MEDIA CONSUMPTION AND MEDIA COVERAGE OF REFORMS IN ARMENIA

Analytical Report

(for end-line survey)

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Yerevan

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ABBREVIATIONS

CRRC	Caucasus Research Resource Center
CSO	Civil society organization
EPF	Eurasia Partnership Foundation
MIC	Media Initiatives Center
MICE	Media for Informed Civic Engagement
USAID	United States Agency for International Development
YPC	Yerevan Press Club

EXECUTIVE SUMMARY

The Media Initiatives Center (MIC) implements the USAID-funded Media for Informed Civic Engagement (MICE) project, in partnership with the Eurasia Partnership Foundation (EPF), the Media Initiatives Center, Caucasus Research Resource Center-Armenia (CRRC), and the Yerevan Press Club (YPC). The present report introduces the results of the end-line survey conducted in 2021 within the framework of the MICE Project. Public opinion data was obtained through a nationally representative CAPI among survey1213 respondents across the country (±2.8 margin of error, 95% confidence interval).

Poll Quick Facts	Data
Fieldwork Dates	02 September 2021 – 27 September 2021
Sampling Frame Data	List of electoral precincts of RA
Sample size	n=1213
Target population	Residents of the Republic of Armenia
Total target population	2 256 538
Survey type	National
Sampling Method	Stratified randomized cluster sample
Margin of error	+/- 2.8, 95% confidence interval
Interview method (mode)	CAPI
Response Rate	27%
Interview language(s)	Armenian
Weight factors	No weights were calculated

Sources of Citizens' Information and Usage of Social Networks/Platforms

Information sources: Internet resources and social networks were the most frequently used sources of information in Armenia for 2021 (67 percent of the respondents reported using internet and social networks every day). Frequency of daily consumption of traditional sources of information, such as National Television, which used to be in the leading positions for 2015, 2017 and 2019 surveys, significantly decreased in Armenia across the recent seven years (from 82 percent in 2015 to 59 percent in 2021). The frequency of daily usage of other traditional media sources, e.g. Russian and international TV channels, Armenian and Russian newspapers also decreased over the years.

Online News Consumption: Though 67 percent of respondents reported using the Internet resources and social media daily, only 14 percent of them reported daily accessing online news websites directly (not via social networks). On the other hand, 46% of the respondents using the internet and social media networks access online news media directly, either frequently or rarely and the rest 54% never access online news media directly. The vast majority of the respondents (89%), who access online news media directly, use smartphones. 40 and 35 percent of the respondents who use social network platforms reported that they either rarely or never click on the news links through social networks. Finally, 24 percent of the respondents who do both – either access online news via social networks or directly, usually consume online news media directly via websites, whereas 76 percent access online news media via social networks.

For 2021, four most frequently accessed news websites in Armenia were News.am, Azatutyun.am, Armnews.am and Lurer.com. Shamshyan.com and Tert.am that used to have leading positions for the 2017 and 2019 surveys following News.am, did not appear in the top list for 2021.

Usage of social networks/platforms: The vast majority of the respondents, 75 percent (N=913), use social network platforms which implicates statistically significant improvement compared to 2019. On the other hand, 97% of internet users use at least one social media platform. In addition, the number of social network platforms users' demonstrates a remarkable positive trend over the past seven: it was 43 percent in 2015, 53 percent in 2017 and 64 percent in 2019.

Facebook and YouTube were the two most popular networks in Armenia: both were used by 90 percent of those Armenians who have a social media profile. Instagram was the third most popular social network in Armenia (45 percent of social media profile owners). In terms of daily usage, Facebook, Instagram and YouTube were also among the most frequently used social media platforms. A new social media network – TikTok, recorded 16% popularity among social media profile owners.

Over 2015, the popularity of Facebook has increased among social media users, from 69 percent to 90 percent, whereas the popularity of Odnoklassniki has decreased significantly, from 66 percent to 17 percent. The popularity of Instagram also increased over the last five years, with 45 percent result VS 23 percent in 2017.

Overall, 89% of Facebook users and three-quarters of Blogs and Twitter users use the platforms to access news. As for the other popular networks, such as Instagram, Odnoklassniki, Linkedin, Vkontakte and, TikTok, less than half of those having accounts on these platforms use them to access news. On the other hand, more than three-quarters of those who have social media account or use blogs, were passive network users (the do not share either political or social news via these platforms). Meanwhile, the number of active users (those who share social and/or political news via social media) was the highest among Facebook users (34 percent share only political, only social news or both).

Media literacy and Satisfaction with Media Products

Media Literacy and Verification of Suspicious Information: Most frequently, the respondents will think about the information to be suspicious or unreliable if the headline of the article and the content do not match, if the source is not mentioned, unreliable if the content is shared by unreliable and unknown websites/people or if they have other information. On average one respondent mentioned two conditions they would think information is suspicious or unreliable. As a reaction to wrong, false, misleading, or unethical information published by the Armenian media the respondents most frequently mentioned boycotting (48% of the respondents mentioned this). As for checking the website links, only 18 percent of the respondents always or often check them, while 15 percent do it rarely. Almost half of the respondents never check the links (44 percent) and 23 percent of the respondents claimed they never click on links that take them to news websites. Vast majority of the respondents (83%) mentioned they will do nothing in case they see suspicious information in the media and only 9% will try to verify information.

Overall, 21% of the respondents were aware of at least one Media Initiatives Center product which implicates statistically significant improvement compared to 2019 results. "Media.am" website was the most popular Media Initiative Center product, followed by Lratun Media Museum and Infotun.

Overall, 4% of the respondents were aware of the activity of "Ditord Marmin" of Mass Media Ethics. After being introduced to its key functions and scope of activity, more than half of the respondents (68%) reported that they were not willing to apply to the body if necessary.

Satisfaction with Media Products: The audiences of International TV Channels, Russian TV channels, and local radio enjoy the work of the reporters of these media most of all. On the other hand, respondents were relatively less satisfied with the professionalism of the reporters representing internet sources and social networks media. As for the trust towards different media sources, national radio and International TV channels were the most trusted by their Armenian audiences, as respectively 81 and 77 percent of users say that the information provided by these sources was reliable. Meanwhile, the trust towards Internet resources has decreased from 66 percent in 2015 to 45 percent in 2021 and was the smallest among other media sources. National television enjoys trust among 58 percent of its users.

The survey results also show that Armenian respondents consider the international TV channels, Armenian Newspapers, local and national radio to be the most independent media sources. National and local TVs were the least independent compared to the other media sources.

Public Perception and Media Coverage of Reforms

Public Awareness of and Satisfaction with the Reforms: Public awareness about ongoing reforms (social reforms, child protection system reforms, anti-corruption policy reforms, etc.) was generally low in Armenia. Most of all respondents were less informed about social reforms and more aware of power decentralization/community enlargement reforms. Meanwhile, compared to 2015, for 2021 public awareness of power decentralization reforms has significantly increased from 11 percent to 49 percent, while for the rest of the reforms, the overall awareness has slightly decreased compared to 2017.

Child protection system reforms and pension system reforms were the most required topics in Armenia and there was a relatively low public interest towards social reforms. Interestingly, compared to 2015, in 2021 the share of the respondents interested in reforms has significantly increased among those who were informed about the reforms, while when computing the data of the portion of the total sample it was obvious that public interest significantly increased for only power decentralization reforms.

As for the perception of the effectiveness of the reforms, the share of aware respondents who say that the implementation of the aforementioned reforms in Armenia was effective was average, ranging from 35 percent to 64 percent.

Child protection system reforms and pension system reforms were considered relatively more effective while power decentralization and anti-corruption reforms seem to be less praised. Meanwhile, compared to 2017, the share of the respondents considering the aforementioned reforms effective has significantly increased, however for certain reforms the effectiveness was assessed to be slightly lower in 2021 compared to 2019.

Media Coverage of the Reforms: An overwhelming majority of respondents attach a significant importance to comprehensive coverage of the ongoing reforms by the media. The most required topics were "what is the possible impact of the reforms on citizens" and "what are the reforms and how are they implemented".

Similar to the previously conducted survey data, in 2021 public interest toward the media coverage of reforms remains high: for almost all criteria over three-fourths of surveyed Armenians attached importance to the media's role in covering reforms. Internet resources, social networks and national TV were the main media sources that provide audiences with information of the reforms most regularly (for more than 70 percent to those who sue those media sources). Meanwhile, compared to 2015, the intensity of the consumption of news on reforms through different media sources, including internet resources, national television and local television has significantly increased.

Generally, respondents were satisfied with the media coverage of the reforms. Armenian newspapers, local and national radio, as well as television channels with national coverage, were in the leading positions in terms of respondents' satisfaction with coverage of the reforms. Meanwhile, respondents' satisfaction with media coverage of the ongoing reforms has both improved and deteriorated since 2017 for different media sources. Public TV, Shant TV, Armenia TV, and Azatutyun Radio Station were the four most frequently mentioned media in 2021 covering the reforms in Armenia best of all.

INTRODUCTION

The Media Initiatives Center (MIC) implements the USAID-funded Media for Informed Civic Engagement (MICE) project, in partnership with the Eurasia Partnership Foundation (EPF), the Media Initiatives Center, Caucasus Research Resource Center-Armenia (CRRC), and the Yerevan Press Club (YPC). **The goals of the project** include improving the quality of journalism and alternative content about the Government of Armenia's policies and planned reforms (with an emphasis on USAID-supported reforms in decentralization, transparency and accountability, and social-sector policy reforms); increasing citizens' and CSOs' knowledge and skills for becoming more savvy media consumers and demanding better quality media; engaging journalists and active citizens to produce multimedia content that stimulates a vibrant discussion in society about the reforms; and equipping media sector workers with skills to conduct reliable fact-based reporting and digital storytelling.

The impact of the project was assessed through a number of tools, including four (baseline, two mid-term surveys, and end-line) CRRC quantitative surveys about citizens' awareness and perceptions of the coverage of the reforms. Public opinion data was obtained through a nationally representative CAPI survey in Armenia that was designed to obtain the most accurate possible information about media consumption practices among the Armenians.

The present report introduces the results of the end-line survey conducted in 2021 within the framework of the MICE Project. Starting from 2015, four public opinion polls were conducted with two years intervals – including 2015, 2017, 2019, and 2021. The current end-line survey included 1213 respondents across the country (±2.8 margin of error, 95% confidence interval). Wherever possible, the report compares the results of this survey with the ones of the baseline survey conducted in 2015 to track the dynamics of MICE performance against the outcome indicators.

SURVEY METHODOLOGY NOTES

The present report draws on the results of a countrywide household survey among 1213 respondents (1178 in 2017; 1448 in 2015 and 1200 in 2019) implemented by CRRC-Armenia in August-September 2021. The fieldwork was conducted from September 3 to September 27, 2021. The distribution of the sample size by Marz (region) is presented in the table below.

Table 1. Sample size and its distribution by Marz, 2021

Marz	Number of interviews	% of total
Aragatsotn	54	4.5
Ararat	99	8.2
Armavir	98	8.1
Gegharkunik	88	7.3
Kotayk	96	7.9
Lori	86	7.1
Shirak	95	7.8
Syunik	62	5.1
Tavush	59	4.9
Vayots Dzor	24	2.0
Yerevan	452	37.3
Total	1213	100.0

The proportionate to Population Size random sampling methodology was used. The confidence interval or margin of error for the 2021 survey with a 95% confidence level equaled +/-2.8% (compared with 2.85% for 2019; 2.85% for the 2017 survey and 2.53% for the 2015 survey).

The present report uses a batch of indicators which were included in the survey to disclose general media consumption patterns in Armenia, respondents' interest in social reforms, respondents' satisfaction with the information that the Armenian media provides about these reforms, and other related issues.

The questionnaire in Armenian was reviewed by CRRC team based on the versions developed for previous waves of the survey. Similar to 2019 survey, some of the questions that were included in the previous baseline questionnaire were removed from the current survey questionnaire, other questions were reformulated, and the scales for answers in some cases were expanded (to measure the phenomena more accurately). However, whenever needed, respective statistical operations were made (aggregations, recoding, etc.) to assure comparability of the results of 2021 survey with the ones based on the surveys conducted in 2015, 2017 and 2019.

Response Rate: Only 27% of the successful HH visits ended with an interview. Total number of HH visits is 4474. 3163 HH visits were unsuccessful. 1651 (52%) HH members refused to take part in the survey. 1192 (37%) HHs were closed, and interviewers couldn't reach out any HH members. Other HHs were in self-isolation, adults were not at home, the respondent had language barriers, etc.

The low level of the response rate was mainly determined by the high number of refusals among the respondents in Yerevan, especially in those in Kentron district.

SOCIAL AND DEMOGRAPHIC PROFILE OF THE RESPODENTS

Table 2: Socio-Demographic Snapshot of the Respondents Involved in the Survey (n=1213)

Criteria	Number	Percent
Overall	1213	100
Gender		
Female	700	58
Male	513	42
Age		
18-35	367	30
36-55	371	31
56-and older	475	39
Education		
Have not attended primary school	1	0
Primary (complete or incomplete)	35	3
Secondary (incomplete)	19	2
Secondary(complete)	454	37
Vocational	289	24
Higher education (incomplete)	47	4
Higher education (complete)	364	30
PhD	4	0
Marital Status		
Married	806	66
Never married	186	15
Widowed	150	12
Divorced	44	4
Living together	14	1
Living separately	12	1
Economic status of family		
Family income is not enough for purchase of food	157	13
Family income is enough for purchase of food, but not for clothes.	249	21
Family income is insufficient for buying expensive household items, such as refrigerator or washing machine.	535	45
We can afford to buy expensive items, such as refrigerator or washing machine.	154	13
We can afford to buy anything we want.	105	9
Employment status		
Employed	329	27
Working Retired	290	24
Housewife	212	17
Self-employed	173	14
Unemployed	100	8
Unemployed Student	44	4
Not Working Retired	35	3
Employed Student	30	2
Description of the economic situation of the household compared to other households around		
The lowest	40	3
2	73	6
3	783	66
4	266	22
The highest	30	3

Figure 1. Using this card, imagine this is a 10 scale ladder describing the current economic situation of all households in Armenia. The first level represents the lowest positions and the 10th level represents the highest positions. On which level do you think your household is located on this ladder? (%)

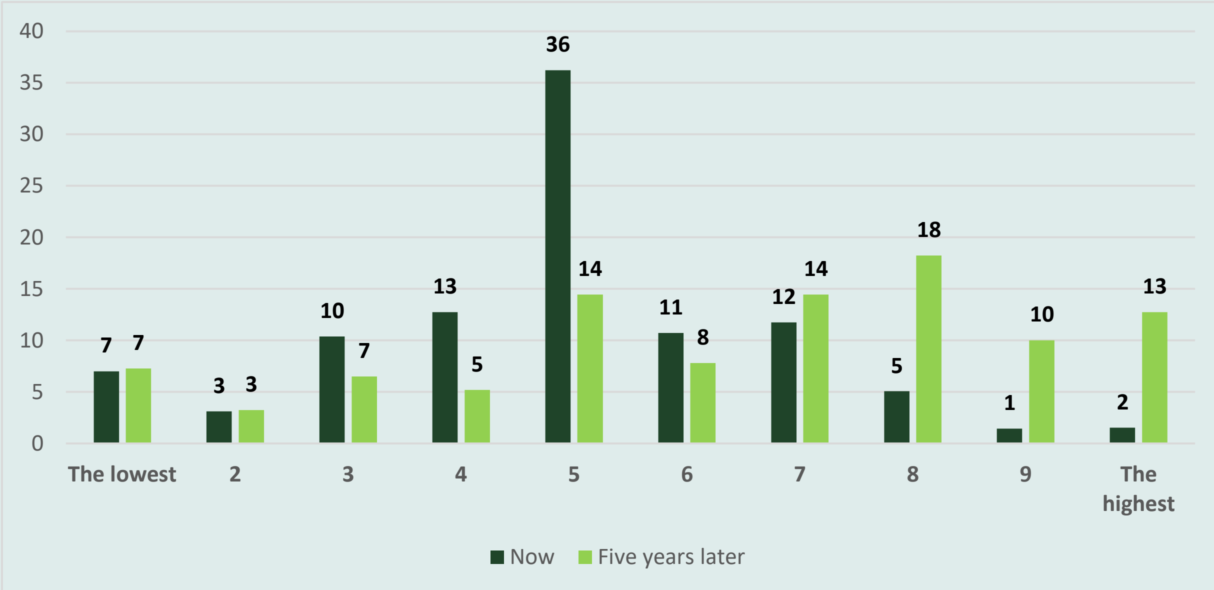
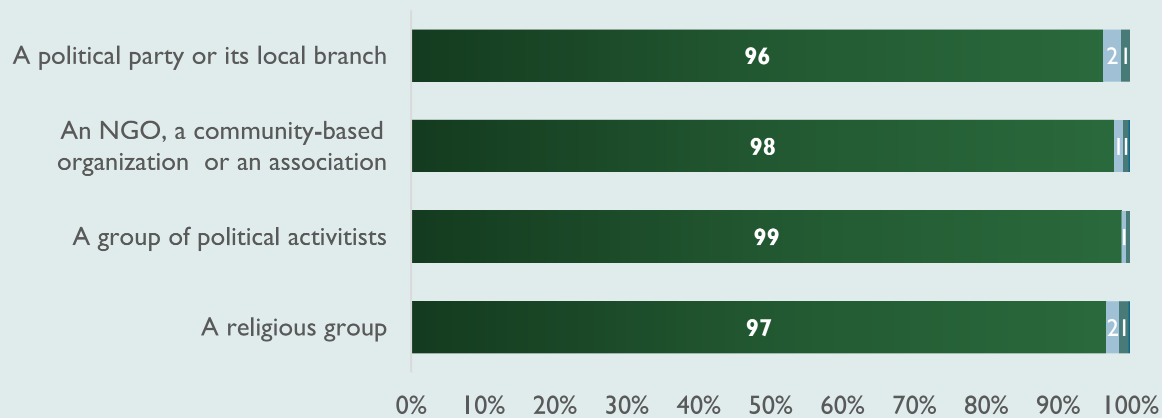


Figure 2. For each group, could you please indicate whether you are a member or not, and if YES, under what terms



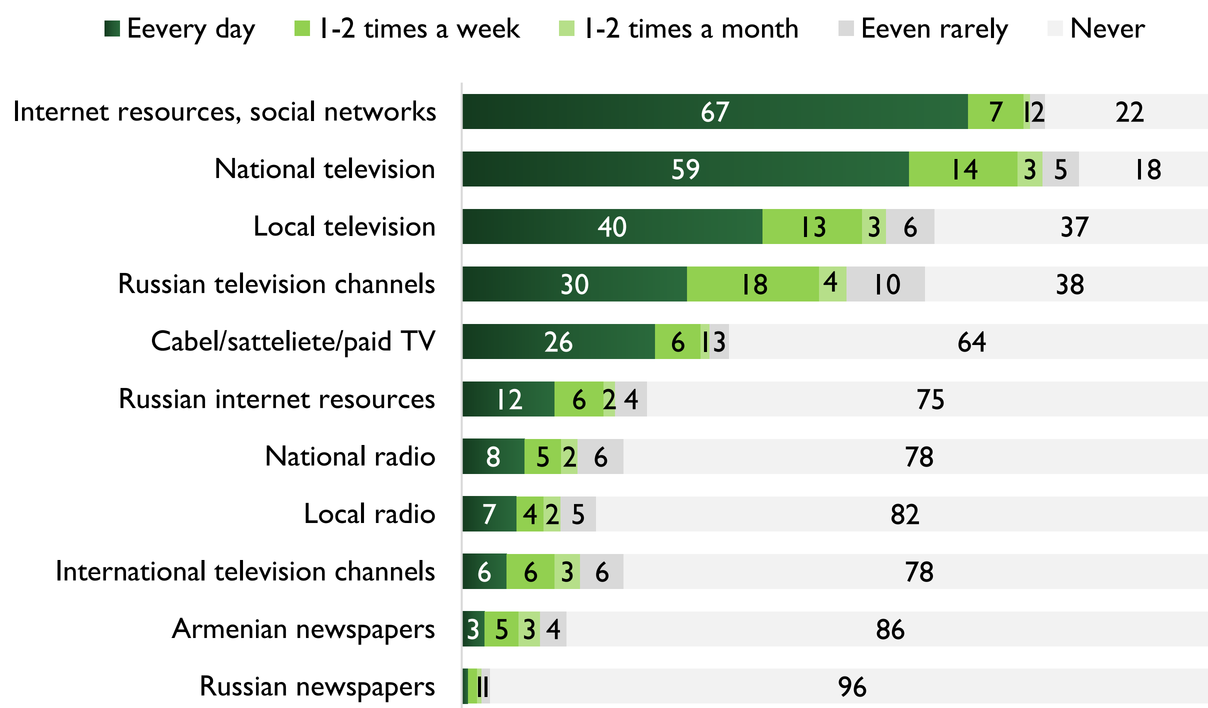
	A religious group	A group of political activitists	An NGO, a community-based organization or an association	A political party or its local branch
Not a member	97	99	98	96
Passive member	2	1	1	2
Active member	1	0	1	1
Official leader	0	0	0	0

PART 1. SOURCES OF CITIZENS' INFORMATION AND USAGE OF SOCIAL NETWORKS/PLATFORMS

1.1 Information sources

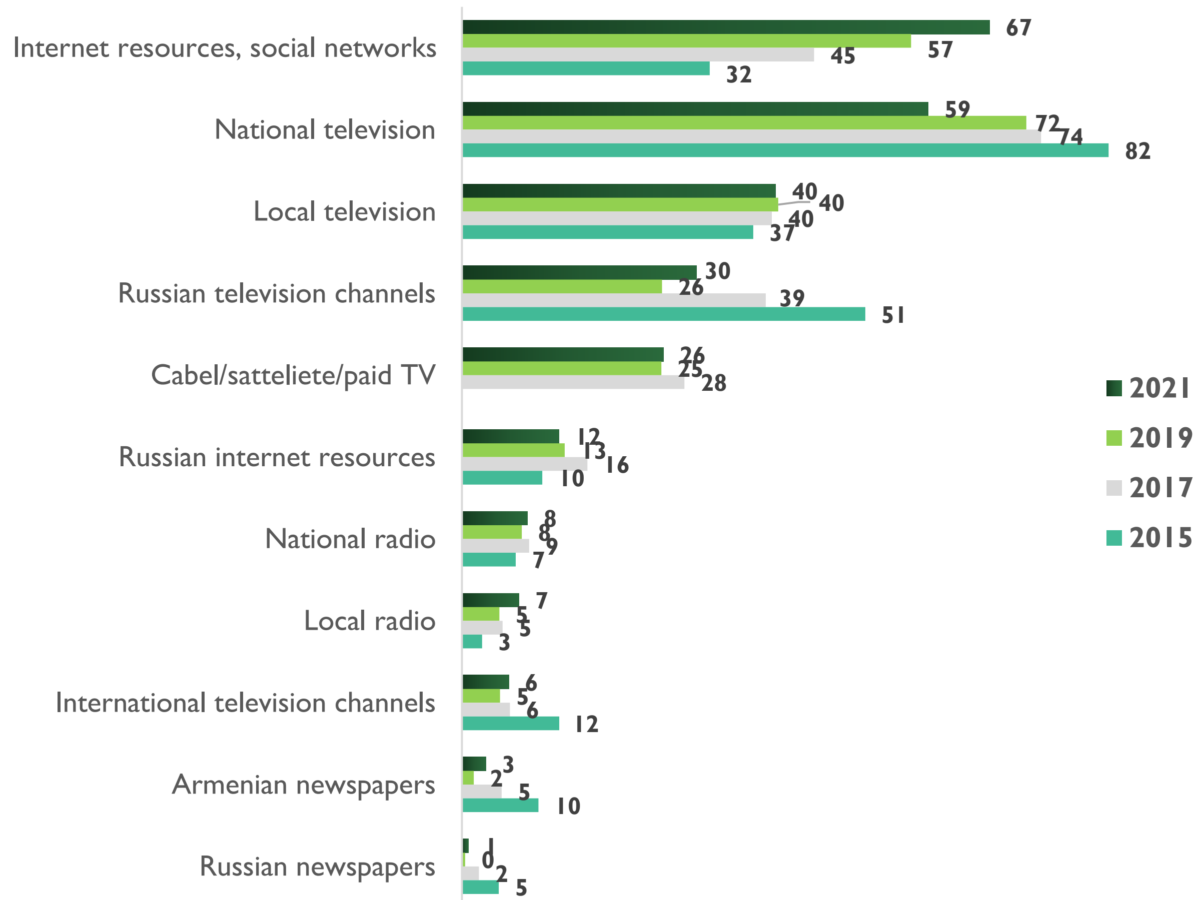
The respondents have been asked to mention the frequency of different media sources they use. According to the results, internet resources and social networks were the most frequently used source of information in Armenia. Overall, 67 percent of respondents reported using internet resources and social networks every day. The second more frequently consumed source of information was national television, with 59 percent admitting to using "national television" every day. "Local television" and "Russian television channels" were watched daily by 40 and 30 percent of the respondents, respectively, followed by cable, satellite, or paid TV channels and Russian internet resources, consumed by 26 percent and 12 percent each day, respectively. As the respondents reported, daily usage of the other media sources, such as national radio, International TV channels, and Armenian and Russian newspapers, was smaller (Figure 1.1).

Figure 1.1 Frequency of consumption of information sources, 2021 (% of total, n=1213)



In comparison with 2015, the frequency of daily consumption of traditional sources of information, such as television and newspapers, significantly decreased in Armenia. In particular, daily usage of TV channels with national coverage has decreased from 82 percent to 59 percent, while daily consumption of Armenia and Russian Newspapers decreased significantly, from 10 percent in 2015 to 3 percent in 2021 and 5 percent in 2015 to 1 percent in 2021, respectively. The frequency of daily consumption of Russian TV channels decreased significantly: from 51 percent in 2015 to 30 percent, meanwhile it was slightly higher compared to 2019 results – 26 percent. The trend was the same for the international TV channels - from 12 percent in 2015 to 6 percent in 2021. However, local television seems to be an exception here, as daily consumption has remained almost constant for pervious 5 years at 40 percent. In contrast to the traditional sources of information, newer sources of news consumption, particularly through the Internet and social networks, has gained more popularity over the past seven years in Armenia. In particular, the rates of daily usage of the Internet as a source of information have increased from 32 percent in 2015 to 76 percent in 2021 recoding 10% of improvement over 2019 (Figure 1.2)[1].

Figure 1.2 Daily consumption of information sources in 2015, 2017, 2019 and 2021 (% of total)

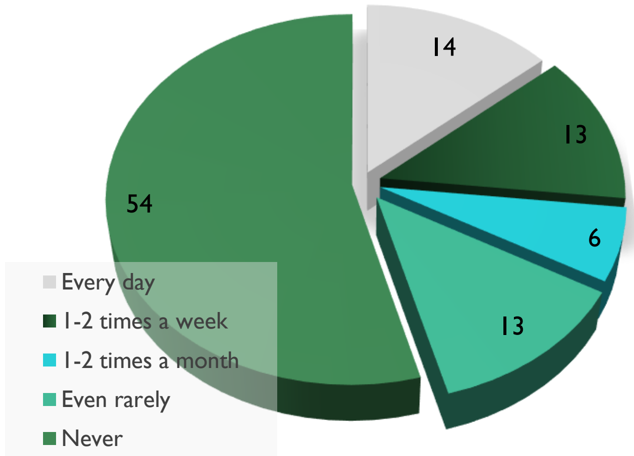


1.2. Online News Consumption

As the comparative analysis shows, though 67 percent of respondents reported using Internet resources and social media daily, only 14 percent reported daily accessing online news websites directly (not via social networks), whereas 13 percent reported doing so one or two times a week. A majority of respondents, 54 percent, said that they never access news websites directly (55 percent in 2019) (Figure 1.3). Overall, 46% of the respondents who use internet and social media networks access online news media directly, either frequently or rarely (n=430).

Figure 1.3 Frequency of accessing news websites (not via social networks), 2021 (n=939, % of total)

[1] The survey conducted in 2015 did not include any question on the usage of cable, satellite, or paid TV in Armenia.



The respondents who use the Internet to directly access online news media (assessed among n=430 respondents) most frequently use smartphones to access news (89% of the aforementioned group). TV was the second more frequently mentioned option. A smaller number of respondents mentioned notebooks/netbooks, desktop computers, or tablets as devices to use online news media.

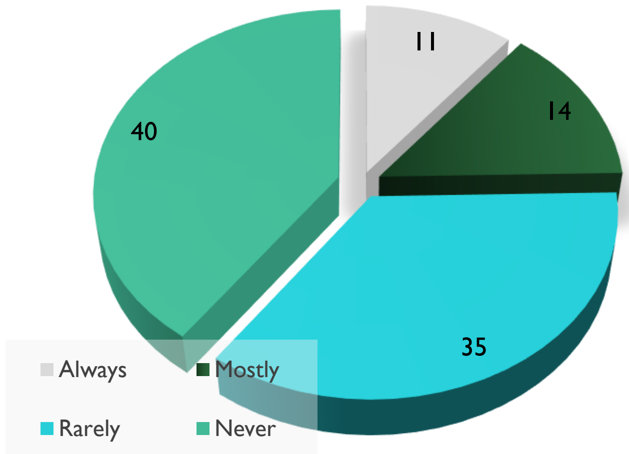
Table 1.1 Devices the Respondents Usually Use to Access Online News Media, 2021 (assessed among the respondents who directly access online news web-sites, n=430)[2]

Device	Number	% of responses	% of cases
Smartphone	384	67%	89%
TV	93	16%	22%
Notebook/netbook	39	7%	9%
Desktop computer	37	6%	9%
Tablet	17	3%	4%
Total	570	100%	133%

Overall, 97% of internet users use social network platforms (n=913 respondent) which makes 75% of total surveyed population. Those respondents have been asked to answer to the question about how often they click on the news link that they read via the social networks. As the analysis shows, 11% of the respondents always click on the news links they read via the social networks, while 14% do so most of the time. The vast majority of the respondents either rarely or never click on the news links through social networks, 40 and 35 percent respectively (Figure 1.4)

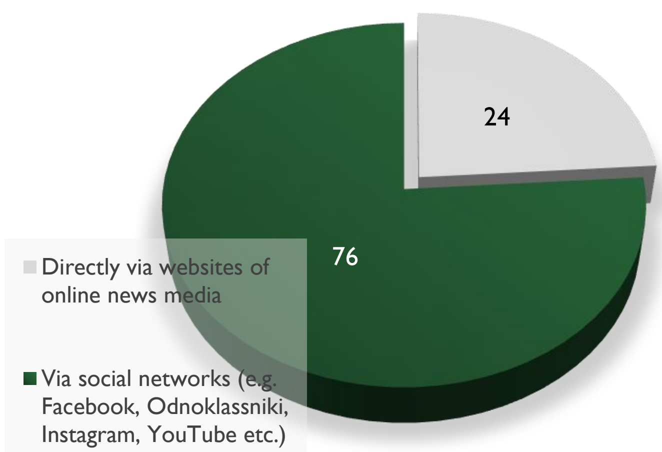
[2] Multiple response question, total 570 responses received, on average one respondent provided 1.3 responses

Figure 1.4 Frequency of clicking on the news link that the respondents read via the social networks, 2021 (% of total, n=913)



Finally, the respondents who access online news media via both means – through social media networks (e.g., Facebook, Odnoklassniki, Instagram, YouTube, etc.) and directly, have been asked about how they do usually consume online news media" (n=598). As the analysis shows, 24 percent of respondents reported that they usually consume online news media directly via websites, whereas 76 percent access online news media via social networks (Figure 1.5).

Figure 1.5 Ways of accessing news websites, 2021 (n=598, % of total)



The respondents who access news websites directly were also asked to name a maximum of three websites that they use most frequently and access directly (not via social networks). Similar to other years' survey data, News.am seems to be the most popular news website in Armenia, with 21 percent of total mentions. Azatutyun.am maintained its position as it was in 2019, with 16 percent of total mentions (13 percent in 2017). The next most popular websites in Armenia are: Armnews and Lurer.com. News web-sites popular during the previous years – Shamshyan.com and Tert.am did not appear in the top list for 2021 (Table 1.2).

Table 1.2 Four most frequently accessed news websites in Armenia, 2017, 2019 and 2021 (% of total responses)

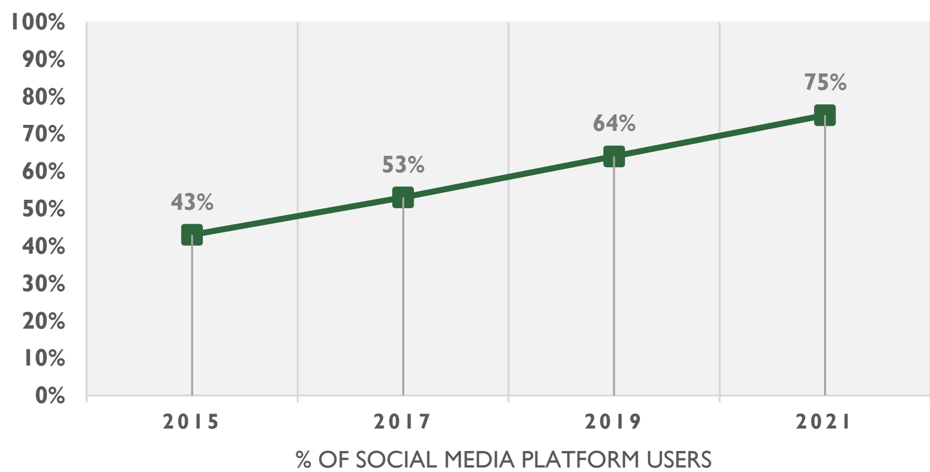
News website	%	News website	%	News website	%
2021		2019		2017	
News.am	21	News.am	23	News.am	32
Azatutyun.am	16	Azatutyun.am	13	Shamshyan.com	18
Armnews.am	5	Shamshyan.com	10	Tert.am	16
Lurer.com	4	Tert.am	9	Azatutyun.am	11

As data analysis shows, presently, 4 percent of the respondents were subscribed to any paid online resources (such as TV channels or journals), which implicates an improvement compared to 2019 data - only 1 percent of the respondents. Interestingly, overall 13 percent of the respondents demonstrated readiness to pay for online media resources to receive reliable information regularly. This result was an improvement compared to 2019 data (6 percent of the respondents). Of those who were ready to pay (N=118), a vast majority (80 percent) agreed to pay no more than 4000 AMD (roughly 8.41 USD) monthly, 12% were ready to pay from 4000 AMD to 6000 AMD (roughly from 8.41 USD to 12.4 USD), and the rest were willing to pay more than 6000 AMD.

1.3. Usage of social networks/platforms

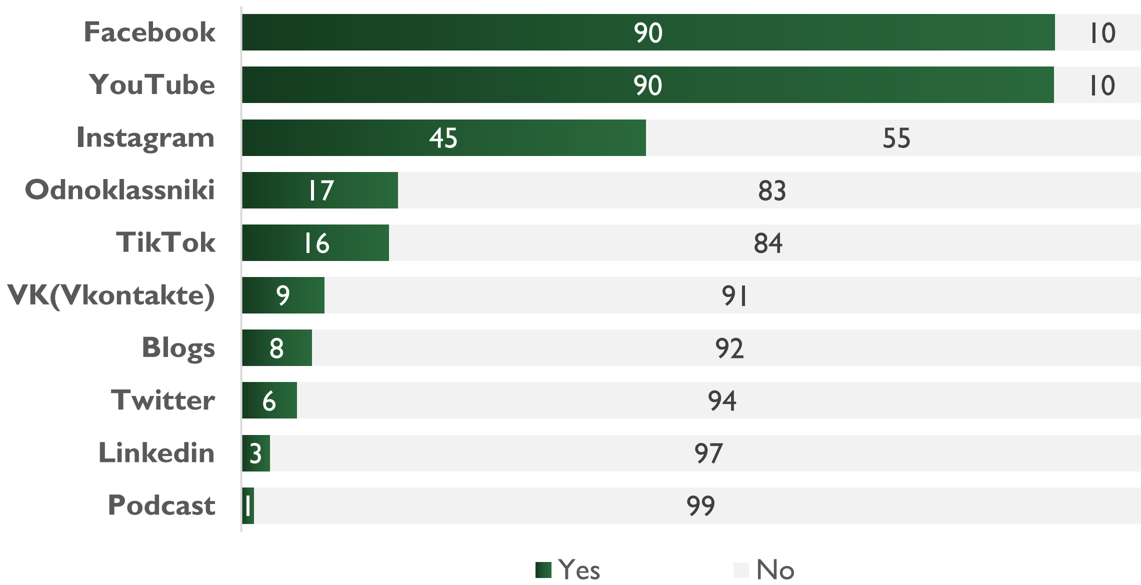
As the data analysis shows, the vast majority of the respondents, **75** percent (N=913), use social network platforms which implicates statistically significant improvement compared to 2019 (64% during 2019, one-sample t-test, $p < .00$). Meanwhile, the data of social network platforms users' demonstrates a remarkable positive trend over the past seven years on this matter: the 2015 survey results showed that some 43 percent of the respondents reported using social networking sites or platforms, while the 2017 and 2019 survey results showed 53 and 64 percent on this matter, respectively (Figure 1.6).

Figure 1.6 Percent of social media platform users over the past seven years



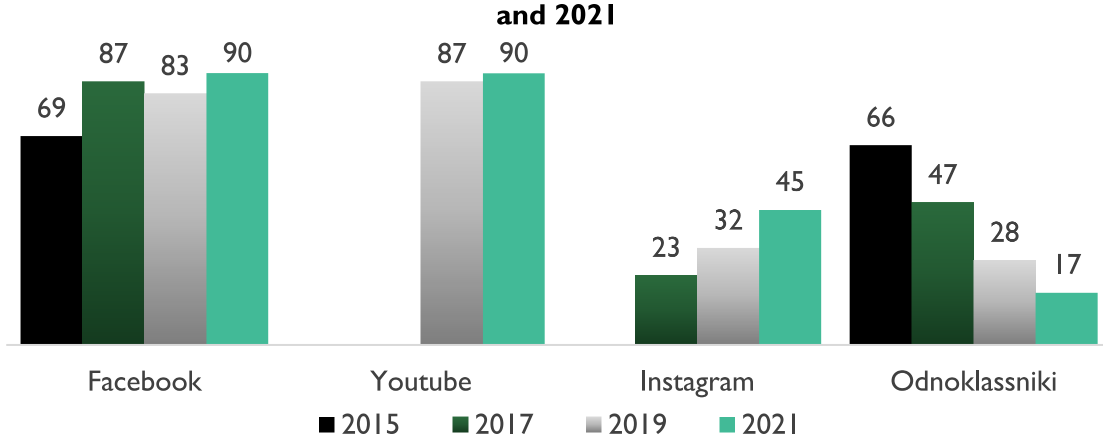
Facebook and YouTube were the two most popular networks in Armenia. Both were used by 90 percent of those Armenians who have a social media profile. The third most popular social network in Armenia was Instagram, with 45 percent of social media profile owners. Interestingly, 16% of social media users have TikTok accounts and 17% still use Odnoklassniki. The other social networks were less popular, among them VK, Blogs, Twitter, Linkedin. As data analysis shows, 1% of the population use podcasts (Figure 1.7).

Figure 1.7 Popularity of social networks among social network/platform users in Armenia 2021 (%, N=913)



The comparison of 2015, 2017, 2019, and 2021 survey results shows that the popularity of Facebook has increased among social media users, from 69 percent to 90 percent (with a minor decrease in 2019 compared to 2017), whereas the popularity of Odnoklassniki has decreased significantly falling in 2021 by more than third compared to 2012, from 66 percent to 17 percent. Similar to Facebook, the popularity of Instagram also increased over the last five years, with 45 percent result VS 23 percent in 2017. Meanwhile, YouTube has the highest popularity among other social networks, with a 90 percent result for 2021[3] (Figure 1.8).

Figure 1.8 Usage of the most popular four social networks in Armenia in 2015, 2017, 2019 and 2021

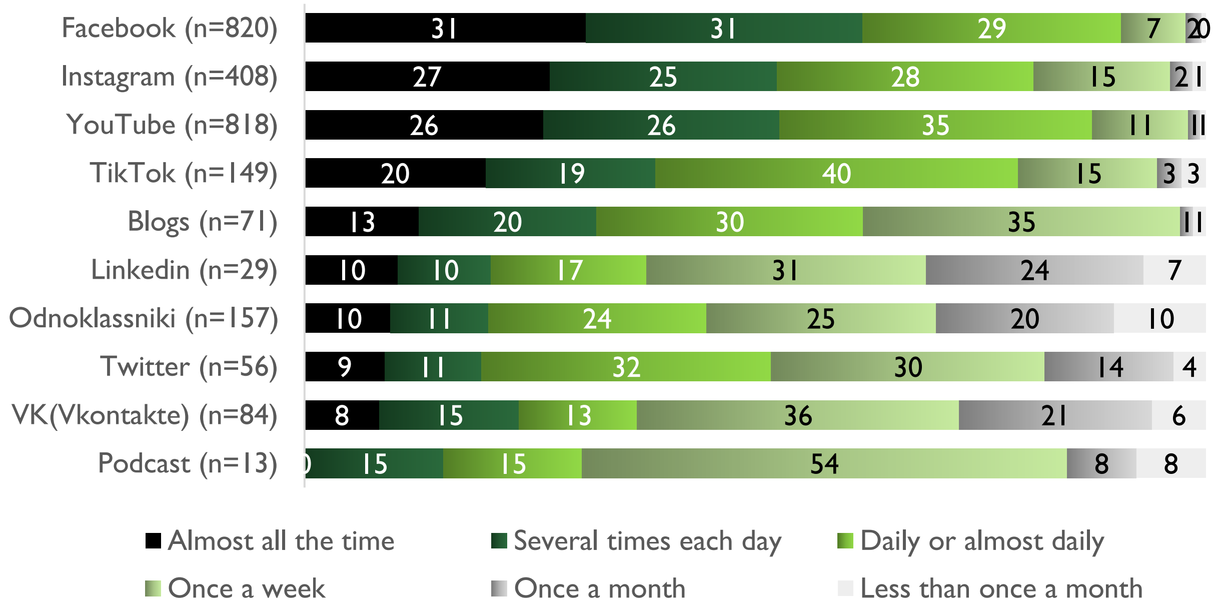


In terms of daily usage, Facebook, Instagram and YouTube were among the most frequently used social media platforms. Facebook and Instagram users spend most of their time on those social media platforms as more than half and almost half of the respondents mentioned that they use them almost all the time or several times each day. In terms of daily usage, YouTube was also popular among the respondents (52 percent of the respondents use YouTube either almost all the time or several times each day). Interestingly, 39 percent of respondents having

[3] The research conducted in 2015 and 2017 did not include an assessment of "YouTube" as a social media platform. "Instagram" has not been assessed during the research conducted in 2015.

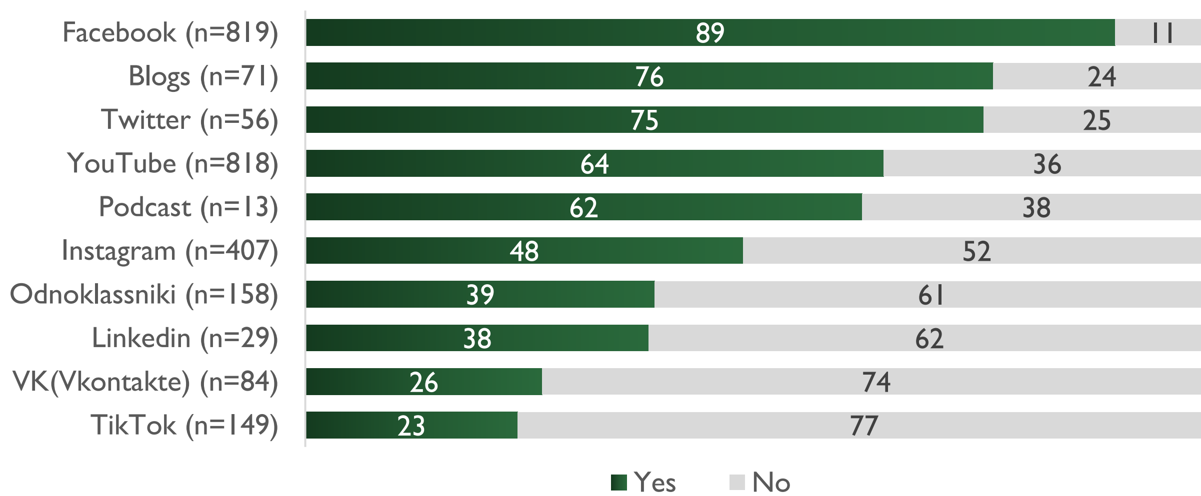
"TikTok" accounts use it almost all the time or several times each day. Other social network platforms such as blogs, Twitter, Linkedin, etc. were less frequently used (Figure 1.9).

Figure 1.9 Frequency of usage of social networks in Armenia in 2021



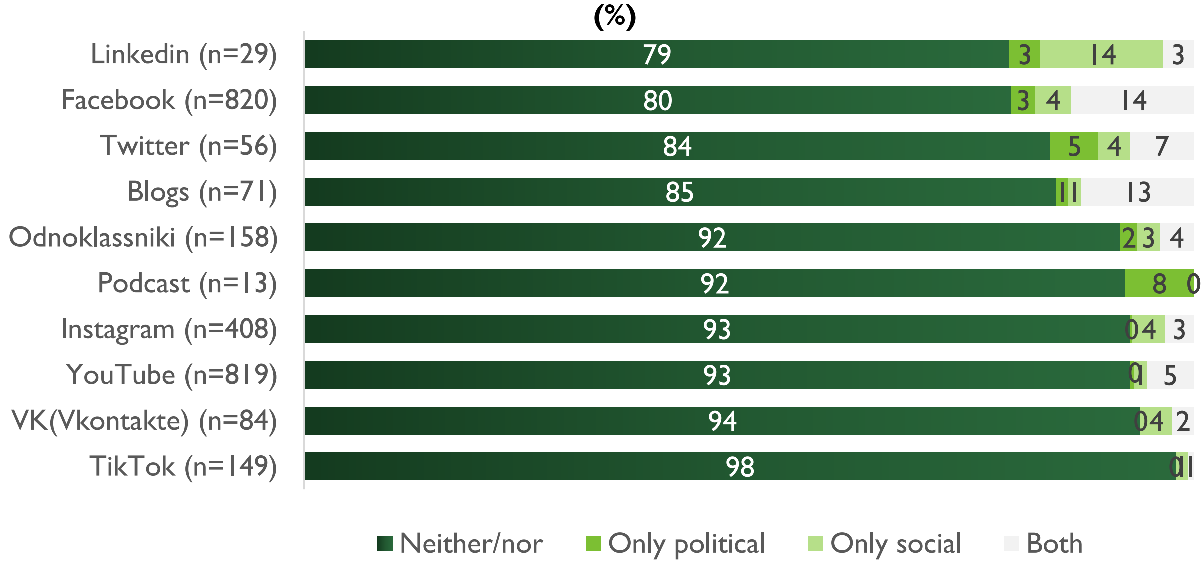
The respondents have been asked whether they use the most popular social networks in Armenia to access news and share social and/or political news via their respective social networks. As the results show, 89% of Facebook users and three-quarters of Blogs and Twitter users use the platforms to access news. As for the other popular networks, such as Instagram, Odnoklassniki, Linkedin, Vkontakte and, TikTok, less than half of those having accounts on these platforms use them to access news (Figure 1.10).

Figure 1.10 Usage of the most popular social networks to access news, 2021 (%)

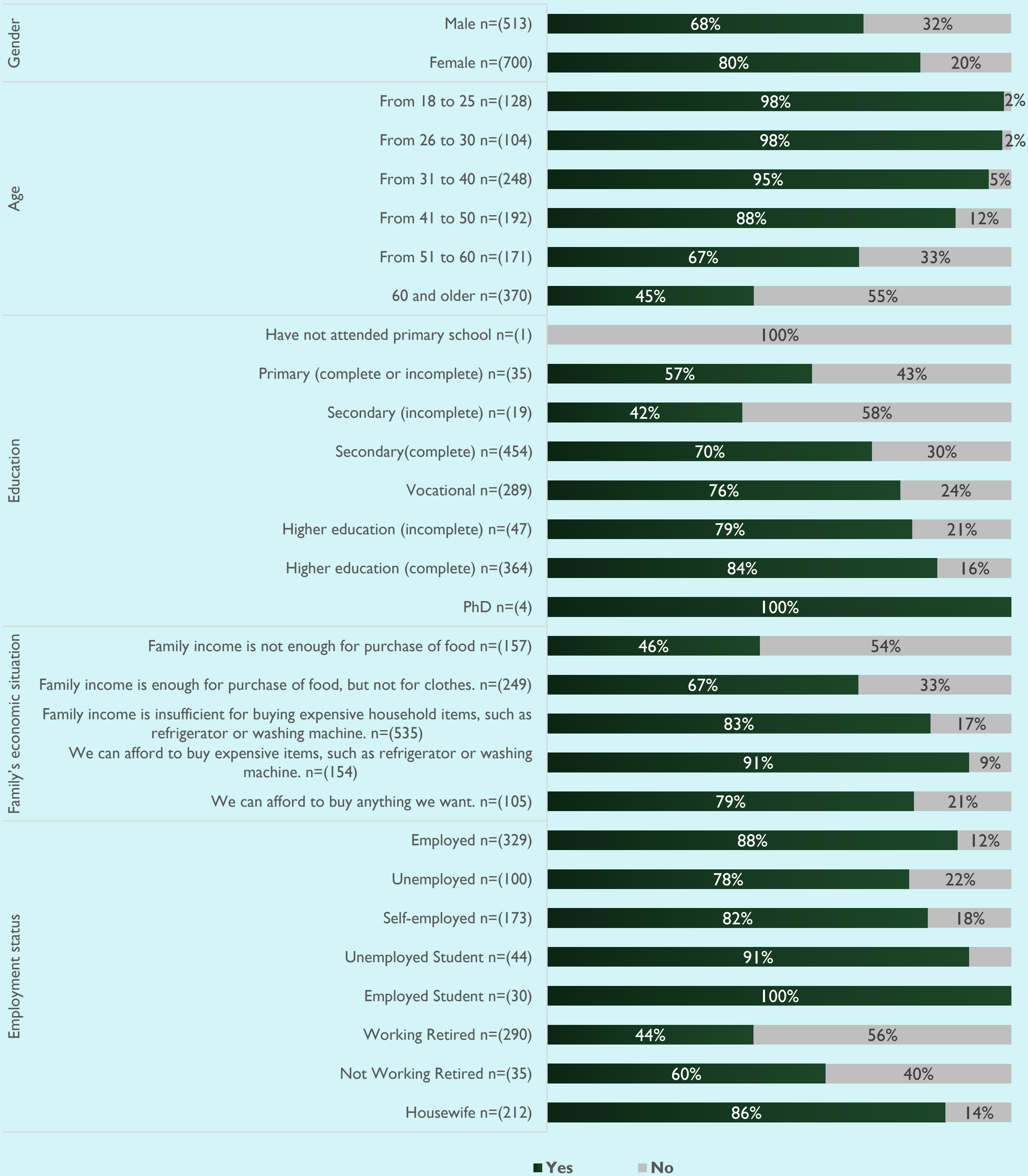


More than three-quarters of those who have social media account or use blogs, were passive network users, meaning that they do not share either political or social news via these platforms. The percentage of those who do not share social and/or political news was much higher among Odnoklassniki, Instagram, Youtube, Vkontakte and TikTok users and those who consume podcasts (Figure 1.8). Meanwhile, the number of active users (those who share social and/or political news via social media) was the highest among Facebook users, at 34 percent ("Only political," "Only social," and "Both social and political" answers aggregated) (compared to 39 percent in 2015). Comparing to the other social networks, the number of active Vkontakte users was also high and totals 26 percent (Figure 1.11).

Figure 1.11 Usage of the most popular social networks to share political/social news, 2021 (%)



SOCIAL-DEMOGRAPHICS OF INTERNET AND SOCIAL MEDIA USERS, 2021



PART 2. MEDIA LITERACY AND SATISFACTION WITH MEDIA PRODUCT

2.1 Media Literacy and Verification of Suspicious Information

The respondents have been asked to list the cases they consider information suspicious or unreliable. As Table 2.1 demonstrates, the most frequently mentioned answers were "If the headline and the content do not match" and "If the source is not mentioned" (18 percent of total answers). Respondents also consider information suspicious or unreliable if the content was shared by unreliable and unknown websites/people (18 percent of total answers each), if they have other information (15 percent of total answers) or if it is very unlikely (14 percent of total answers).

Table 2.1 Cases the information is considered suspicious/unreliable[4]

	N	Percent	Percent of Cases
If the headline and the content do not match	412	18%	37%
If the source is not mentioned	396	18%	36%
If the content is shared by unreliable websites/people	396	18%	36%
If the content is shared by unknown websites/people	392	18%	36%
If I have other information	330	15%	30%
If it is very unlikely	303	14%	27%
Total	2229	100%	202%

On average, respondents provided 2 answers to this question during the 2021 survey and 1.6 answers during the 2019 survey which means that in terms of media literacy the respondents are considering more criteria in 2021 to be sure information is reliable compared to 2019. In terms of distribution of the responses the option *"if it is very unlikely"* was the least mentioned option for the 2021 survey while for the 2019 survey it was the most frequently recalled option (22 percent of total answers).

Respondents were also asked to provide their opinion on how they should react to wrong, false, misleading, or unethical information published by the Armenian media. Respondents were presented with a list of possible actions and asked to choose a maximum of three answers from the list. As Table 2.2 shows, the most frequently mentioned action was boycotting (do not watch, do not read) mentioned by almost half of the respondents. As for active forms of reaction, some 23 percent of the respondents would discuss it with relatives, friends, and colleagues, 21% would complain to the journalist or media representatives and 17% suggested complaining to the body dealing with the issues of media quality or ethics (Table 2.2).

Table 2.2 Reaction to Wrong, False, Misleading or Unethical Information by the Armenian Media[5]

Reaction to wrong, false, misleading or unethical information	N	Percent	Percent of Cases
Boycott (do not watch, do not read)	307	38%	48%
Discuss with relatives, friends, colleagues	147	18%	23%
Complain to the journalist or media representatives	134	17%	21%

[4] Multiple response question, 2229 total responses received, one respondent provided 2 answers on average

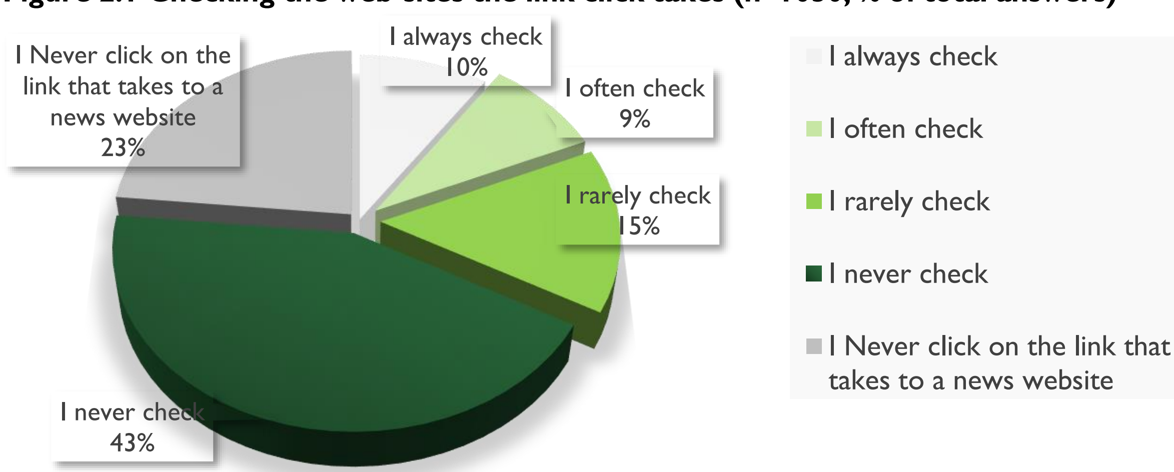
[5] Multiple response question, total 808 responses received, one respondent provided 1.3 answers on average

Complain to the body dealing with the issues of media quality or ethics	108	13%	17%
Cooperate with the media (help the media by taking part in the creation of information, give interviews and etc.)	36	4%	6%
Sue the newspaper	34	4%	5%
Other	16	2%	3%
Do nothing	5	1%	1%
Difficult to answer/Refuse to answer	21	3%	3%
Total	808	100%	127%

Interestingly, compared to the 2019 survey, the share of the respondents who mentioned that they will do nothing as a reaction to wrong, false, misleading or unethical information has sharply declined from 59% to 1% during the 2021 survey. The share of the respondents who will "boycott" (do not watch, do not read) wrong, false, misleading or unethical Information in Armenian media has significantly increased from 28% during 2019 to 48% during 2021. The share of the respondents who will discuss with relatives, friends, colleagues or will complain to the journalist or media representatives has also increased from 13% and 9% during 2019 to 23% and 21% during 2021, respectively.

Another interesting question assessed during the survey was whether the respondents check links on other websites taking them to news websites. According to the survey results, only 18 percent of the respondents always or often check the website links, while 15 percent do it rarely. Almost half of the respondents never check the links (44 percent). Last but not least, 23 percent of the respondents say that they never click on links that take them to news websites.

Figure 2.1 Checking the web-sites the link click takes (n=1050, % of total answers)



Comparison of 2019 and 2021 survey data shows that the share of the respondents who always check the links has increased from 6% during the 2019 survey to 10% during 2021. The share of the respondents who never clock on the link that takes them to a news website has remained almost the same – 23% during 2021 and 25% during 2019. Meanwhile, it is worth mentioning that the share of the respondents who never check the links has increased by 9% - during the 2019 survey it was 34% and for the 2021 survey it comprised 43%.

The respondents have been asked about their behavior when they see suspicious in the media. More specifically, the following question "What do you do when you see suspicious in the media?" has been asked to the respondents. Vast majority of the respondents mentioned they will do nothing in case they see suspicious information in the media (80% of the responses). 9% of the respondents will try to verify information and 5% will leave a comment about the content (Table 2.3).

Table 2.3 Reactions to Suspicious Information in the Media[6]

	N	Percent	Percent of Cases
Nothing	1009	80%	83%
Try to verify	104	8%	9%
Leave a comment about the content	64	5%	5%
Share in social media	14	1%	1%
Call the editors and complain/verify	8	1%	1%
Other	47	4%	4%
Refuse to answer/Difficult to answer	10	1%	1%
Total	1256	100%	104%

The respondents who have mentioned that they will try to verify suspicious information they see in the media have been asked to specify the means of verification (n=104). To verify suspicious information, the respondent most frequently will search for articles on the same topic in a reliable website (mentioned by 46% of the respondents), will ask acquaintances/friends/family (37% of the respondents), or will search on the same topic on the internet (35% of the respondents) (Table 2.4). It should be noted that compared to 2019 survey data, the share of the respondents who mentioned that they will search on the same topic on the internet has declined from, 52% to 35% in 2021. Meanwhile, the share of the respondents who will search for articles on the same topic on a reliable website has slightly increased from 41% in 2019 to 46% in 2021.

Table 2.4 Verification of suspicious Information in the Media (n=104)[7]

	N	Percent	Percent of Cases
I search for articles on the same topic in a reliable website	48	31%	46%
I ask acquaintances/friends/family	38	24%	37%
I search on the same topic in the internet	36	23%	35%
I find the source of information and make an inquiry (official's page, official website, in case of academic topics, the research or institutions' website, etc.)	29	19%	28%
I make post on it in the social media	4	3%	4%
Difficult to answer	1	1%	1%
Total	156	100%	150%

In addition, the respondents have been asked to specify how they verify the reliability of the news website. To verify the reliability of the news websites the respondents most frequently check to whom it belongs or verify suspicious websites through URLs, 37 and 27 percent of answers, respectively. In addition, 23 percent of the respondents take into account the

[6] Multiple response question, total 1256 responses received, one respondent provided 1 answer on average
[7] Multiple response question, one respondent provided 1 answer on average

area/direction of the website while others check the "About us" section or volume of advertisement (12 percent each) (Table 2.5).

Table 2.5 How do the respondents verify the reliability of the news website?[8]

Ways to verify the reliability of the news website	N	Percent	Percent of Cases
To whom it belongs to	129	27%	37%
URL	97	21%	27%
The area/direction of the website	81	17%	23%
"About us" section	44	9%	12%
Volume of advertisement	44	9%	12%
Editors	26	6%	7%
Other	9	2%	3%
Refuse to answer/Difficult to answer	41	9%	12%
Total	471	100%	133%

Compared to the 2019 survey data the share of the respondents who will consider the ownership of a news website to verify its reliability has significantly increased. In 2019 it comprised 23% and in 2021 it increased to 37%. In contrast, the share of the respondents who will consider the "URL" and "About us" sections has decreased from 31% and 26% in 2019 to 27% and 12% during the 2021 survey, respectively.

Most often respondents characterized a media literate person as someone who can use the Internet (16 percent of total answers). Afterward, the most frequently mentioned answers were an ability to understand the aim of creating the media content (14 percent of total answers), an ability to analyze how the media content was perceived by others (13 percent of total answers), and an ability to analyze the presented or missing media content (12 percent of total answers) (Table 2.6). The comparison with the 2019 survey data for this question did not reveal any remarkable differences to be pointed out.

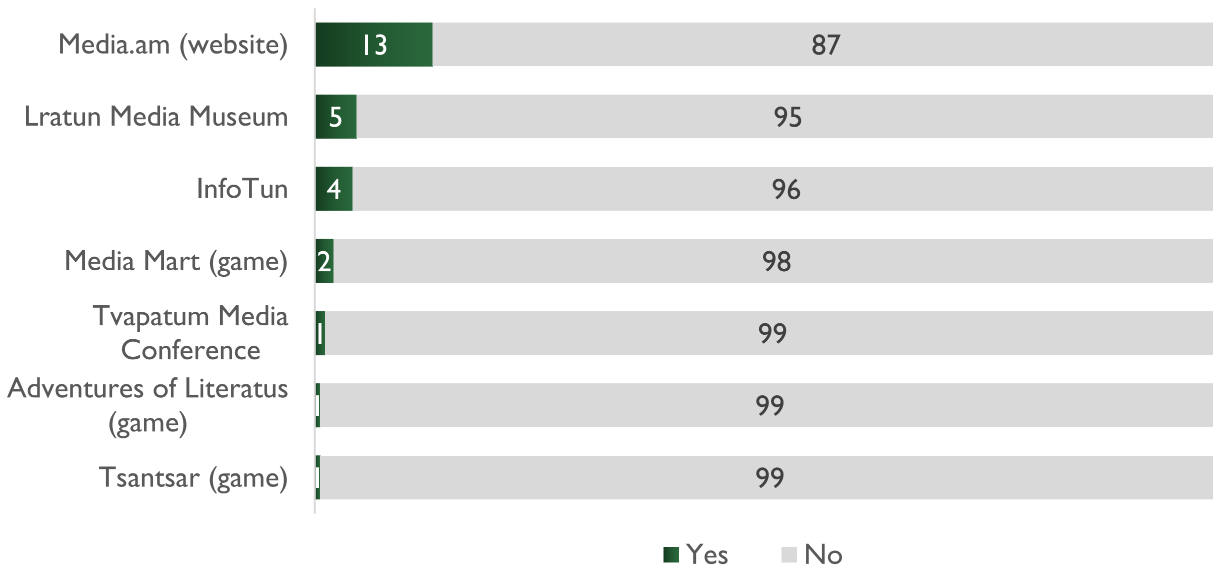
Table 2.6 Characteristics of a media literate person (up to 3 answers permitted)[9]

Reaction to wrong information	N	Percent	Percent of Cases
Ability to use internet	314	16%	26%
Ability to understand the aim of creating the media content	282	14%	23%
Ability to analyze how the media content is perceived by others	247	13%	20%
Ability to analyze the presented/missing media content	227	12%	19%
Ability to create and share media content	137	7%	11%
Ability to upload necessary applications/materials	127	6%	10%
Ability to criticize the creator of the media content	117	6%	10%
Ability to earn money using media	98	5%	8%
Ability to meet ones financial/consumer needs	67	3%	6%
Ability to open an account	66	3%	5%
Other	9	0%	1%
Difficult to answer/Refuse to answer	266	14%	22%
Total	1957	100%	161%

[8] Multiple response question, 471 total responses received, one respondent provided 1.3 answers on average
[9] Multiple response question, total 1957 responses received, one respondent provided 1.6 responses on average

Respondents were also asked about the Media Initiatives Center products with which they were familiar. As the analysis shows, 21% of the respondents were aware of at least one Media Initiative Center product (n=252) which implicates statistically significant improvement compared to 2019 results (12 percent in 2019, one sample t-test, p< 0.00). Similar to 2019, the most popular Media Initiative Center product was the "Media.am" website (13% of the respondents were familiar with), that was followed by Lratun Media Museum (5% of the respondents) and by "Infotun" (4 percent). "Media Mart" game, Tvapatum Media Conference, Adventure of Literatus and Tsantsar game were less popular among the respondents (Figure 2.2).

Figure 2.2 Media Initiatives Center products respondent were familiar with in 2021 (% of total answers)

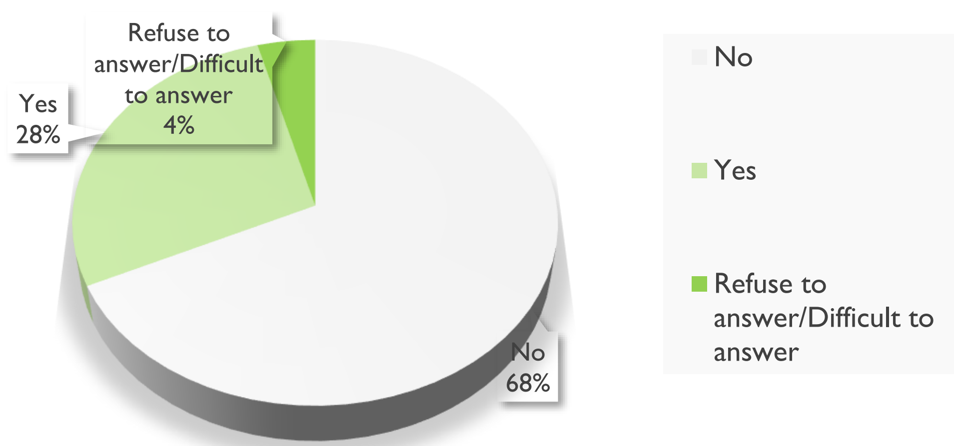


As the data analysis shows, 4.4% of the respondents were aware of the activity of "Ditord Marmin" (Observer Body) of Mass Media Ethics. The respondents who were aware of "Ditord Marmin" (n=53), have been asked to describe what they think it does. According to the results, 35 percent of the respondents believe that the Observer Body follows up and monitors violations, 31 percent believes that it pursues the observance of ethical norms and 22 percent mentioned "fact-checking". 8 percent of the respondents think that it does not work effectively and was not doing anything and 4 percent mentioned that it examines complaints (Figure 2.3).

Figure 2.3 What the respondents think "Ditord Marmin" does (n=53)

The respondents have been introduced to the key function of the Media Ethics Observatory (MEO). Particularly, the following text has been introduced to the respondents "The Media Ethics Observatory was authorized to review the actions and publications of media representatives, their compliance with the provisions of the present Code of Ethics, and it has the authority to investigate complaints on violations and to draw conclusions from the results of the investigation". Afterward, the respondents have been asked whether they were willing to apply to the MEO if necessary. According to the results, more than half – 68% of the respondents were not willing to apply, 28% were willing and 4% had difficulty or refused to answer (Figure 2.4).

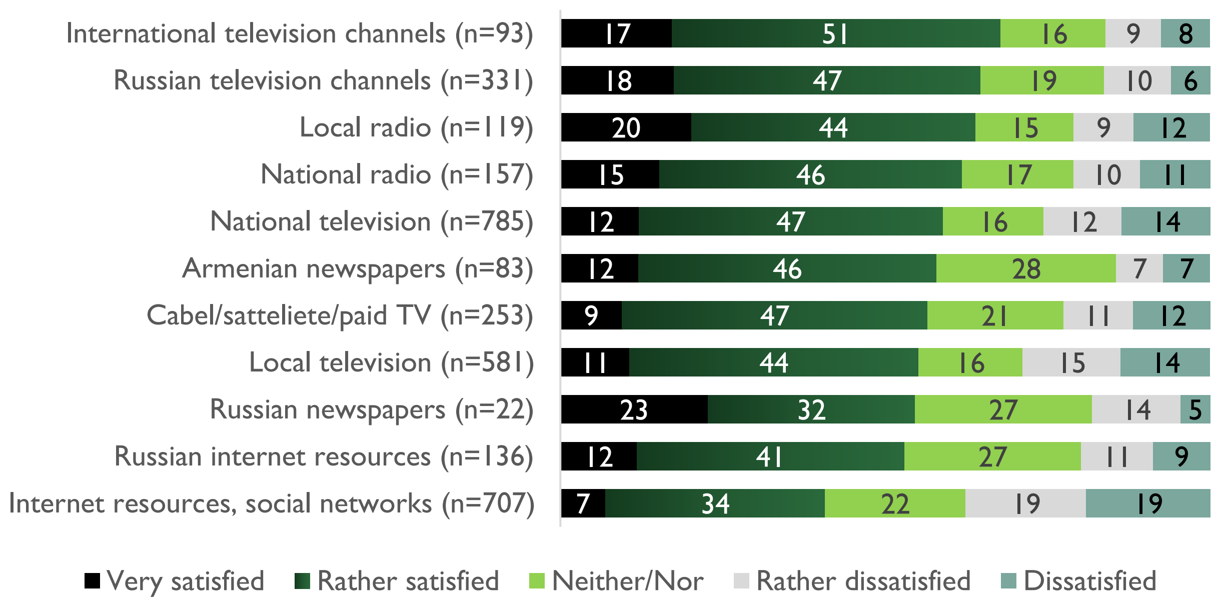
Figure 2.4 Willingness to apply to the MEO if necessary



2.2 Satisfaction with Media Products

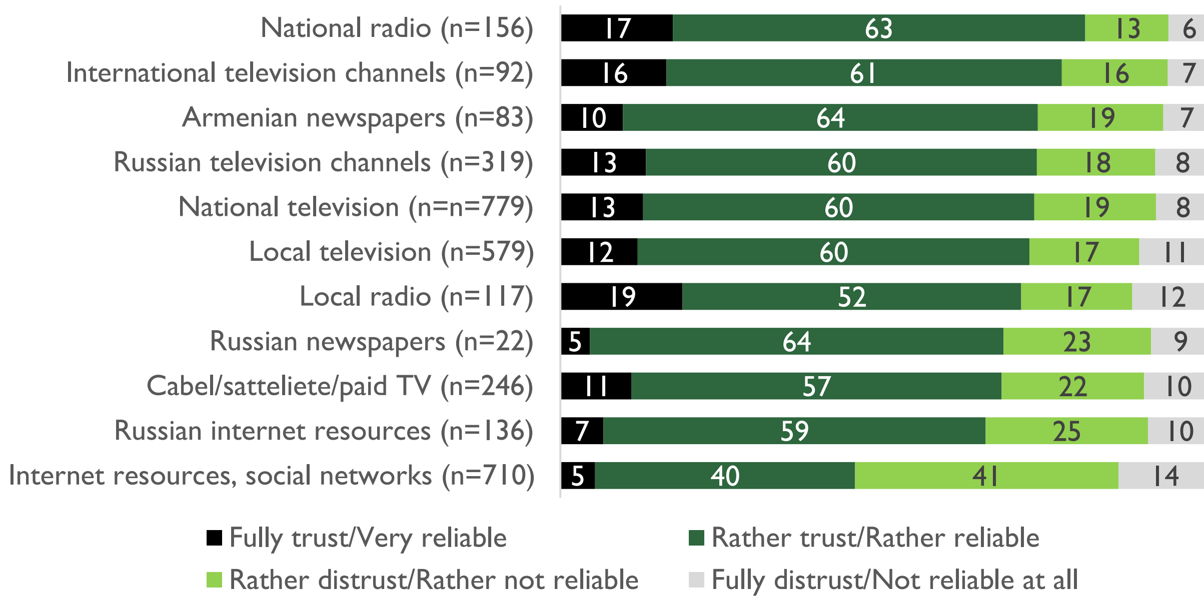
The audiences of International TV Channels, Russian TV channels and local radio enjoy the work of the reporters of these media most of all. In particular, 68 percent of users of International TV Channels and 65 percent of users of Russian TV channels said they were satisfied ("Very satisfied" and "Rather satisfied" answers aggregated) with the professional qualities of the reporters of these media sources. Local radio and national radio were also appreciated by the respondents, as 64 and 61 percent of respondents mentioned they were satisfied with these media products, respectively. Less but not least, the share of the respondents who praise the professionalism ("Very satisfied" and "Rather satisfied" answers aggregated) of reporters representing internet sources and social networks media was the smallest: only 41 percent of the respondents were satisfied with the professionalism of the reporters representing this media (Figure 2.5).

Figure 2.5 Satisfaction with the ethics of the journalists representing the sources, 2021 (%)



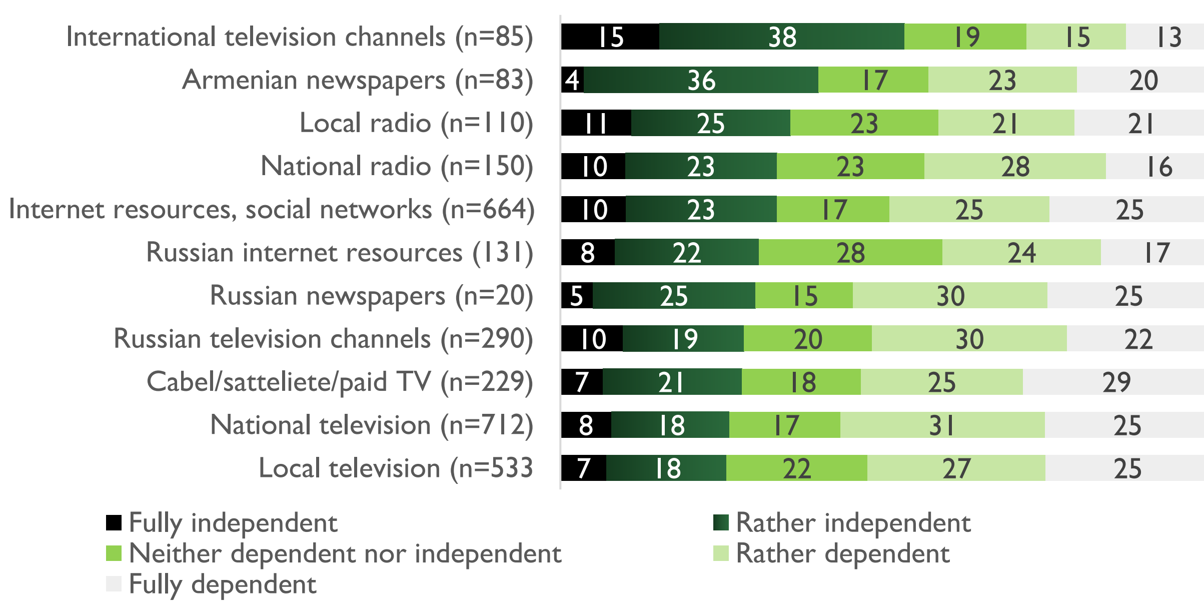
National radio and International TV channels were the most trusted by their Armenian audiences, as respectively 81 and 77 percent of users say that the information provided by these sources was reliable ("Very reliable" and "Rather reliable" answers aggregated). 73 percent of users of Armenian Newspapers, Russian TV channels and National television channels, find the information provided by these channels reliable (Figure 2.6) Compared to the data from the 2015 survey, in 2021 the levels of trust toward National television channels has increased: in 2015, only 58 percent of the users of the national television channels demonstrated trust toward these channels. It also appears that the trust towards Internet resources have decreased from 66 percent in 2015 ("trust completely" and "trust very much" answers aggregated) to 45 percent in 2021.

Figure 2.6 Trust towards the sources of information, reliability of information sources (%)



The survey results show that Armenian respondents consider the international TV channels, Armenian Newspapers, local and national radio to be the most independent media sources. In particular, international television channels were considered independent by 53 percent of respondents ("Fully independent" and "Rather independent" answers aggregated). Online resources and social networks were considered independent by 33 percent of respondents which implicates a decrease compared to 2019 results (42 percent of respondents in 2019) (Figure 2.7).

Figure 2.7 Perceptions of Independence of Media Sources, (% of total)



PART 3. PUBLIC PERCEPTION AND MEDIA COVERAGE OF REFORMS

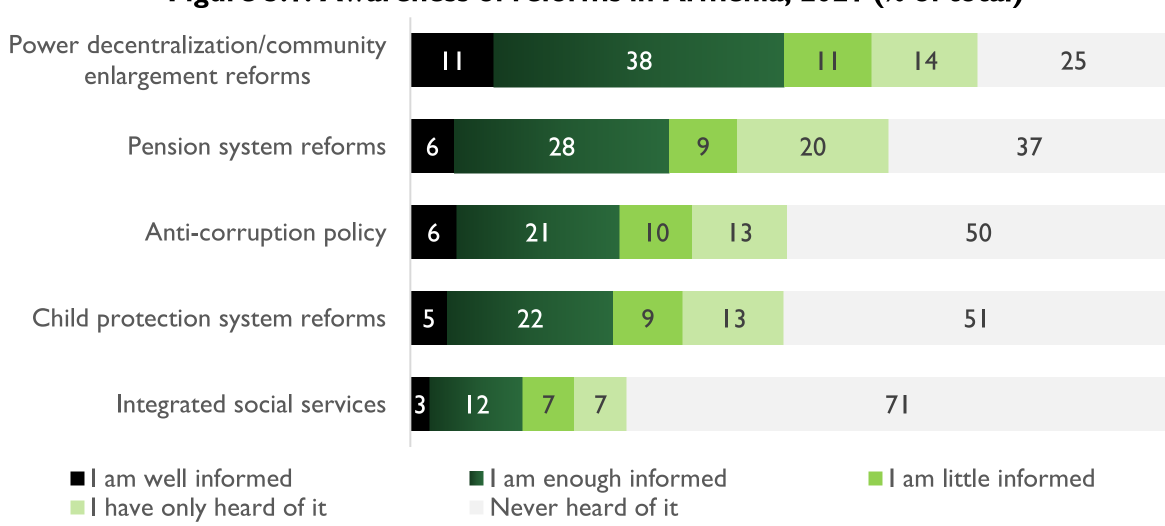
METHODOLOGICAL NOTE

From a methodological point of view, there are some differences in the questions on the perceptions and coverage of ongoing reforms between the 2015 survey and the 2017, 2019 and 2021 surveys. For several questions, different scales were used in the survey conducted in 2015. In the 2015 survey, respondents were first asked if they were interested in the reforms, and if the answer was positive, then they were asked if they were aware of the reforms (those who were not interested skipped to the next question). In the 2017, 2019 and 2021 surveys, the order of the questions has been changed. Therefore, the comparative analysis of data between 2015, 2017, 2019 and 2021 is performed accounting for comparable scales. Some scale recoding and data manipulation was performed, where applicable. Note that data re-coding and manipulations did not affect the reliability of findings. In case the comparative analysis of 2015 survey data with the 2017, 2019 and 2021 data could produce bias, a comparison between only the 2017, 2019 and 2021 survey data was performed.

3.1 Public Awareness of and Satisfaction with the Reforms

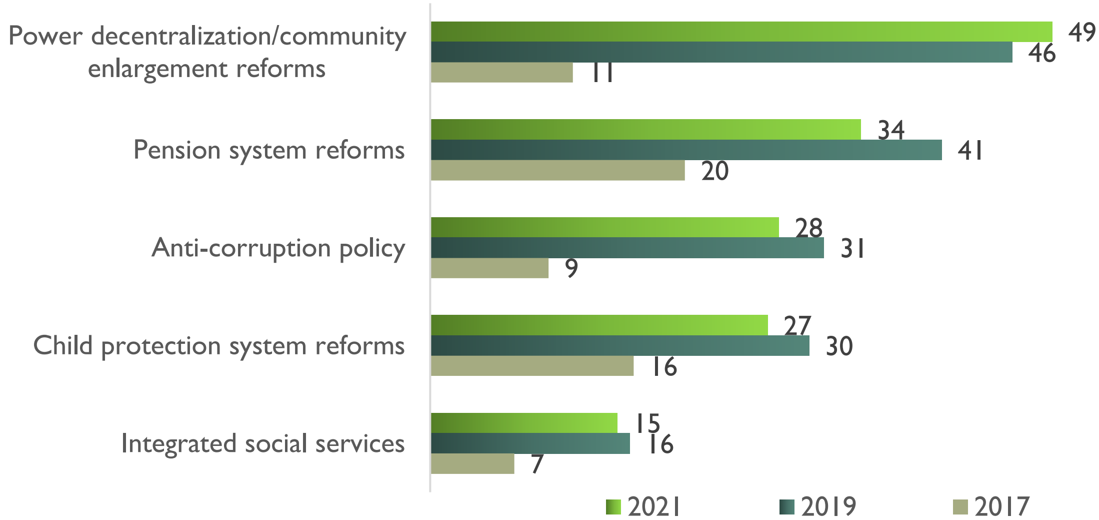
The survey results show that public awareness about ongoing reforms (social reforms, child protection system reforms, anti-corruption policy reforms, etc.) was **generally low** in Armenia (Figure 3.1). Most of all respondents were **less informed about social reforms**: more than 70 percent of the respondents were not informed about child protection system reforms and integrated social services reforms ("I am little informed", "I have only heard of it" and "Never heard of it" answers aggregated). Respondents were relatively more informed about the power decentralization reforms and pension system reforms, at 49 percent and 34 percent of the respondents, respectively ("well informed" and "enough informed" answers aggregated).

Figure 3.1. Awareness of reforms in Armenia, 2021 (% of total)



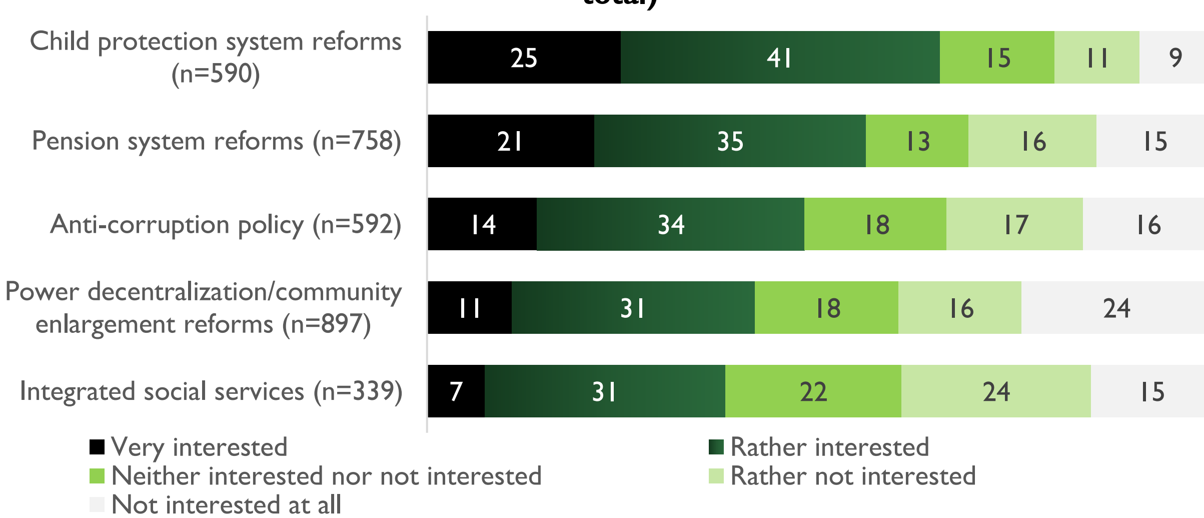
Compared to 2015, for 2021 public awareness of power decentralization reforms **has significantly increased** from 11 percent to 49 percent. However, for the rest of the reforms, the overall awareness has slightly decreased compared to 2017. For example, public awareness of pension system reforms decreased from 41 percent in 2017 to 34 percent in 2021 (Figure 3.2).

Figure 3.2 Awareness of reforms in Armenia, 2017 and 2019 (% of total, "well informed" and "enough informed" answers aggregated)[10]



Child protection system reforms and pension system reforms seem to be the most required topics in Armenia, as some 66 percent of respondents say they were interested ("Very interested" and "Rather interested" answers aggregated) in the child protection system reforms, and some 56 percent with regard to the pension system reforms (among those who were informed about the reforms). Meanwhile, there was a relatively low public interest towards social reforms (Figure 3.3).

Figure 3.3 Public interest in the reforms, (among those who were informed) 2021 (% of total)

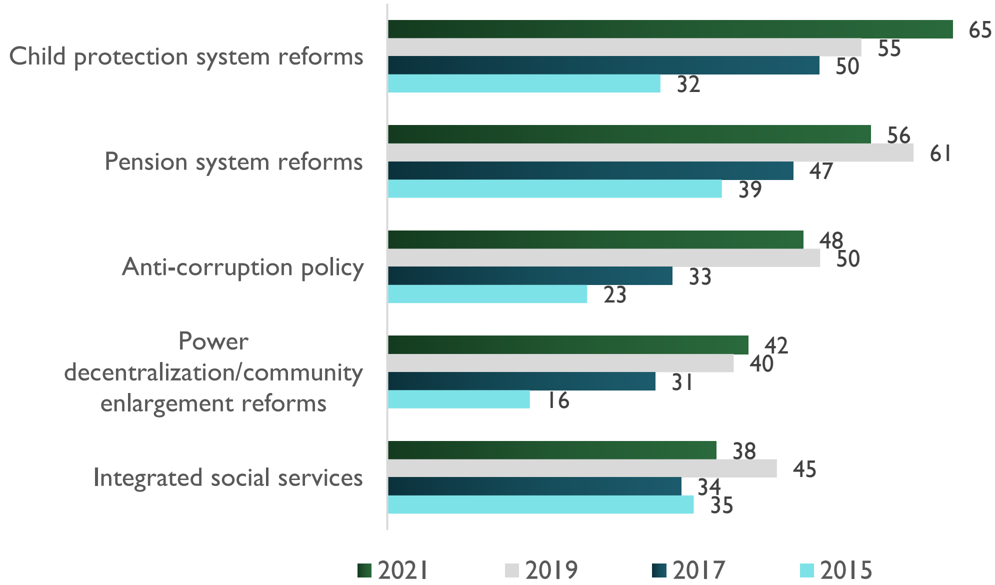


Compared to 2015, in 2021 the share of the respondents interested in reforms has significantly increased among those who were informed about the reforms (Figure 3.4)[11]. For example, in

[10] Please note, that for 2017 and 2019 survey "Social Reforms" terms was used
[11] Data for 2015 was adjusted to make it comparable with 2017 and 2019 data.

2015 only 16 percent of the respondents were interested in power decentralization reforms ("Yes" and "Somehow" answers aggregated), while 42 percent of the respondents mentioned they were interested in these reforms in 2021 ("Very interested" and "Rather interested" answers aggregated). The same tendency could be observed for the other reforms as well.

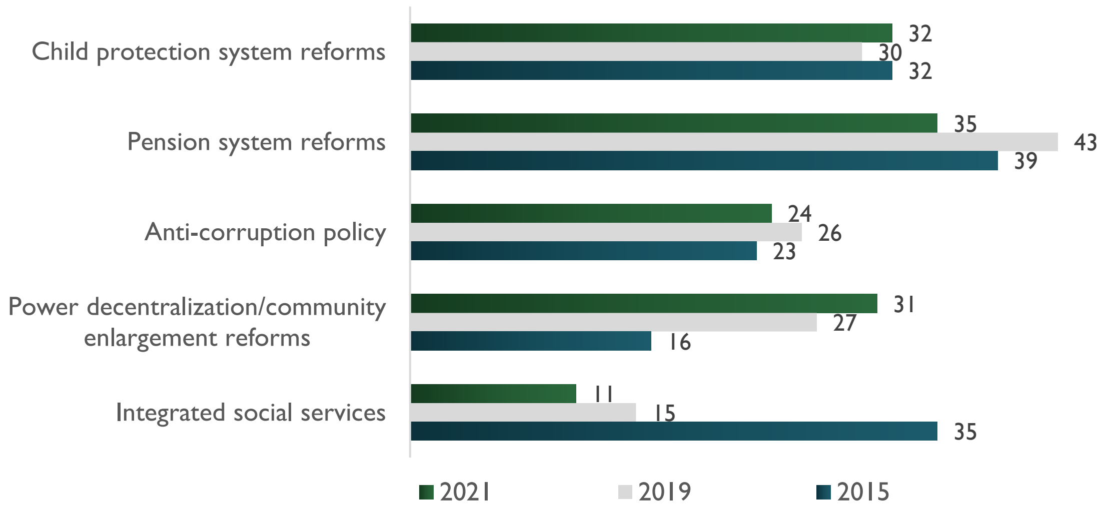
Figure 3.4 Public interest in the reforms, 2015, 2017 and 2019 comparison (%, among those who were informed, "very interested" and "rather interested" answers aggregated)



When computing the data of the portion of the total sample that was interested in public reforms, it is obvious that public interest significantly increased for only power decentralization reforms in 2021 compared to 2015, meanwhile for the others, e.g. social reforms, pension system reforms, public interest decreased in 2021 as compared to 2015.[12] For Child protection system reforms, anti-corruption policy reforms the interest remained same or almost the same (Figure 3.5).

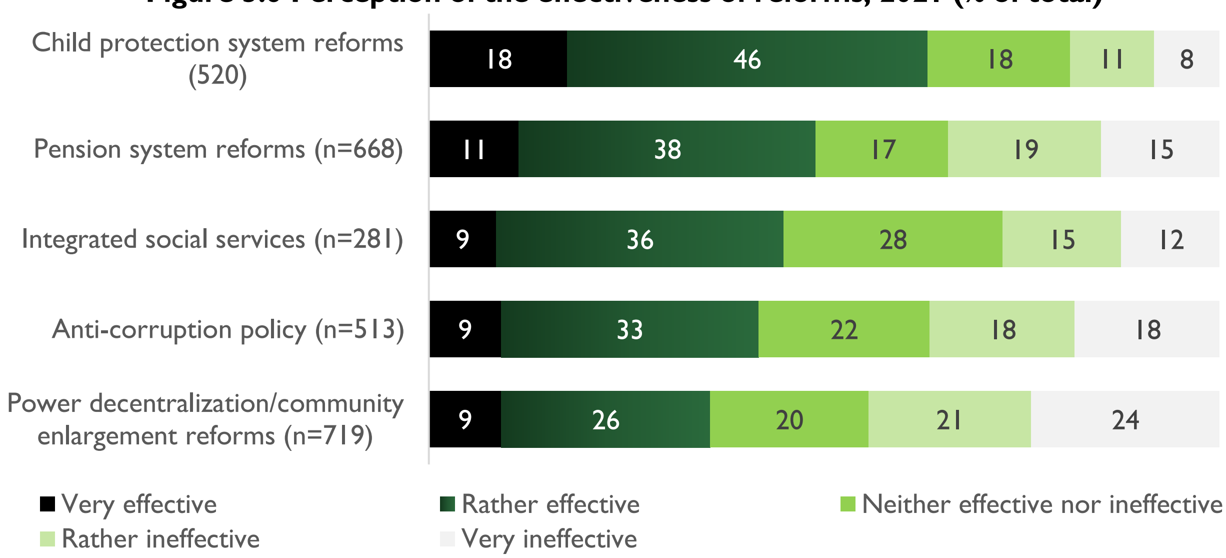
Figure 3.5 Public interest in the reforms, 2015 and 2019 comparison (% of total respondents, "very interested" and "rather interested" answers aggregated)

[12] While interpreting data, consider that different scales were used for 2019 and 2015 to measure respondent's satisfaction: the scale for 2019 included "very satisfied", "rather satisfied", "neither satisfied nor dissatisfied", "rather dissatisfied", and "very dissatisfied" options; the scale for 2015 included "very much", "somewhat", "very little", and "not at all" options.



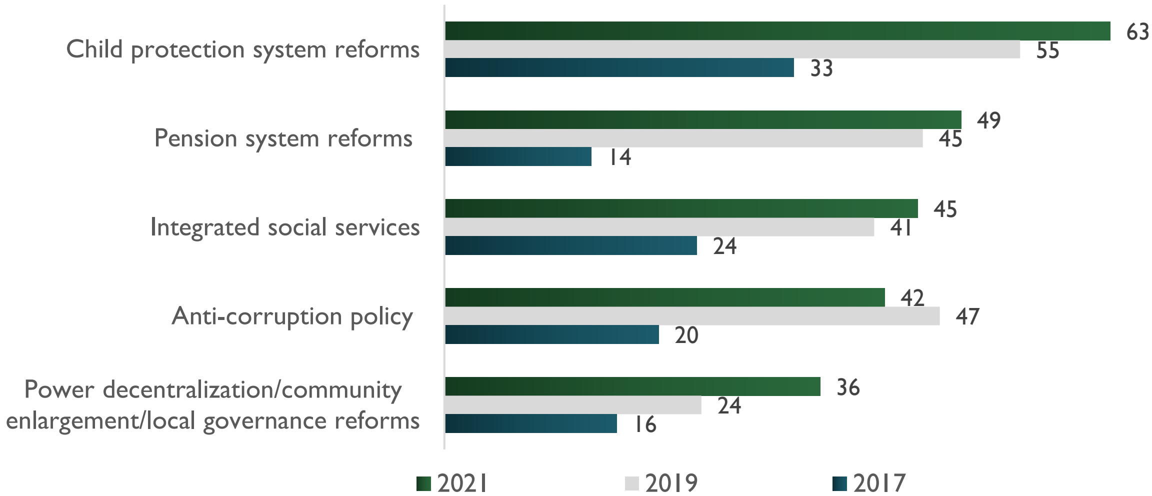
As for the perception of the effectiveness of the reforms, the share of aware respondents who say that the implementation of the aforementioned reforms in Armenia was "very effective" or "effective" was average, ranging from 35 percent to 64 percent (Figure 3.6). Child protection system reforms and pension system reforms were considered relatively more effective. Meanwhile, power decentralization reforms were considered ineffective by approximately half of the respondents ("Rather ineffective" and "Not effective at all" answers aggregated). Anti-corruption reforms also seem to be less praised, as only 42 percent of the respondents consider these reforms effective ("Very effective" and "Rather effective" answers aggregated).

Figure 3.6 Perception of the effectiveness of reforms, 2021 (% of total)



Compared to 2017, the share of the respondents considering the aforementioned reforms effective has significantly increased (Figure 3.7). For example, in 2017, the share of respondents who evaluated pension system reforms as effective ("Very effective" and "Rather effective" answers aggregated) was 14 percent, which has increased to 49 percent in 2021. As for the anti-corruption policy reforms, though for 2021 it recorded improvement compared to 2017 data, for 2021 the effectiveness was assessed to be slightly lower compared to 2019.

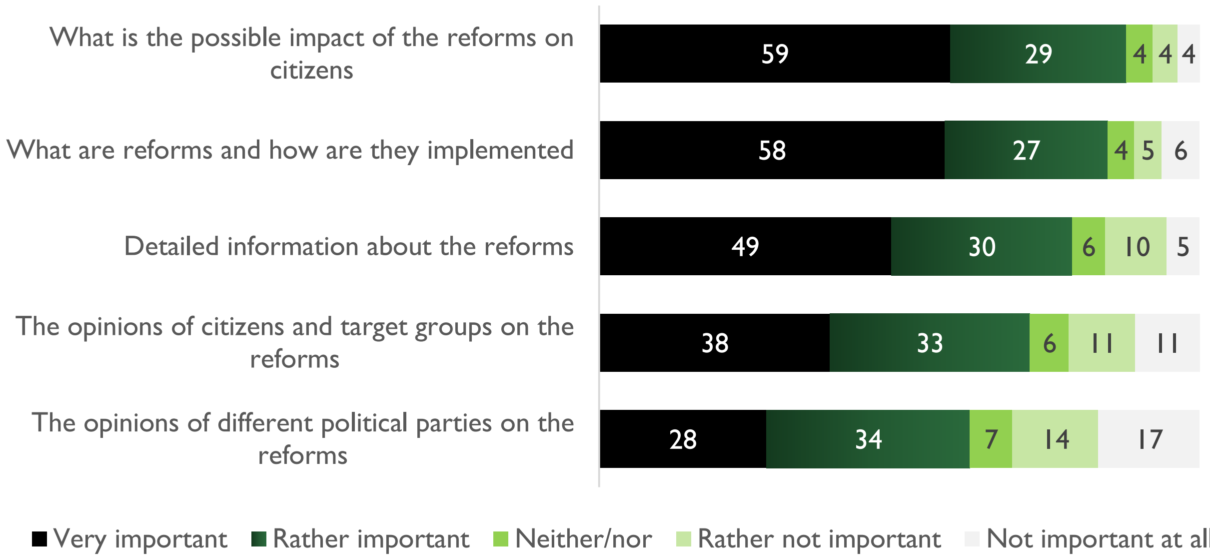
Figure 3.7 Perception of the effectiveness of reforms, 2017, 2019 and 2021 comparison (% of total, among those who were informed about the reforms, "very effective" and 'rather effective" answers aggregated)



3.2 Media Coverage of the Reforms

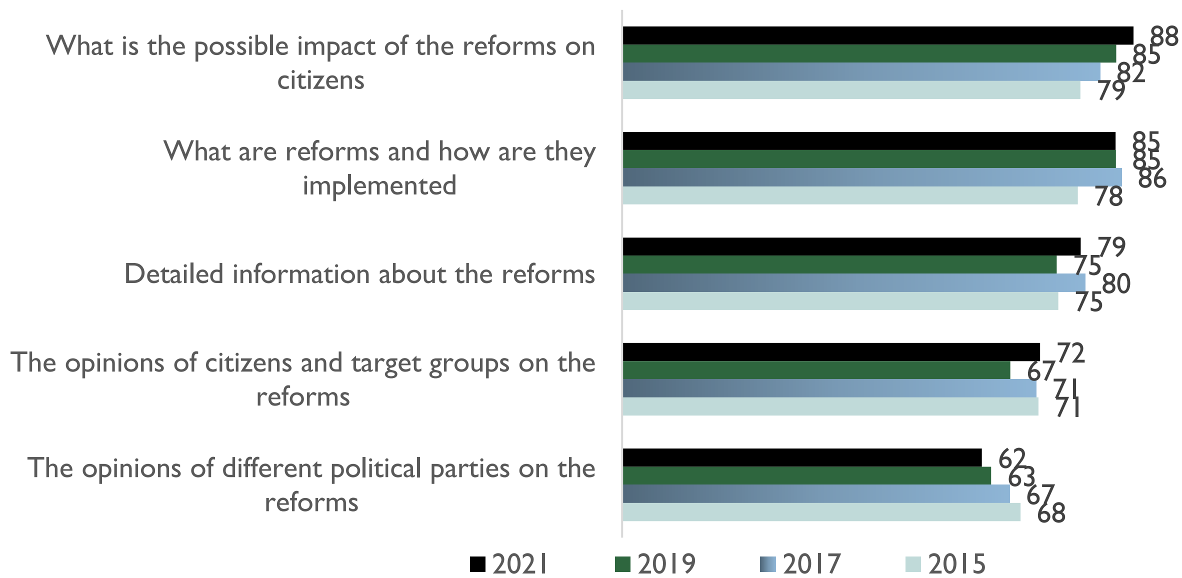
As the survey results, an overwhelming majority of respondents attach a significant importance to comprehensive coverage of the ongoing reforms by the media. Particularly, "what is the possible impact of the reforms on citizens" and "what are the reforms and how are they implemented" were two aspects most often highlighted by the respondents, 88 and 85 percent respectively ("very important" and "rather important" options aggregated). As the Figure 3.8 shows, the vast majority of respondents also find it important that the media provide coverage with detailed information about the reforms and the opinions of citizens and target groups of the reforms. However, compared to the other options, respondents relatively did not attach significant importance to media coverage of opinions of different political parties on the reforms. Nearly 62 percent of respondents find this aspect unimportant ("rather not important" and "not important at all" options aggregated).

Figure 3.8 Importance of comprehensive coverage of reforms by the media, 2021 (% of total)



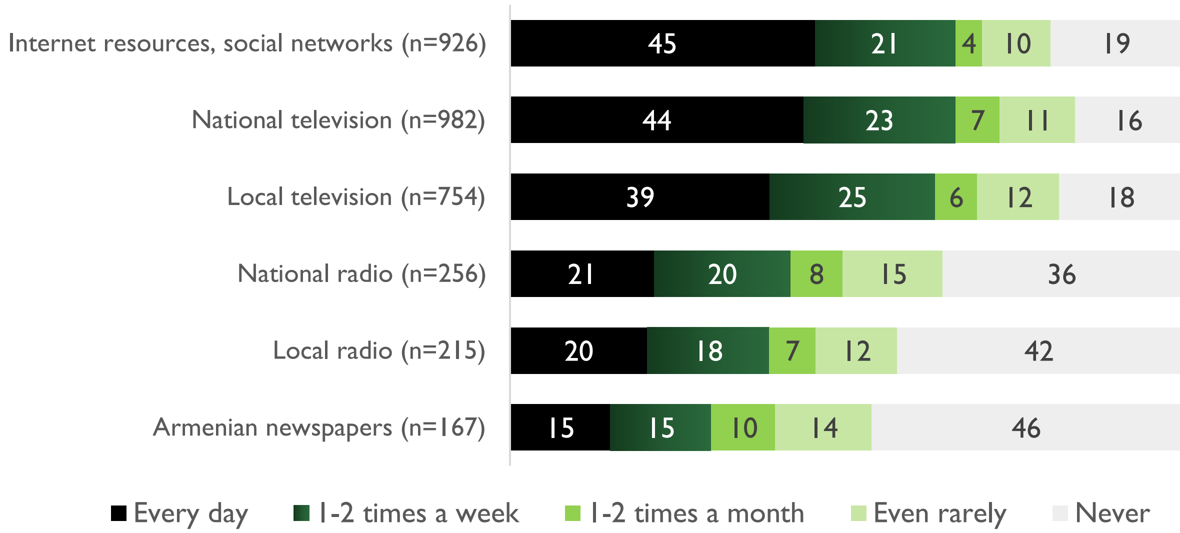
Similar to the previously conducted survey data, in 2021 public interest toward the media coverage of reforms remains high: for almost all criteria over three-fourths of surveyed Armenians attached importance to the media's role in covering reforms. As Figure 3.9 shows, compared to 2015 respondents in 2021 attached relatively less importance to media coverage of opinions of different political parties on the reforms.

Figure 3.9 Importance of comprehensive coverage of reforms by the media, 2015, 2017, 2019 and 2021 (% of total, "very important" and "rather important" options aggregated)



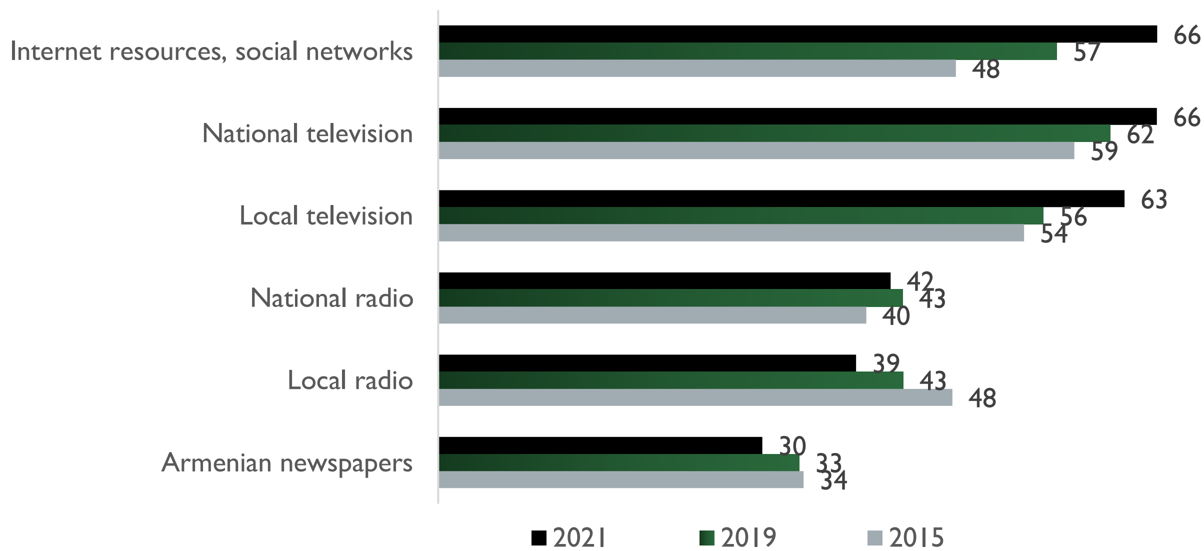
Internet resources, social networks and national TV were the main media sources that provide audiences with information of the reforms most regularly. More than half, approximately 70 percent of those who use internet resources, social networks and national TV report that they regularly ("every day" and "1-2 times a week" answers aggregated) receive information about the reforms. These two sources were followed by local televisions and national radio in terms of the regularity of informing respondents about the reforms (Figure 3.10).

Figure 3.10 Sources of consumption of news on the reforms, 2021 (%)



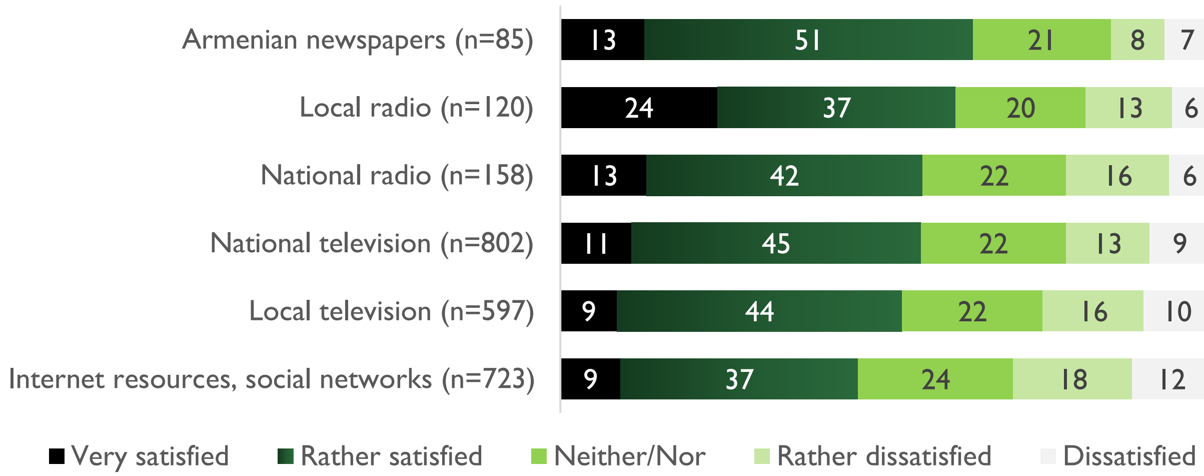
Compared to 2015, the intensity of the consumption of news on reforms through different media sources, including internet resources, national television and local television has significantly increased: in 2015 a lower percentage of respondents used internet resources, social networks and television channels to become informed about the ongoing reforms, as compared to 2021. As for local radio and Armenian newspapers, the number of respondents using these media to become informed about ongoing reforms has decreased (Figure 3.11).

Figure 3.11 Sources of consumption of news on the reforms, 2015, 2019 and 2021 (% of total, "every day" and "1-2 times a week" answers aggregated)



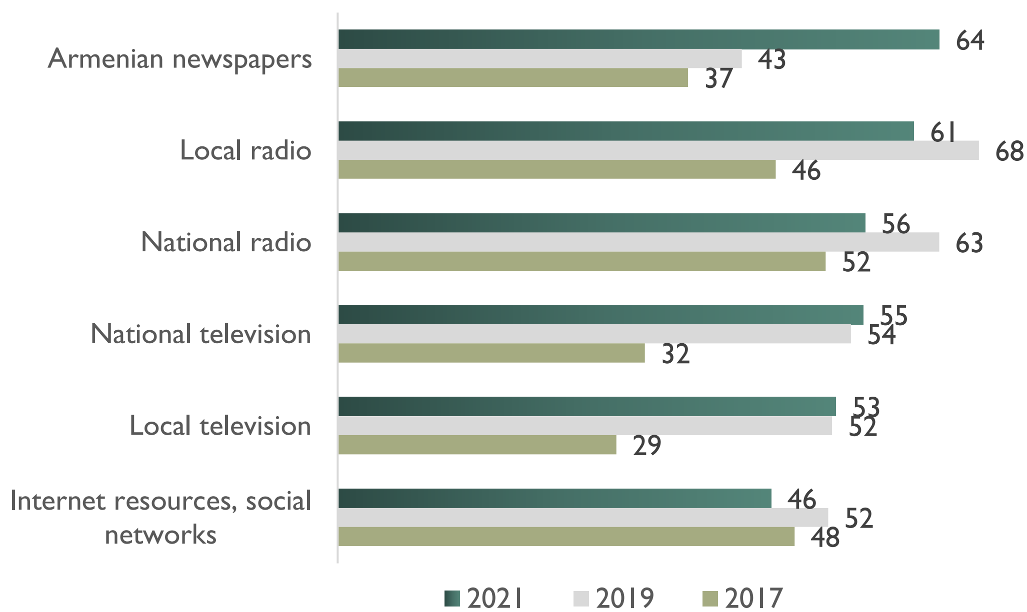
Generally, **respondents were satisfied with the media coverage of the reforms**. Armenian newspapers, local and national radio, as well as television channels with national coverage, were in the leading positions in terms of respondents' satisfaction with coverage of the reforms (Figure 3.12). Compared to the aforementioned media, internet resources and social media were less highly rated in terms of respondents' satisfaction with the content and quality of the information provided on the reforms.

Figure 3.12 Satisfaction with the coverage of reforms, 2021 (%)



Respondents' satisfaction with media coverage of the ongoing reforms has both improved and deteriorated since 2017. The improvement was most noteworthy for Armenian newspapers, National and Local television. As for local and national radio, the satisfaction level improved for 2019 compared to 2015 and deteriorated for 2021. In contrast, for national and local television, the satisfaction level improved compared to 2017 and remained relatively static since then (Figure 3.13).

Figure 3.13 Satisfaction with the coverage of reforms, 2017, 2019 and 2021 (%, "very satisfied" and "rather satisfied" answers aggregated)



Respondents were also asked to name a media source that covers the reforms in Armenia best of all. **Public TV, Shant TV, Armenia TV, and Azatutyun Radio Station** were the four most frequently mentioned media in 2021 (Table 3.1). As can be seen, Public TV significantly improved its position in terms of coverage of the reforms. Shant TV and Armenia TV follow Public TV maintaining their leading positions. As can be seen in Table 3.1, Azatutyun Radio Station constantly improved its position compared to 2015 and 2017 and maintained the fourth position for 2019 and 2021. Armnews and News.am marinated their positions while Kentron TV did not appear in the top-ten list for 2021.

Meanwhile the positions of opposition-oriented media - 5 TV improved and it appeared in the list for 2021.

Table 3.1 Media sources that cover the reforms in Armenia best of all

2021		2019		2017		2015	
Name of the media	**% of total**	**Name of the media**	**% of total**	**Name of the media**	**% of total**	**Name of the media**	**% of total**
Public TV	28%	Shant TV	37%	Shant TV	37%	Shant TV	35%
Shant TV	24%	Armenia TV	21%	Armenia TV	25%	Armenia TV	16%
Armenia TV	19%	Public TV of Armenia	17%	Public TV	11%	Kentron TV	14%
Azatutyun R.S.	7%	Azatutyun R.S.	5%	Kentron TV	8%	Public TV	12%
Armnews	6%	Armnews	4%	Azatutyun R.S.	3%	Yerkir Media	4%
News.am	2%	News.am	3%	A1+	2%	Gala TV	4%
5 TV	1%	Kentron TV	3%	Yerkir Media	2%	Azatutyun R.S.	3%
Yerkir media	1%	ATV	1%	ATV	2%	Armnews	2%
ATV	1%	Yerkir Media	1%	News.am	2%	News.am	1%
Other	10%	Other	8%	Other	9%	Other	8%