural residents and two-thirds of regional city dwellers *never* accessing the Internet, this technology remains in the hands of Yerevan residents (see Figure 9).

Figure 9: Internet access frequency by settlement type



Internet Access: Why Aren't Armenians Getting Online?

For the many Armenians that do not use the Internet (57% of Yerevan residents, 67% of regional city dwellers, and 86% of rural residents), the primary barrier is limited access to either a computer or a mobile phone (see Table 13 below). The second most important reason is age, which 20% gave as an explanation for not using the Internet.

Table 13: Reasons for not using Internet by settlement type (% of respondents, who don't use the Internet)

	Overall	Yerevan	Urban	Rural
Limited or no access to a computer/mobile phone	33	24	38	36
Age reasons/seniors	20	23	17	20
No interest	11	4	16	13
Not enough time	10	16	9	6
Internet or computer too difficult to use	8	9	6	10
No need/not useful	8	14	6	7
High prices for the Internet	7	8	5	8
Other	1	3	2	0
DK	0	-	1	0

Internet Access: Where and How

Almost two-thirds of Internet users (65%) primarily go online from home, 14% access the internet from work, and 13% browse from anywhere using their mobile phone.³⁸ Almost three quarters of 69% Internet users use their PC to go online, 14% of Internet users use both a mobile phone and a PC, and 17% of Internet users use a mobile phone only.³⁹ Most Armenian Internet users use a cellular flash card to access the Internet (32%) (see Table 14).

Table 14: Mean of Internet access at home overall and by settlement type (% of respondents who use the Internet)

	Overall	Yerevan	Urban	Rural
3G Flashcard	32	29	29	47
Cable line connected to a computer	22	29	22	2
Telephone line/ Dial-up	14	17	12	10
3G mobile phone connection	13	6	14	33
Wi-Fi connection/ Wireless	1	1	3	-
Other	1	1	1	1
No Internet at home	19	19	20	14

Mobile connectivity devices built into USB sticks have become popular in the past few years, as has tethering – a method to share the Internet connection of an Internet-capable mobile phone. A quarter of Armenian internet users have a cable connection. Another 13% tether their mobile phones to their computer or use their mobile phone as their access device (see Table 14 above).

Internet Use

Armenians primarily use information and communication technology for interpersonal communication. As Pearce (2011) argues, Armenians' nation-as-a-family mentality and

³⁸ Table 56 Appendix³⁹ Table 57 Appendix

the emphasis Armenians place on kinship have created a unique context to study interpersonal communication mediated through information and communication technology. Information and communication technology plays a role in fostering connectedness and sociability, which are strongly valued by Armenians to reaffirm kinship ties. Furthermore, the need for interpersonal communication due to kinship demands may be an explanation for the emphasis on interpersonal communication over information searching in Armenian technology uses.

Internet Attributes

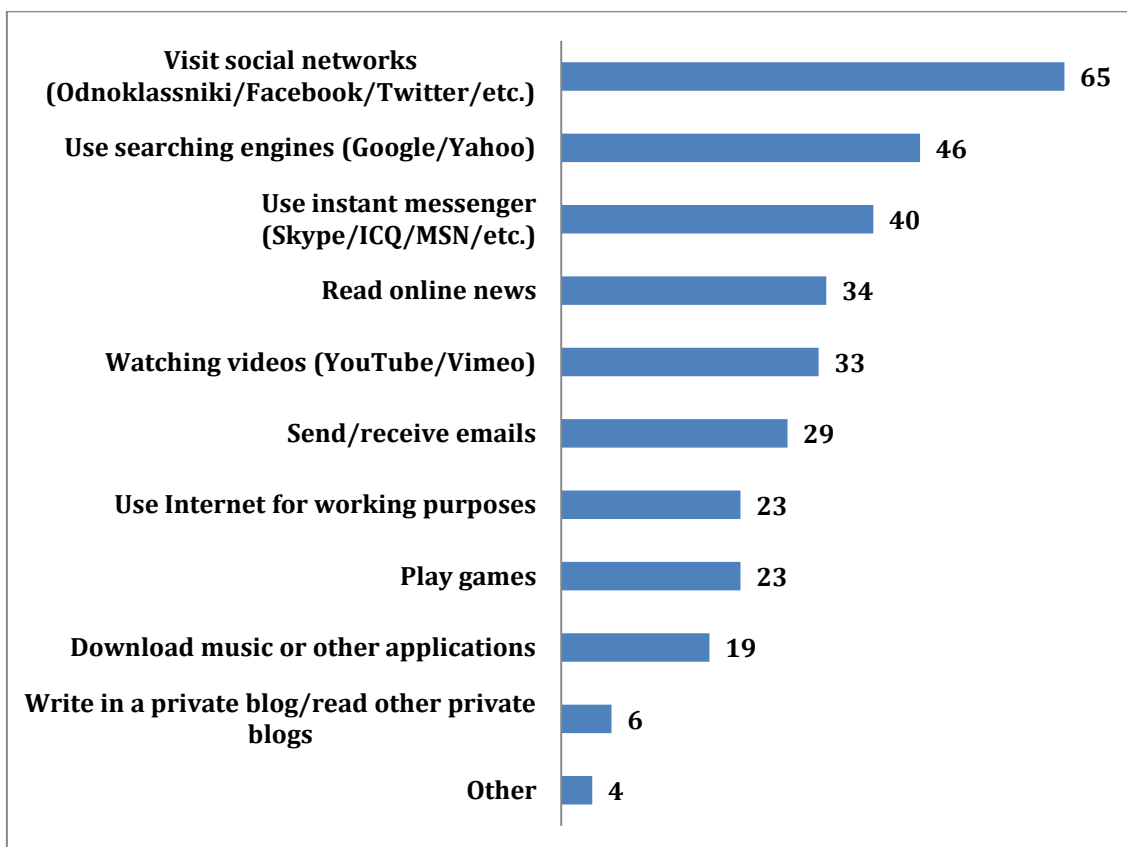
Focus group participants who are university students echoed these interpersonal needs as well as the Internet's utility as an information source, especially in their studies. They felt that there is no alternative to the Internet for fast, efficient information. Furthermore, the students felt that the information which they receive from the Internet is credible. Students also use the Internet as a source of entertainment.

Internet Activities

Armenian Internet users go online for a variety of reasons. Using social networking sites is the most popular activity, with over half of Internet users using these sites (see Figure 10).

Figure 10: Internet activities

**applicable to those respondents who used the Internet during the last 12 months*



Social Networking Sites

Almost two thirds of Armenian Internet users have a profile at a social networking site⁴⁰, with the Russian site Odnoklassniki being the most popular (see Table 15).⁴¹ Of those

Armenians active on social networking sites, over two-thirds access these sites daily or even several times per day (see Table 16 below). Armenian university students in a focus group said that they use both Odnoklassniki and Facebook but they believed that interaction “quality” was higher on Facebook.

Table 15: Social networking site membership most used overall and by settlement type (% of respondents, who use social networks)

	Overall	Yerevan	Urban	Rural
Odnoklassniki	81	72	89	93
Facebook	12	19	5	-
Moy Mir	2	-	4	2
Other	4	5	-	5
DK	1	1	1	-
RA	1	2	-	-

There are regional differences in social networking site preferences, however. While Odnoklassniki dominates Armenia, a fifth of Yerevan social networking site users are on Facebook as well. No rural residents use Facebook, however, and no Yerevantsis use Moy Mir, the social networking site that is part of the Internet email and search portal Mail.ru (see Table 15).

Social Networking Site Frequency

Three quarters of Armenians have never used a social networking site (see Figure 4, above). Nonetheless, Armenians who use social networking sites do so frequently, with around a third using them several times a day, and another third using them every day (see Table 16 below)

⁴⁰ Table 58 Appendix

⁴¹ Social networking sites are web-based services that allow individuals to (1) construct a public or semi-public profile within a bounded system, (2) articulate a list of other users with whom they share a connection, and (3) view and traverse their list of connections and those made by others within the system. Social networking especially emphasizes the importance of providing a variety of tools to allow people to discover, develop, and maintain connections with other users. The nature and nomenclature of these connections may vary from site to site (boyd & Ellison, 2007).

Table 16: Social networking site visit frequency overall and by settlement type (% of respondents, who use social networks)

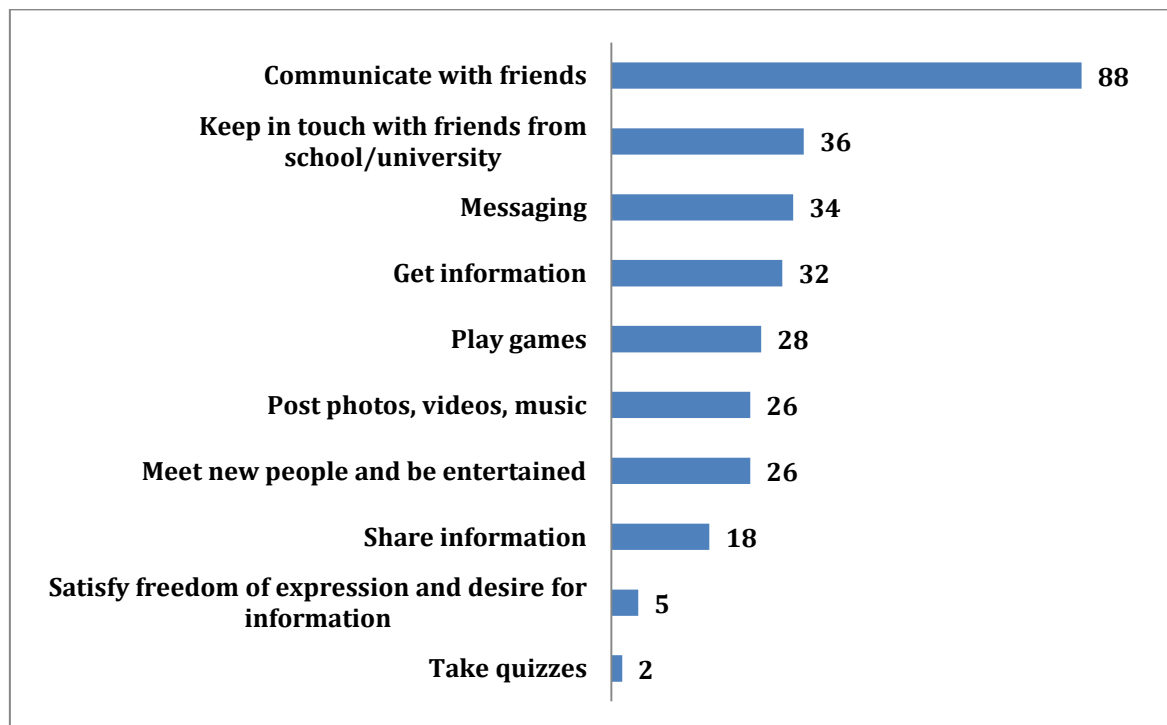
	Overall	Yerevan	Urban	Rural
Several times a day	36	39	37	26
Every day	35	33	36	38
Several times a week	19	18	18	24
Once a week	6	7	4	3
Once or several times per month	5	2	6	8
RA	-	1	-	-

Social Networking Site Activities

Most Armenian social networkers use the sites for communicating with friends (88% of users) rather than meeting new people, further supporting the idea that Armenians are primarily social with their kinship groups and close friends when using technology (see Figure 11). When asked about the most important functions these sites, 51% of users said to communicate, 24% said to keep in touch with friends, and 13% said to get information.⁴² University student focus group participants also mentioned the importance of social networking sites as an efficient source of news and other information.

Figure 11: Social networking site activities

**applicable to those respondents who have a page or public profile in any social networking site such as Odnoklassniki or Facebook*



⁴² Table 59 Appendix

Social Networking Site Non-Users

For non-users of social networking sites, half (46%) say that they are not interested, over a quarter (26%) say that they do not have the time, and some do not have technical skills (7%), others prefer other forms of communication (12%), and a few (3%) are concerned about privacy (see Table 17).

Table 17: Reason for not using social networking sites (% of respondents, who don't use social networks)

Have no interest in using social networking sites as an activity	46
Not enough time to use such sites	26
A preference for face-to-face and other forms of communication	12
Technically inexperienced to use such sites	7
Concerns about privacy and personal data safety	3
Other	4
DK	2

Blogs

A quarter of Armenian Internet users do not know what blogs are.⁴³ Of those who do know what they are, most do not use them (64%); only 7% read and 2% read and write blogs.⁴⁴

Writing Blogs

According to focus groups conducted for this project, the Armenian blogging community is small and bloggers know each other well. Barriers to becoming a blogger, according to university student focus group participants, include a lack of content to write about as well as a lack of time. However, the students were open to the idea of blogging training. According to the focus group participants, the primary motivation for writing blogs is self-expression and, secondly, for discussing political topics. Specific topics include Armenian-Azerbaijani relations and Armenian-Turkish relations, the environment, foreign relations, social-political issues, and issues related to political parties.

As blogs have become better known, some bloggers have become more concerned about sensitive topics and their personal privacy. For example, "I put more and more topics under lock... before I was very open about writing about things connected to me, but during the last 3-4 years I started to be more cautious and I have noticed the same tendency among my blogger friends". Bloggers believe that blogs are monitored by the government. According to one blogger, "monitoring [happens] to understand what the needs of society are, whether this society needs foreign schools, and if they need to open

⁴³ A blog is a website that contains entries that are usually diary-like in a particular chronological order, usually with the ability for readers to leave comments about the content. Some blogs are private, others are public. Some are about news or current events, while many are about mundane topics.

⁴⁴ Table 60 Appendix

borders with Turkey or not.” However, there was agreement that there is no formal suppression of blog content, although one blogger mentioned that she received a phone call and was told that her writings have “a negative impact.”

Reading Blogs

The Armenians that write blogs are also heavy readers of other blogs. Blogger focus group participants use blogs as primary *non-filtered* information sources. Moreover, the analysis and commentary that blogs provide is valuable to blog readers. One participant noted “I have the list of bloggers’ whose opinion and analytical skills I trust and like” and for this blogger, reading other blogs is a more efficient way of consuming news content.

Blogs as Alternative Media

Blogs can serve as an alternative information source and most often, offer an alternative analysis. As one focus group participant explained, “now (2011) it is common to say that blogs are an alternative media, but at that time (2007) blogs were the only media because all other media published only official press releases or were closed.” One participant mentioned the lack of unfiltered news content as the motivation to start blogging because there was a lack of “intermediate neutral information” about the Armenian-Turkish normalization process.

Blogs were a source of alternative information (for those that used alternative information) during the events leading up to and following the March 1, 2008 mass protests. University student focus group participants mentioned the role of blogs during these events, when it was difficult to find information, and blogs were a source of news. In the survey, 6% of those that used alternative media said that they used blogs. The Armenian government ordered a 20-day state of emergency during which media outlets were not allowed to broadcast any political news except those issued by official state press releases. Interestingly, the 2011 study found that two-thirds of Armenians (67%) had no problem using traditional media following the March 1 events.⁴⁵ Those who did have problems (17%) turned to the Internet for information, using news sites (37%), Twitter (12%) and chats (12%) (see Table 18 below).

Table 18: Alternative media for March 1 events (% of respondents, who used alternative media for information in March 1)

News sites	37
Twitter	12
Chats	12
Word of mouth	9
Eyewitness	9
Blogs	7
Social networking sites	3
Forums	2
Guestbooks	1
Other	1
None	26

⁴⁵ Table 61 Appendix

Growth of Blogging

Although only a small number of Armenians write blogs, Armenian bloggers in the February 2011 focus group noted that the popularity of Facebook has helped increase blog readership audiences because blog authors link blog posts to their Facebook profiles and Facebook friends that may not have otherwise read the blog material will become aware of it. Furthermore, with a larger audience for discussion on Facebook, some bloggers noted that discussion of material was occurring more often on Facebook now than in the comments section of their blogs. At the same time, Facebook is perceived as “less serious” than blogging. University student focus group participants touched on the same issue, but from a different perspective: a blog takes about 2 hours to write, but the same opinion can be expressed on Facebook in 5 minutes. Another university focus group participant said that she uses her blog when she has something longer to write if it “does not fit in the status, you put it in the blog.”

Blog Trustworthiness

Bloggers must establish credibility with their audience. “Personally for me a blog is reliable if the blogger is reliable/trusted. I don’t know who stands behind some blogs and when the blogger uncovers his face, he is more trustable for me, or at least I understand why he writes a blog,” said a blogger focus group participant. This is an interesting remark, as some of the most popular Armenian bloggers and social media participants are anonymous.

Online Video

Online video sites are very popular worldwide, but require a high speed Internet connection to view with ease.⁴⁶ Until very recently in Armenia (2009-2010), even the best available Internet providers did not offer subscribers the capacity to view online video sites, much less upload. The lack of Internet bandwidth capacity is still a barrier to use in Armenia, although those with faster connections are able to use these sites, although not with the speed that those in Europe or North America are accustomed to.

A tenth of Armenians use online video sites, primarily YouTube, for watching (33%) and occasionally uploading (7%) or sharing videos (4%).⁴⁷ Three-quarters of Armenian online video viewers watch music videos and half watch fun videos and films.⁴⁸

⁴⁶ Online video sites, such as YouTube, are places on the Internet where users can view, upload, and share videos, either amateur or professionally-made.

⁴⁷ Table 62 Appendix

⁴⁸ Table 63 Appendix

CONCLUSION

While this study is a broad overview of the 2011 media landscape in Armenia, the potential utility for policymakers, academic researchers, journalists, NGOs, and, most importantly, the Armenian public, is great. With very little research on the Armenian media available to the general public, informed discussions about the role of media and technology in society and the impact that they have on individuals, groups, and the nation, is challenging. It is the hope of the research team that this report can serve as a beginning for a larger debate about the significant impact that the media has on Armenian society.

METHODOLOGY

This research was conducted as part of the Alternative Resources in Media Program. The program aims to enhance and improve access to pluralistic and unbiased information in Armenia through the use of new information technologies, as well as to increase alternative sources of news, build civic demand for alternative content, and enhance public advocacy on media freedom. This program is a cooperative effort led by Eurasia Partnership Foundation with Internews Network (USA), Internews Media Support NGO, and the Yerevan Press Club (YPC). The program is made possible by the support of the American People through the United States Agency for International Development (USAID).

The purpose of the current study is to discern the media preferences of the Armenian public, their expectations on media content, their perception of freedom of media and censorship as well as their trust in the media. The qualitative and quantitative studies were designed by the Caucasus Research Resource Centers. The studies were analyzed and results written by independent researcher Dr. Katy Pearce, a scholar of Armenian media and technology adoption and use.

The study consists of both quantitative and qualitative components, and was divided into four parts:

1. Representative quantitative study of the general population using face-to-face interviews with a structured questionnaire;
2. Comparison of survey data with YPC monitoring data on media preferences of the audience (media demand) and media supply;
3. Eight focus group discussions among specific populations, which will become the project's most likely target groups for citizen journalism;
4. 33 in-depth interviews with representatives of the media industry.

Quantitative Study

Survey and Sampling Methodology

- Sample size: 1420 respondents representing the population of Armenia age 16 and above.
- Margin of error: $\pm 2.5\%$, with a 95% confidence interval.
- Sampling method: Multistage cluster sampling with preliminary stratification by urban/rural areas and by administrative regions.

- Sampling frame: Household address list of electricity users (physical persons only) was provided by the Armenian Electricity Networks (CJSC). The following steps were implemented within a four-stage sampling approach:
- Grouping of electricity network branches into administrative regions; stratifying the sample proportionately by administrative region and by urban and rural areas.
- Random selection of Primary Sampling Units (PSUs), or clusters, within the administrative regions; each cluster comprised an average of 500 households and usually corresponded to an electricity transformation station.
- Selection of households (final sampling units) within PSUs was performed by a random selection method.
- Selection of respondents within households was performed by the next-birthday method.

Settlement type	
Yerevan	540
Other urban areas	468
Rural areas	492

The main fieldwork period: January-February 2011.

Method of empirical data collection: Face-to-face interview in a household dwelling, with the help of pen and paper.

Demographic Profile of Respondents

In total 1420 interviews were conducted with the respondents in ten administrative regions of Armenia and Yerevan. Out of these respondents, 39% were men and 61% were women.

Distribution of respondents by age shows that the surveyed respondents represent almost equal distribution among four age groups; 27% of respondents were in 16-30 age group, 24% were 31-45 years old, 28% were 46-60 years old, and 21% were 60+ years old.

30% of the respondents have higher education (either complete or incomplete and PhD), 26% - secondary specialized education, 31% - complete secondary education, and 13% - primary and incomplete secondary education.

Employment status is dominated by full time employed respondents (21%), retired persons (19%) and housewives (19%).

When asked about the current financial situation of the family/household, one third of respondents (34%) say they do not even have enough money for food. 26% indicated that they have enough funds for food, but not for clothing, 27% mentioned that money is enough for food/clothes, but not for buying TV or washing machine. One-tenth said that they could afford expensive goods, a car, a summer vacation, but not afford an apartment. In addition, less than 1% of respondents said they could buy an apartment.

Qualitative Study

Focus Group Methodology

The purpose of the focus group discussions was to determine perceptions and opinions of people about the media sector of Armenia. Eight focus group discussions (7 Yerevan, 1 regional) were conducted among the general population to assess the needs and level of satisfaction of media product and coverage.

Focus group duration: 1-2 hours

Number of participants: 6-10 participants

Target population: entire population (age 18-65)

Topics and composition of focus group discussions:

Blogging (bloggers) - 25-65 years old bloggers with higher education

On February 25, 2011, the first focus group on blogging was conducted, and seven bloggers participated in the discussion. The study included 3 women aged 22 to 41 years old with higher education and are of better than average financially. Four men, 30 to 52 years old, participated in the discussion, and all have completed higher education and are of better than average financially.

Usage of Internet - 18-35 years old BA/MA level students who use Internet - 18-65 years old male/female respondents with secondary and higher education

The second round of focus groups was held on March 1, 2011. Four women and two men participated in this session (19-26 years old). All of them were students studying in various universities. Two participants described their financial situation, as 'money is enough only for foods and clothes', three of them described it as 'they can afford expensive goods, like TV or washing machine' and only one mentioned that 'they can afford a TV or washing machine, even a car, and have summer vacation'.

Armenian soap operas (two groups – one in Yerevan and one in the region) – 18-65 years old male/female respondents with higher and secondary education

On March 16, 2011, the next study was conducted about Armenian soap operas with a Yerevan-based audience, and eight people in their middle ages participated in this discussion. The study included six women aged 40 to 65 years old, two having with higher and four having secondary education. Three men, aged 30 to 47, participated in the discussion. Two of them have a higher and one has secondary education. Three participants described their financial situation as 'money is not enough even for food'. For one participant, money is enough for food but not for clothes. Two participants have enough money for food and clothes, but they can't afford a TV or a washing machine. Two participants mentioned that they could afford to buy a TV or washing machine.

Entertainment programs (two groups, one group Internet users & the second group with limited/no usage of Internet) – 18-65 years old male/female respondents with higher and secondary education

The next discussion about the Armenian entertainment programs was held on March 11, 2011. Four women aged 20-55 and four men aged 24-42 participated in this session. Seven of them had higher education, and one had secondary education. All participants were active Internet users. One participant described his family financial situation as

'money is enough only for food', four participants described their financial situation as 'money is enough only for food and clothes', two of them described it as 'they can afford expensive goods, like TV or washing machine', and only one mentioned that 'they can afford a TV or washing machine, even a car, and have summer vacation'.

The discussion about Armenian soap operas among a rural (village) audience was held in March 30, 2011. Five 50-65 years old women and three 25-35 years old men participated in this session. Five of them have secondary education, two have secondary technical, and one has higher education. All participants live in a village. One participant described his family financial situation as 'money is not enough even for food', two described it as 'money is enough for food, but not for clothes', one participant described his financial situation as 'money is enough only for food and clothes', four of them described it as 'money is enough for food and clothes, but they can't afford expensive goods, like TV or washing machine'.

Information/news programs - 18-65 years old male/female respondents with secondary and higher education

The discussion among passive/non users of Internet about the Armenian entertainment programs was held on March 16, 2011. Four women aged 30-65 and four men aged 18-55 participated in this session. All participants had higher education. Two participants described their family financial situation as 'money is not enough even for food', one participant described it as 'money is enough for food, but not for clothes', one participant described it as 'money is enough only for food and clothes', three of them described their financial conditions as 'they can afford expensive goods, like TV or washing machine', and only one mentioned that 'they can afford a TV or washing machine, even a car, and have summer vacation'.

Advertising - Representatives of advertising agencies, marketing/advertising managers - representatives of big, small and established/new advertising agencies.

A focus group about Armenian news/information programs was held on March 18, 2011. Four women aged 40-55 and four men aged 20-52 participated in this session. Five of them had higher education, and two had secondary education. Half of the participants described their financial situation as 'money is enough only for foods and clothes', and the other half described it as 'they can afford expensive goods, like TV or washing machine'.

APPENDIX

Table 19: Trust in Online News (% of respondents, who access online news)

Trust very much	8
Somewhat trust	75
Somewhat don't trust	14
Don't trust at all	1
DK	1

Table 20: Satisfaction with content of online news (% of respondents, who access online news)

Strongly satisfied	9
Somewhat satisfied	69
Somewhat dissatisfied	19
Don't satisfied at all	2
DK	1

Table 21: Caucasus Barometer 2010: How well TV journalists inform the population about what is going on? (%)

Very well	4
4	14
3	50
2	19
Very poorly	10
DK	3

Table 22: Caucasus Barometer 2010: TV journalists serve interests of people like you? (%)

Completely agree	4
4	18
3	31
2	27
Completely disagree	15
DK	5

Table 23: Caucasus Barometer 2010: Trust toward TV journalists (%)

Completely trust	11
4	24
3	33
2	16
Completely distrust	12
DK	4

Table 24: Caucasus Barometer 2010: TV independent from the government (%)

Completely agree	6
Somewhat agree	18
Somewhat disagree	37
Completely disagree	22
DK	17
RA	1

Table 25: Perceived reasons for non-objective coverage (% of respondents who believe that the media does not provide objective coverage)

Political affiliation	65
Censorship	8
Business affiliation	6
Financial limitations	4
Low professionalism of journalists	2
Self-censorship	1
Other	5
DK	10
RA	1

Table 26: Media owners' influence on content of broadcasting and publication (%)

Does not influence at all	4
Hardly influences	8
Influences somewhat	40
Influences very much	37
DK	11

Table 27: Importance of media freedom (%)

	TV	Newspaper	Radio	Internet
Very important	65	58	55	51
Somewhat important	22	22	22	17
Not very important	6	6	6	6
Not important at all	3	4	3	4
DK	3	11	13	21

Table 28: Attitudes towards government control of Internet access (%)

Strongly agree people should have the right to read whatever is on the Internet	58
Agree that people should have the right to read whatever is on the Internet	24
Agree government should have the right to prevent people access to some news on the Internet	10
Strongly agree that government should have the right to prevent people from having access to some news on the Internet	6
Agree with neither	1
DK	1

Table 29: Interest in political news (%)

A lot of interest in political news	20
Some interest in political news	37
Not much interest in political news	21
No interest at all in political news	22

Table 30: Interest in political news by education (%)

	No interest at all in political news	Not much interest in political news	Some interest in political news	A lot of interest in political news
No primary education	39	21	33	7
Incomplete secondary education [5-9th grades]	25	32	27	16
Complete secondary education [10/11th grades]	24	17	41	18
Secondary technical education	21	17	38	24
Incomplete higher education [1-3rd grades]	24	29	34	13
Completed higher education [BA/MA]	18	23	33	26
Post-graduate degree [PhD/Aspirantura]	25	14	35	26

Table 31: Topics in foreign policy and international relations respondents want to get more information about (mean of a 10 point scale where 10 equals the most important)

Recognition of Armenian Genocide	8.9
Resolution of Karabakh conflict	8.1
Normalization of Armenian-Turkish relations	7.9
Situation in Nagorno-Karabakh	7.5
Regional developments	7.4
World news	7.4
Armenian foreign policy	7.1
Activities of Armenian Diaspora	7.0
EU, EU-Armenia relations	6.5
Armenia in CoE and other international organizations	6.4
USA, US-Armenia relations	6.3

Table 32: Topics in domestic policy respondents want to get more information about (mean of a 10 point scale where 10 equals the most important)

Armenian Elections (Electoral Code)	6.4
President, his administration, and affiliates	6.1
Government	5.8
National Assembly	5.8
Armenian tax and custom service	5.7
Armenian opposition parties	5.2
Armenian Pro-governmental political parties	4.9

Table 33: Topics in economic and social policy respondents want to get more information about (mean of a 0 point scale where 10 equals the most important)

Situation in the Armenian Army	8.9
Increase in prices, salaries, pensions, social benefits	8.9
Healthcare issues	8.8
Unemployment	8.8
Education	8.5
Migration	8.2
Violation of human rights and fundamental freedoms	8.0
Problems with freedom of speech/media independence	7.9
Corruption, monopoly, oligopoly, unequal competition	7.3
Criminal situation	7.0
Tourism in Armenia	6.3
Urban construction/ecology	6.1
Ecological problems connected to economic initiatives	5.9

Table 34: Most important news source (%)

TV	90
Internet/Network	6
Radio	2
Newspaper	1
Interpersonal connections	0

Table 35: Knowledge of English (%)

Advanced	4
Intermediate	15
Beginner	17
No basic knowledge	60
DK	4

Table 36: Do you use social networking sites to share political or social news? (%)

Yes, both	7
Only social news	9
No	84

Table 37: Advantages of online newspapers compared to traditional newspapers (% of respondents, who read online newspapers)

Timeless/ Timesaving	25
Convenient to access	25
Available diversity of sources	24
Free of charge	16
Environmentally friendly	1
Other	7
DK	2

Table 38: Topics of most interest on online news sites (mean of 10 point scale where 1 equals the most interesting topic)

Politics	1.9
Sport	2.3
Other	2.3
Art/Culture	2.4
Society	2.5
Fashion	2.5
Sciences/ technology	2.6
Economics/ business	2.9
Celebrity news	3
Job announcements	3.5

Table 39: Which online publications do you read more often to get news (% of respondents, who read online news)

News.am	28
Aravot	21
A1+	19
Tert.am	19
Haykakan Zhamanak	16
Radio Liberty	13
Lragir.am	13
Chorrord Ishkhanutyun	12
Other	10
Aysor.am	5
Casual/ search	4
Novoye Vremya	4
Armenia.Now.com	4
PanArmenianNetwork.am	3
Panorama.am	3
Hraparak.com	3
Golos armenii	3
7 or.am	3
Noyan tapan	2

Table 40: Do you read newspapers (%)

Yes	33
No	67

Table 41: Frequency of newspaper purchasing (% of respondents, who read newspapers)

Every day	6
Several times a week	21
Once a week	38
1-2 times a month	24
Never buy a newspaper	11

Table 42: Form in which newspaper is read (% of respondents, who read newspapers)

Only hard copy	77
Both online and hard copies	16
Only online	7

Table 43: Reasons for not reading newspapers (%)

Getting news from other sources	29
Don't have time to read newspapers	26
Don't have enough money to buy newspapers	13
Newspapers are not sold in the settlement	9
Don't trust information in newspapers	8
Sight problems	5
Don't like to read newspapers	3
Don't interested in reading newspapers	3
Sicknes/ old age	2
Other	1
Illiterate	1
DK	1

Table 44: Attitudes and awareness digital television (%)

	Yes	No	DK
Aware of Armenia's switch to digital television	55	42	2
Aware that digital television provides better quality of TV channels	44	50	5
Aware that digital television provides allows to watch more TV channels	44	51	5
Willingness to pay for special equipments needed for digital television	33	48	18

Table 45: Frequency of watching TV Channels (% of respondents, who watch TV)

	Every day	Several times a week	Once a week	Once or twice per month	Never
Shant	82	8	3	2	4
H1	80	11	4	2	3
Gala	78	13	2	4	3
NTV	77	19	4	0	-
Armenia	77	12	4	2	5
Tsayg	74	21	2	3	-
ORT	55	18	9	8	10
H2	50	30	9	5	7
RTR Planeta	46	22	10	8	14
ALM	31	17	11	12	29
Kultura	28	22	13	14	23
Erkir Media	26	29	19	11	15
Dar 21	25	23	15	15	22
ATV	22	26	19	16	17
TV5	22	28	18	15	17
Ararat	21	21	18	20	21
AR TV	18	23	22	17	20
Kentron TV	16	32	19	17	16
Hay TV	15	23	21	19	22
Shoxakat TV	14	18	22	20	25
Hayrenik	14	20	16	20	30
Yerevan	13	27	22	17	21
Other	65	24	1	10	-
Entertainment	92	5	3	-	-
Information/Analytical	67	19	7	4	3
Regional	64	15	7	9	5

Table 46: Type of TV content desired (%)

Films	42
Informative programs	32
Music	31
News with detailed coverage	25
Entertainment programs	20
Sports	20
Soap operas	18
News	15
Political debates	11
Interactive programs	8
Analysis of current political events	8
Talk shows	7
Other	5
Religious programs	3
Old Armenian films	1
Cartoons	1

Table 47: Respondents listening to the radio during the past 12 months (%)

Listened to the radio	24
Did not listen to the radio	76

Table 48: Average daily radio listening time (% of respondents, who listen to the radio)

Less than 1 hour	28
1-3 hour	35
3-5 hour	12
5-7 hour	6
7-9 hour	5
9-12 hour	3
12 hours and more	1
DK	5
RA	5

Table 49: Radio listening location (% of respondents, who listen to the radio)

At home	59
In the car	26
Anywhere on mobile phone	12
At workplace	11
Other	1

Table 50: Armenian Radio Stations Listenership (% of who listen to the radio BY nationally and Yerevan)

Name	Daily		Several Times a Week		A few times a week		A few times a month		Total		Never	
	Nationally	Yerevan	Nationally	Yerevan	Nationally	Yerevan	Nationally	Yerevan	Nationally	Yerevan	Nationally	Yerevan
Armenian National Radio	6	7	3	9	1	2	2	4	13	18	3	6
Autoradio	4	7	3	6	1	3	1	3	10	18	3	5
Radio Van	3	4	4	7	1	3	2	4	10	18	3	6
Ardzagank	2	3	3	5	1	2	2	4	8	14	3	7
Radio Hay	3	4	3	4	1	2	2	3	9	13	3	7
City FM	0	0	1	3	1	2	1	4	4	8	3	6
Azatutyun Radio	5	8	3	4	0	0	2	4	10	17	3	6
Radio Jazz	1	2	1	2	1	1	2	3	4	9	4	8
Vem Radio Station	0	1	0	1	0	1	1	3	3	6	4	7
Radio Hay 107	1	1	2	5	1	2	1	2	5	10	3	6
Ruskoye Radio	3	7	3	7	1	2	1	3	9	19	2	5
Nor Radio	4	10	2	5	1	2	1	3	9	19	2	5
Radio Yerevan	2	3	2	4	1	1	2	3	3	12	6	6

Table 51: Preferred language of radio programs (% of respondents, who listen to the radio)

Armenian	50
Russian	6
Both	44
RA	1

Table 52: Preferred radio content type (% of respondents, who listen to the radio)

Music	78
News	51
Interviews	11
Quiz	7
Other	3

**Table 53: Numbers of cell phones household owns
(% of households with cell phone ownership)**

1 cell phone	28
2 cell phones	30
3 cell phones	20
4 cell phones	14
5 cell phones	5
6 cell phones	2

Table 54: PC ownership by accumulated household income (%)

	HH owns PC	HH does not own PC
Up to USD 50	1	99
USD 51 - 100	9	91
USD 101 - 250	19	81
USD 251 - 400	39	61
More than USD 400	60	40
None	37	63

Table 55: PC ownership by respondent's level of education (%)

	HH owns PC	HH does not own PC
Secondary or lower	17	83
Secondary technical	24	76
Higher than secondary	54	46

Table 56: Primary Internet access (% of respondents, who use the Internet)

At home	65
At workplace	14
Anywhere from my mobile phone	13
At Internet cafe	3
At university/school	1
Other	5

Table 57: Primary Internet access device (% of respondents, who use the Internet)

Computer	69
Mobile phone	17
Both	14

Table 58: Social networking site profile (% of respondents, who use the Internet)

Yes, and I have profile	60
Yes, but I don't have profile	12
I don't use social networks	29

Table 59: According to you, what is the most important function of social networking sites (% of respondents that use social networks)

To communicate	51
To keep in touch with friends	24
To get information	13
To be entertained	9
To share information	1
To share political information	1

Table 60: Use of blogs (% of respondents, who use the Internet)

Read blogs	7
Write blogs	0
Both read and write blogs	2
Don't use blogs	64
Don't know what blog is	26

Table 61: Problems accessing traditional media for March 1 events (%)

Yes	17
No	67
DK	16
RA	1

Table 62: Use of online videos (% of respondents, who use the Internet)

Watch videos	33
Upload videos	7
Share videos	4

Table 63: Online video content watched (% of respondents who use online video)

Music	79
Fun videos	53
Films	47
Sports	14
Political content videos	10
News programs	9
Social content videos	4
Other	3

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