MEDIA CONSUMPTION AND MEDIA COVERAGE OF REFORMS IN ARMENIA

Analytical Report

August 2019

Yerevan

This report was submitted to **Media Initiative Center**. It was prepared by the **Caucasus Research Resource Center-Armenia Foundation**.

Contents

ACKNOWLEDGMENTS

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

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 is assessed through a number of tools, including three (baseline, mid-term, and end-line) CRRC quantitative surveys about citizens' awareness and perceptions of the coverage of the reforms. The present report introduces the results of the mid-term survey conducted in 2017. 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 1200 respondents (1178 in 2017 and 1448 in 2015) implemented by CRRC-Armenia in October-November 2019. The distribution of the sample size by marz (region) is presented in the table below.

Table: Sample size and its distribution by Marz, 2019

Marz	Number of interviews	% of total
Aragatsotn	54	4.5
Ararat	103	8.6
Armavir	108	9.0
Gegharkunik	89	7.4
Kotayk	111	9.3
Lori	111	9.3
Shirak	106	8.8
Syunik	53	4.4
Tavush	50	4.2
Vayots Dzor	22	1.8
Yerevan	393	32.8
Total	**1200**	**100.0**

The proportionate to Population Size random sampling methodology was used. The confidence interval or margin of error for the 2019 survey with a 95% confidence level equaled 2.85% (compared with 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. After intensive discussions with MIC representatives, some of the questions that were included in the previous baseline questionnaire were removed from the mid-term 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 2019 survey with the ones based on the surveys conducted in 2015 and 2017.

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

1.1 Information sources

Television continues to be the most frequently used source of information in Armenia, according to the survey results. The vast majority (72 percent) of respondents reported watching "National television channels" every day. The second most frequently consumed source of information is the Internet, with 57 percent admitting to using "Other Internet resources and social networks" every day. "Local television" and "Russian television channels" are watched on a daily basis by 40 and 26 percent of the respondents, respectively, followed by cable, satellite or paid TV channels, consumed by 25 percent each day (Figure 1.1).

Figure 1.1 Frequency of consumption of information sources, 2019 (% of total)
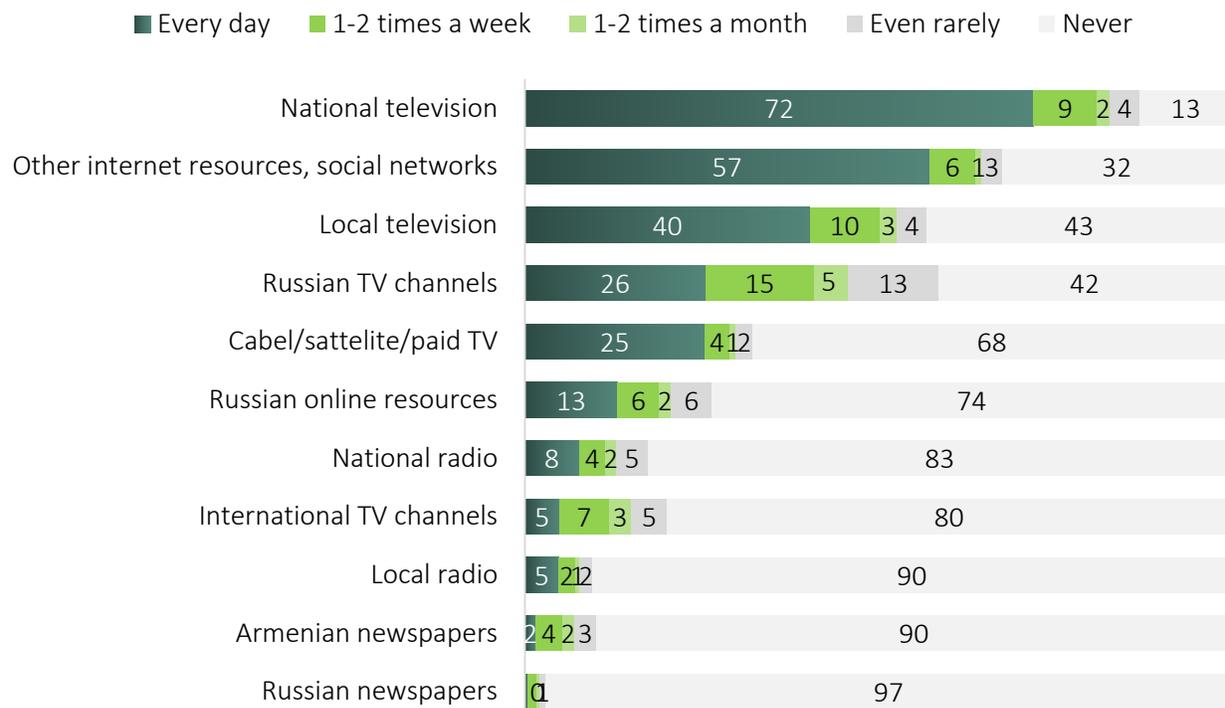
In comparison with 2015, the frequency of daily consumption of traditional sources of information, such as television and newspapers, decreased in Armenia. In particular, daily usage of TV channels with national coverage has decreased from 82 percent to 72 percent, while daily consumption of Armenia and Russian Newspapers decreased significantly, from 10 percent in 2015 to 2 percent in 2019 and 5 percent in 2015 to 0 percent in 2019, respectively. The frequency of daily consumption of Russian TV channels decreased significantly: from 51 percent in 2015 to 26 percent. The trend is the same for the international TV channels - from 12 percent in 2015 to 5 percent in 2019. 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 five 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 57 percent in 2019 (Figure 1.2).[1]

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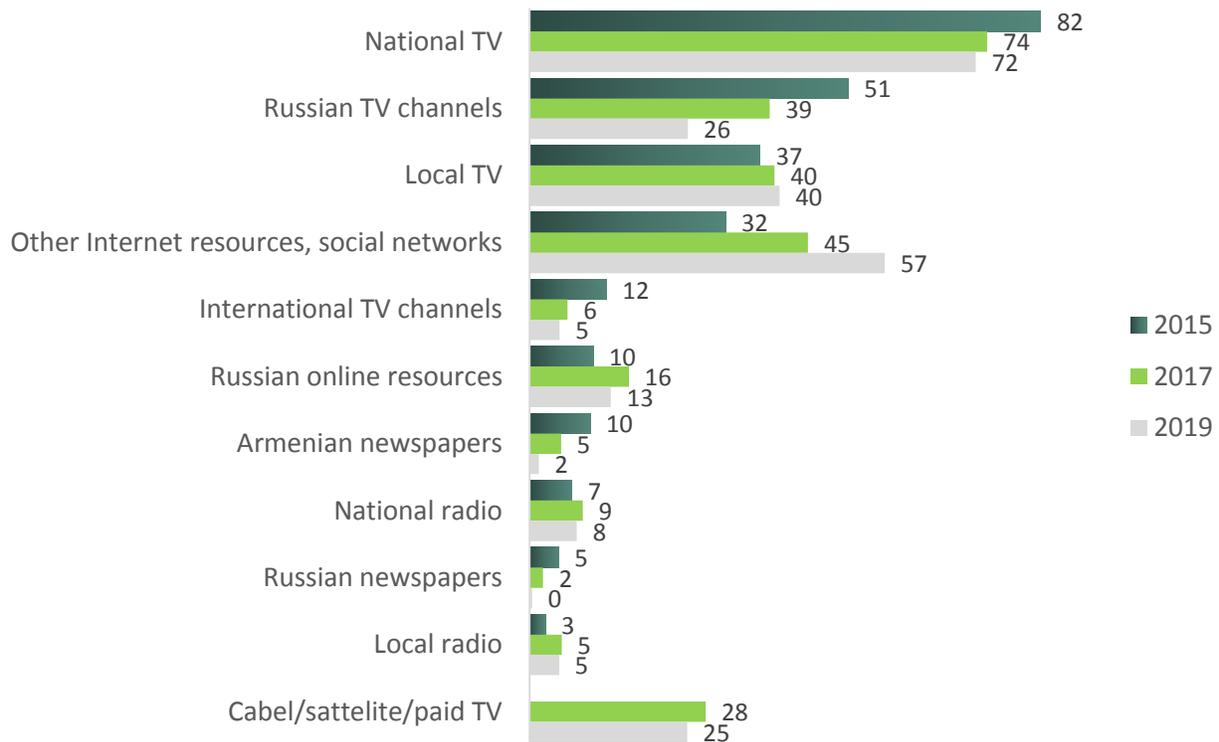
1.2. Online news consumption

17 percent of respondents reported consuming online news media directly via websites, whereas 83 percent of them use online news media via social networks (e.g., Facebook, Odnoklassniki, Instagram, YouTube, etc.) (Figure 1.3).

Meanwhile, though 57 percent of respondents reported using Internet resources and social media on daily basis, only 11 percent reported accessing online news websites every day directly (not via

Figure 1.3 Ways of accessing news websites, 2019 (% of total)

---

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

social networks), whereas another 16 percent reported doing so one or two times a week. A majority of respondents, 55 percent, said that they never access news websites (63 percent in 2017) (Figure 1.4).

Figure 1.4 Frequency of accessing news websites (not via social networks), 2019 (% of total)
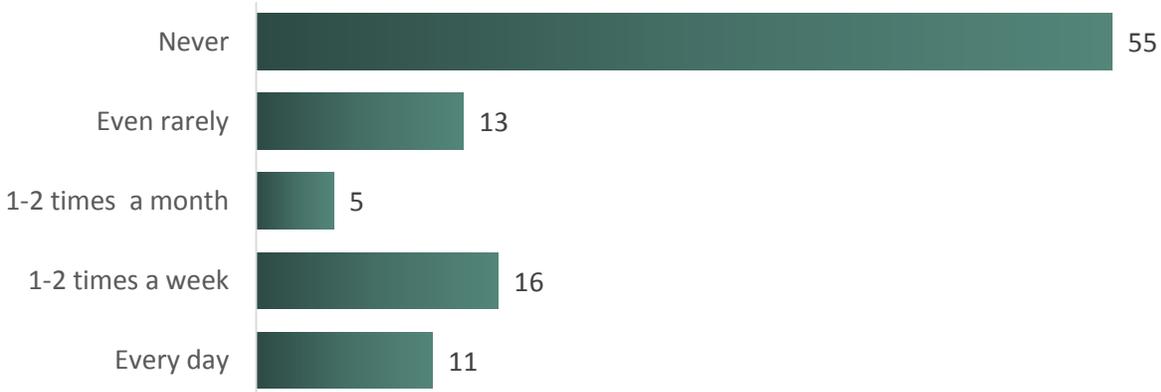
The respondents who access news websites were also asked to name a maximum of three websites that they use most frequently and access directly (not via social networks). Similar to 2017, News.am seems to be the most popular news website in Armenia, with 23 percent of total mentions. Azatutyun.am improved its position comparing to 2017, with 13 percent of total mentions (11 percent in 2017). The next most popular websites in Armenia are: Shamshyan.com and Tert.am (Table 1.1).

Table 1.1 Four most frequently accessed news websites in Armenia (N=360), 2017

News website	%	News website	%
2019		2017	
News.am	23%	News.am	32
Azatutyun.am	13%	Shamshyan.com	18
Shamshyan.com	10%	Tert.am	16
Tert.am	9%	Azatutyun.am	11

The survey showed that presently only 1 percent of the respondents are subscribed to any paid online resources (such as TV channels or journals). Meanwhile, only 6 percent of the respondents demonstrated any readiness to pay for online media resources to receive reliable information on regular bases. Of those who were ready to pay (N=52), a vast majority (92 percent) agreed to pay no more than 4000 AMD (roughly 8.41 USD) monthly.

1.3. Usage of social networks/platforms

More than half, 64 percent (N=767), of the respondents said that they use social network platforms. The amount of social network users has significantly increased over the past five years and positive trend is obvious: the 2015 survey results showed that some 43 percent of the respondents reported using social networking sites or platforms, while the 2017 survey results showed 53 percent on this matter.

YouTube and Facebook are the two most popular networks in Armenia. The former is used by 87 percent and the latter by 83 percent of those Armenians who have a social media profile. The third and fourth most popular social networks in Armenia are Instagram and Odnoklassniki, used by 32 and 28 percent of network users, respectively (Figure 1.5).

Figure 1.5 Popularity of social networks among social network/platform users in Armenia 2019 (%, N=767)
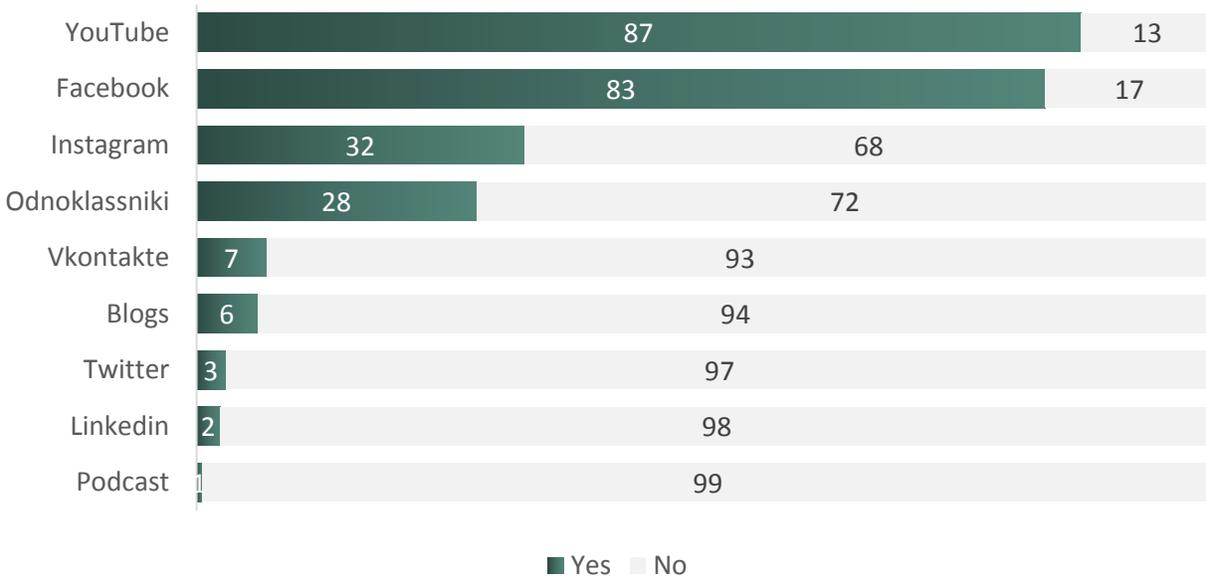
The comparison of the 2015, 2017 and 2019 survey results show that popularity of Facebook has increased among social media users, from 69 percent to 83 percent, whereas the popularity of Odnoklassniki has decreased from 66 percent to 28 percent. Meanwhile, YouTube has the highest popularity among other social networks, with an 87 percent result[2].

In terms of daily usage, Instagram and Facebook are among the most frequently used social media platforms. More than half of the respondents having Instagram and Facebook account use it almost all the time or several times each day. In terms of daily usage, YouTube is also popular among the respondents (53 percent of the respondents use YouTube either almost all the time or several times each day). 45 percent of respondents having "Odnoklassniki" accounts use it

---

[2] The research conducted in 2015 and 2017 did not include an assessment of YouTube as a social media platform.

almost all the time or several times each day. Other social network platforms such as blogs, Twitter, Linkedin and Podcast are less frequently used (Figure 1.6).

Figure 1.6 Frequency of usage of social networks in Armenia in 2019 (%, N=767)
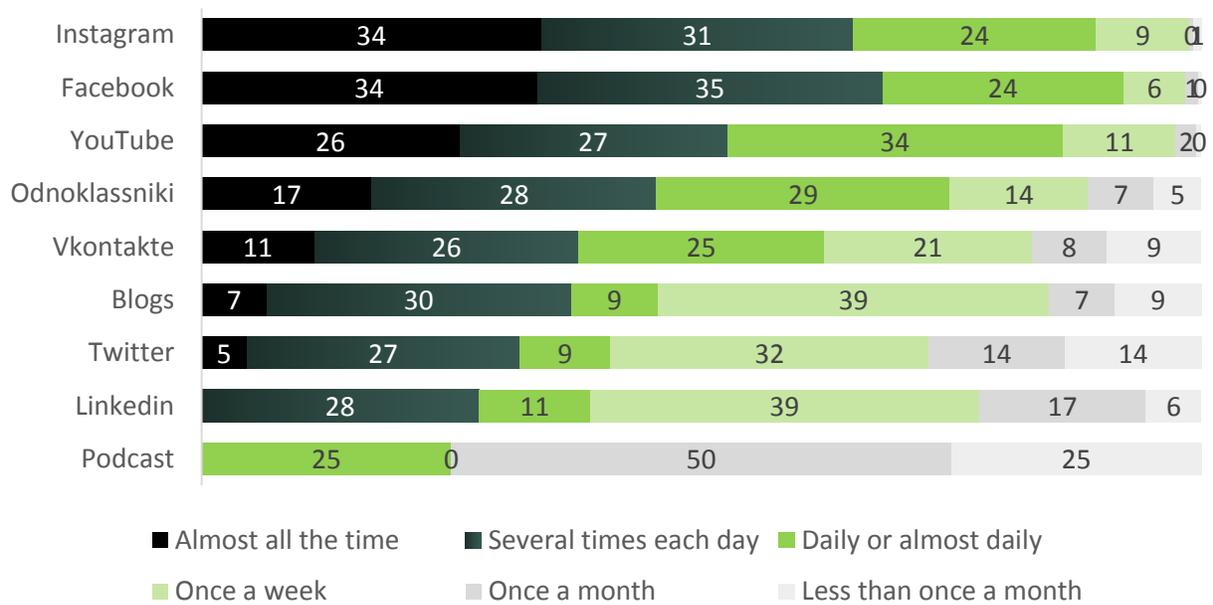
Comparing the results from 2015, 2017 and 2019, the frequency of usage of Facebook has increased since 2015, with a minor decrease in 2019 compared to 2017. Odnoklassniki has a sharp decline in its frequency of usage, falling in 2019 by more than half compared to 2015. With no data for 2015, the usage of Instagram increased by 9% in 2019 compared to 2017. Vkontakte, Twitter and LinkedIn have also declined for each year surveyed.

Figure 1.7 Frequency of usage of social networks in Armenia in 2015, 2017, 2019
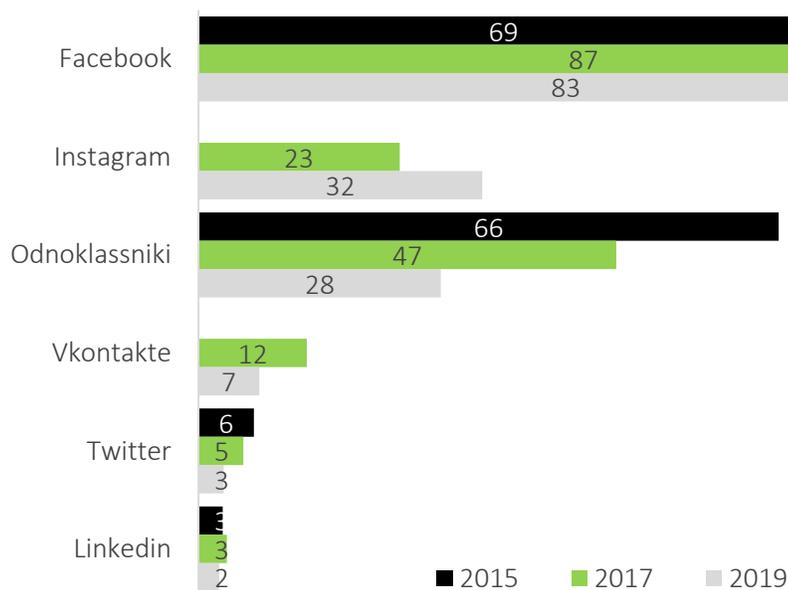
Do users of the most popular social networks in Armenia access news and share social and/or political news via their respective social networks? Nearly all Facebook users (95 percent) and three quarters of YouTube users (72 percent) use the platforms to access news. As for the other popular networks, such as Twitter, Instagram, Vkontakte and Odnoklassniki, nearly half of those having accounts in these platforms use them to access news (Figure 1.7).

Figure 1.7 Usage of the most popular social networks to access news, 2019 (%)
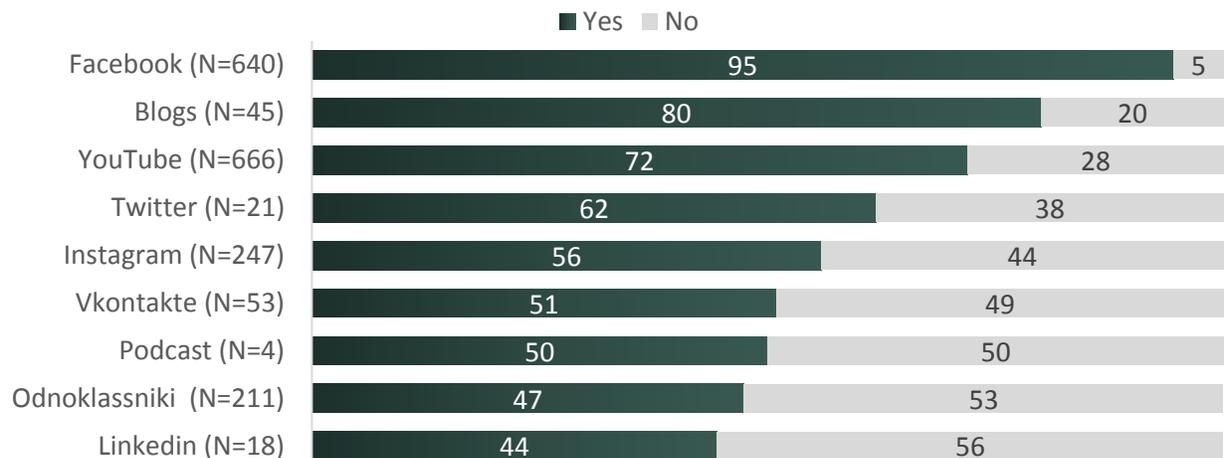
More than three quarters of those who have Instagram, YouTube, LinkedIn, Odnoklassniki and Twitter accounts are passive network users, meaning that they do not share either political or social news via these platforms. The percentage of those who do not share social and/or political news is much higher among Instagram and YouTube users (Figure 1.8). Meanwhile, the number of active users (those who share social and/or political news via social media) is 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 is also high and totals 26 percent (Figure 1.8).

Figure 1.8 Usage of the most popular social networks to share political/social news, 2019 (%)
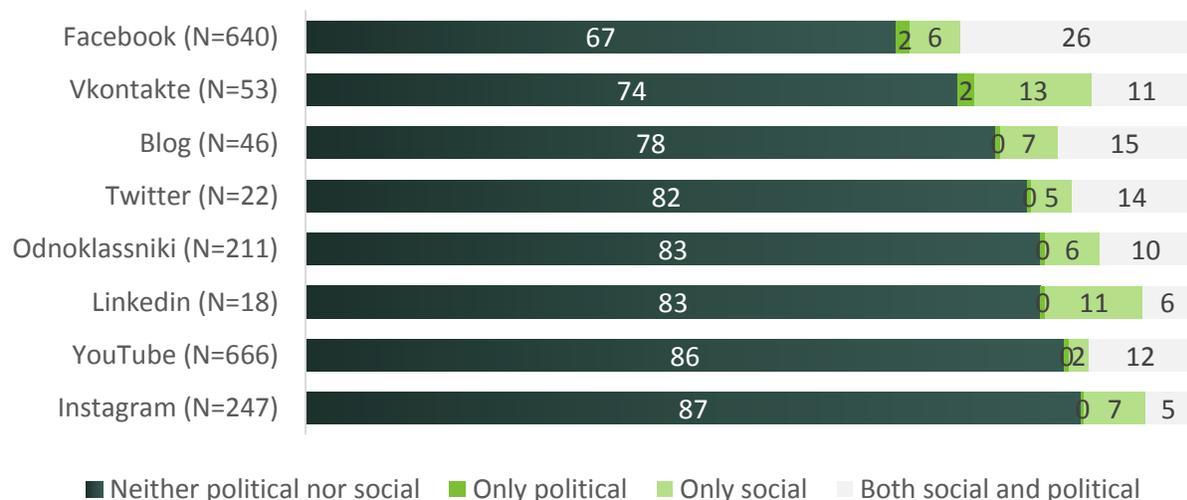
SOCIAL-DEMOGRAPHICS OF INTERNET AND SOCIAL MEDIA USERS

Gender
	Yes	No
Male	62%	38%
Female	65%	35%

Age
	Yes	No
From 18 to 25	96%	4%
From 26 to 30	93%	7%
From 31 to 40	88%	12%
From 41 to 50	76%	24%
From 51 to 60	59%	41%
60 and older	30%	70%

Education
	Yes	No
Have not attended primary school		100%
Primary (complete or incomplete)	28%	72%
Secondary (incomplete)	26%	74%
Secondary (complete)	58%	42%
Vocational	63%	37%
Higher education (incomplete)	84%	16%
Higher education (complete)	81%	19%
PhD	65%	35%

Economic situation (Family income)
	Yes	No
Not enough for purchase of food	30%	70%
Enough for purchase of food, but not for clothes	53%	47%
Enough for purchase of food and clothes, but is insufficient for buying expensive household items	75%	25%
Enough to buy expensive items, such as refrigerator or washing machine	86%	14%
Enough to buy anything we want	82%	18%

Employment status
|	Yes	No
Employed	86%	14%
Unemployed	75%	25%
Self-employed	65%	35%
Unemployed student	100%	
Employed student	100%	
Retired (not working)	25%	75%
Retired (working)	42%	58%
Housekeeper	67%	33%

■ Yes ■ No

PART 2. MEDIALITERACY AND SATISFACTION WITH MEDIA PRODUCTS

## 2.1 Media literacy and verification of suspicious information

In which cases do respondents consider information suspicious or unreliable? As figure 2.1 shows, the most frequently mentioned answer was "if it is very unlikely" (22 percent of total answers), followed by the answer "if the headline and the content do not match" (19 percent of total answers). Respondents also consider information suspicious or unreliable if the content is shared by an unknown website or person (17 percent of total answers), if they have other information (16 percent of total answers) or if the source is not mentioned (15 percent of total answers).

Figure 2.1 Cases the information is considered suspicious/unreliable (% of total answers)
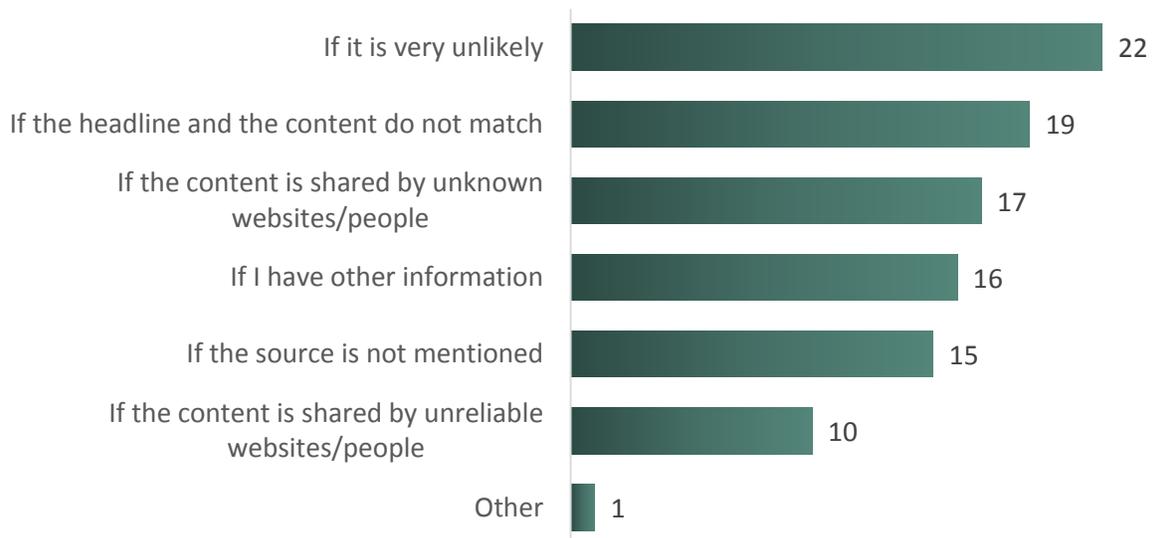
Respondents were also asked to provide their opinion on how one should react to wrong, false, misleading or unethical information published by the Armenian media. Respondents were presented with a list of possible actions and asked to choose a maximum of three answers from the list. As Figure 2.2 shows, the most frequently mentioned action was the passive "To do nothing" answer (52 percent). As for active forms of reaction, some 25 percent of the respondents think that the media providing wrong information should be boycotted; 11 percent think that the issue should be discussed with friends or relatives, and another 8 percent think that a complaint should be filed with the reporter or media representative (Figure 2.2).

Figure 2.2 Reaction to wrong information by the Armenian media (% of total answers)
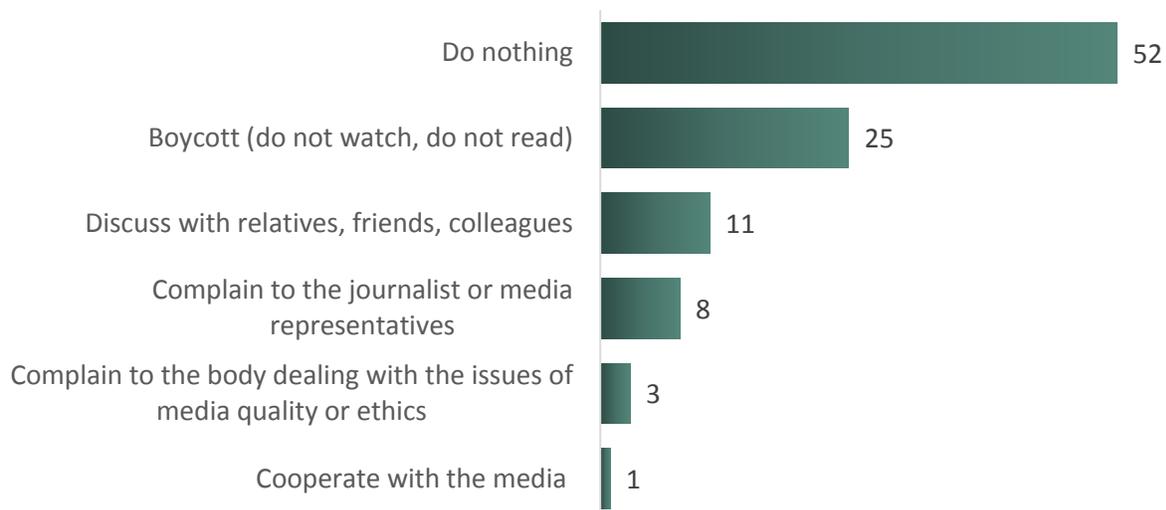
Do respondents check links on other websites taking them to news websites? According to the survey results, only 6 percent of the respondents always check the website links, while 11 percent mostly check. A vast majority of the respondents check the links either rarely (24 percent) or never (34 percent). 25 percent of the respondents say that they never click on links that take them to news websites.

Figure 2.3. Checking the web-sites the link click takes (% of total answers)
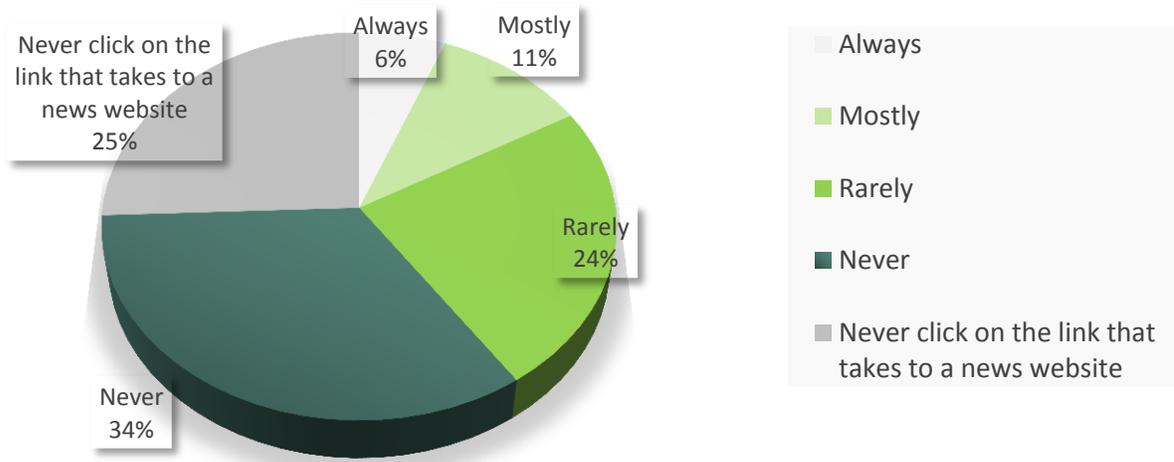
Respondents verify suspicious websites through URLs (23 percent of answers), "About us" sections (19 percent of answers), and to whom websites belong (17 percent of answers). A smaller number of respondents consider the volume of advertisements and editors (Figure 2.4). As for suspicious information, most often respondents perform a search of the topic on the Internet (32 percent of answers), search for articles on the same topic on a reliable website (26

percent of total answers) or ask acquaintances, friends, or family members (23 percent of total answers) (Figure 2.5).

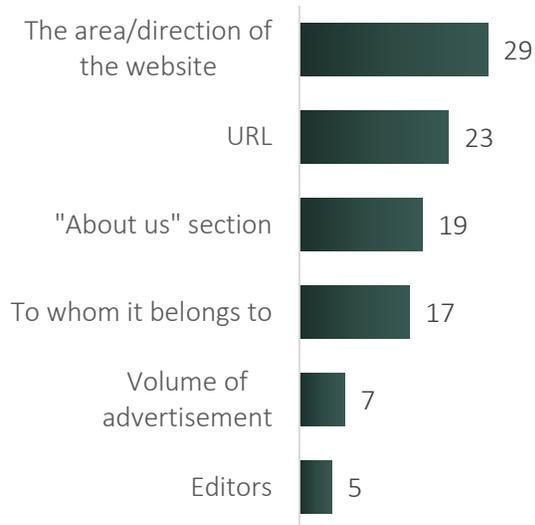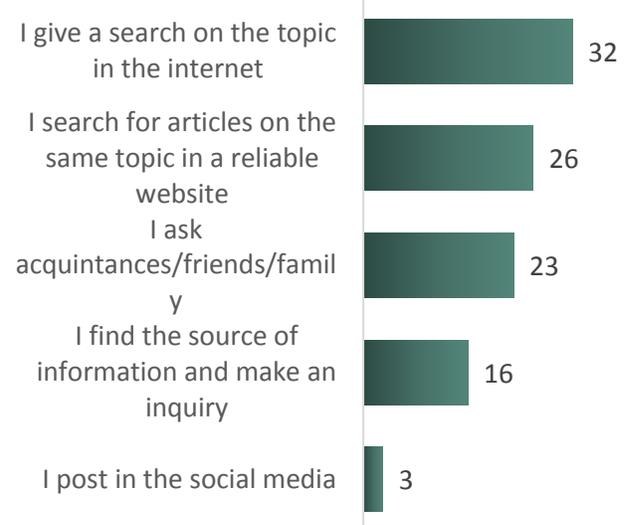### Figure 2.4 Verification of suspicious web-site (% of total answers)

Category	Value
The area/direction of the website	29
URL	23
"About us" section	19
To whom it belongs to	17
Volume of advertisement	7
Editors	5

Figure 2.5 Verification of suspicious information (% of total answers)

Category	Value
I give a search on the topic in the internet	32
I search for articles on the same topic in a reliable website	26
I ask acquintances/friends/family	23
I find the source of information and make an inquiry	16
I post in the social media	3

Most often respondents characterized a media literate person as someone who is able to use the Internet (18.7 percent of total answers). Afterwards, the most frequently mentioned answers were an ability to analyze how the media content is perceived by others (14.2 percent of total answers), an ability to understand the aim of creating the media content (11.5 percent of total answers), and an ability to analyze the presented or missing media content (11.2 percent of total answers) (Table 2.1).

Table 2.1 Characteristics of a media literate person

Characteristics	% of total answers
Ability to use internet	18.7%
Ability to analyze how the media content is perceived by others	14.2%
Ability to understand the aim of creating the media content	11.5%
Ability to analyze the presented/missing media content	11.2%
Ability to upload necessary applications/materials	9.0%
Ability to create and share media content	8.9%
Ability to criticize the creator of the media content	6.8%
Ability to earn money using media	6.3%
Ability to open an account	6.2%
Ability to meet ones financial/consumer needs	5.6%
Other	1.5%

Respondents were also asked about the Media Center products with which they are familiar. 12 percent of the respondents are familiar with at least one Media Center product (N=144). The most popular Media Center product is the "Media.am" website (98 respondents are familiar

with), followed by "Infotun" (15 percent), "Media Mart" (14 percent) and Lratun Media Museum (12 percent) (Figure 2.6).
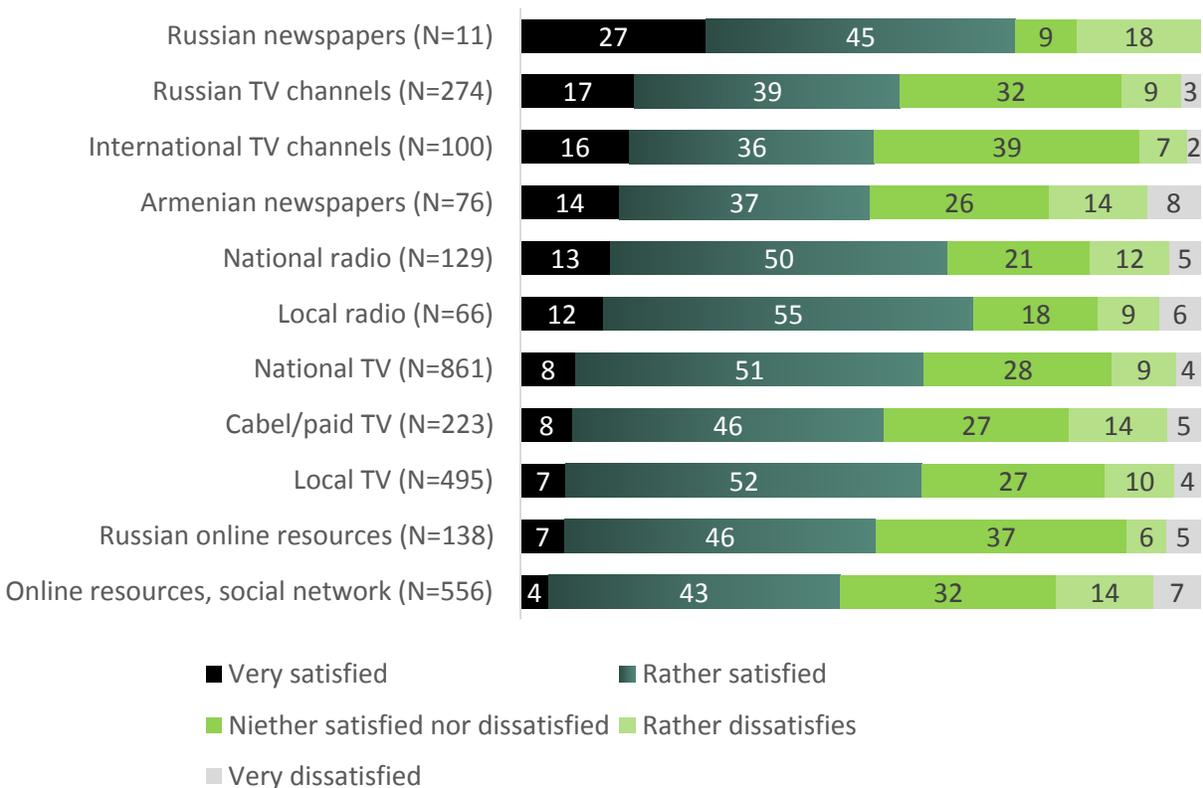
Figure 2.6 Media Center products respondent are familiar with in 2019 (% of total answers)
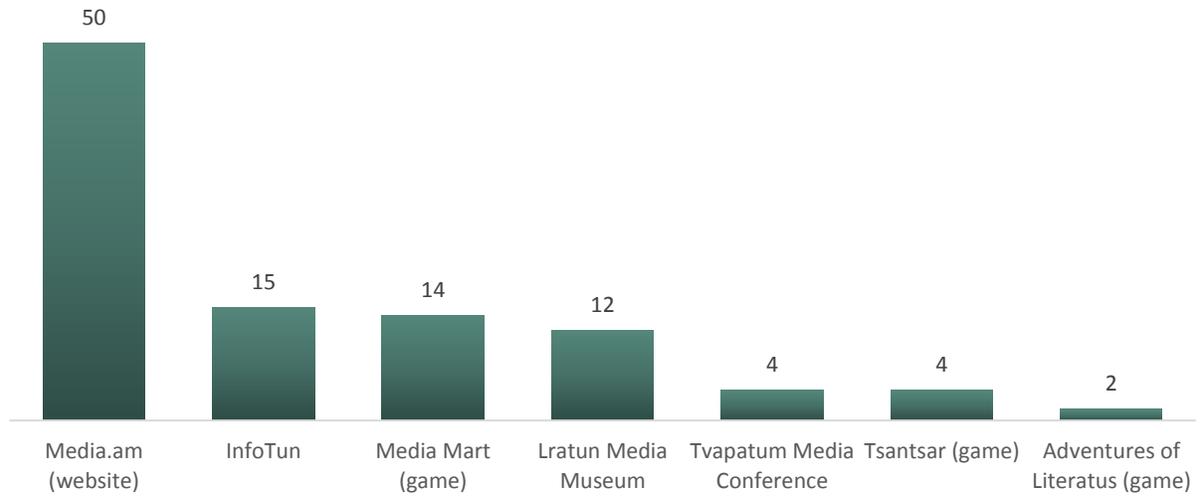
2.2 Satisfaction with media products

The audiences of Russian newspapers and Russian TV channels enjoy the work of the reporters of these media most of all. In particular, 72 percent of users of Russian Newspapers and 56 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. National radio and local radio were also appreciated by the respondents, as 63 and 67 percent of respondents mentioned they are satisfied with these media products, respectively. About half of Internet users and a little more than half of the users of National television channels praised the professionalism ("Very satisfied" and "Rather satisfied" answers aggregated) of reporters representing these media (Figure 3.1).
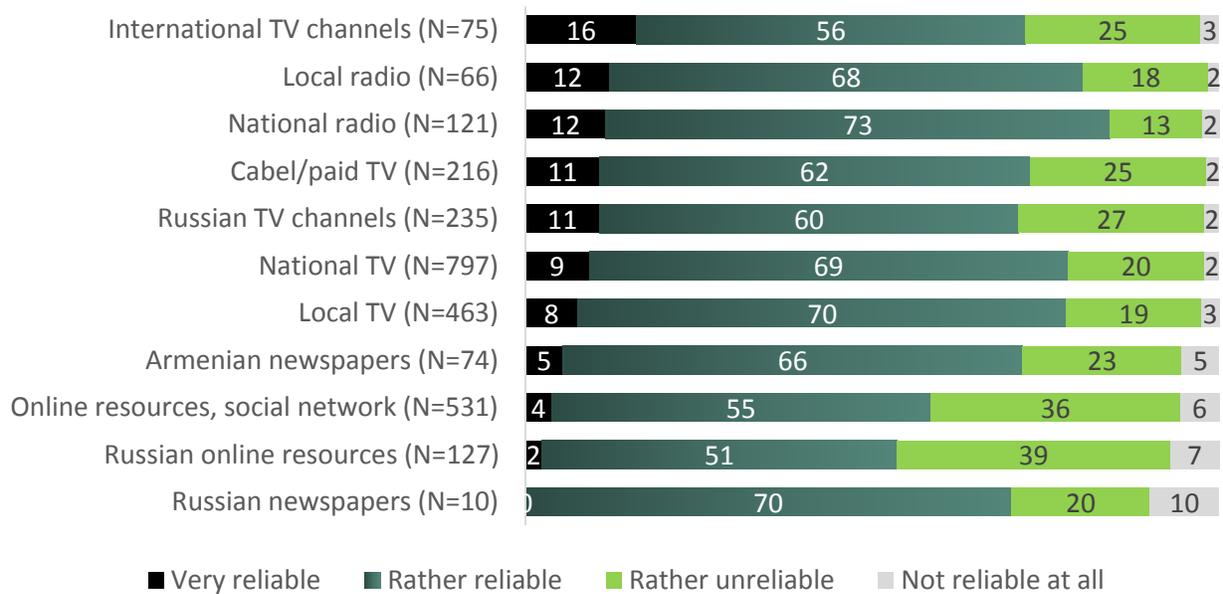
Figure 3.1 Satisfaction with the professional qualities of reporters, 2019 (%)

Media	Very satisfied	Rather satisfied	Niether satisfied nor dissatisfied	Rather dissatisfies	Very dissatisfied
Russian newspapers (N=11)	27	45	9	18	
Russian TV channels (N=274)	17	39	32	9	3
International TV channels (N=100)	16	36	39	7	2
Armenian newspapers (N=76)	14	37	26	14	8
National radio (N=129)	13	50	21	12	5
Local radio (N=66)	12	55	18	9	6
National TV (N=861)	8	51	28	9	4
Cabel/paid TV (N=223)	8	46	27	14	5
Local TV (N=495)	7	52	27	10	4
Russian online resources (N=138)	7	46	37	6	5
Online resources, social network (N=556)	4	43	32	14	7

■ Very satisfied ■ Rather satisfied
■ Niether satisfied nor dissatisfied ■ Rather dissatisfies
■ Very dissatisfied

National radio, Local radio and International TV channels are the most trusted by their Armenian audiences, as respectively 85, 80 and 72 percent of users say that the information provided by these sources is reliable ("Very reliable" and "Rather reliable" answers aggregated). 78 percent of users of national television channels find the information provided by these channels reliable (Figure 3.2) Compared to the data from the 2015 survey, in 2019 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
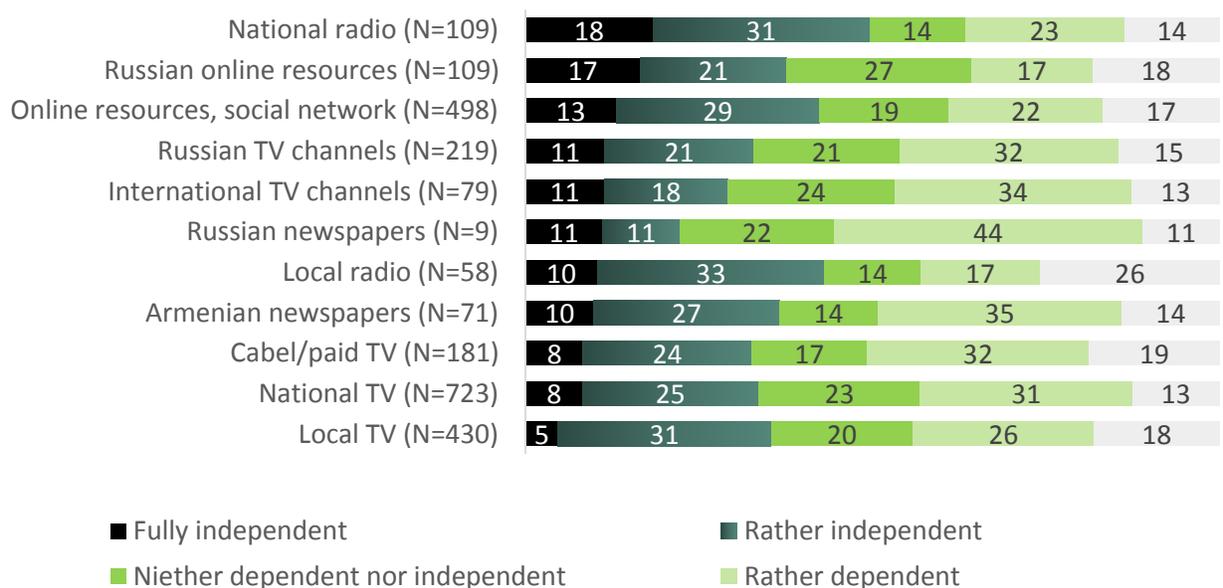
toward the Internet resources have decreased from 66 percent in 2015 ("trust completely" and "trust very much" answers aggregated) to 59 percent in 2019.

Figure 3.2 Reliability of information sources (%)

Source	Very reliable	Rather reliable	Rather unreliable	Not reliable at all
International TV channels (N=75)	16	56	25	3
Local radio (N=66)	12	68	18	2
National radio (N=121)	12	73	13	2
Cabel/paid TV (N=216)	11	62	25	2
Russian TV channels (N=235)	11	60	27	2
National TV (N=797)	9	69	20	2
Local TV (N=463)	8	70	19	3
Armenian newspapers (N=74)	5	66	23	5
Online resources, social network (N=531)	4	55	36	6
Russian online resources (N=127)	2	51	39	7
Russian newspapers (N=10)	0	70	20	10

■ Very reliable   ■ Rather reliable   ■ Rather unreliable   ▨ Not reliable at all

The survey results show that Armenian respondents consider local and national radio to be the most independent media sources. In particular, National radio is considered independent by 49 percent of respondents ("Fully independent" and "Rather independent" answers aggregated), with local radio by 43 percent. Online resources and social network are considered independent by 42 percent of respondents. (Figure 3.3).

Figure 3.3 Perceptions of independence of media sources (% of total)

Source	Fully independent	Rather independent	Niether dependent nor independent	Rather dependent	(Rather dependent light)
National radio (N=109)	18	31	14	23	14
Russian online resources (N=109)	17	21	27	17	18
Online resources, social network (N=498)	13	29	19	22	17
Russian TV channels (N=219)	11	21	21	32	15
International TV channels (N=79)	11	18	24	34	13
Russian newspapers (N=9)	11	11	22	44	11
Local radio (N=58)	10	33	14	17	26
Armenian newspapers (N=71)	10	27	14	35	14
Cabel/paid TV (N=181)	8	24	17	32	19
National TV (N=723)	8	25	23	31	13
Local TV (N=430)	5	31	20	26	18

■ Fully independent   ■ Rather independent
■ Niether dependent nor independent   ▨ Rather dependent

## 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 and 2019 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 and 2019 surveys, the order of the questions has been changed. Therefore, the comparative analysis of data between 2015, 2017 and 2019 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 and 2019 data could produce bias, a comparison between only the 2017 and 2019 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.) **is generally low** in Armenia (Figure 3.1). Most of all respondents are **less informed about social reforms:** 84 percent of the respondents are not informed about these reforms ("Rather not informed", "Not informed at all" and "Never heard of that reform" answers aggregated). Respondents are more informed about the power decentralization reforms and pension system reforms, at 46 percent and 41 percent of the respondents, respectively ("Very informed" and "Rather informed" answers aggregated).

Figure 3.1 Awareness of reforms in Armenia, 2019 (% of total)
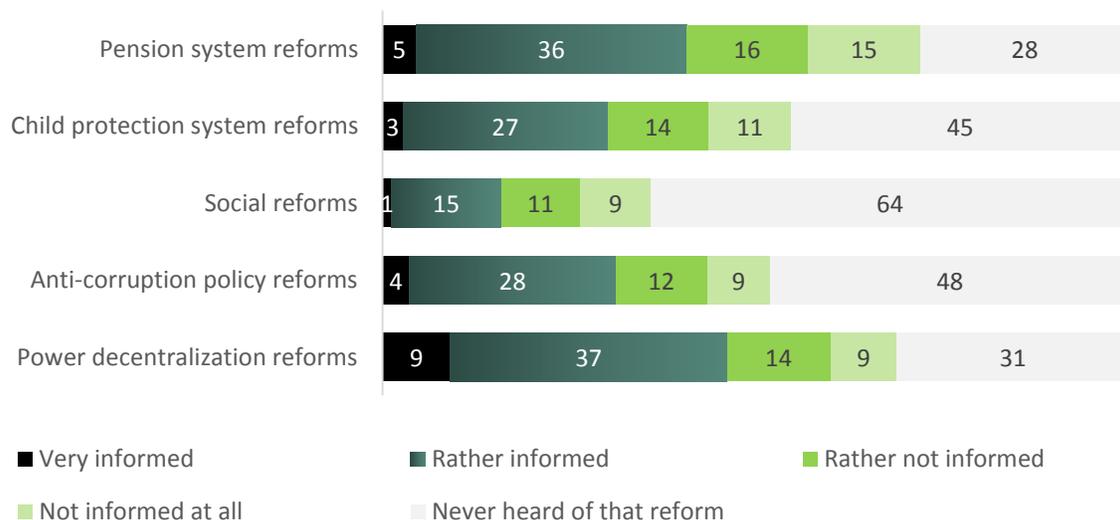
Compared to 2017, public awareness of ongoing reforms **has significantly increased**. For some reforms, the improvement is outstanding. For example, public awareness of power decentralization reforms increased from 11 percent in 2017 to 46 percent in 2019, while awareness on anti-corruption policy reforms increased from 9 percent to 31 for 2019 (Figure 3.2).

Figure 3.2 Awareness of reforms in Armenia, 2017 and 2019 (% of total, "very informed" and "rather informed" answers aggregated)
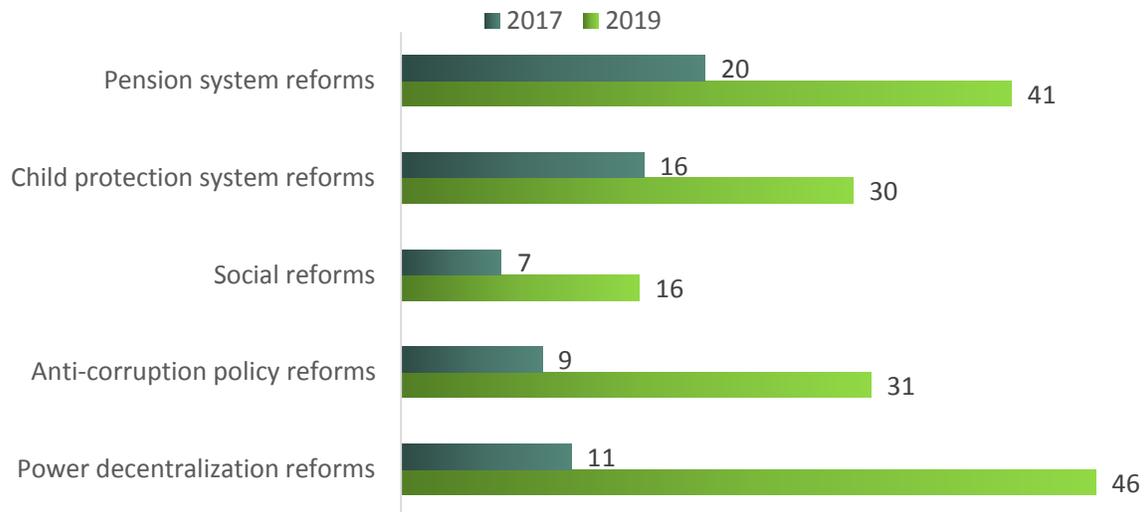
Pension system reforms and **child protection system reforms** seem to be the most discussed topics in Armenia, as some 61 percent of respondents say they are interested ("Very interested" and "Rather interested" answers aggregated) in the pension system reforms, and some 55 percent with regard to the child protection system reforms. Meanwhile, there is a relatively low public interest towards social reforms (Figure 3.3).

Figure 3.3 Public interest in the reforms, (among those who are informed) 2019 (% of total)
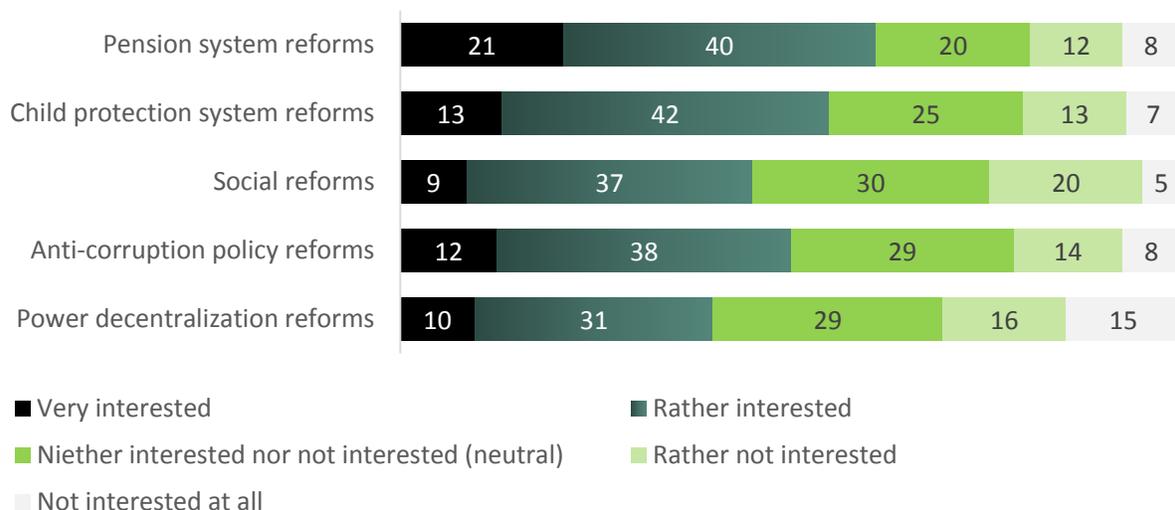
Compared to 2015, in 2019 the share of the respondents interested in reforms has significantly increased (Figure 3.4).[3] For example, in 2015 only 11 percent of the respondents were interested in power decentralization reforms ("Yes" and "Somehow" answers aggregated), while 40 percent of the respondents mentioned they are interested in these reforms in 2019 ("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 are interested, "very interested" and "rather interested" answers aggregated")
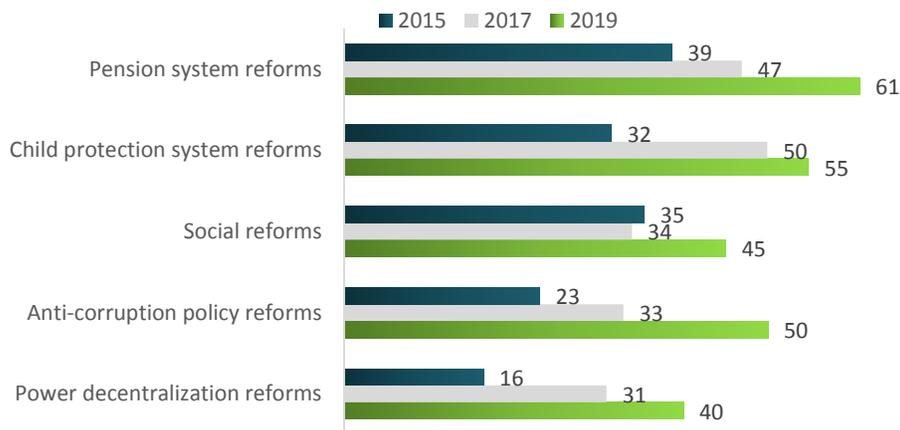

When computing the data of the portion of the total sample that is interested in public reforms, it is obvious that for some of the reforms, public interest increased in 2019 from to 2015, e.g. power decentralization reforms, anti-corruption policy reforms, pension system reforms; meanwhile for the others, e.g. social reforms and child protection system reforms, public interest decreased in 2019 as compared to 2015.[4] More significant improvement refers to power decentralization reforms: comparing to 2015, more people are interested in these reforms in 2019 (Figure 3.5).

[3] Data for 2015 was adjusted to make it comparable with 2017 and 2019 data.
[4] 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.

Figure 3.5 Public interest in the reforms, 2015 and 2019 comparison (% of total respondents, "very interested" and "rather interested" answers aggregated")
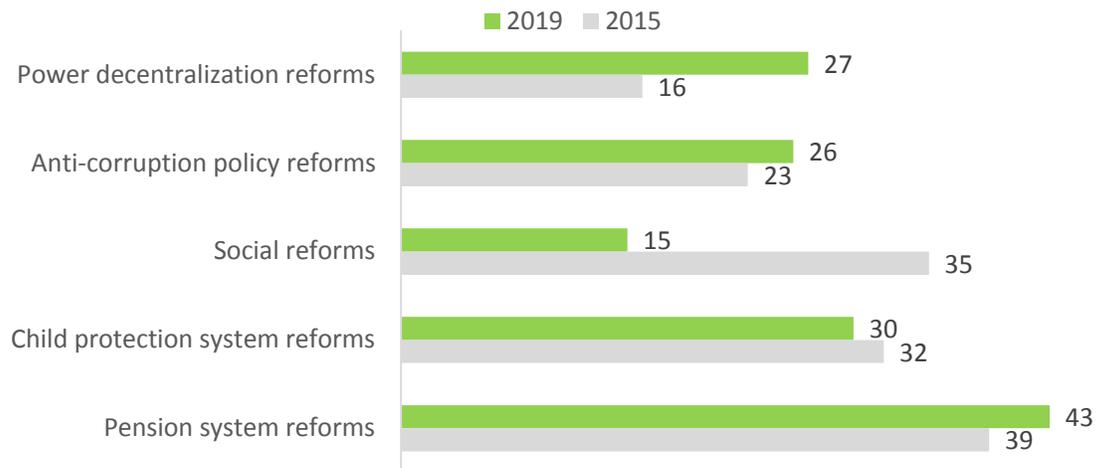
As for the perception of the effectiveness of the reforms, the share of respondents who say that the implementation of the aforementioned reforms in Armenia is very effective is quite low (not exceeding 10 percent) (Figure 3.6). Child protection system reforms, anti-corruption policy reforms and pension system reforms are considered relatively more effective. Meanwhile, power decentralization reforms are considered ineffective by approximately half of the respondents ("Rather ineffective" and "Not effective at all" answers aggregated). Social reforms also seem to be less praised, as only 40 percent of the respondents consider these reforms effective ("Very effective" and "Rather effective" answers aggregated).

Figure 3.6 Perception of the effectiveness of reforms, 2019 (% of total)
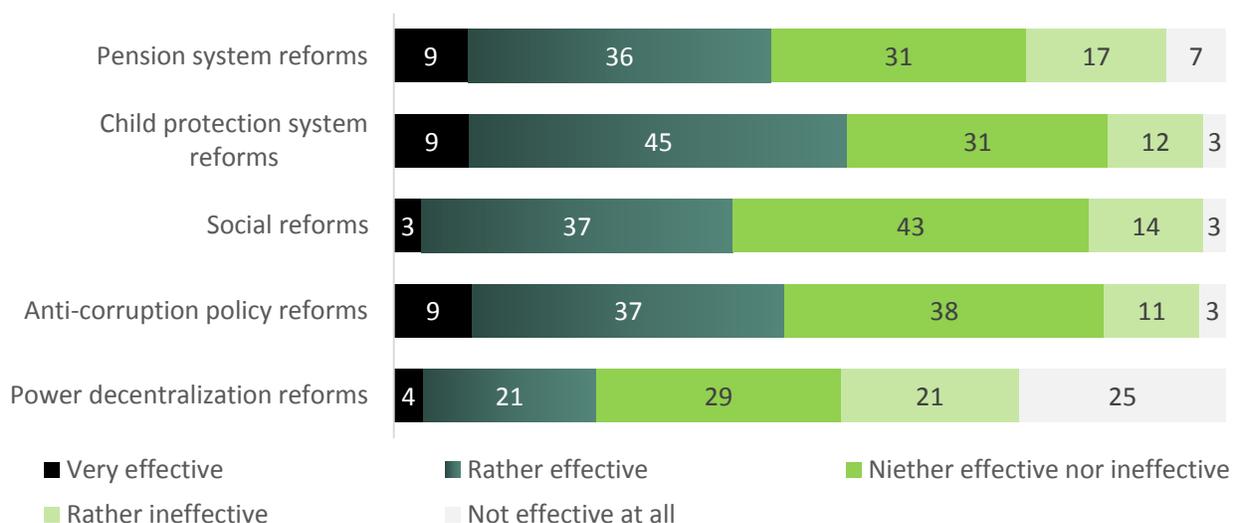
Compared to 2017, the share of the respondents considering the aforementioned reforms effective has significantly increased (Figure 3.7). For example, in 2017, the share of respondents

who evaluated pension system reforms as effective ("Very effective" and "Rather effective" answers aggregated) was 14 percent, which has increased to 45 percent in 2019.

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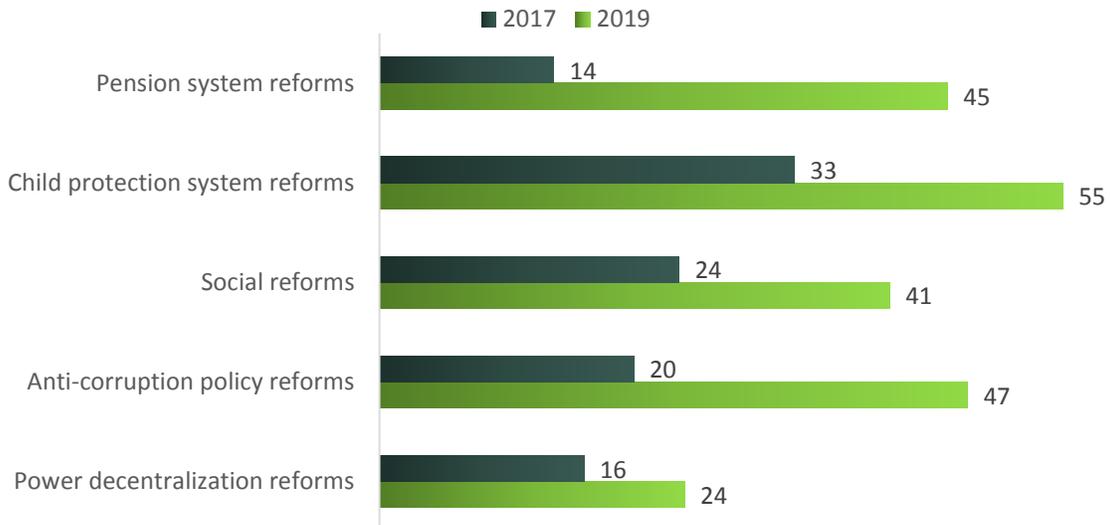
3.2 Media coverage of reforms

According to the survey results, an overwhelming majority of respondents attach a significant importance to comprehensive coverage of the ongoing reforms by the media. Particularly, "what exactly are the reforms and how are they implemented" and "what is the possible impact of the reforms on citizens" are two aspects most often highlighted by the respondents (85 percent each, "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 20 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, 2019 (% of total)
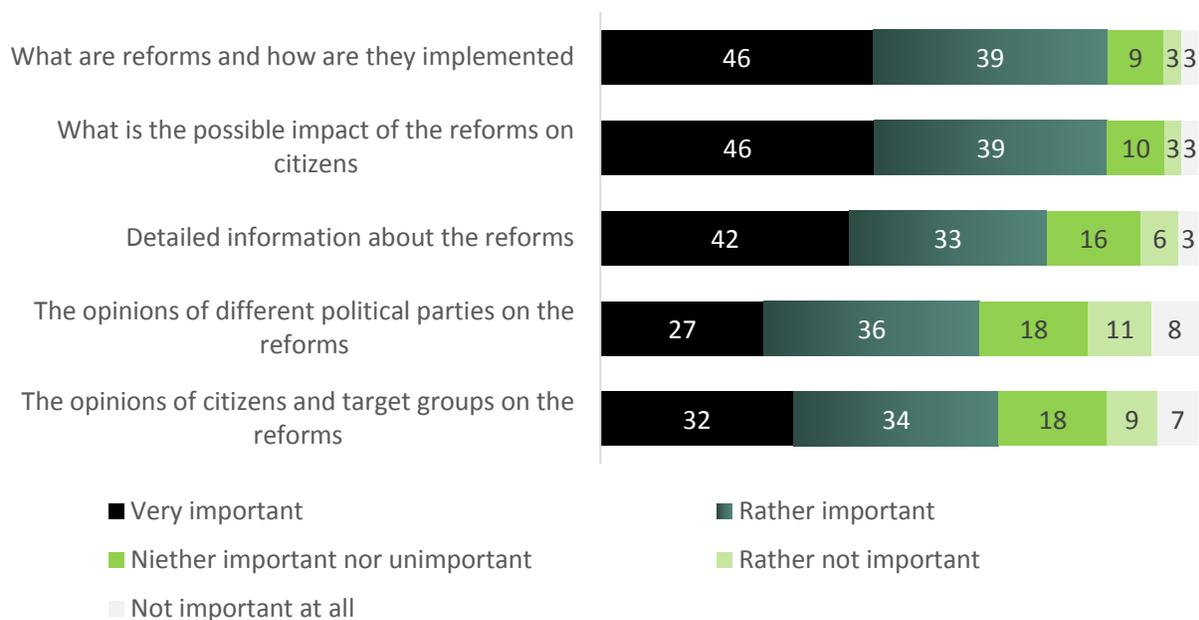

Compared to the 2015 and 2017 survey data, in 2019 public interest toward the media coverage of reforms remains high: in 2015, over three-fourths of surveyed Armenians attached importance to the media's role in covering reforms. As Figure 3.9 shows, compared to 2015 respondents in 2019 attached relatively less importance to media coverage of opinions of different political parties, citizens and target groups on the reforms.

Figure 3.9 Importance of comprehensive coverage of reforms by the media, 2015, 2017 and 2019 (% of total, "very important" and "rather important" options aggregated)
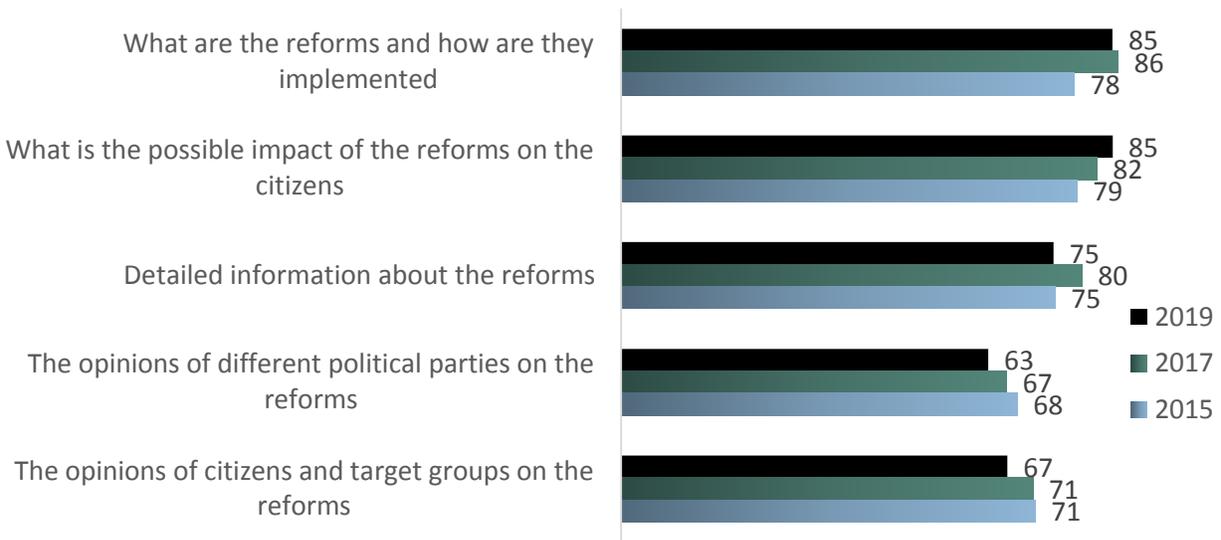
National TV and online resources are the main media sources that provide audiences with information of the reforms most regularly. More than half, 62 percent, of those who use television channels and some 58 percent of Internet users in Armenia report that they regularly ("every day" and "1-2 times a week" answers aggregated) receive information about the reforms. These two sources are 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, 2019 (%)
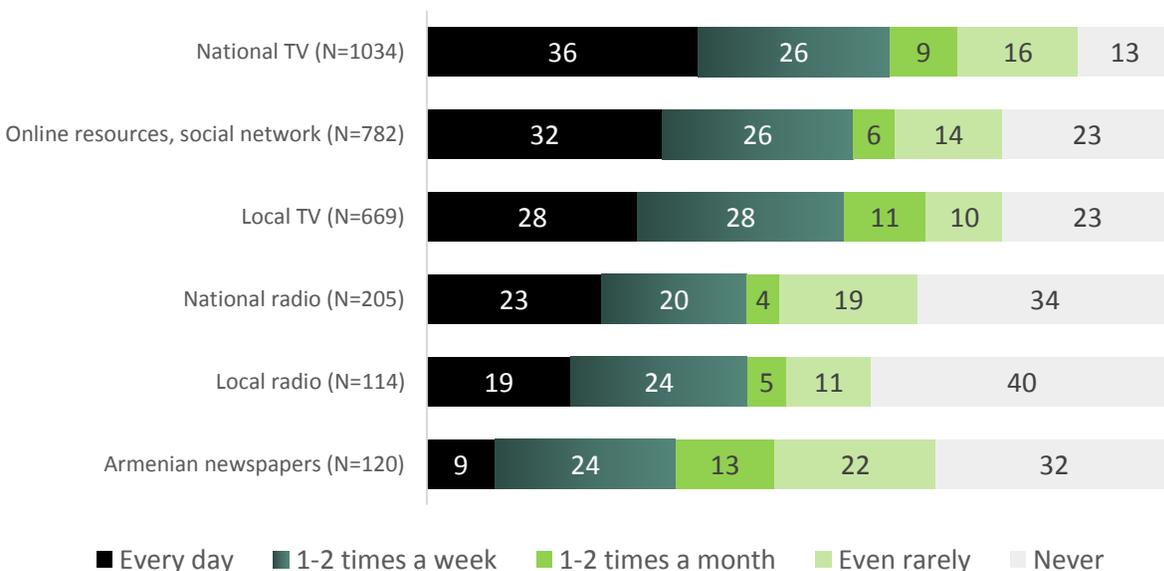
Compared to 2015, the intensity of the consumption of news on reforms through different media-sources **has slightly increased**: in 2015 a lower percentage of respondents used television

channels, internet and local radio to become informed about the ongoing reforms, as compared to 2019. As for local radio and Armenian newspapers, the number of respondents using these media to become informed about ongoing reforms has slightly decreased (Figure 3.11).

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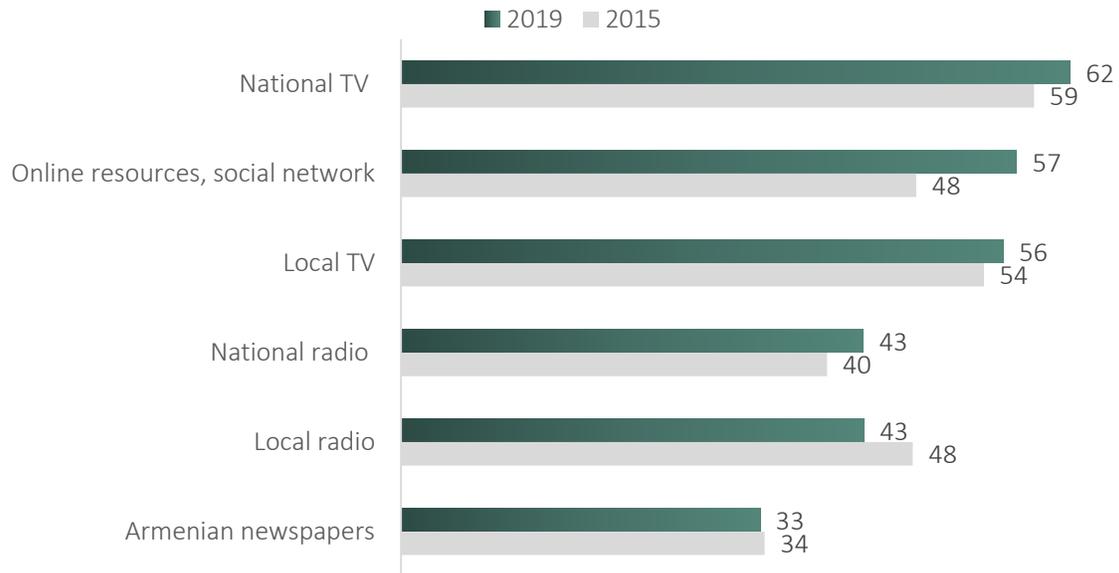

Generally, **respondents are satisfied with the media coverage of the reforms**. Local and national radio, as well as television channels with national coverage, are in the leading positions in terms of respondents' satisfaction with coverage of the reforms (Figure 3.12). Compared to the aforementioned media, Armenian newspapers are 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, 2019 (%)
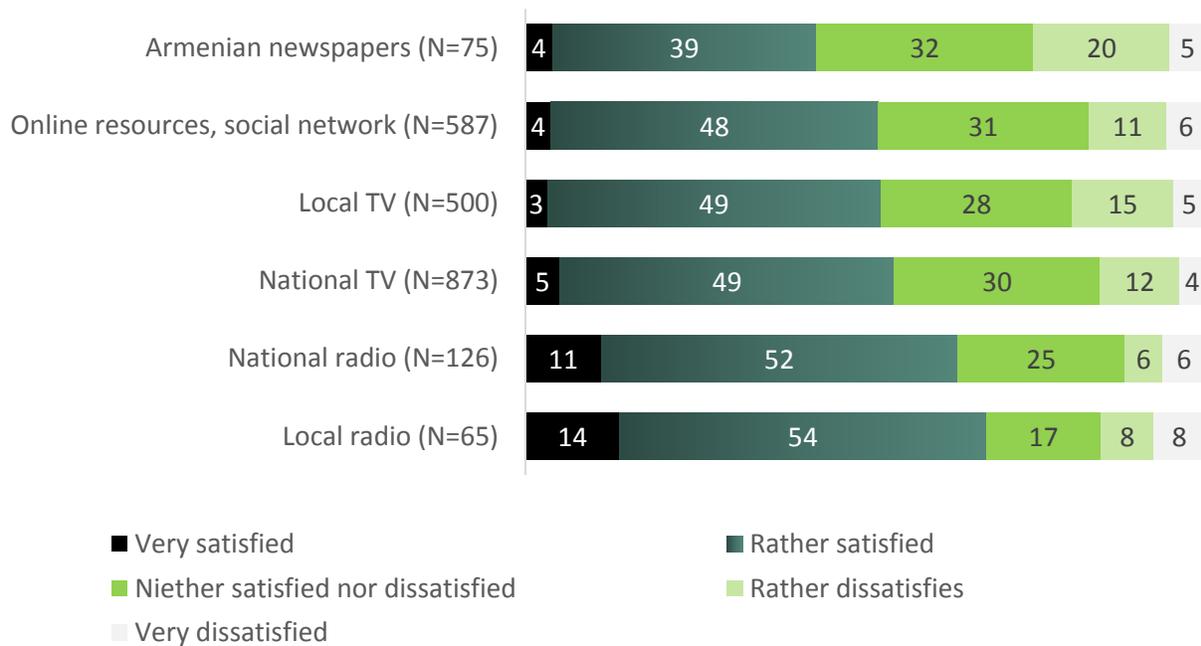
Respondents' satisfaction with media coverage of the ongoing reforms **has significantly improved** since 2017. The improvement is most noteworthy for National TV and Local TV. For the former, 54 percent of informed population were satisfied with coverage of the reforms, while in 2017 only 32 percent recorded satisfaction ("Very satisfied" and "Rather Satisfied" answers aggregated). As for Local TV, 29 percent of the informed population were satisfied with reform coverage in 2017, which increased to 52 percent in 2019 (Figure 13).

Figure 3.13 Satisfaction with the coverage of reforms, 2017 and 2019 (%, "very satisfied" and "rather satisfied" answers aggregated)
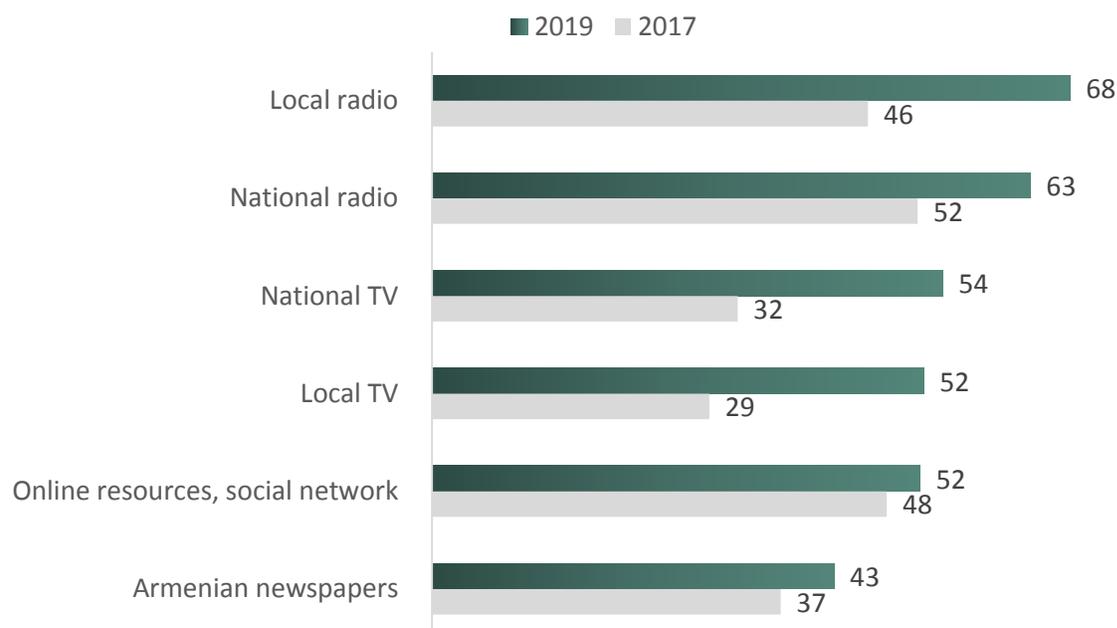
Respondents were also asked to name a media source that covers the reforms in Armenia best of all. **Shant TV**, **Public TV of Armenia**, **Armenia TV** and **Azatutyun Radio Station** were the four most frequently mentioned media in 2019 (Table 3.1). Shant TV and Armenia TV maintain their leading position in the list in each year of the survey. As can be seen in Table 3.1, Azatutyun Radio Station constantly improved its position compared to 2015 and 2017, while some "opposition-oriented" media, such as A1+ and Gala TV did not appear in the top-ten list for 2019. Meanwhile, the positions of "party-oriented" media, such as Kentron TV and Yerkir Media worsened compared to the 2015 and 2017 results.

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

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

SUMMARY (primary highlights)

- Television remains the most used source of information in Armenia. In comparison with previous years, the rates of daily consumption of traditional sources of information, such as television and newspapers, have decreased in Armenia. Daily usage of TV channels with national coverage has decreased from 82 percent to 72 percent. The number of Armenian respondents who read newspapers every day remains low and has decreased significantly, from 10 percent in 2015 to 2 percent in 2019.

- The second most popular source of information is the internet and social networks. These have gained more popularity over the past two years in Armenia. The rates of daily usage of the Internet as a source of information have increased from 32 percent in 2015 to 57 percent in 2019.

- Approximately one quarter of Armenian respondents reported consuming online news media directly via websites, whereas more than three quarters access online news media via social networks. (Note: This data is based on the number of internet users, N=798, 2019). 17% of respondents that consume news online, read online news from the original source, while 83% consume news on social networks. Despite 57% of respondents using the internet daily, only 11% of them read news from the original website every day. 16% read from the original source once or twice a week. The majority of respondents, (55%) do not read news online (63% in 2017).

- News.am, Azatutyun.am, Shamshyan.com and Tert.am are the most popular online news websites among respondents who directly access news websites.

- 64% of respondents use social networks. In 2015 and 2017 43% and 53% of respondents reported using social networks. 96% of internet users in Armenia use social networks (798 internet users and 767 users of social networks).

- YouTube and Facebook are the two most popular social networks in Armenia. The former is used by 87 percent and the latter by 83 percent of those Armenians who have a social media profile. The third and fourth most popular social networks in Armenia are Instagram and Odnoklassniki, used by 32 and 28 percent of network users, respectively.

- In terms of daily usage, Instagram and Facebook are among the most frequently used social media platforms – 65% and 69% respectively (Data based on the number of social media users, N=767). Nearly all Facebook users (95%) and three-quarters of YouTube users (72%) use the platforms to access news and share social and/or political news.

- In case of wrong, false, misleading or unethical information published by the Armenian media, most often respondents would prefer the passive action "to do nothing" (nearly half of the provided answers). A vast majority of respondents rarely or never check the websites from which information is taken by clicking links.

- 12 percent of respondents are familiar with at least one Media Center product. The most popular Media Center products are "Media.am" website, "Infotun" and "Media Mart."

- National and local radio enjoy the highest levels of trust among their respective audiences. Compared to 2015, trust toward Internet resources has decreased in 2019.

- An overwhelming majority of respondents attach significant importance to comprehensive media coverage of ongoing reforms. Compared to 2015, the share of the respondents interested in reforms has significantly increased in 2019.
- Public awareness of ongoing reforms (social reforms, anti-corruption, child protection, etc.) is very low in Armenia. There is an increase in awareness towards pension systems (20% in 2015 to 41% in 2019) and power decentralization (11% in 2015 to 46% in 2019). Levels of public satisfaction with the effectiveness of the ongoing reforms in Armenia are quite low as well, and did not change significantly.
- Compared with other media, the Internet and television have leading positions in the regularity with which they provide their audiences with information on ongoing reforms. However, television channels with national coverage as well local cable television channels lag behind national channels in terms of respondents' satisfaction with these media sources' coverage of the reforms.