

Three-City Media Survey in Armenia: Yerevan, Gyumri, and Vanadzor



Audience Analysis & Market Profile December 2004

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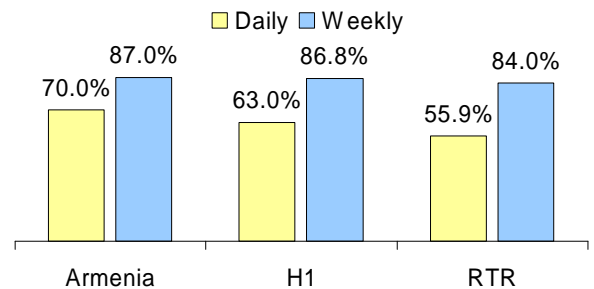
Armenia at a Glance: Main Findings

This report presents results of an InterMedia three-city survey of adults (15 and older) in Yerevan, Gyumri and Vanadzor, Armenia. InterMedia commissioned the Yerevan-based market research firm ASA, which conducted 500 interviews in each city between 16 and 21 December 2004. Given a sample of this size, the margin of error with a 95 percent confidence interval would be ± 4.4 percent.

- TV ownership rates were highest in Vanadzor and Yerevan, where 97 percent of respondents own a TV, but 87 percent of respondents in Yerevan said they watch TV every day, compared to 77 percent in Gyumri and 70 percent in Vanadzor.
- Most respondents in all three cities had seen advertisements on TV “yesterday,” including 72 percent in Yerevan; the attributes most commonly applied to TV advertisements were “irritating” and “boring.”
- The highest number of available TV channels is in Yerevan, where 61 percent of respondents can receive at least 14 channels. In Gyumri and Vanadzor, most respondents receive less than 14 channels. In all three cities, total awareness of the top 10 channels is very high: At least 85 percent of respondents are aware of these top channels either spontaneously or after prompting.
- Most Armenians live in poverty: According to the CIA World Factbook, the GDP per capita is \$3,500, or less than \$300 a month. A very large majority (69 percent in Yerevan, 83 percent in Gyumri and 84 percent in Vanadzor) cannot afford both food and clothing. Very few can afford expensive goods.
- The three cities surveyed all reflect Armenia’s skewed gender ratio of approximately three-fifths women to two-fifths men, an indication of the number of males who leave Armenia for more lucrative work outside the country.

Top TV Stations in Yerevan

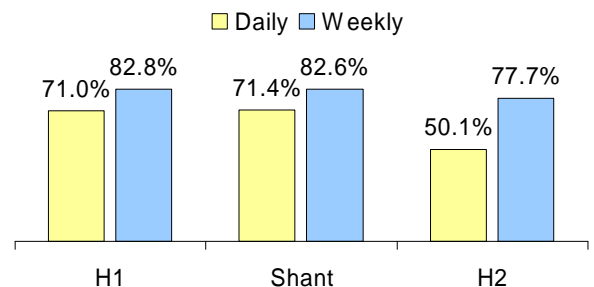
(Percent of adults watching)



Base: n=500 (adults 15 and older) in Yerevan, Armenia

Top TV Stations in Gyumri

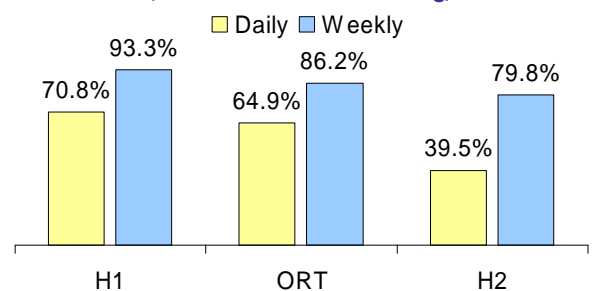
(Percent of adults watching)



Base: n=500 (adults 15 and older) in Gyumri, Armenia

Top TV Stations in Vanadzor

(Percent of adults watching)



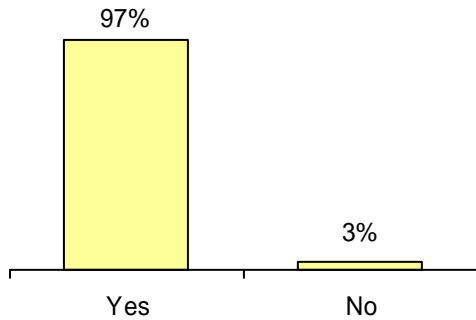
Base: n=500 (adults 15 and older) in Vanadzor, Armenia

Armenia at a Glance: Main Findings (cont.)

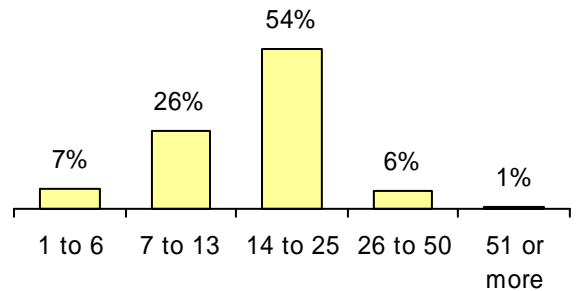
- In all three cities, peak TV viewing times are between about 20:00 and 23:00. Respondents under 30, in all three cities, tend to watch in higher numbers in the afternoon, from 14:00 until 17:00 or 18:00, and respondents over 30 tend to watch in higher numbers from the morning until about 13:00, except in Gyumri.
- Entertainment programming is clearly the most important to respondents in all three cities, especially among respondents under 30. In Vanadzor, 80 percent of all respondents consider entertainment programming important; in Yerevan, the figure is 66 percent, and in Gyumri, 47 percent.
- TSAYG and Shant audiences in Gyumri commonly characterized those stations as “independent” and “objective.” In Vanadzor, however, 44 percent of Lori weekly viewers consider the station “amateurish,” though 41 percent consider it “engaging.” The top two characteristics Interkap weekly viewers in Vanadzor mentioned were “trustworthy” and “engaging.”
- H1 is the most popular station in Gyumri and Vanadzor, and rates a close second to Armenia in Yerevan. H1 has weekly reach of 86.8 percent in Yerevan, 82.8 percent in Gyumri and 93.3 percent in Vanadzor. Other top stations in terms of weekly reach include Armenia and RTR in Yerevan, Shant and H2 in Gyumri, and ORT and H2 in Vanadzor.
- Only H1 ranks as one of the top two TV stations for news about current events in all three cities. Other popular news stations include Armenia in Yerevan, Shant in Gyumri and ORT in Vanadzor.

TV: Penetration and Use: Yerevan

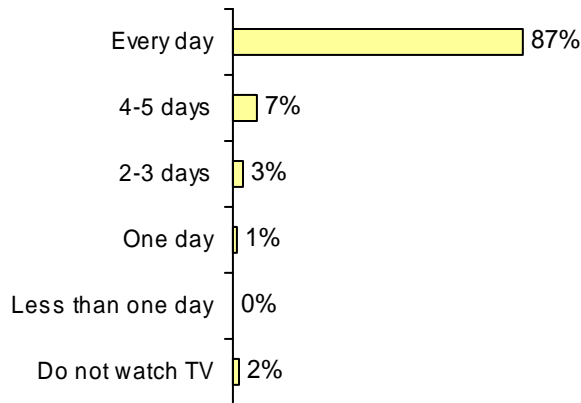
Ownership



Number of Channels Available



Weekly TV Viewing Frequency

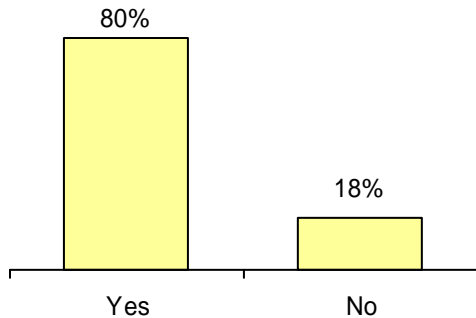


Base: n=500 (adults 15 and older) in Yerevan, Armenia

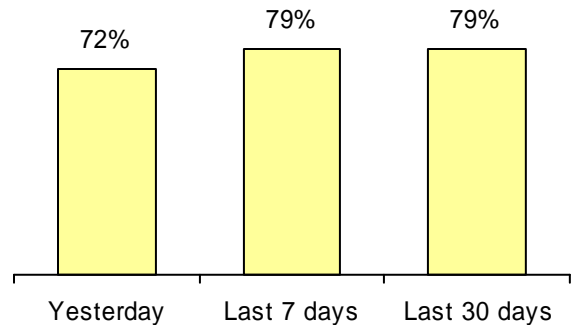
- Nearly all adults in Yerevan own a TV, and most (54 percent) can receive between 14 and 25 channels, more than in Gyumri or Vanadzor, where most respondents are able to receive 13 channels or less. In Yerevan, 7 percent of respondents said they can receive 26 channels or more.
- Nearly nine in 10 adults in Yerevan watch TV every day, more than in Vanadzor (70 percent) or Gyumri (77 percent).

TV: Advertising: Yerevan

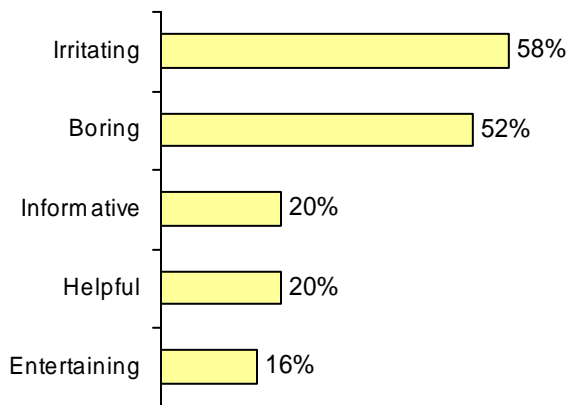
Watch ads on TV?



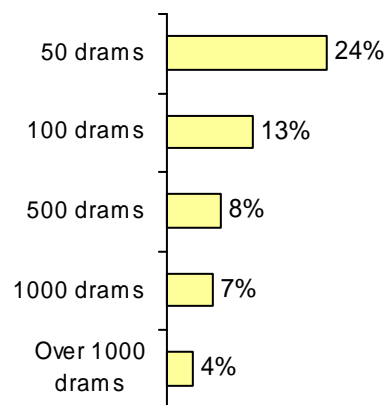
When last saw ads on TV?



How do you feel about ads?



How much would you pay for a one-minute greeting on TV?

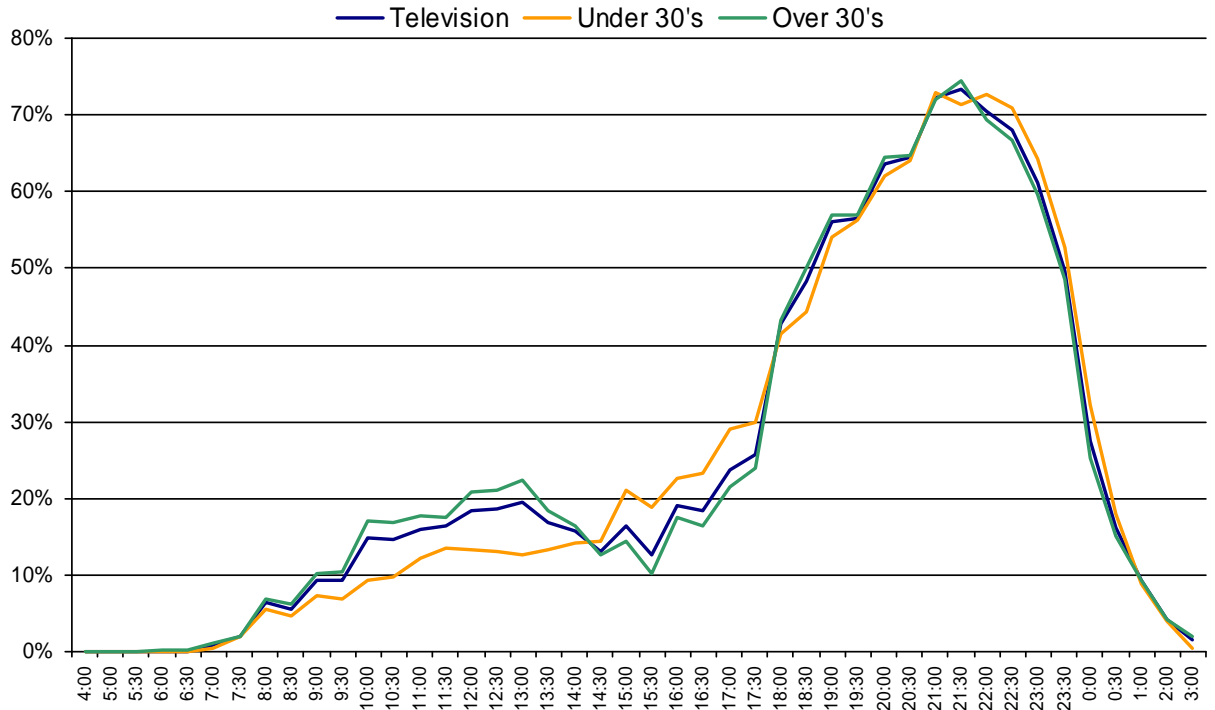


Base: n=500 (adults 15 and older) in Yerevan, Armenia

- Four out of five respondents said they watch advertisements on TV, and 72 percent said they last saw advertisements “yesterday.”
- Most respondents consider TV advertisements “irritating” and “boring;” one in five consider advertisements “informative” and “helpful.”
- About one-quarter of respondents said they would pay 50 drams for a one-minute greeting on TV, although interestingly, 11 percent indicated they would pay 1,000 drams or more.

Media Use: Listening/Viewing Times: Yerevan

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

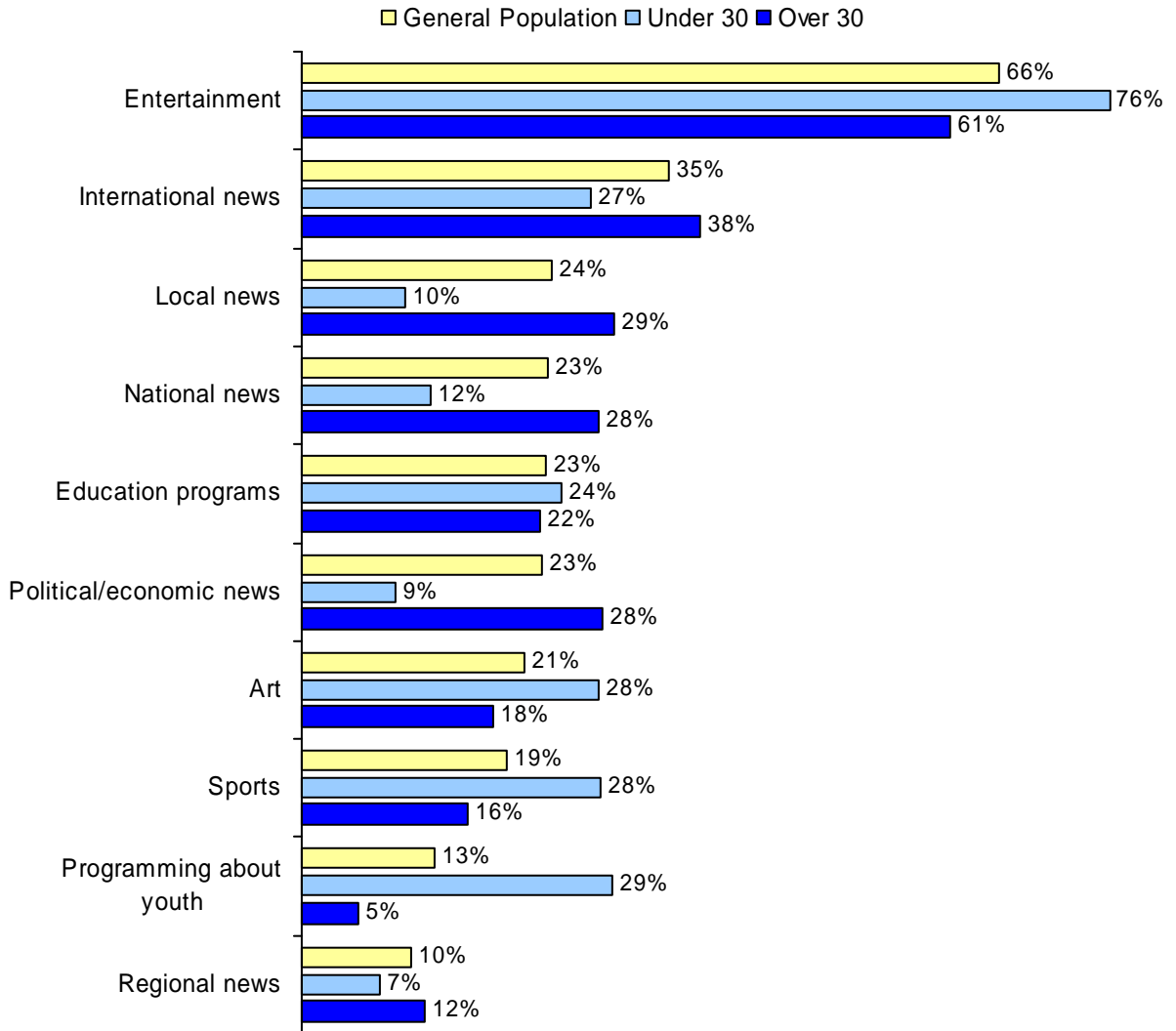


Base: n=500 (adults 15 and older) in Yerevan, Armenia

- TV viewing in Yerevan peaks at 21:30, when 73 percent of adults watched TV “yesterday.” During prime evening hours (20:00 to 23:30), viewing rates in Yerevan are more than 60 percent. Viewing rates for those under 30 and over 30 are roughly similar to those of the general population from about 18:00 through the rest of the night.
- Viewing rates earlier in the day peak at about 20 percent at 13:00. Viewing is much more common among respondents over 30 than those under 30 from the early morning until 14:30. At 14:30, when many respondents under 30 arrive home, the viewing rate for those under 30 exceeds that of older viewers until about 18:00.

Media Use: Program Importance: Yerevan

Kinds of programming important when watching TV

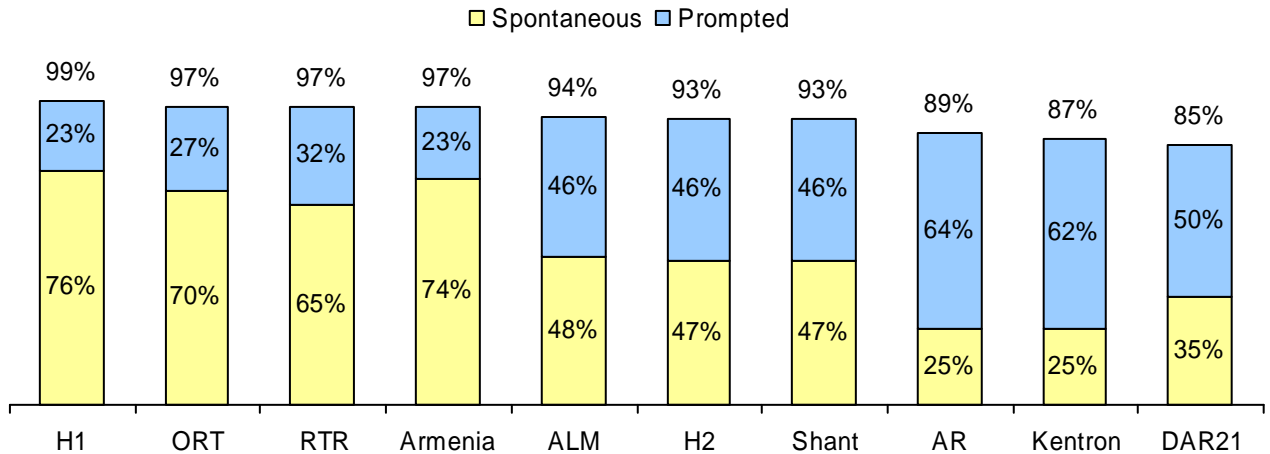


Base: n=500 (adults 15 and older) in Yerevan, Armenia

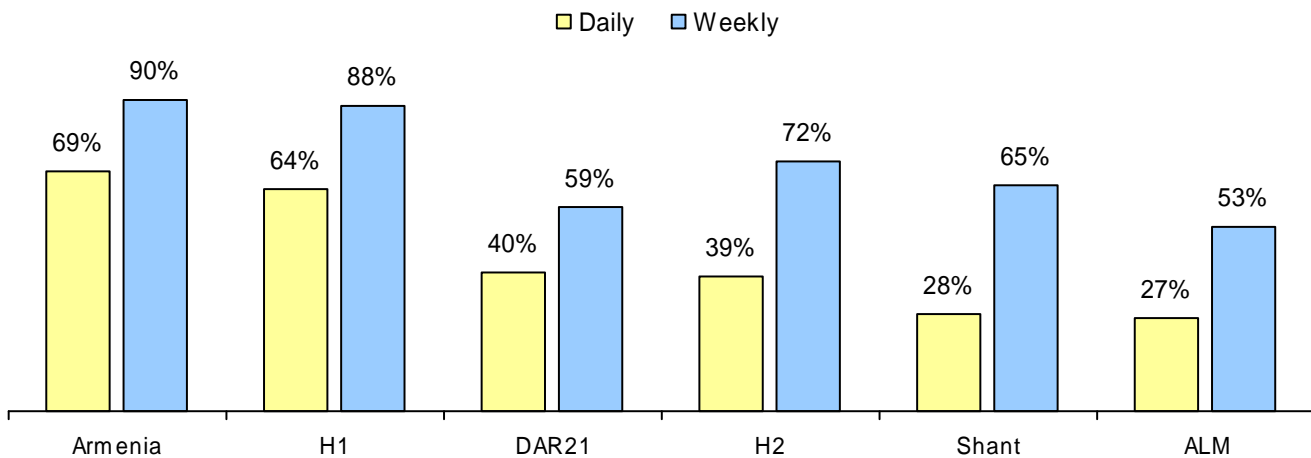
- Entertainment programming is by far the most important to respondents, who mentioned it nearly twice as often as they did international news (35 percent). Local news and national news—each mentioned by about a quarter of respondents—trails international news, but preferences for news programming are driven by respondents over 30, who also feel political and economic news is important. Respondents under 30, on the other hand, consider education programs, art programs, sports programs and youth-oriented programming important. Interestingly, many (27 percent) also consider international news important, more than they do local (10 percent) or national news (12 percent).

Media Use: Local TV Stations: Yerevan

Awareness of TV Stations



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



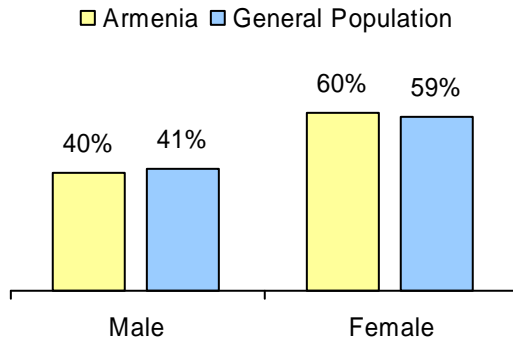
Base: n=500 (adults 15 and older) in Yerevan, Armenia

- Total awareness rates of the major TV stations in Armenia are lower among respondents in Yerevan than they are in the other two cities. Although nearly all respondents (97 percent or higher) are aware of H1, ORT, RTR and Armenia, total awareness rates for other stations dip as low as 85 percent (for DAR21).
- Armenia and H1 are the two most popular stations in Yerevan for news about current events; about nine in 10 respondents said they use these stations weekly for news. Other popular news stations, mentioned as weekly sources for at least half the respondents in Yerevan, are H2 (72 percent), Shant (65 percent), DAR21 (59 percent) and ALM (53 percent).

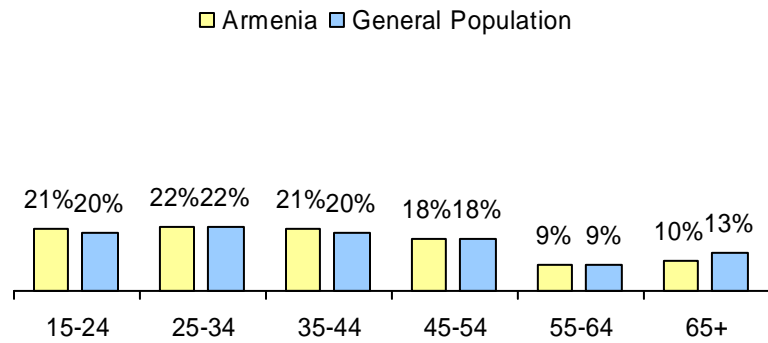
Audience Profiles: Armenia in Yerevan

Armenia Audience in Yerevan, Armenia Weekly Audience Composition

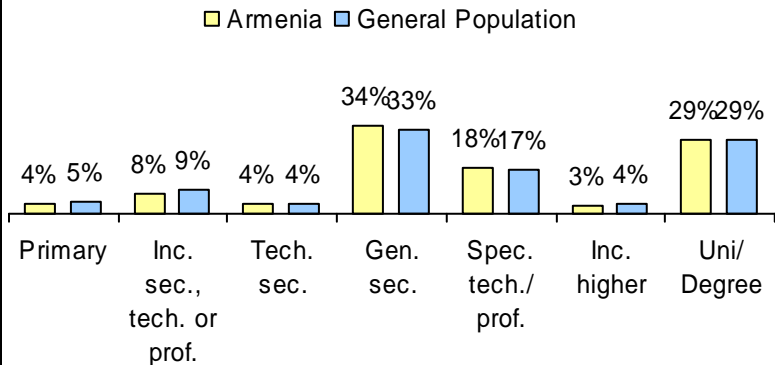
Sex



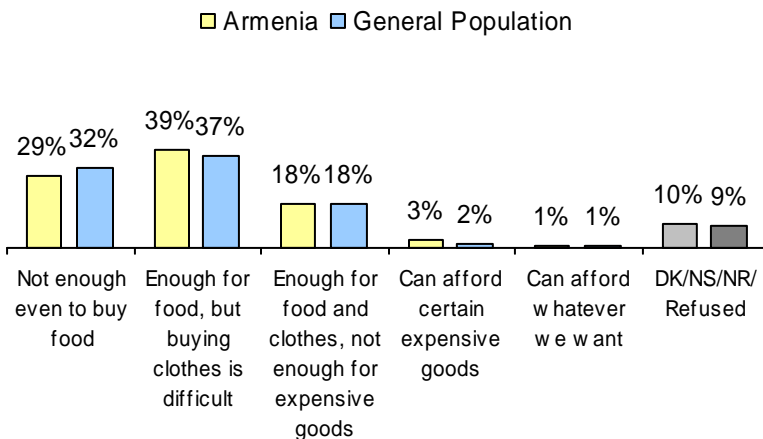
Age



Education



Income



- TV station Armenia's weekly audience very closely resembles the general population of Yerevan, as would be expected for a station watched by nine in 10 respondents.
- Armenia's broad appeal is apparent across all age groups and educational levels, among which it is difficult to distinguish between Armenia's weekly audience and the general population.
- Armenia's weekly audience appears slightly better off financially than does the population of Yerevan as a whole, probably indicating those in the poorest income group have less access to TV overall.

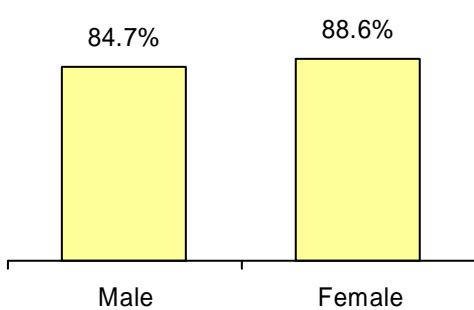
Base: n=436 Armenia weekly viewers (adults 15 and older) in Yerevan, Armenia

Audience Profiles: Armenia in Yerevan

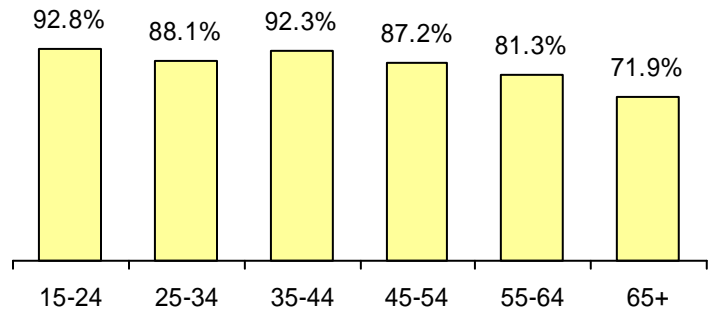
Armenia Audience in Yerevan, Armenia Weekly Reach Among Demographic Segments

Armenia weekly reach: 87.0%

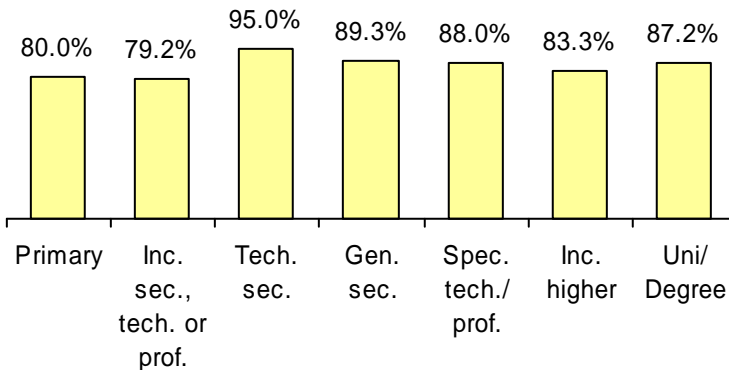
Sex



Age

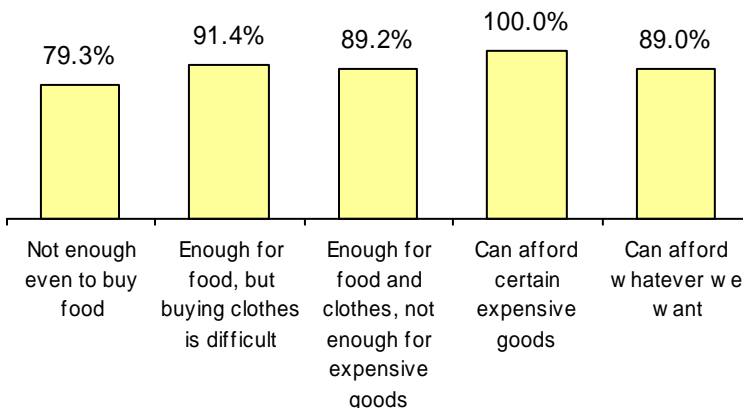


Education



- Armenia has broad weekly reach across all demographic segments; no subgroup shows less than a 70 percent weekly reach rate.
- Armenia is slightly more popular among younger respondents than it is among those 55 and older.
- As might be expected, Armenia viewing rates are slightly lower among the least educated and those in the lowest income group.

Income

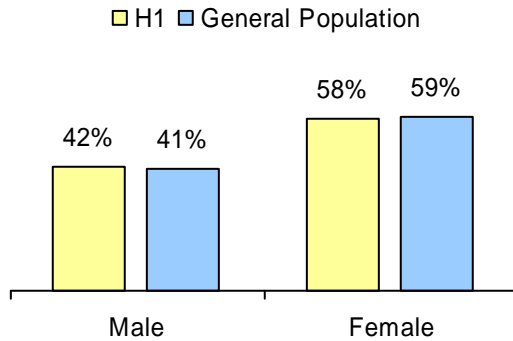


Base: n=500 (adults 15 and older) in Yerevan, Armenia

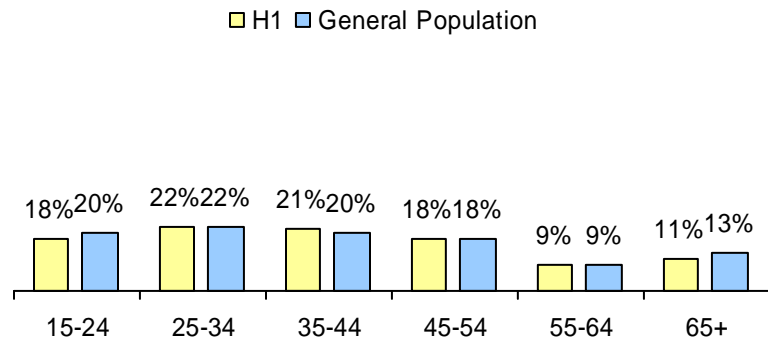
Audience Profiles: H1 in Yerevan

H1 Audience in Yerevan, Armenia Weekly Audience Composition

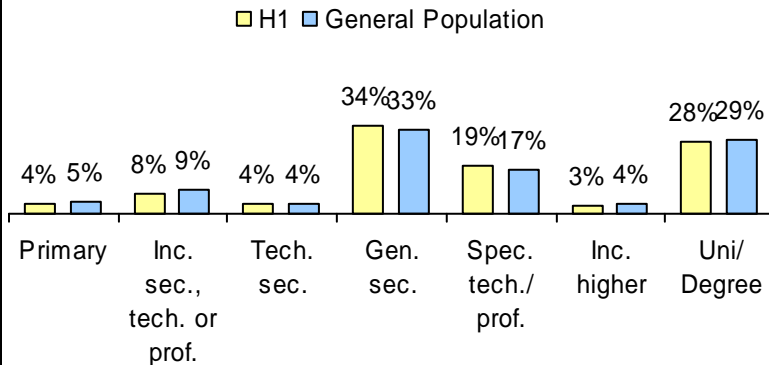
Sex



Age

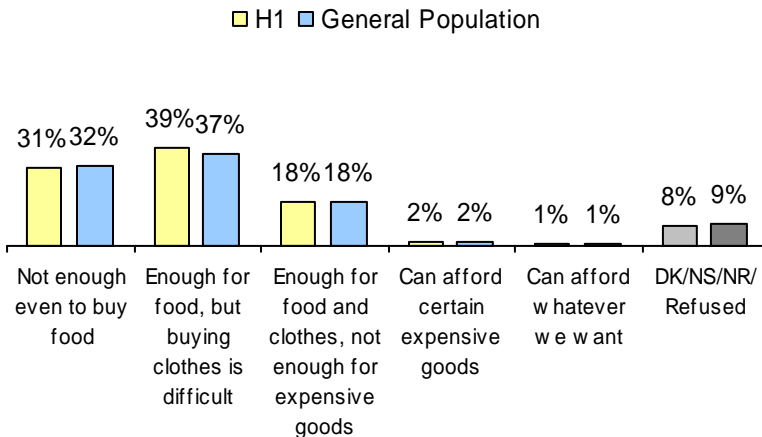


Education



- As with Armenia TV, H1's weekly audience very closely resembles the population of Yerevan as a whole.
- Aside from some very slight differences, all of which are within the margin of sampling error, the H1 weekly audience is indistinguishable from the general population of Yerevan due to its high reach levels.

Income



Base: n=433 H1 weekly viewers (adults 15 and older) in Yerevan, Armenia

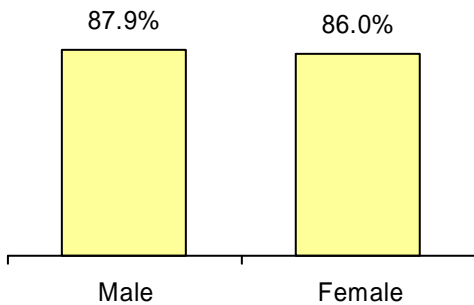
Audience Profiles: H1 in Yerevan

H1 Audience in Yerevan, Armenia

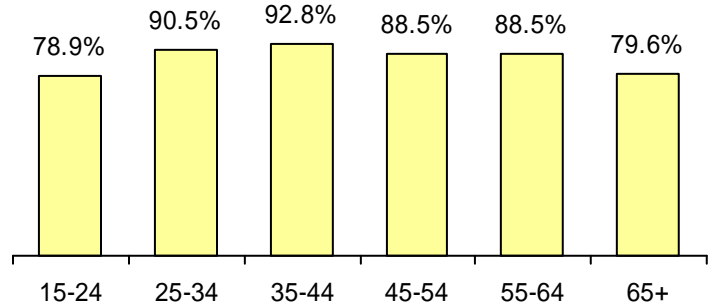
H1 weekly reach: 86.8%

Weekly Reach Among Demographic Segments

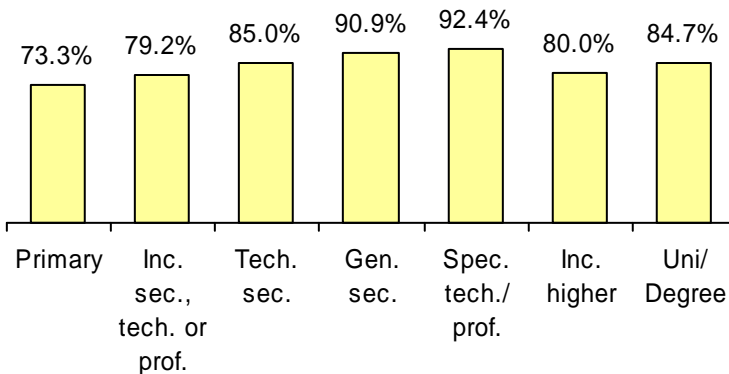
Sex



Age



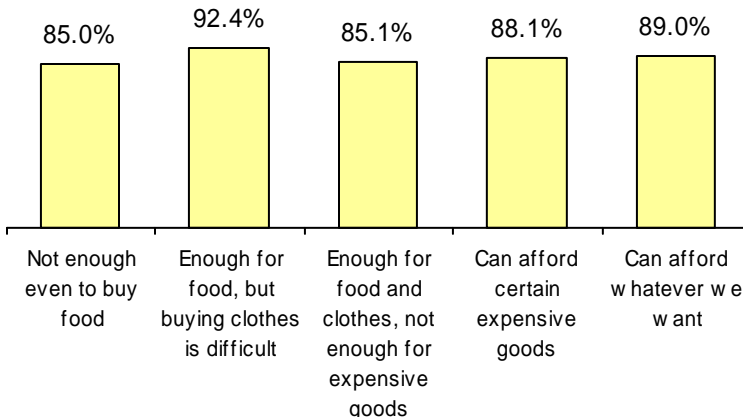
Education



- H1 reaches male and female respondents in Yerevan at approximately equal rates. It appears to be more popular among respondents between 25 and 64 than it is among the youngest (15 to 24) or oldest (65 and older) respondents, for whom reach rates were below 80 percent.

- Weekly reach is slightly higher among respondents with some type of secondary education than it is among the least- or best-educated respondents.

Income

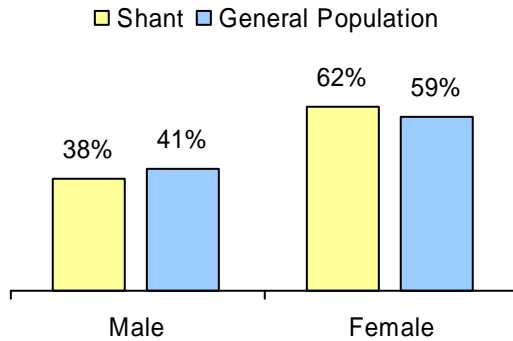


Base: n=500 (adults 15 and older) in Yerevan, Armenia

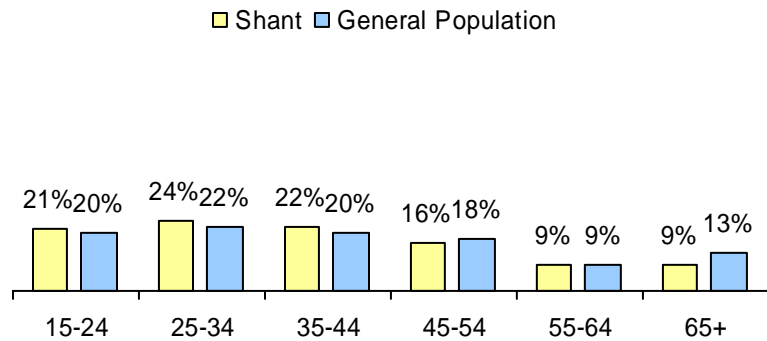
Audience Profiles: Shant in Yerevan

Shant Audience in Yerevan, Armenia Weekly Audience Composition

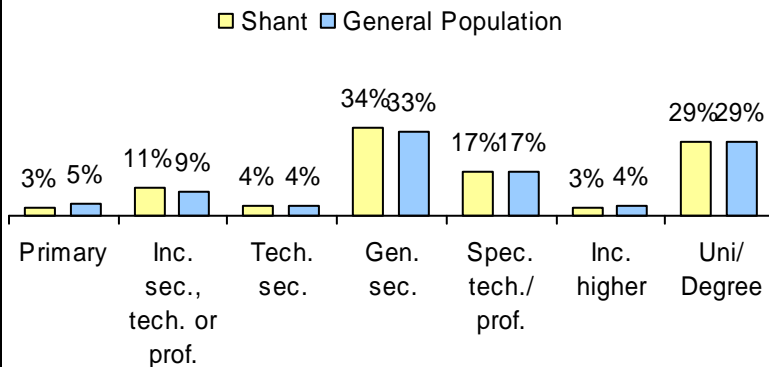
Sex



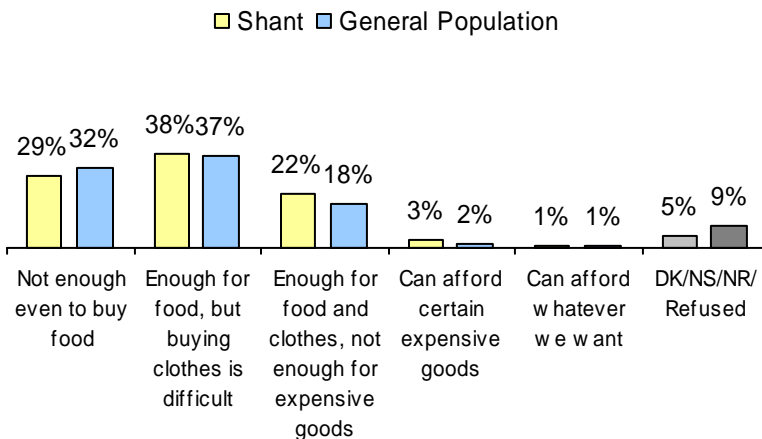
Age



Education



Income



- Shant TV's weekly audience is slightly more than three-fifths female.
- Weekly Shant viewers are younger than are viewers of Armenia or H1, whose weekly audience mirrors the general population of Yerevan.
- By educational groups, Shant's weekly audience is practically indistinguishable from the general population of Yerevan.
- Shant's weekly audience appears to be slightly better off financially than is the population of Yerevan as a whole, but this difference is not statistically significant.

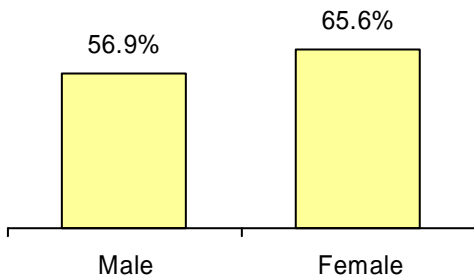
Base: n=307 Shant weekly viewers (adults 15 and older) in Yerevan, Armenia

Audience Profiles: Shant in Yerevan

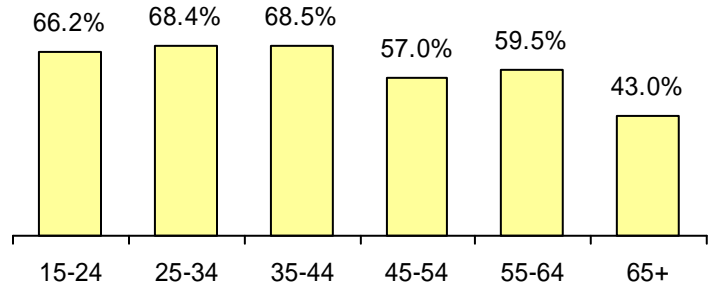
Shant Audience in Yerevan, Armenia Weekly Reach Among Demographic Segments

Shant weekly reach: 62.0%

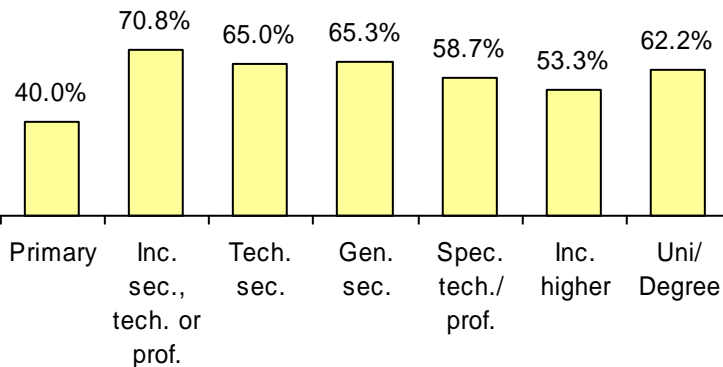
Sex



Age



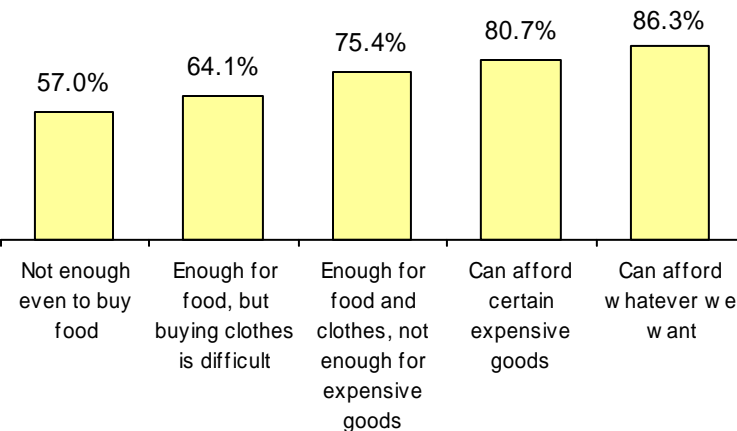
Education



- Shant’s weekly reach is slightly higher among females than males. It is also more popular among younger respondents than it is among those 45 and older, as suggested in the composition figures.

- Weekly reach is lowest among respondents with only a primary education (40.0 percent).

Income

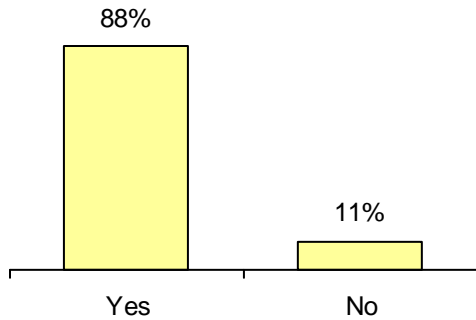


- Weekly reach for Shant increases with income level, from 57.0 percent among respondents unable to afford food to 86.3 percent among respondents who can afford whatever they want.

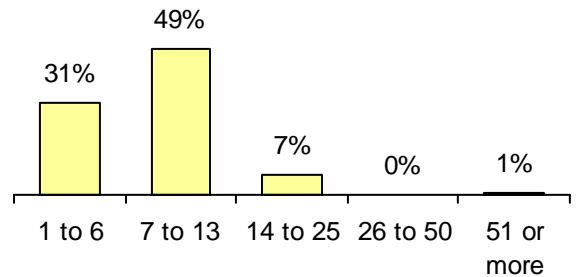
Base: n=500 (adults 15 and older) in Yerevan, Armenia

TV: Penetration and Use: Gyumri

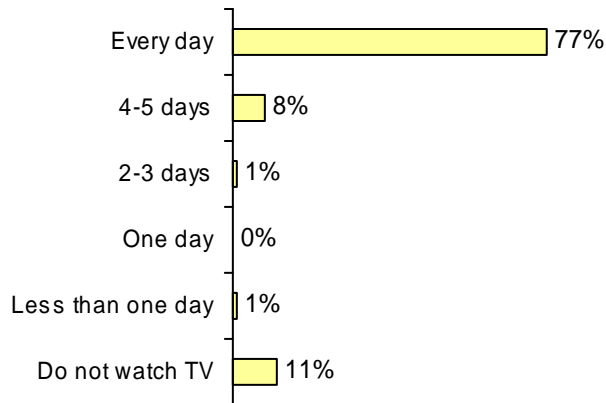
Ownership



Number of Channels Available



Weekly TV Viewing Frequency

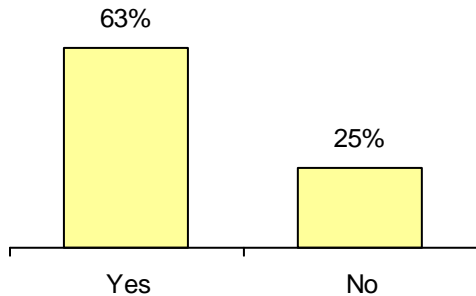


Base: n=500 (adults 15 and older) in Gyumri, Armenia

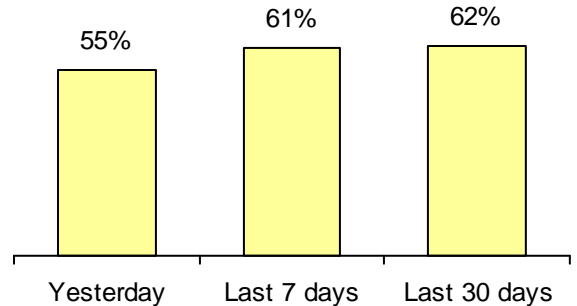
- Nearly nine in 10 respondents in Gyumri own a television, though this is the lowest TV ownership rate of the three surveyed cities. Four in five respondents receive less than 14 channels, and only a handful receive more than 25 channels.
- More than three-fourths of adults in Gyumri watch TV every day. Most of those who own TV but do not watch daily said they watch four or five days a week.

TV: Advertising: Gyumri

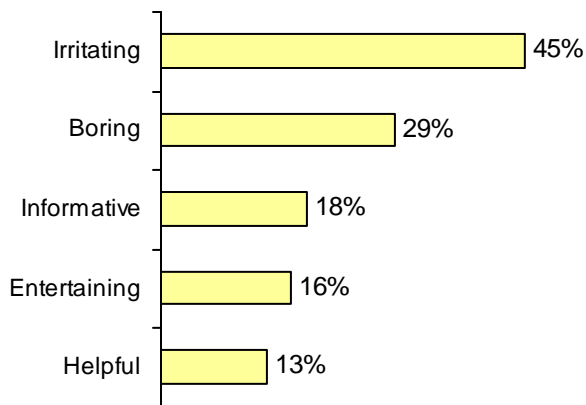
Watch ads on TV?



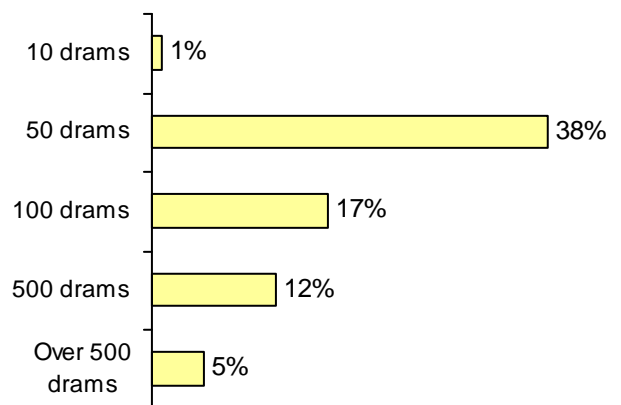
When last saw ads on TV?



How do you feel about ads?



How much would you pay for a one-minute greeting on TV?

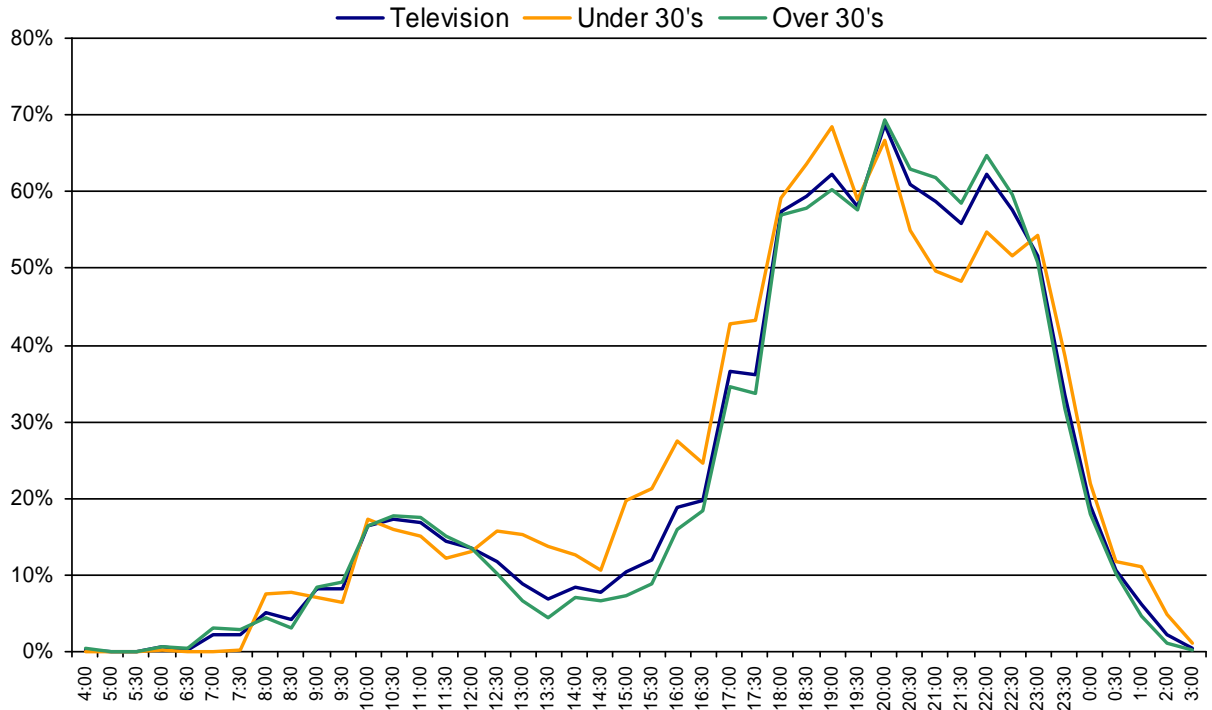


Base: n=500 (adults 15 and older) in Gyumri, Armenia

- Most respondents in Gyumri watch advertisements on TV; 55 percent saw advertisements as recently as “yesterday.”
- Nearly half of the adults in Gyumri (45 percent) consider advertisements “irritating,” and 29 percent consider them “boring.” Less than one in five adults consider advertisements “informative,” “entertaining” or “helpful.”
- A plurality of respondents (38 percent) said they would pay 50 drams for a one-minute greeting on TV, though 17 percent said they would pay 500 drams or more.

Media Use: Listening/Viewing Times: Gyumri

TV Reach at Various Times of Day Percentage of Adults Viewing "Yesterday"

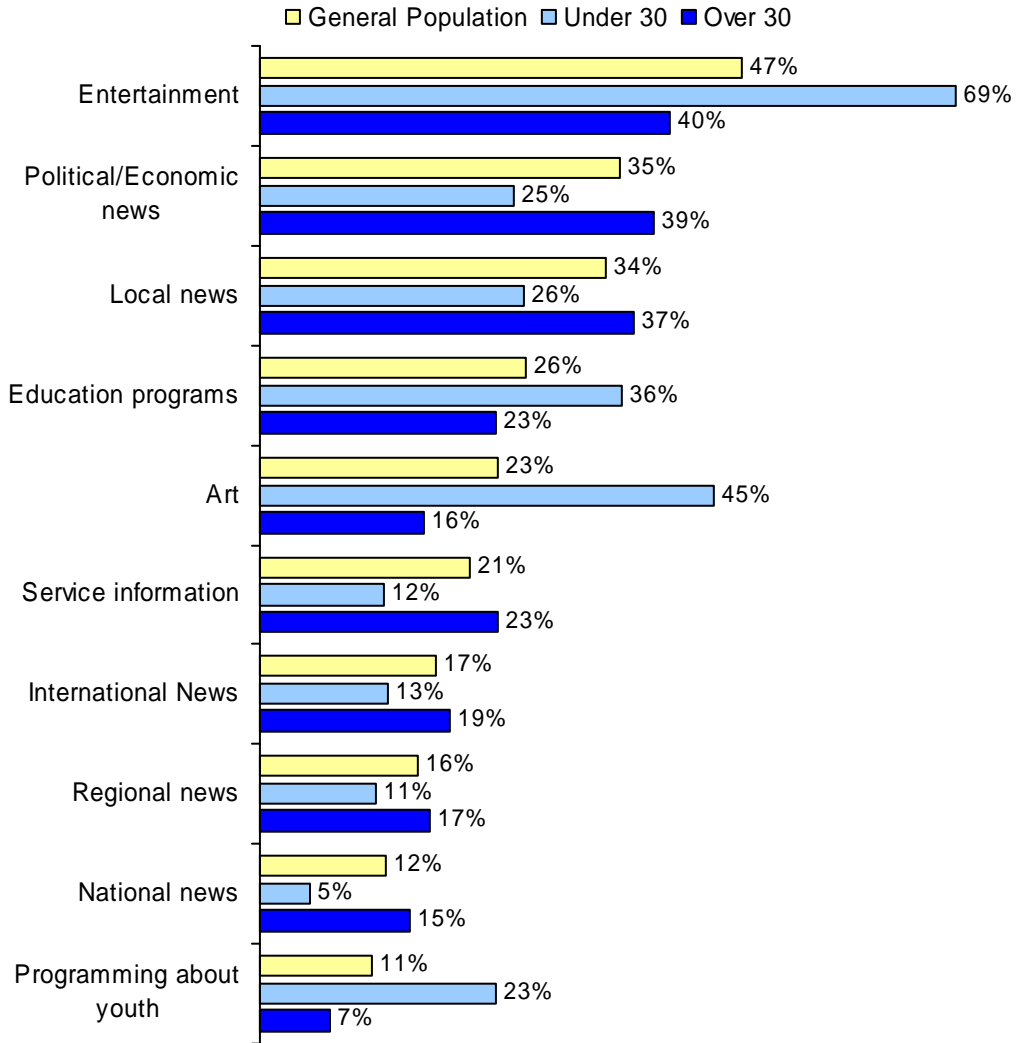


Base: n=500 (adults 15 and older) in Gyumri, Armenia

- The “yesterday” TV audience in Gyumri peaks at 20:00, when 69 percent of adults are watching. TV watching builds slowly from the early morning until a mid-morning peak of 17 percent of adults at 10:30. Viewing dies off again from 11:00 until 13:30, when viewing dips below 10 percent before beginning a steady rise toward the 20:00 peak.
- Interestingly, viewing during peak hours (20:00 to 23:00) is higher among adults over 30 than among those under 30. Conversely, those under 30 watch in higher numbers in the afternoon and early evening (between 12:00 and 17:00).

Media Use: Program Importance: Gyumri

Kinds of programming important when watching TV

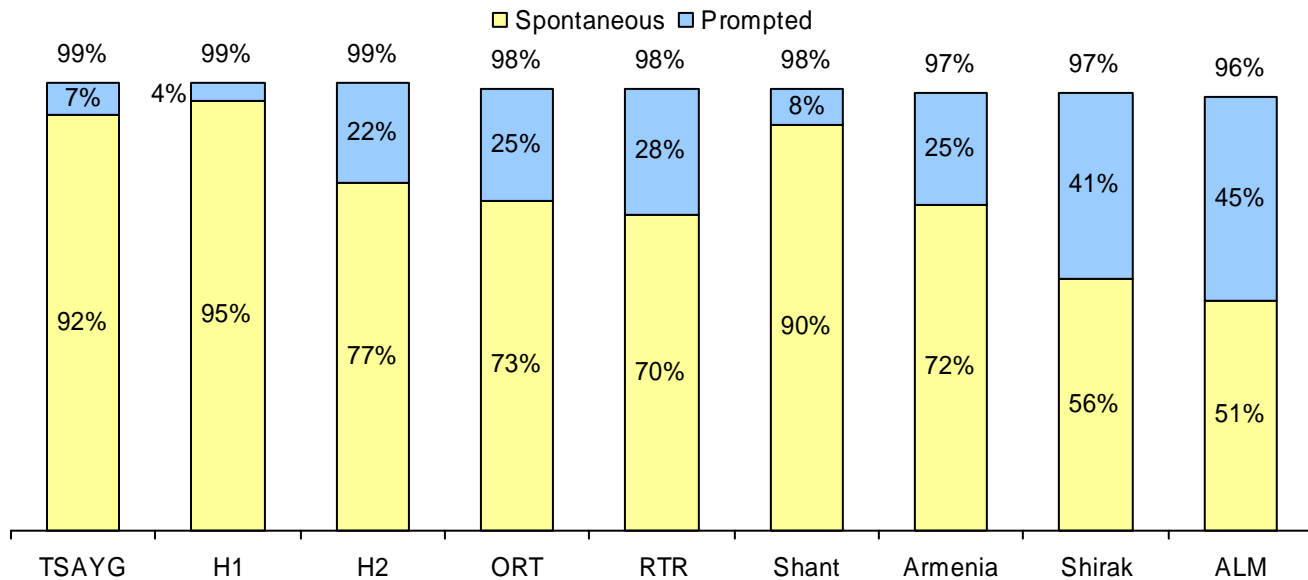


Base: n=500 (adults 15 and older) in Gyumri, Armenia

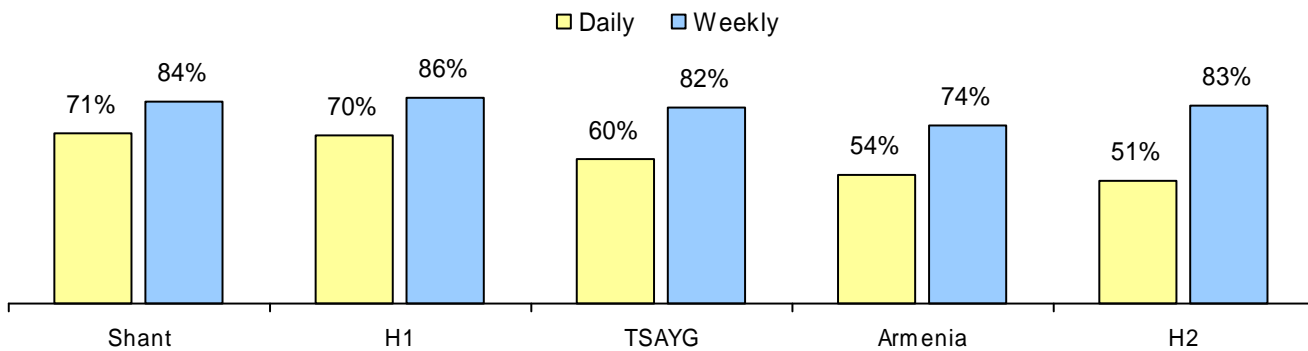
- Adults in Gyumri indicated entertainment programming is most important; it was mentioned by nearly half of all respondents, including 69 percent of those under 30. Local news and political/economic news are also considered important, especially among respondents over 30. Interestingly, art programs are the second most important among respondents under 30, who also tend to value educational programming more than do their older counterparts.

Media Use: Local TV Stations: Gyumri

Awareness of TV Stations



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



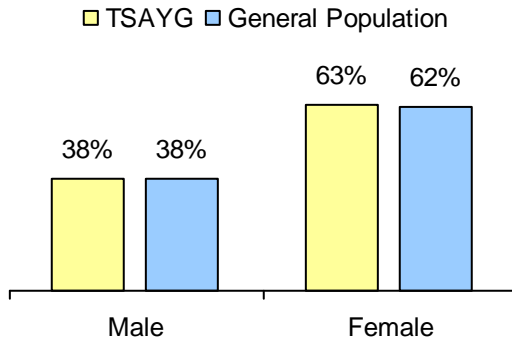
Base: n=500 (adults 15 and older) in Gyumri, Armenia

- Nearly all respondents are aware of the top TV stations, and in most cases could name these stations spontaneously. Only ORT, RTR, Armenia, Shirak and ALM has less than 75 percent spontaneous awareness, though almost all respondents who could not name these stations spontaneously were aware after prompting.
- Shant and H1 are the most popular stations for news about current events, and are watched daily by about seven in 10 adults in Gyumri. Though TSAYG, Armenia and H2 have lower daily use rates for news about current events, weekly use rates are above 80 percent for all stations except Armenia (74 percent).

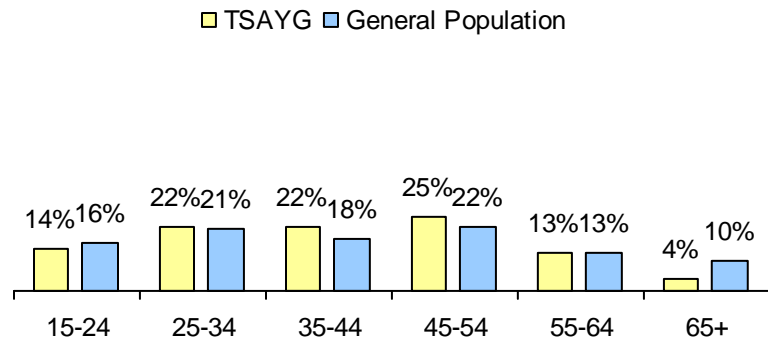
Audience Profiles: TSAYG in Gyumri

TSAYG Audience in Gyumri, Armenia Weekly Audience Composition

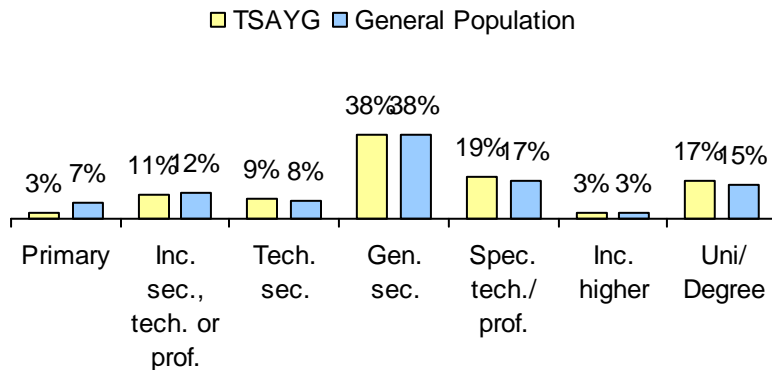
Sex



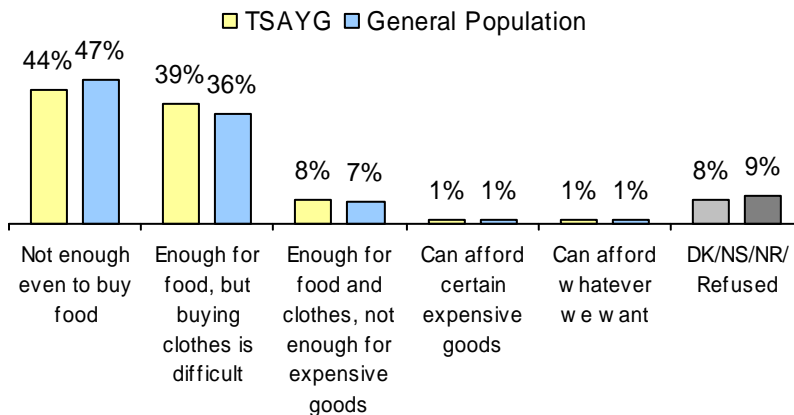
Age



Education



Income



- The TSAYG weekly audience is similar demographically to the adult population of Gyumri overall. Most (69 percent) of TSAYG's weekly audience is between 25 and 54, and the audience, like the general population, is more than three-fifths female.

- From an educational standpoint, the TSAYG weekly audience is very similar to the adult population of Gyumri overall, perhaps slightly better educated. One in five TSAYG weekly viewers has at least an incomplete higher education, compared to 18 percent of the general population, though this difference is not statistically significant.

- More than four-fifths of the TSAYG weekly audience have difficulty affording both food and clothing.

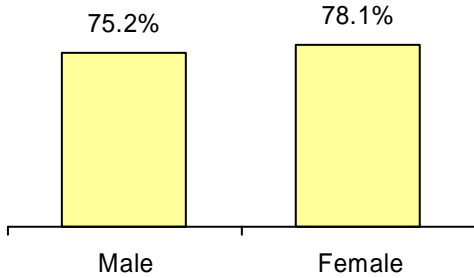
Base: n=406 TSAYG weekly viewers (adults 15 and older) in Gyumri, Armenia

Audience Profiles: TSAYG in Gyumri

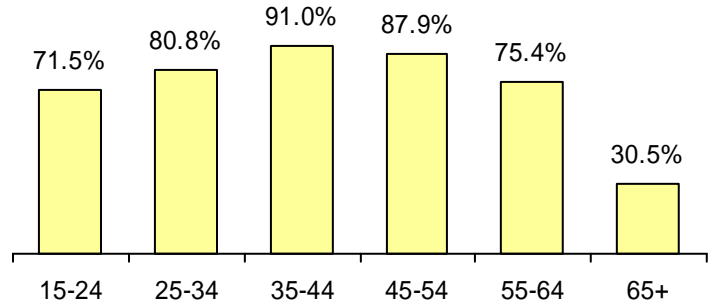
TSAYG Audience in Gyumri, Armenia Weekly Reach Among Demographic Segments

TSAYG weekly reach: 77.0%

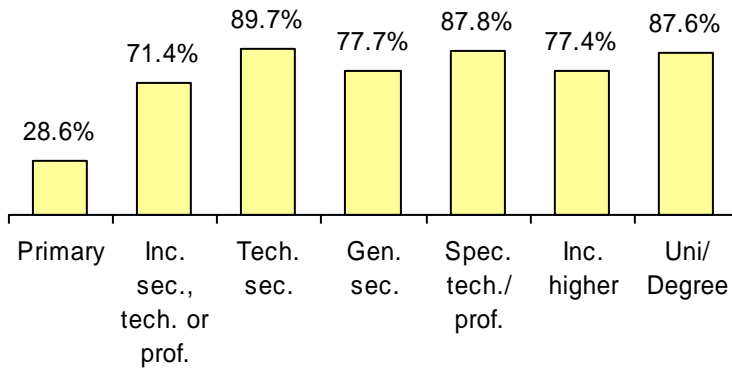
Sex



Age

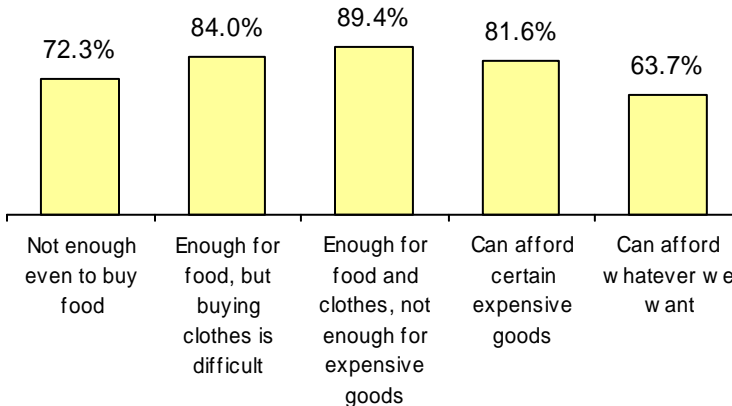


Education



- A very large majority of respondents in nearly all demographic subgroups watched TSAYG in the past week. Weekly reach is slightly higher among females than males, and is much lower among respondents over 65 than it is among other age groups. Reach is more than 80 percent among respondents 25 to 54.
- Weekly reach is lowest among those adults in Gyumri with only a primary education, 28.6 percent of whom watched TSAYG in the past week. Reach among other educational subgroups is between 70 percent and 90 percent, in line with the overall weekly reach figure of 77.0 percent in Gyumri.

Income



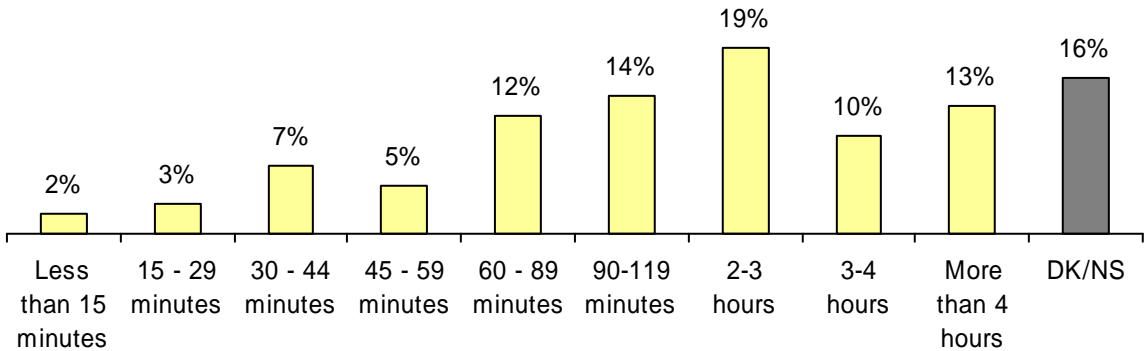
- TSAYG's weekly reach does not vary significantly by income level, though reach is slightly lower among the worst-off respondents in Gyumri.

Base: n=500 (adults 15 and older) in Gyumri, Armenia

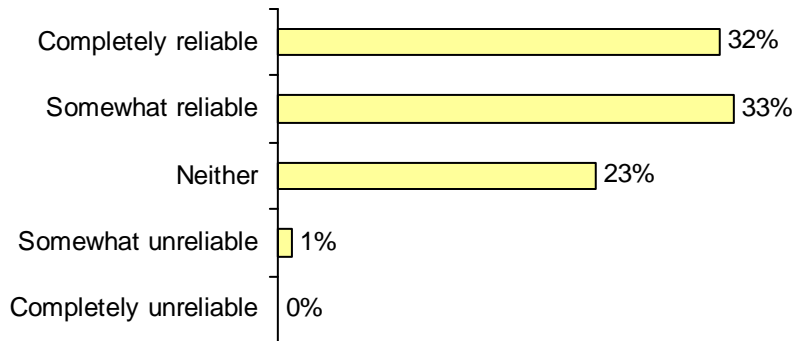
Audience Profiles: TSAYG in Gyumri

TSAYG Audience in Gyumri, Armenia Weekly Audience Listening Behavior

On average, how many minutes or hours per day IN TOTAL do you watch TSAYG ?



How reliable is the news and information on TSAYG?



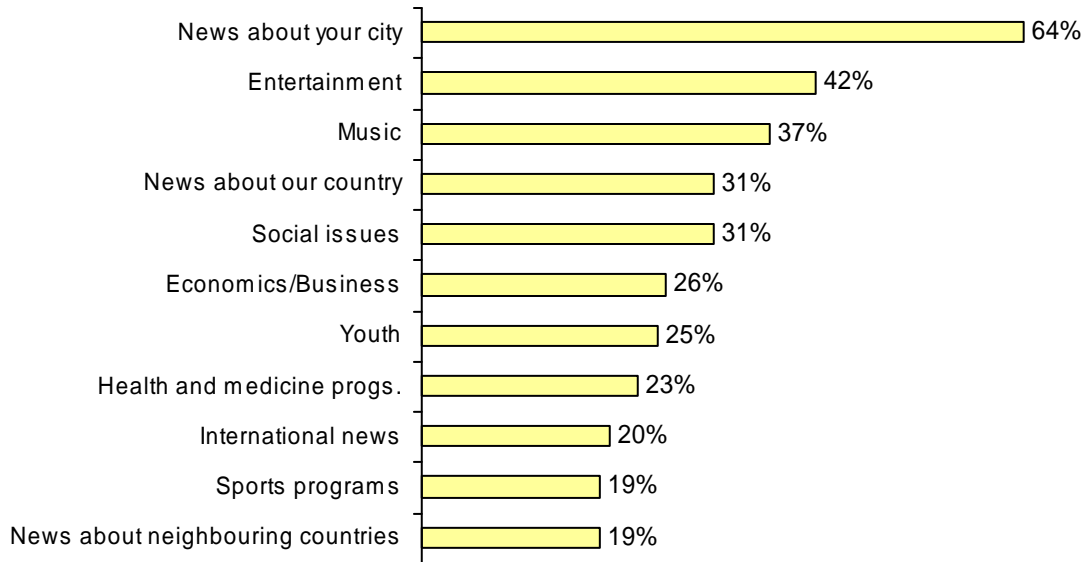
Base: n=406 TSAYG weekly viewers (adults 15 and older) in Gyumri, Armenia

- Only 17 percent of TSAYG weekly viewers said they watch for less than an hour each day, on average. One-quarter watch for between one and two hours, and 42 percent watch for more than two hours a day, including 13 percent who watch more than four hours a day.
- About two-thirds of TSAYG viewers consider its news and information reliable to some degree. Only 1 percent found TSAYG's news and information unreliable.

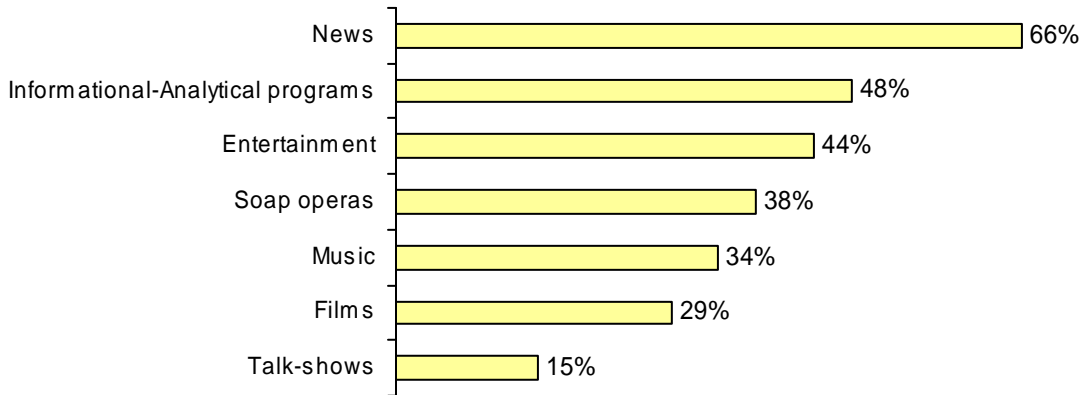
Audience Profiles: TSAYG in Gyumri

TSAYG Audience in Gyumri, Armenia Weekly Audience Attitudes Toward Programming

Which kinds of topics are most important to you?



Which programs or rubrics are important to you?



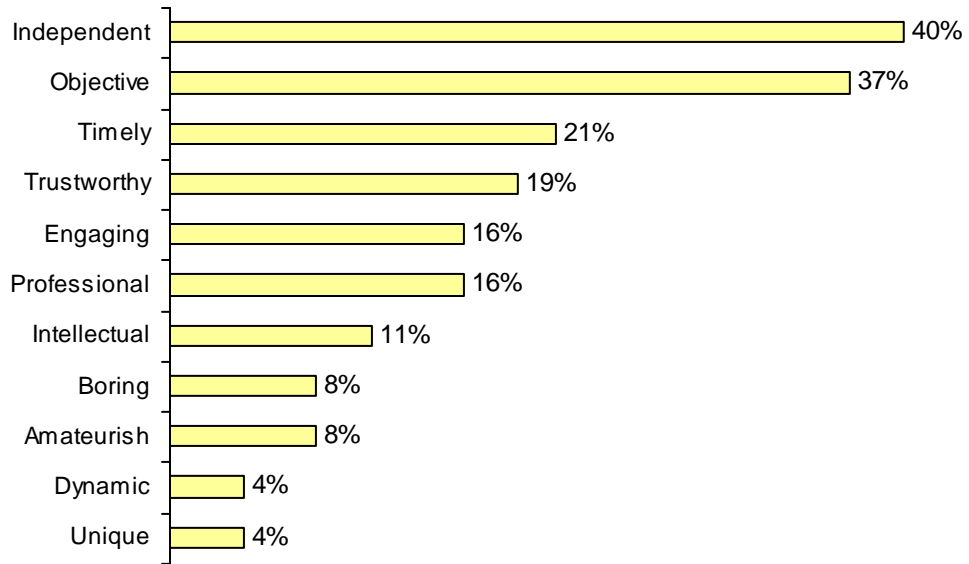
Base: n=406 TSAYG weekly viewers (adults 15 and older) in Gyumri, Armenia

- TSAYG TV's weekly viewers in Gyumri are most interested in local news; 64 percent consider it important. Other important topics include entertainment, music and national news. Regional and international news are considered less important.
- Most weekly viewers consider news programs most important, followed by informational and analytical programs, entertainment, soap operas, and music.

Audience Profiles: TSAYG in Gyumri

TSAYG Audience in Gyumri, Armenia Weekly Audience Attitudes Toward Programming

Which characteristics apply to TSAYG?



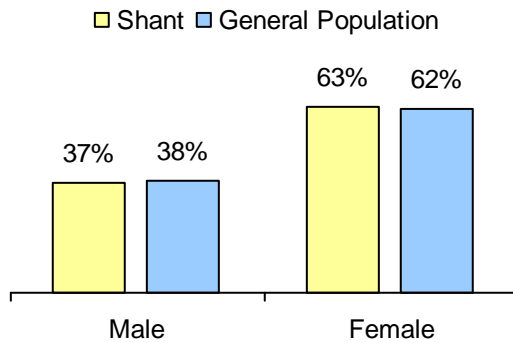
Base: n=406 TSAYG weekly viewers (adults 15 and older) in Gyumri, Armenia

- Weekly viewers most often attributed positive characteristics to TSAYG, like “independent” (40 percent), “objective” (37 percent), “timely” (21 percent), “trustworthy” (19 percent) and “engaging” (16 percent). Only a handful of TSAYG weekly viewers applied negative characteristics, like “boring” and “amateurish” (8 percent each).

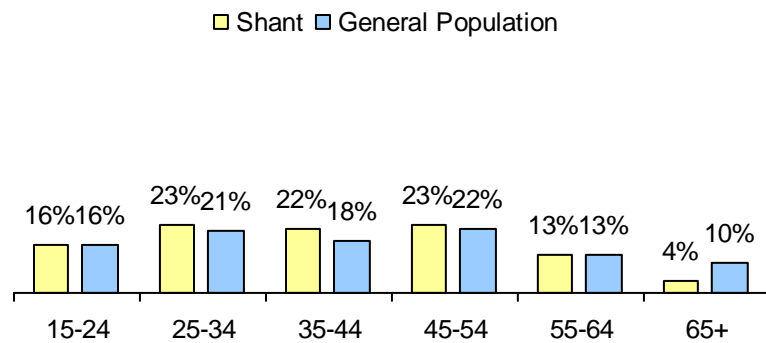
Audience Profiles: Shant in Gyumri

Shant Audience in Gyumri, Armenia Weekly Audience Composition

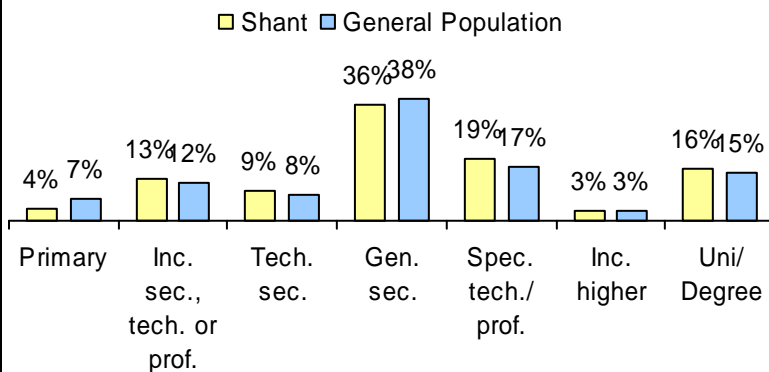
Sex



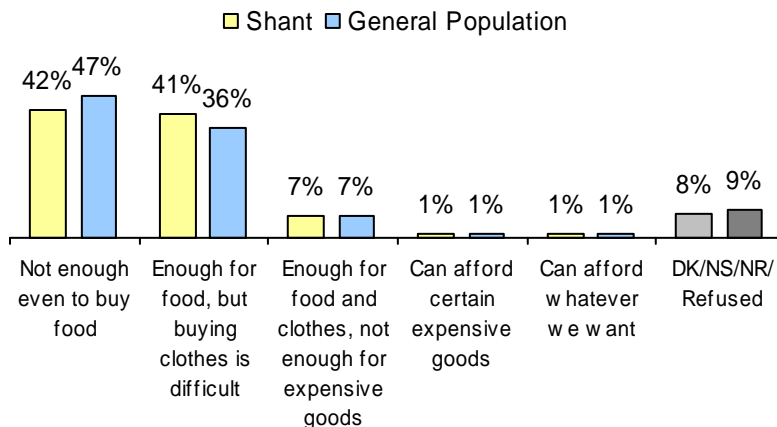
Age



Education



Income



- Shant's weekly audience, like the general population, is about three-fifths female. The weekly audience skews toward the younger age groups: 61 percent of weekly viewers are under 45.
- Shant's weekly audience closely reflects the educational background of the general population in Gyumri: a plurality of 36 percent have a general secondary education.
- As with the TSAYG weekly audience, more than four-fifths of weekly Shant viewers in Gyumri cannot afford both food and clothing.

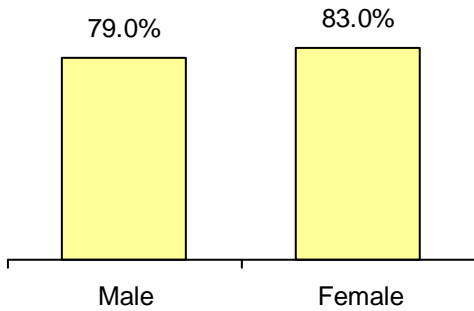
Base: n=428 Shant weekly viewers (adults 15 and older) in Gyumri, Armenia

Audience Profiles: Shant in Gyumri

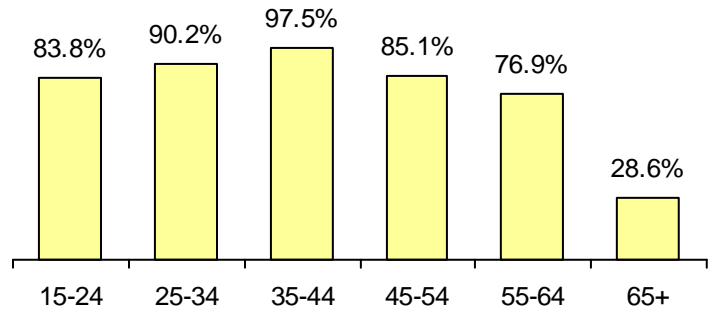
Shant Audience in Gyumri, Armenia Weekly Reach Among Demographic Segments

Shant weekly reach: 81.4%

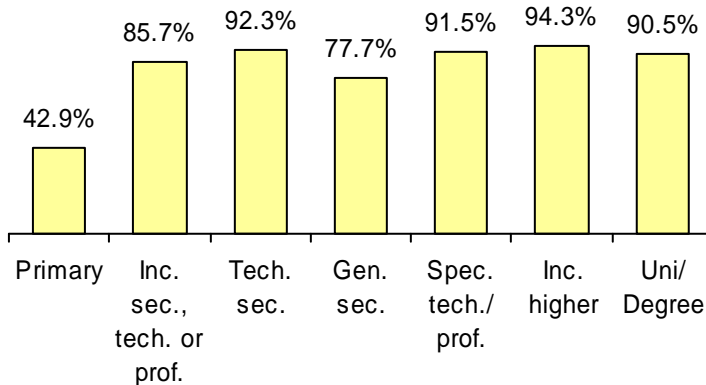
Sex



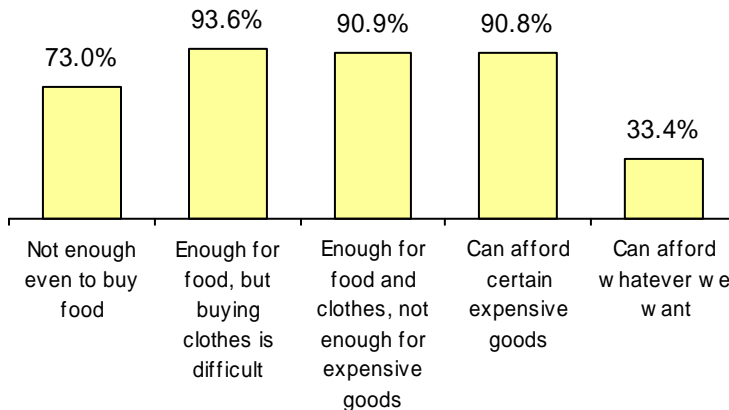
Age



Education



Income



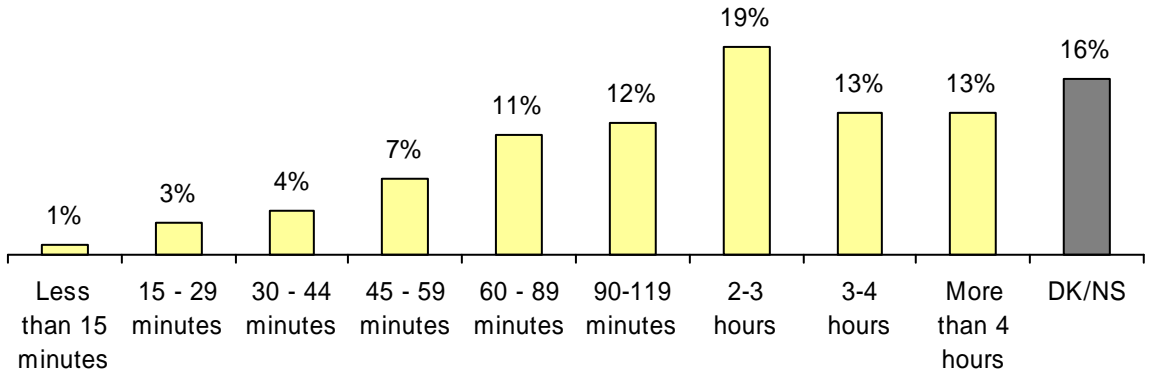
Base: n=500 (adults 15 and older) in Gyumri, Armenia

- Shant’s weekly reach is roughly even among males and females in Gyumri, and is higher among those respondents 15 to 45 than it is among older respondents. Weekly reach falls to 76.9 percent among those 55 to 64, and below 30 percent for those over 65.
- By educational group, weekly reach is lowest (42.9 percent) among respondents with only a primary education, and highest (94.3 percent) among respondents with an incomplete higher education, suggesting the station might be most popular among students or highly educated adults.
- Weekly reach of Shant is similar across most income groups. Although the best-off respondents in Gyumri—those who can afford whatever they want—appear to watch in lower numbers, this subgroup comprises only 1 percent of the total sample, so this figure should be viewed with caution.

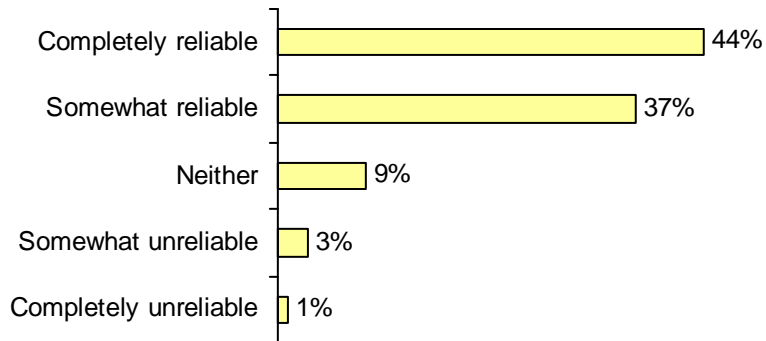
Audience Profiles: Shant in Gyumri

Shant Audience in Gyumri, Armenia Weekly Audience Listening Behavior

On average, how many minutes or hours per day IN TOTAL do you watch Shant ?



How reliable is the news and information on Shant ?



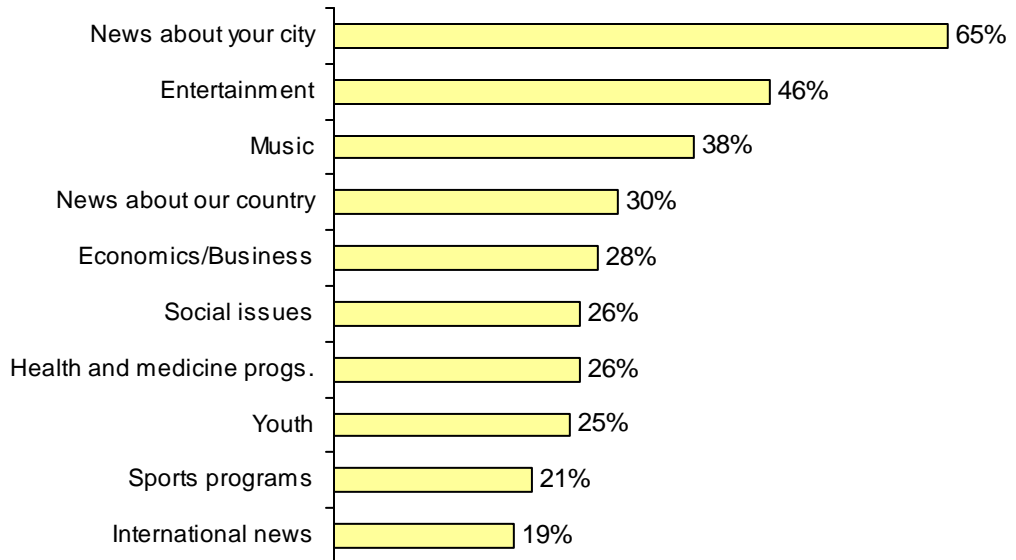
Base: n=428 Shant weekly viewers (adults 15 and older) in Gyumri, Armenia

- Only 15 percent of weekly viewers watch Shant for less than an hour a day, on average, compared to 45 percent who watch for two or more hours a day.
- Four out of five weekly viewers consider Shant's news and information reliable to some degree.

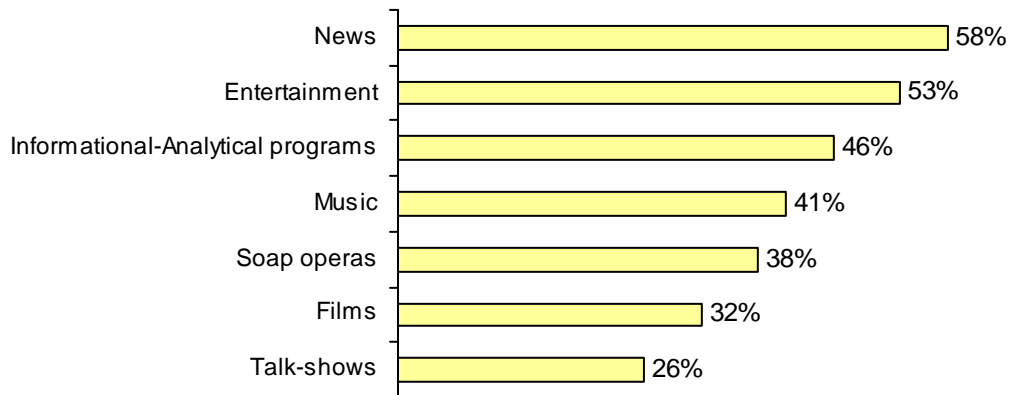
Audience Profiles: Shant in Gyumri

Shant Audience in Gyumri, Armenia Weekly Audience Attitudes Toward Programming

Which kinds of topics are most important to you?



Which programs or rubrics are important to you?



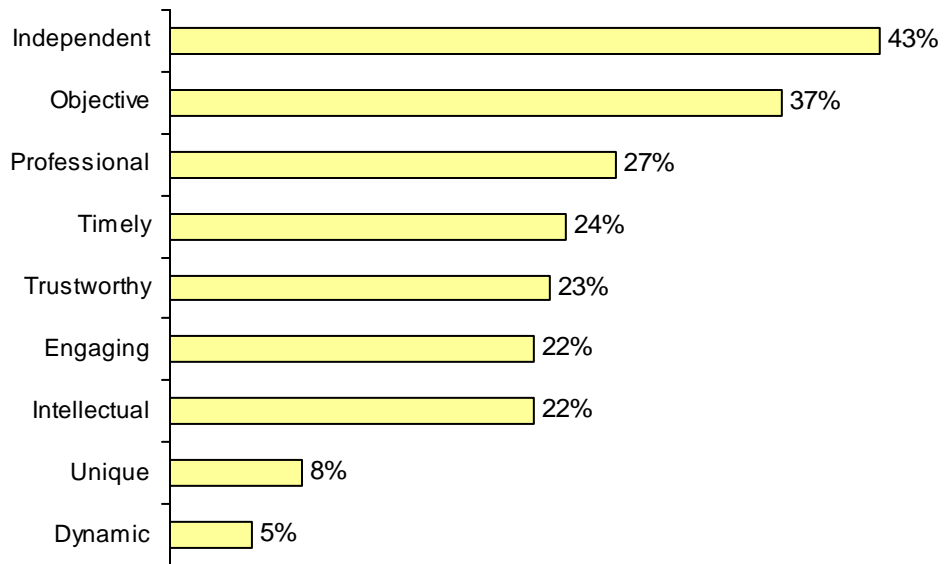
Base: n=428 Shant weekly viewers (adults 15 and older) in Gyumri, Armenia

- News programs, especially local news, are most important to Shant's weekly audience. Weekly viewers also value entertainment and music programming.
- Weekly viewers deem topics like social issues, health and medicine, youth, sports, and international news least important.

Audience Profiles: Shant in Gyumri

Shant Audience in Gyumri, Armenia Weekly Audience Attitudes Toward Programming

Which characteristics apply to Shant?

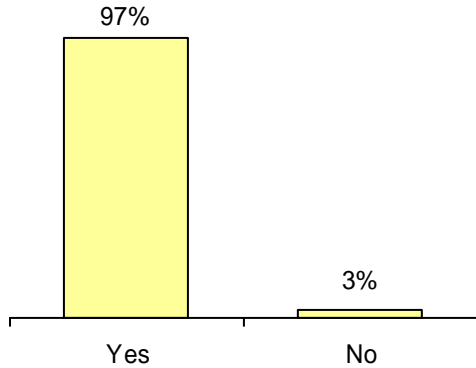


Base: n=428 Shant weekly viewers (adults 15 and older) in Gyumri, Armenia

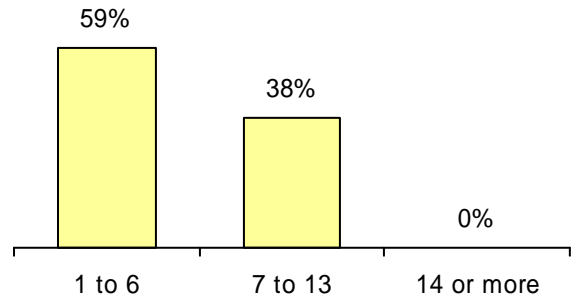
- Weekly viewers in Gyumri applied a number of positive characteristics to Shant, including “independent” (43 percent), “objective” (37 percent) and “professional” (27 percent).

TV: Penetration and Use: Vanadzor

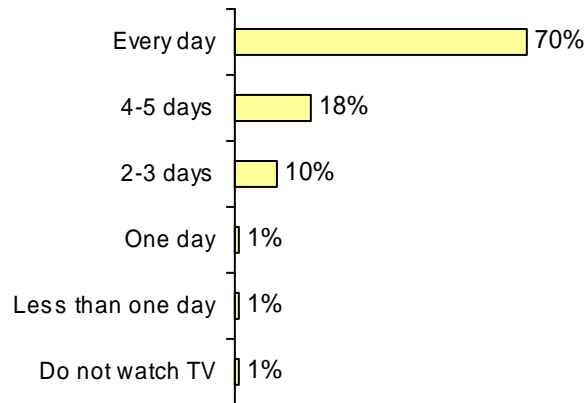
Ownership



Number of Channels Available



Weekly TV Viewing Frequency

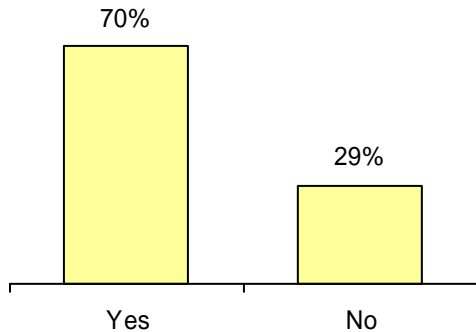


Base: n=500 (adults 15 and older) in Vanadzor, Armenia

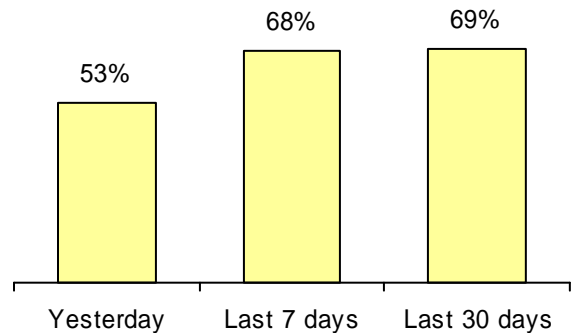
- Nearly all adults in Vanadzor own a TV, and seven in 10 watch every day. Another 18 percent watch most days each week.
- Nearly all respondents surveyed receive less than 14 channels, including about three in five who receive six channels or less.

TV: Advertising: Vanadzor

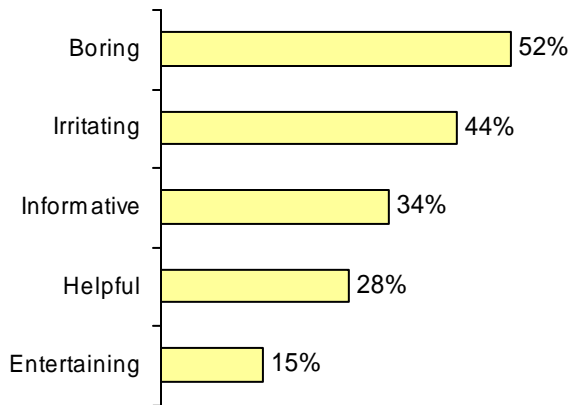
Watch ads on TV?



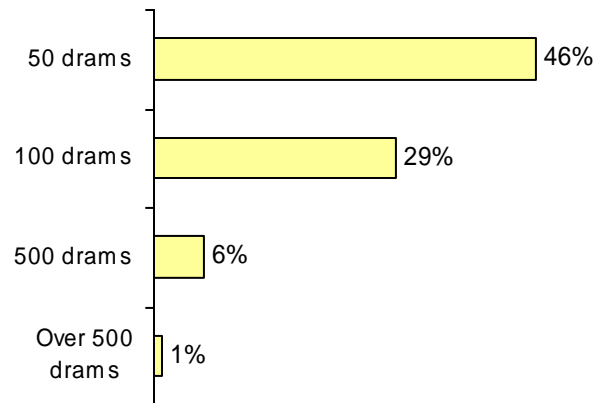
When last saw ads on TV?



How do you feel about ads?



How much would you pay for a one-minute greeting on TV?

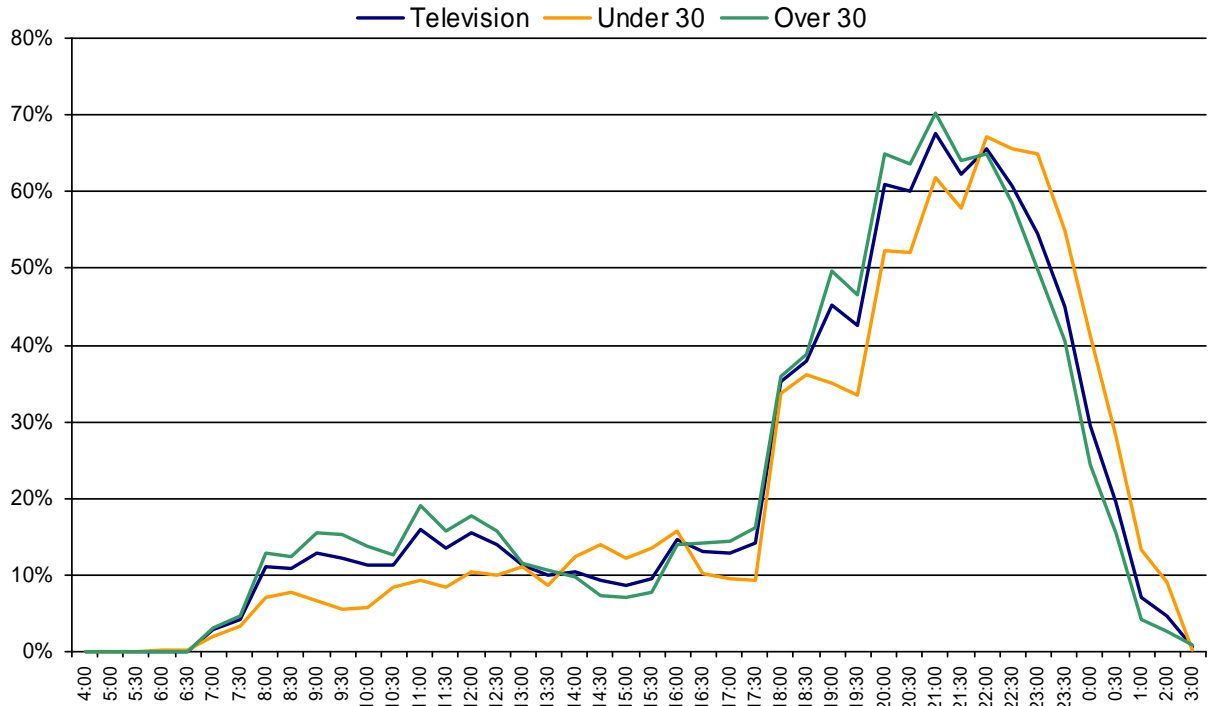


Base: n=500 (adults 15 and older) in Vanadzor, Armenia

- Seven in 10 adults in Vanadzor said they watch advertisements on TV, and more than half (53 percent) said they had seen advertisements on TV the previous day.
- Respondents more often consider advertisements “boring” or “irritating” than “informative,” “helpful” or “entertaining.”
- Based on respondents’ perceptions, the going rate for a one-minute greeting in Vanadzor should be between 50 drams and 100 drams.

Media Use: Listening/Viewing Times: Vanadzor

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

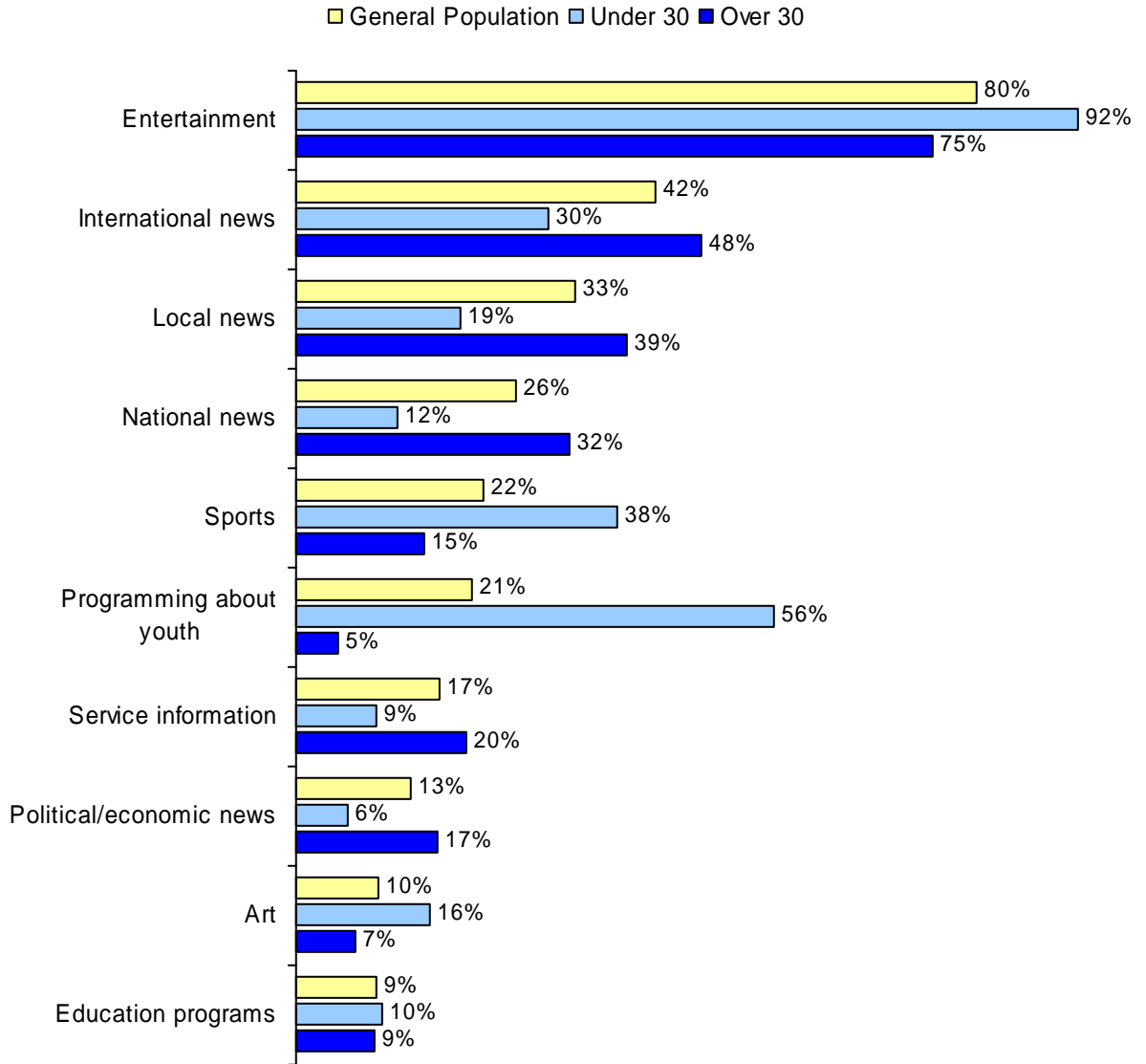


Base: n=500 (adults 15 and older) in Vanadzor, Armenia

- Adults in Vanadzor mainly watch TV in the late evening; viewing peaks at 21:00, when 68 percent of respondents watched TV “yesterday.” More than half were watching at any given time between 20:00 and 23:30.
- In Vanadzor, evening viewing is more common among respondents over 30, especially from 18:00 until 22:00. After 22:00, however, respondents under 30 watch in higher numbers into the late-night and early morning hours, as late as 02:00.
- TV viewing has a small morning/afternoon plateau between 08:00 and 13:00, when more than 10 percent of adults are watching. The morning peak is at 11:00, when 16 percent of respondents watched “yesterday.” Morning viewing is much more common among respondents over 30, but respondents under 30 watch in higher numbers between 14:00 and 16:00, presumably when many get home from school.

Media Use: Program Importance: Vanadzor

Kinds of programming important when watching TV

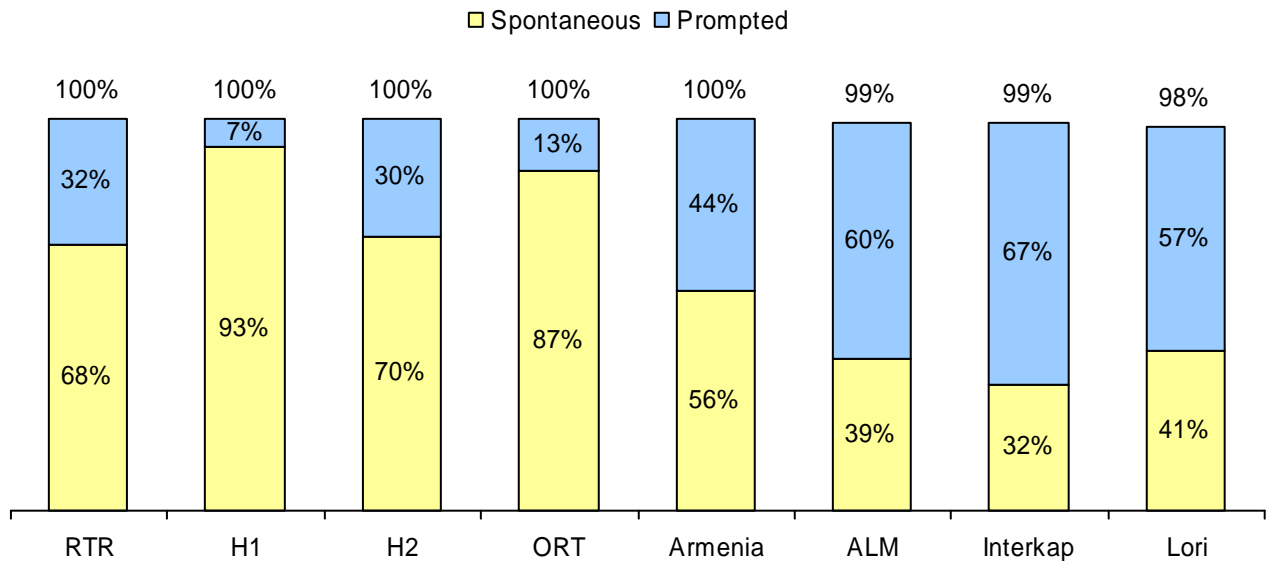


Base: n=500 (adults 15 and older) in Vanadzor, Armenia

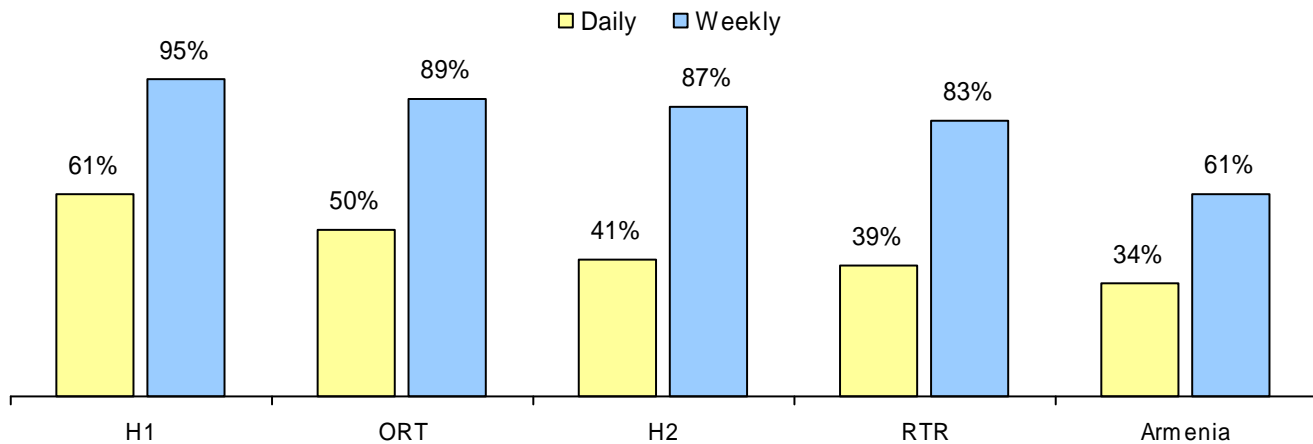
- Entertainment programming is clearly the most important to these respondents, four-fifths of whom mentioned it—nearly twice as many as mentioned international news. Local, national and international news is also important to participants. Respondents under 30 consider youth programming and sports programming much more important than do respondents over 30.

Media Use: Local TV Stations: Vanadzor

Awareness of TV Stations



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



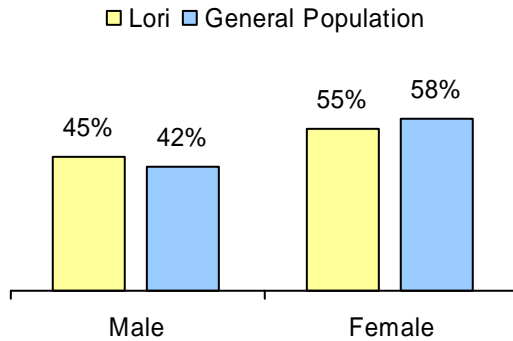
Base: n=500 (adults 15 and older) in Vanadzor, Armenia

- Nearly all respondents in Vanadzor are aware of the TV stations about which they were asked. Stations such as Lori, ALM and Interkap, however, had much lower spontaneous awareness rates; more often, they recalled the station after prompting.
- H1 is the most popular TV station in Vanadzor for news about current events, used by 95 percent of respondents weekly. ORT, H2 and RTR all register between 80 percent and 90 percent weekly use for news. Armenia, the fifth most popular station for news, is used by three in five adults weekly.

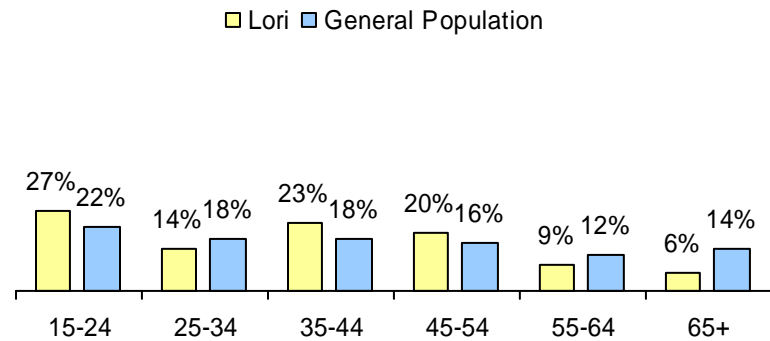
Audience Profiles: Lori in Vanadzor

Lori Audience in Vanadzor, Armenia Weekly Audience Composition

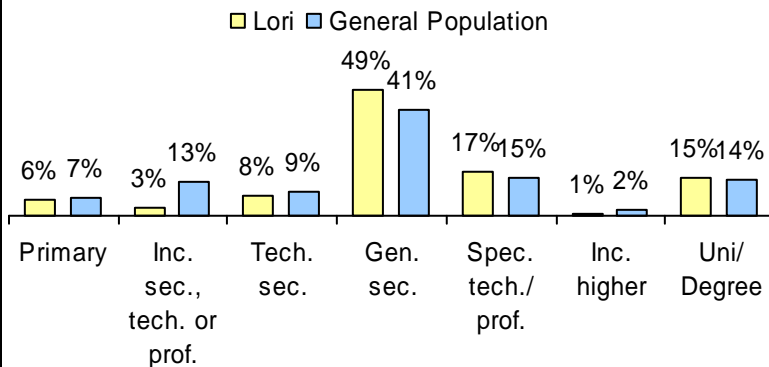
Sex



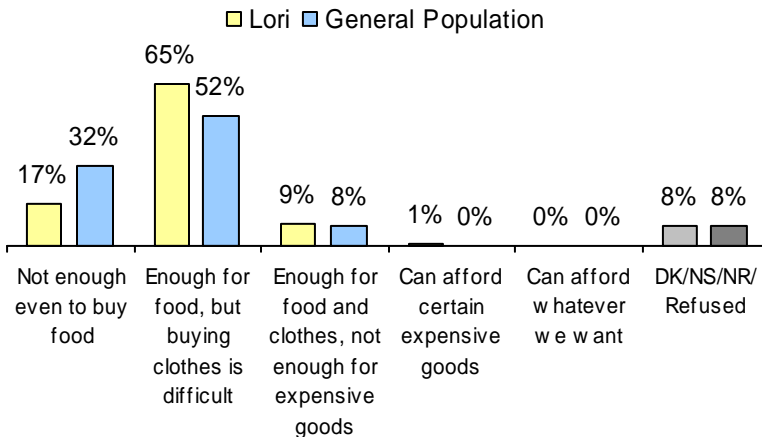
Age



Education



Income



- The Lori weekly audience is slightly more female than male, and more than one-quarter of weekly viewers are between 15 and 24. Only 15 percent of the weekly audience is 55 or older, compared to 26 percent of the general population in that age group.
- The Lori weekly audience generally reflects the educational makeup of the adult population of Vanadzor as a whole, except for the incomplete secondary education subgroup.
- The Lori weekly audience is slightly better off financially than is the general population of Vanadzor. Only 17 percent of weekly viewers have difficulty affording food, about half the proportion of the general population in this income group.

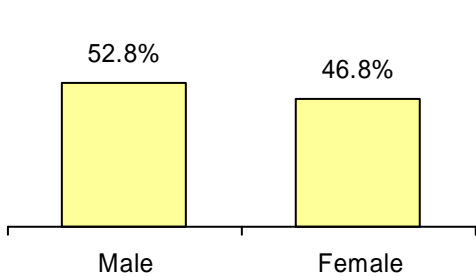
Base: n=251 Lori weekly viewers (adults 15 and older) in Vanadzor, Armenia

Audience Profiles: Lori in Vanadzor

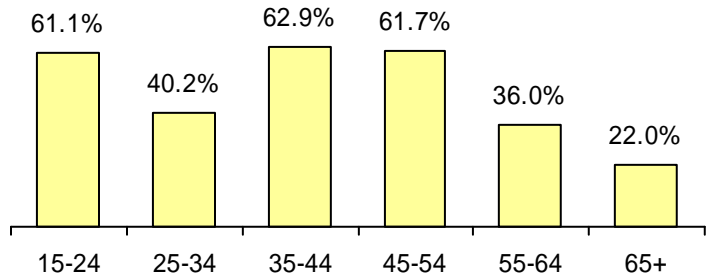
Lori Audience in Vanadzor, Armenia Weekly Reach Among Demographic Segments

Lori weekly reach: 49.3%

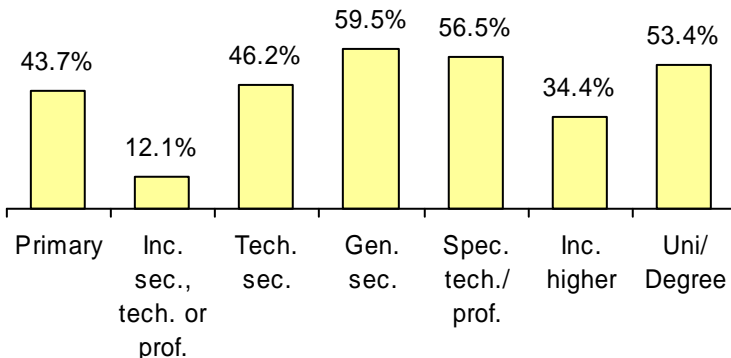
Sex



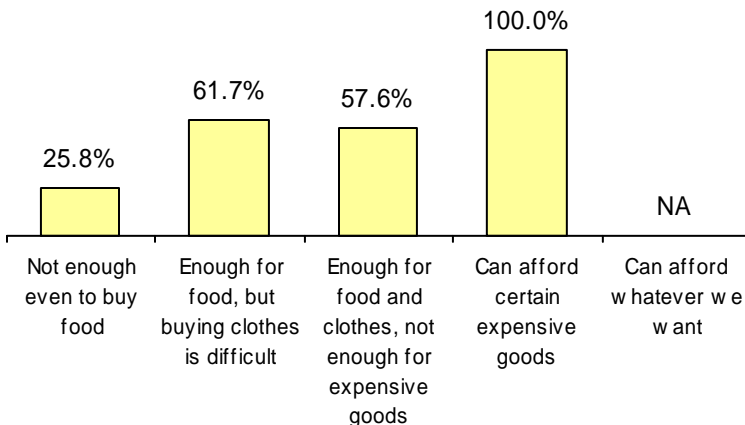
Age



Education



Income



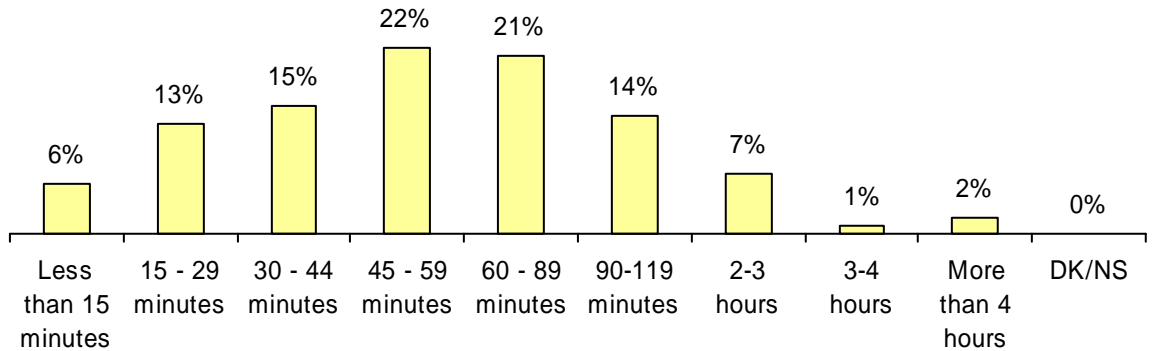
- Lori weekly reach is slightly higher among males than among females. About three in five respondents 15 to 24, 35 to 44 and 45 to 54 watched Lori in the past week, but reach was significantly lower among those 25 to 34, and those 55 and over.
- Among educational subgroups, reach is quite low among respondents with an incomplete secondary education, and is highest among those with a general secondary or specialized technical education.
- Lori has the highest weekly reach among respondents who can at least afford food. The figures for reach among respondents who can afford certain expensive goods was based on an extremely small sample, and there are no respondents in the sample who said they can afford whatever they want.

Base: n=500 (adults 15 and older) in Vanadzor, Armenia

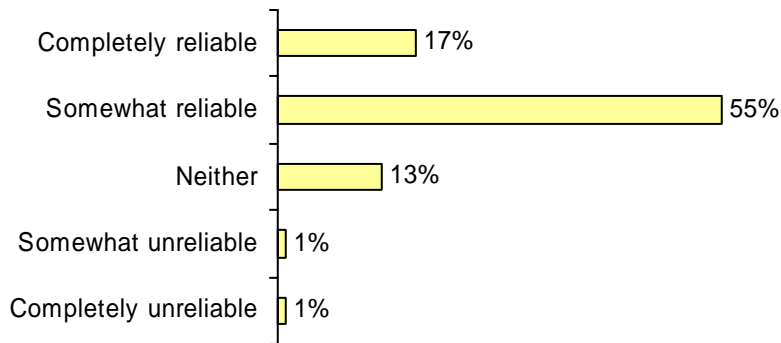
Audience Profiles: Lori in Vanadzor

Lori Audience in Vanadzor, Armenia Weekly Audience Listening Behavior

On average, how many minutes or hours per day IN TOTAL do you watch Lori ?



How reliable is the news and information on Lori?



Base: n=251 Lori weekly viewers (adults 15 and older) in Vanadzor, Armenia

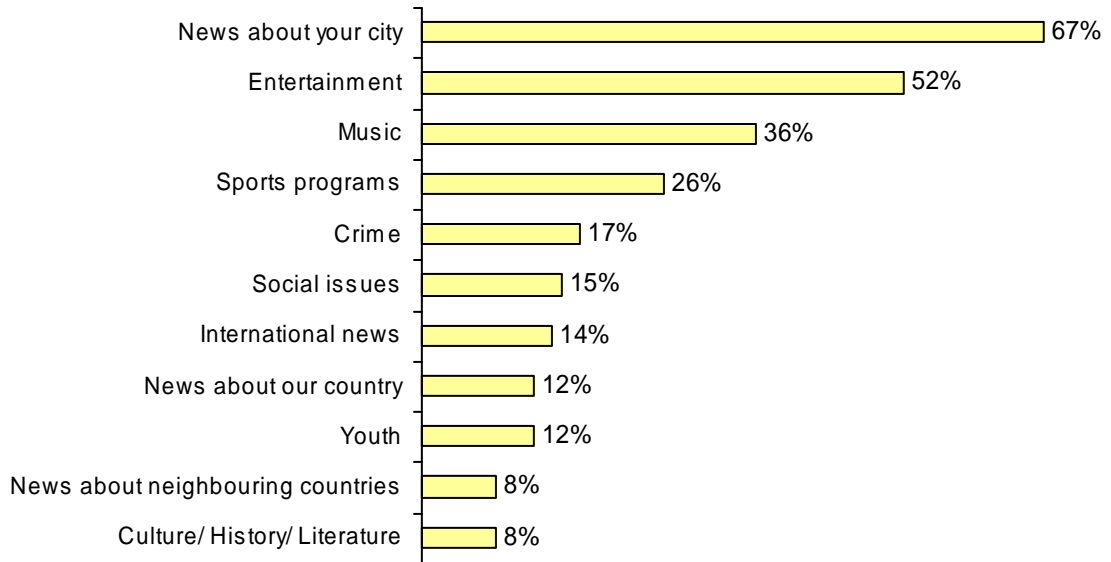
- Most Lori weekly viewers (56 percent) watch for less than an hour a day, on average. Another 35 percent watch for between one and two hours; only 10 percent watch for more than two hours a day.
- Although 72 percent of weekly viewers consider Lori reliable to some degree, only 17 percent of these viewers consider it “completely” reliable.

Audience Profiles: Lori in Vanadzor

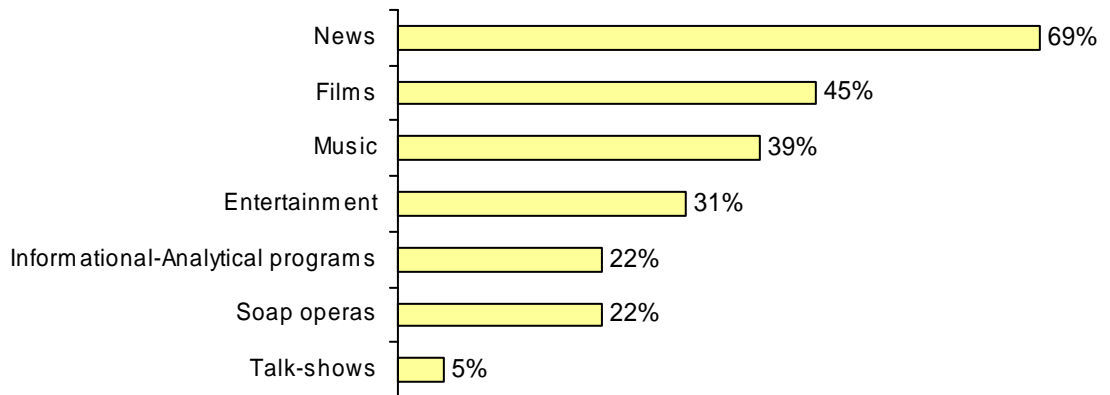
Lori Audience in Vanadzor, Armenia

Weekly Audience Attitudes Toward Programming

Which kinds of topics are most important to you?



Which programs or rubrics are important to you?



Base: n=251 Lori weekly viewers (adults 15 and older) in Vanadzor, Armenia

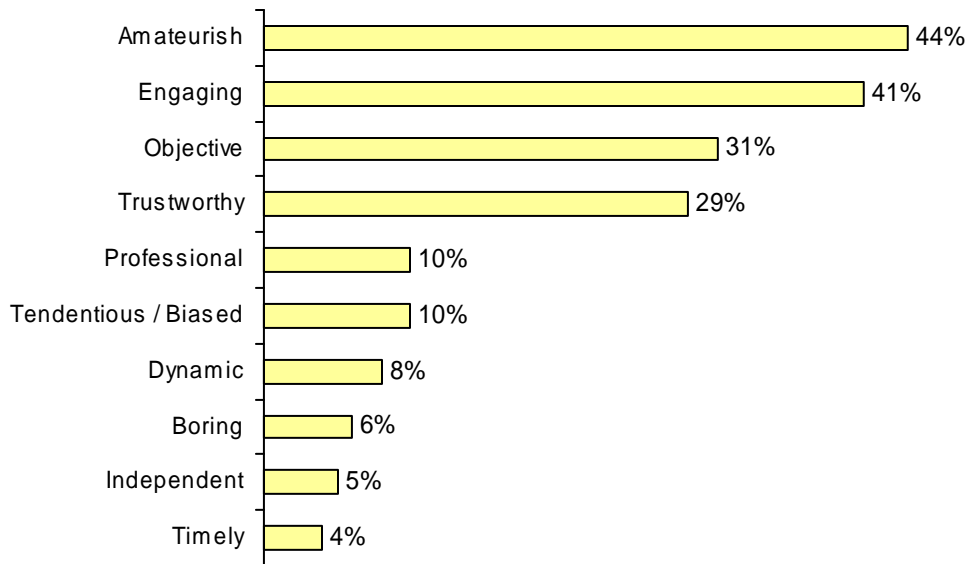
- Local news is the most important topic, mentioned by 67 percent of weekly Lori viewers, followed by entertainment (52 percent), music (36 percent) and sports (26 percent).
- Most weekly viewers consider news programming important. Large minorities feel films and music programs are important.

Audience Profiles: Lori in Vanadzor

Lori Audience in Vanadzor, Armenia

Weekly Audience Attitudes Toward Programming

Which characteristics apply to Lori?



Base: n=251 Lori weekly viewers (adults 15 and older) in Vanadzor, Armenia

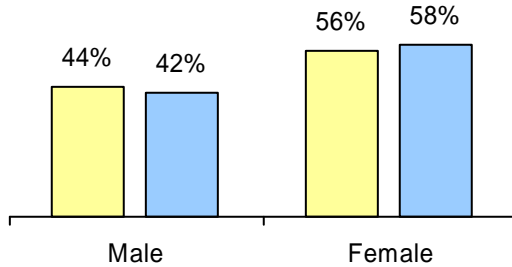
- The most common characteristic applied to Lori is “amateurish,” mentioned by 44 percent of weekly viewers, compared to 10 percent who claim it is “professional.”
- Positive characteristics some weekly viewers applied to Lori include “engaging” (41 percent), “objective” (31 percent) and “trustworthy” (29 percent). A small but notable number consider Lori “tendentious” or “biased” (10 percent).

Audience Profiles: Interkap in Vanadzor

Interkap Audience in Vanadzor, Armenia Weekly Audience Composition

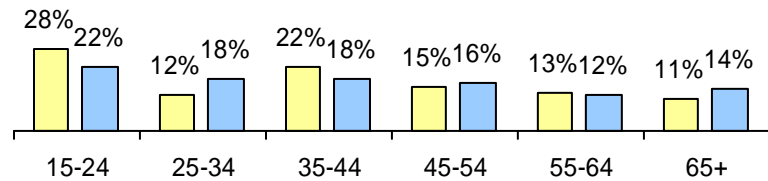
Sex

■ Interkap ■ General Population



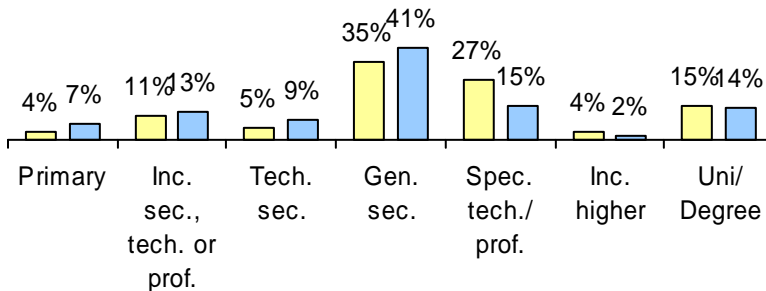
Age

■ Interkap ■ General Population



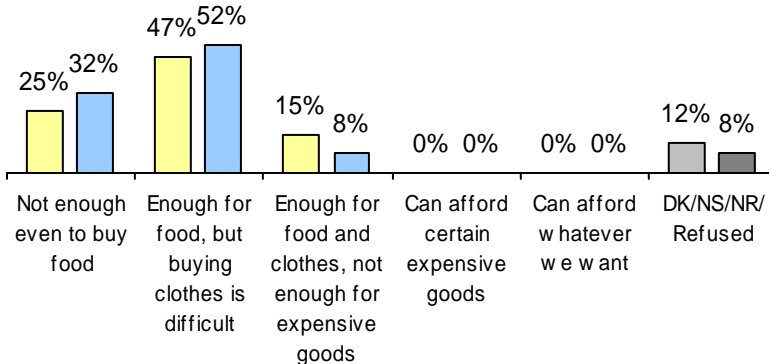
Education

■ Interkap ■ General Population



Income

■ Interkap ■ General Population



Base: n=125 Interkap weekly viewers (adults 15 and older) in Vanadzor, Armenia

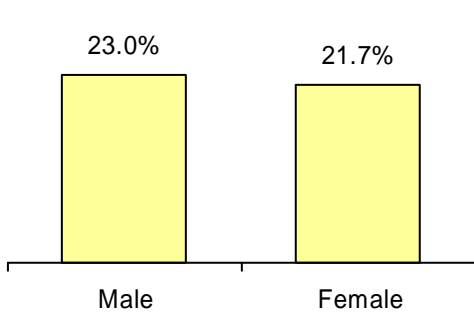
- The weekly Interkap audience in Vanadzor closely mirrors the general population by gender, and by age among those 35 and older. However, 28 percent of the weekly audience is 15 to 24, compared to only 12 percent between 25 and 34.
- The educational breakdown of the weekly Interkap audience is similar to that of the general population in Vanadzor, though the Interkap audience has nearly twice as many adults who attended a specialized technical or professional school.
- The Interkap audience is similar to the general population of Vanadzor from an income standpoint: About three-quarters have difficulty affording both food and clothing.

Audience Profiles: Interkap in Vanadzor

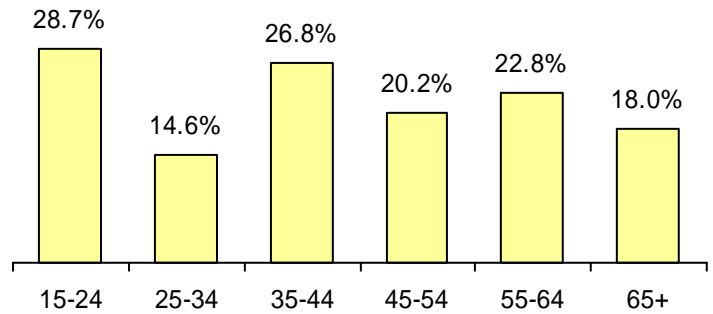
Interkap Audience in Vanadzor, Armenia Weekly Reach Among Demographic Segments

Interkap weekly reach: 22.2%

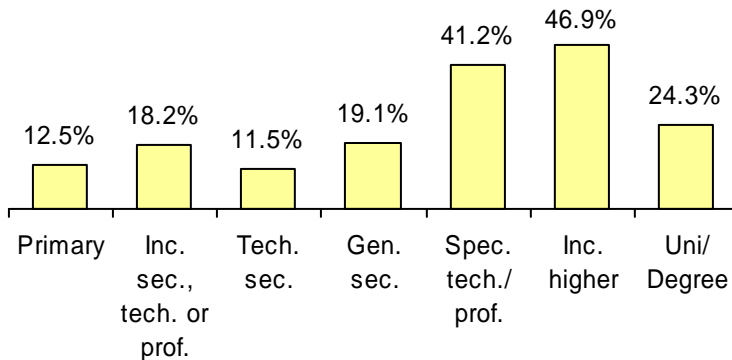
Sex



Age

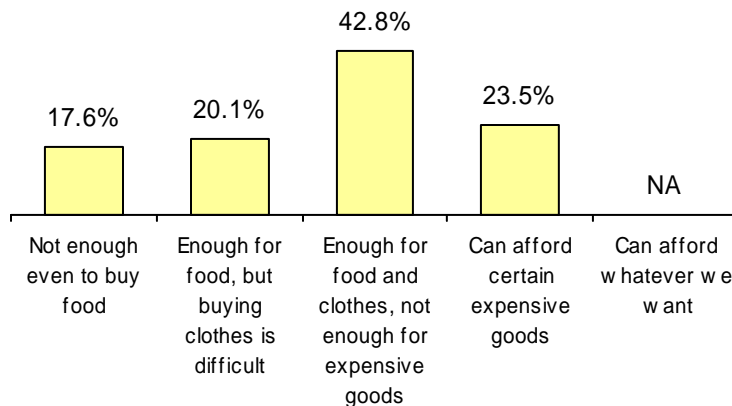


Education



- Weekly reach among males and females is nearly identical.
- More than 20 percent of respondents in every age group, except those 25 to 34 and those 65 or older, watched Interkap in the past week.
- Weekly reach is highest among the better educated, and is particularly high among respondents with an incomplete higher education, many of whom are university students.

Income



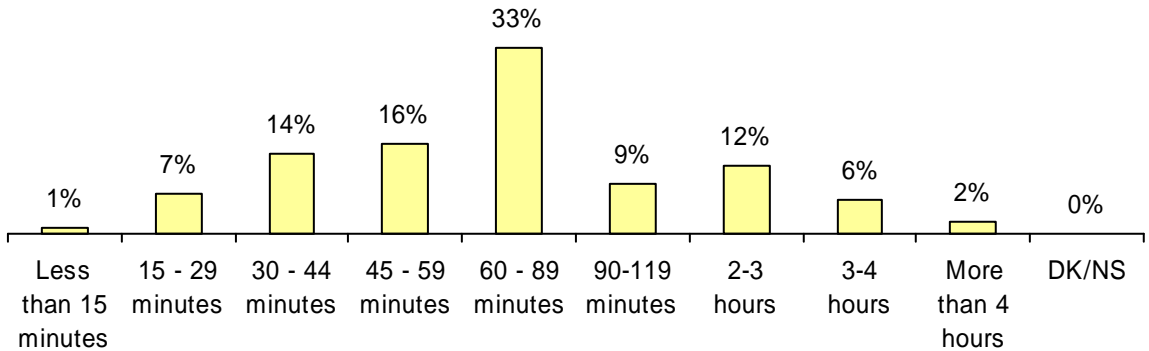
- Based on income, weekly reach is highest among those who can afford food and clothes but not expensive goods—about four in 10 of whom watched Interkap in the past week.

Base: n=500 (adults 15 and older) in Vanadzor, Armenia

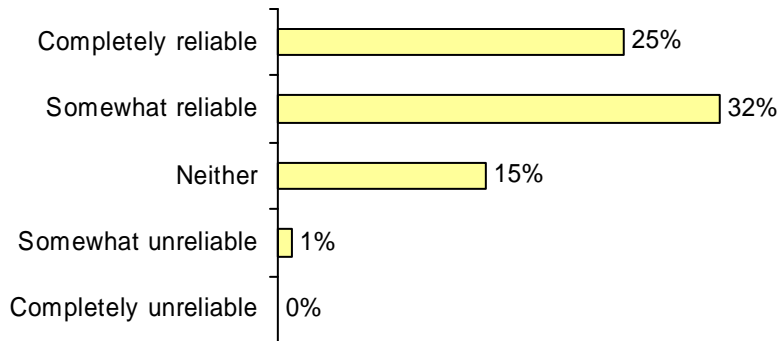
Audience Profiles: Interkap in Vanadzor

Interkap Audience in Vanadzor, Armenia Weekly Audience Listening Behavior

On average, how many minutes or hours per day IN TOTAL do you watch Interkap ?



How reliable is the news and information on Interkap ?



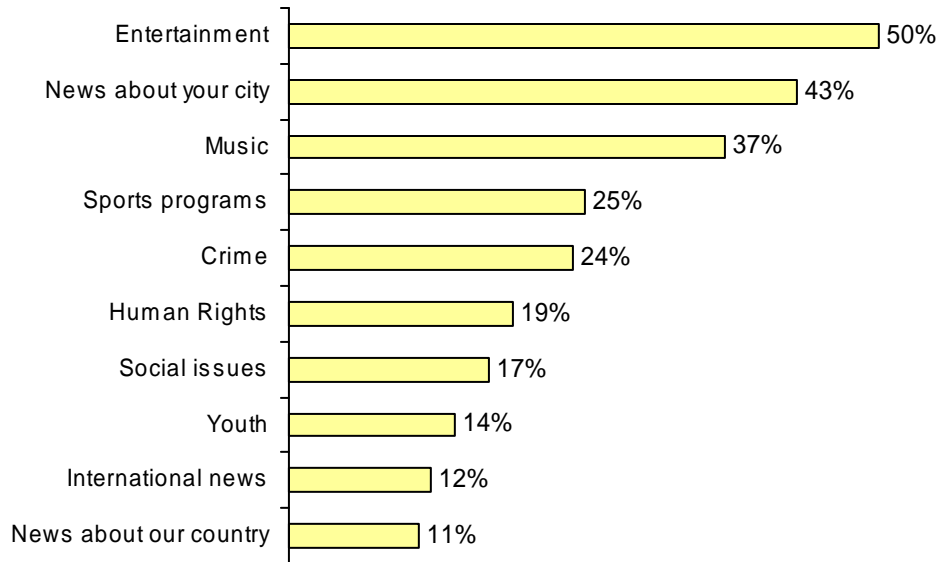
Base: n=125 Interkap weekly viewers (adults 15 and older) in Vanadzor, Armenia

- A plurality (33 percent) of weekly viewers said they watch Interkap for between 60 minutes and 89 minutes a day, on average. One-fifth of weekly viewers watch for more than two hours a day, compared to 38 percent who watch for less than an hour.
- Most weekly viewers (57 percent) consider the news and information on Interkap reliable to some degree, compared to only 1 percent who consider Interkap's news unreliable.

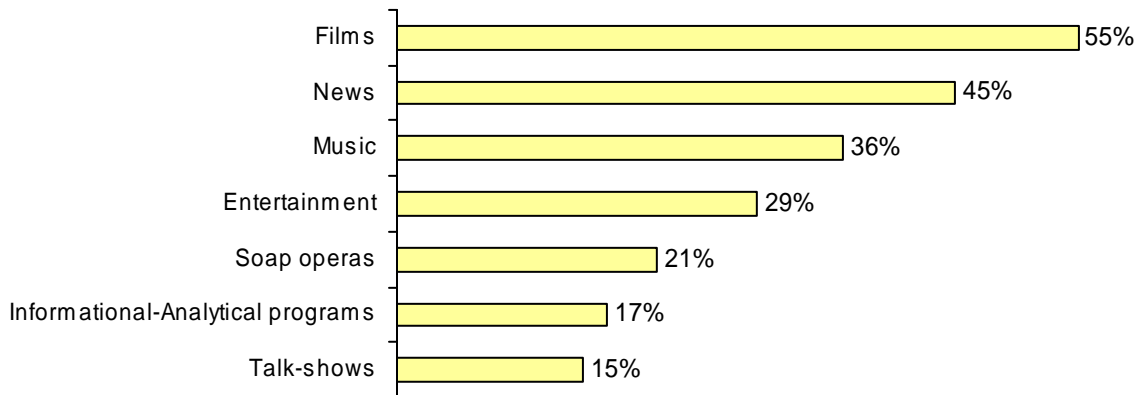
Audience Profiles: Interkap in Vanadzor

Interkap Audience in Vanadzor, Armenia Weekly Audience Attitudes Toward Programming

Which kinds of topics are most important to you?



Which programs or rubrics are important to you?



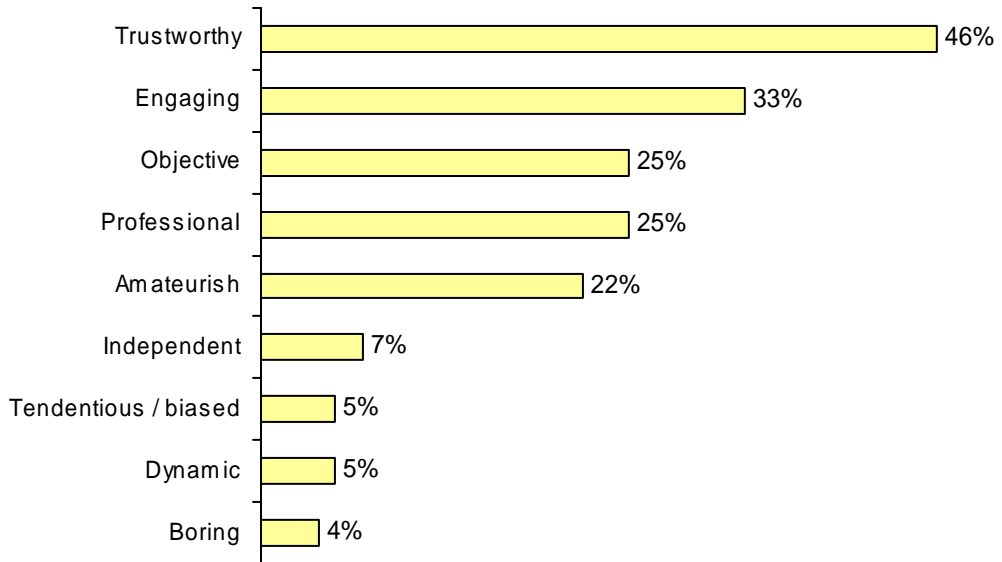
Base: n=125 Interkap weekly viewers (adults 15 and older) in Vanadzor, Armenia

- Weekly Interkap viewers in Vanadzor consider entertainment, local news and music the most important topics. International news and national news were mentioned much less often, by about one in 10 weekly viewers. More than half of weekly viewers (55 percent) consider films important, followed by news (45 percent) and music programming (36 percent).

Audience Profiles: Interkap in Vanadzor

Interkap Audience in Vanadzor, Armenia Weekly Audience Attitudes Toward Programming

Which characteristics apply to Interkap?

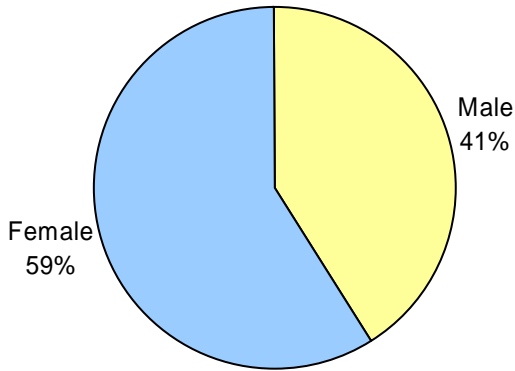


Base: n=125 Interkap weekly viewers (adults 15 and older) in Vanadzor, Armenia

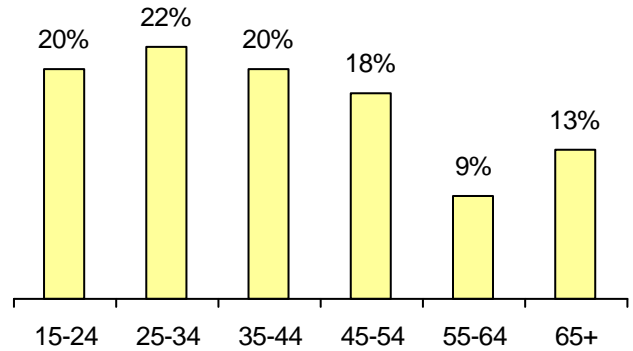
- “Trustworthy” and “engaging” are the characteristics weekly viewers apply most commonly to Interkap. However, the weekly audience seemed unable to decide whether the station is “professional” (mentioned by 25 percent of viewers) or “amateurish” (22 percent).

Appendix I: Yerevan Demographics

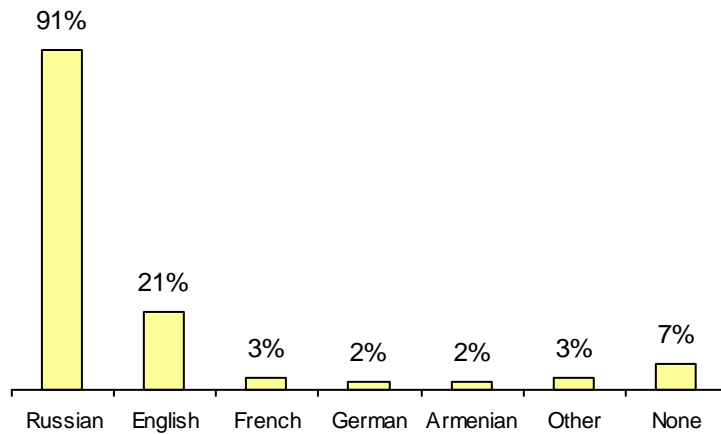
Sex



Age



Foreign Language Knowledge

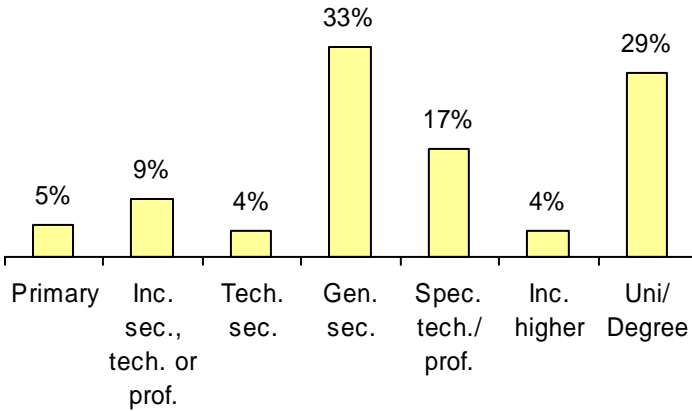


Base: n=500 (adults 15 and older) in Yerevan, Armenia

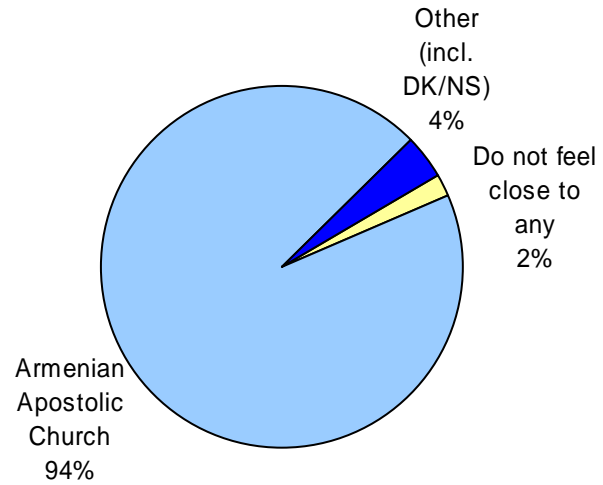
- About three in five respondents in Yerevan are female. Younger respondents (under 45) make up 62 percent of the population.
- More than nine in ten respondents can speak Russian, and 21 percent claim knowledge of English, more than in the other two cities.

Appendix I: Yerevan Demographics

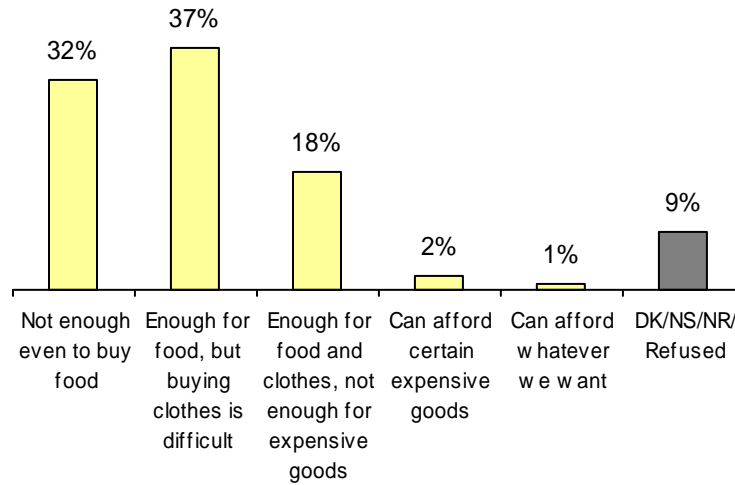
Education



Religion



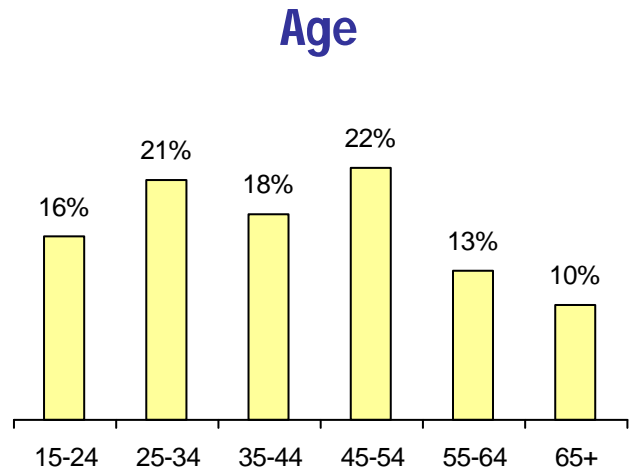
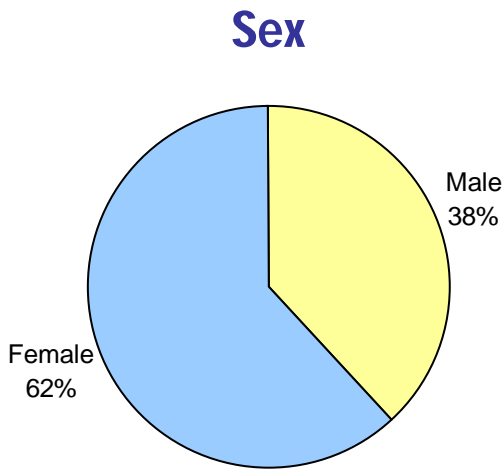
Income



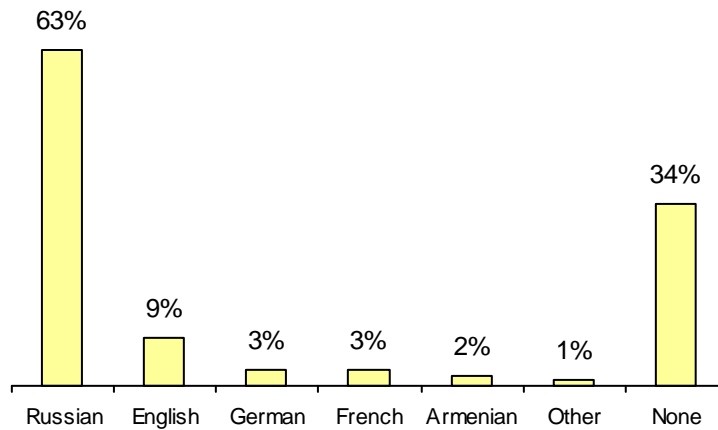
Base: n=500 (adults 15 and older) in Yerevan, Armenia

- One-third of respondents in Yerevan have a general secondary education, and another 29 percent have a college degree.
- Nearly all adults in Yerevan belong to the Armenian Apostolic Church.
- Most adults in Yerevan (69 percent) have a difficult time affording both food and clothing. However, these were the lowest figures for the poorest two income groups among the three cities, making respondents in Yerevan relatively better off than those in Gyumri or Vanadzor.

Appendix II: Gyumri Demographics



Foreign Language Knowledge

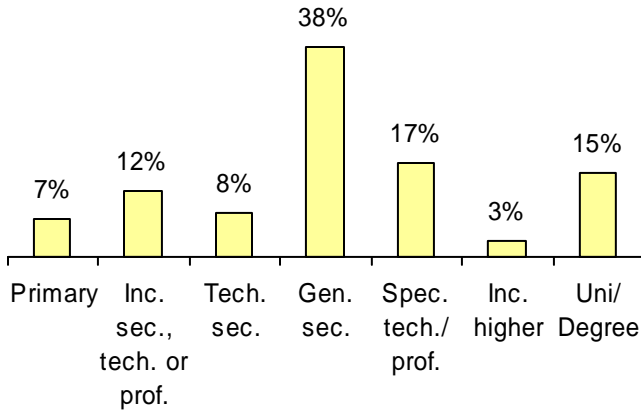


Base: n=500 (adults 15 and older) in Gyumri, Armenia

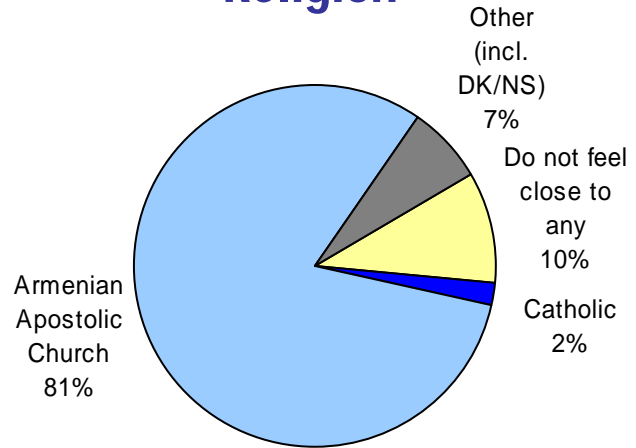
- The adult population of Gyumri is more than three-fifths female, due in part to the large number of males who leave to find work outside Armenia.
- The sample was fairly evenly distributed by age, with 37 percent under 35, 40 percent between 35 and 54, and 23 percent 55 and older.
- If respondents are able to speak a foreign language (one-third do not speak a foreign language), it is most likely Russian: about two-thirds know Russian. Nearly one in 10 adults in Gyumri claims to speak some English.

Appendix II: Gyumri Demographics

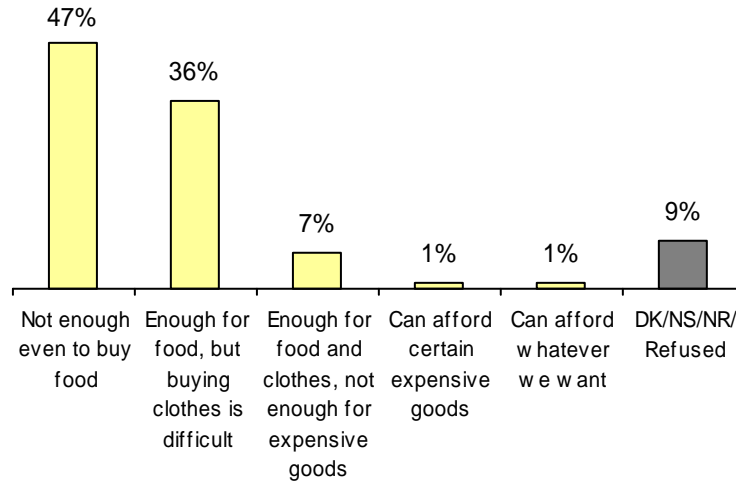
Education



Religion



Income

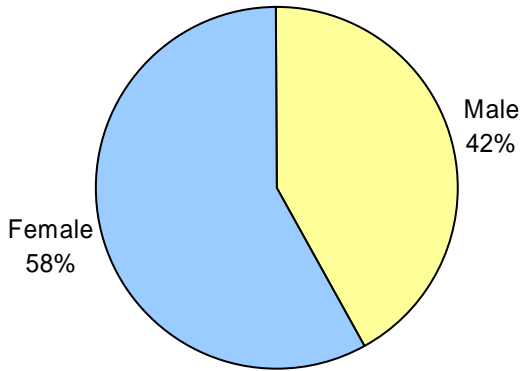


Base: n=500 (adults 15 and older) in Gyumri, Armenia

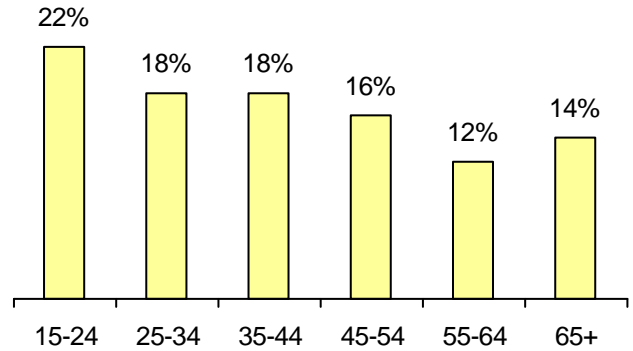
- A plurality of respondents have a complete general secondary education. A small number (15 percent) of adults in Gyumri have a college degree.
- More than four in five respondents identify themselves as members of the Armenian Apostolic Church. One in 10 respondents “do not feel close to any” religion, and 2 percent are Catholic.
- Respondents in Gyumri struggle financially; nearly half cannot afford food, and another 36 percent have difficulty paying for clothing. Only 9 percent can afford food and clothes, and more expensive goods.

Appendix III: Vanadzor Demographics

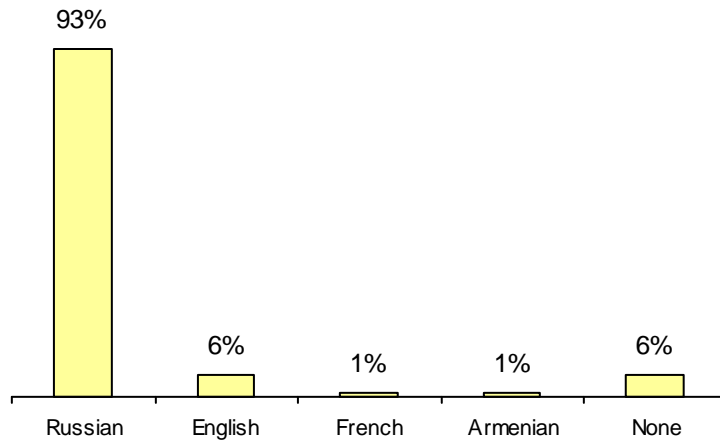
Sex



Age



Foreign Language Knowledge

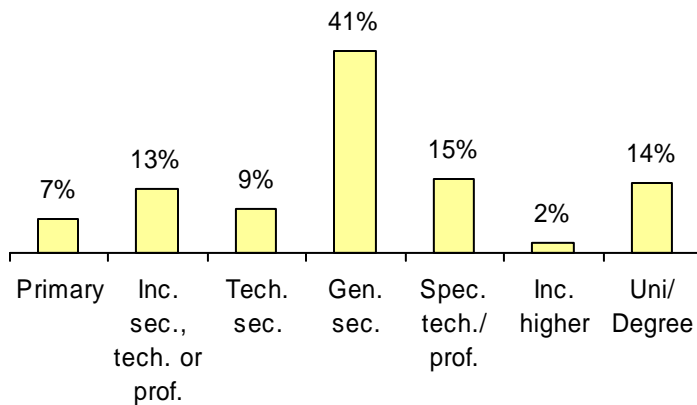


Base: n=500 (adults 15 and older) in Vanadzor, Armenia

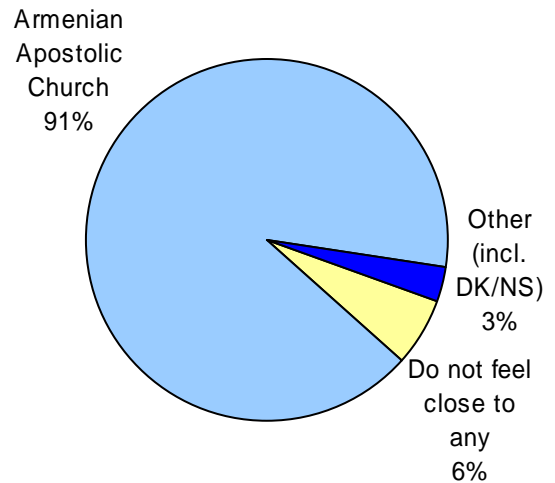
- Population of Vanadzor is more female than male, as is the case in the other two cities surveyed. There are slightly more respondents in younger age groups than there are in older age groups: 58 percent of respondents are under 45, and 42 percent are 45 or older.
- Nearly all adults in Vanadzor speak Russian; only 6 percent speak English.

Appendix III: Vanadzor Demographics

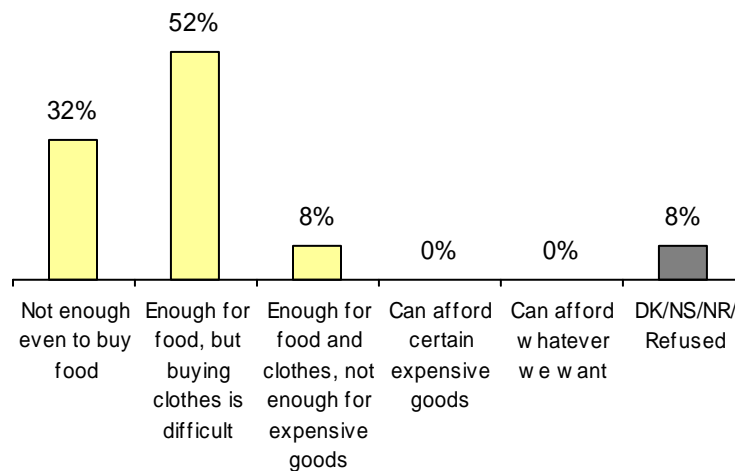
Education



Religion



Income



Base: n=500 (adults 15 and older) in Vanadzor, Armenia

- About one in five respondents has not completed secondary education; 16 percent of respondents have had at least some higher education. A plurality (41 percent) have a general secondary education.
- The overwhelming majority of respondents (91 percent) belong to the Armenian Apostolic Church.
- Adults in Vanadzor are struggling financially. One-third cannot afford food, and another half can afford food but not clothes. Only 8 percent said they have enough money for food and clothes.