



Armenia 2011 Media Public Opinion and Preference Survey

*Alternative Resources in Media Project
(implemented by a consortium of Internews, YPC,
EPF)*

*Caucasus Research Resource Centers - ARMENIA
A Program of the Eurasia Partnership Foundation*

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Study Components

- A nation-wide survey of general population (sample size 1,420, all Marzes; January-February 2011)
- 8 focus group discussions among specific segments of the population how are the main media and internet customers (bloggers-1, soap opera viewers-2, Internet user students-1, advertisers-1, entertainment program viewers-2, news viewers-1; March, 2011)
- 33 in-depth interviews with representatives of media industry (journalists, heads of news agencies, media owners, heads of media NGOs, public servants; April-May, 2011)
- Comparative analysis of media monitoring survey conducted by Yerevan Press Club(hereafter YPC) (7 TV channels, 2 newspapers, 3 online publications; conducted by YPC in February 1-March 15)

Implementing team

- Gayane Mamikonyan – Study design and coordination, questionnaire, guide developer, draft analytical report writer;
- Gayane Ghukasyan – sampling/data archiving expert;
- Ruben Yeganyan – questionnaire adviser and fieldwork manager
- CRRC-Armenia all staff including Jenny Paturyan (Program Manager) and Monika Shahmenendyan (Program Assistant)
- Arpine Porsughyan – PPT file developer
- 60 Supervisors, interviewers, moderators

CRRC-Armenia team acknowledges generous advice by Maria Aslamazyan, EPF and YPC staff, as well as CRRC-Regional staff

Outline

1. **Traditional Media**

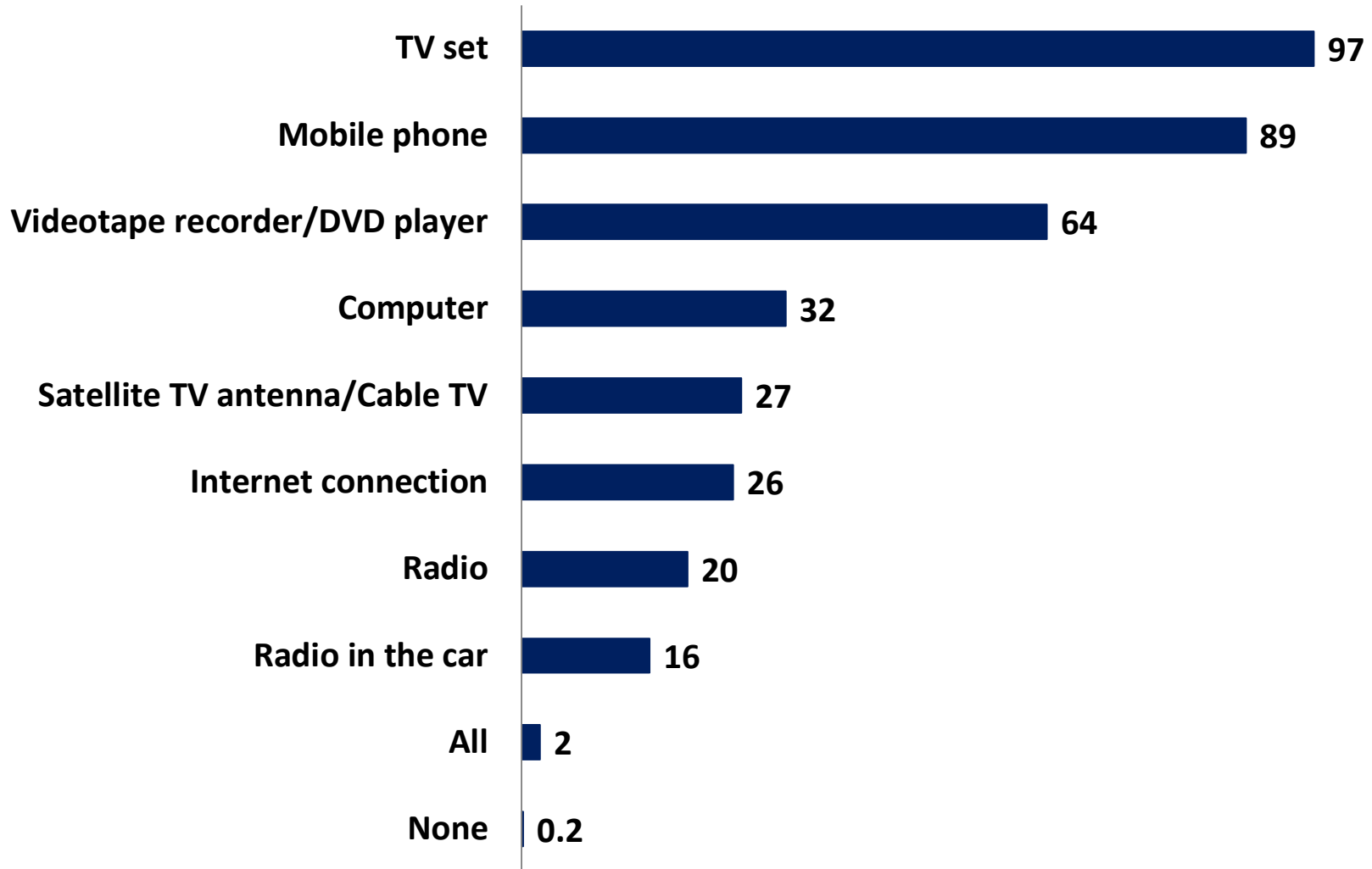
- General Overview (TV, Radio, Newspapers)
- Concerns
- Opportunities

2. **Alternative/online Media**

- General overview (Internet usage, Social networks, Online publications)
- Concerns
- A look forward

Traditional Media | General Overview (availability, usage, trust, content)

Household working appliance ownership (%) (QF6)

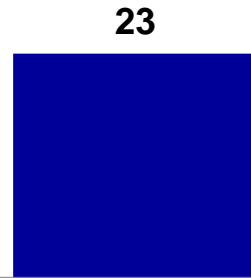


F6. Which of the appliances do you have that work properly?

During the last 12 months, have you watched TV or listened to radio? (%)



76



23



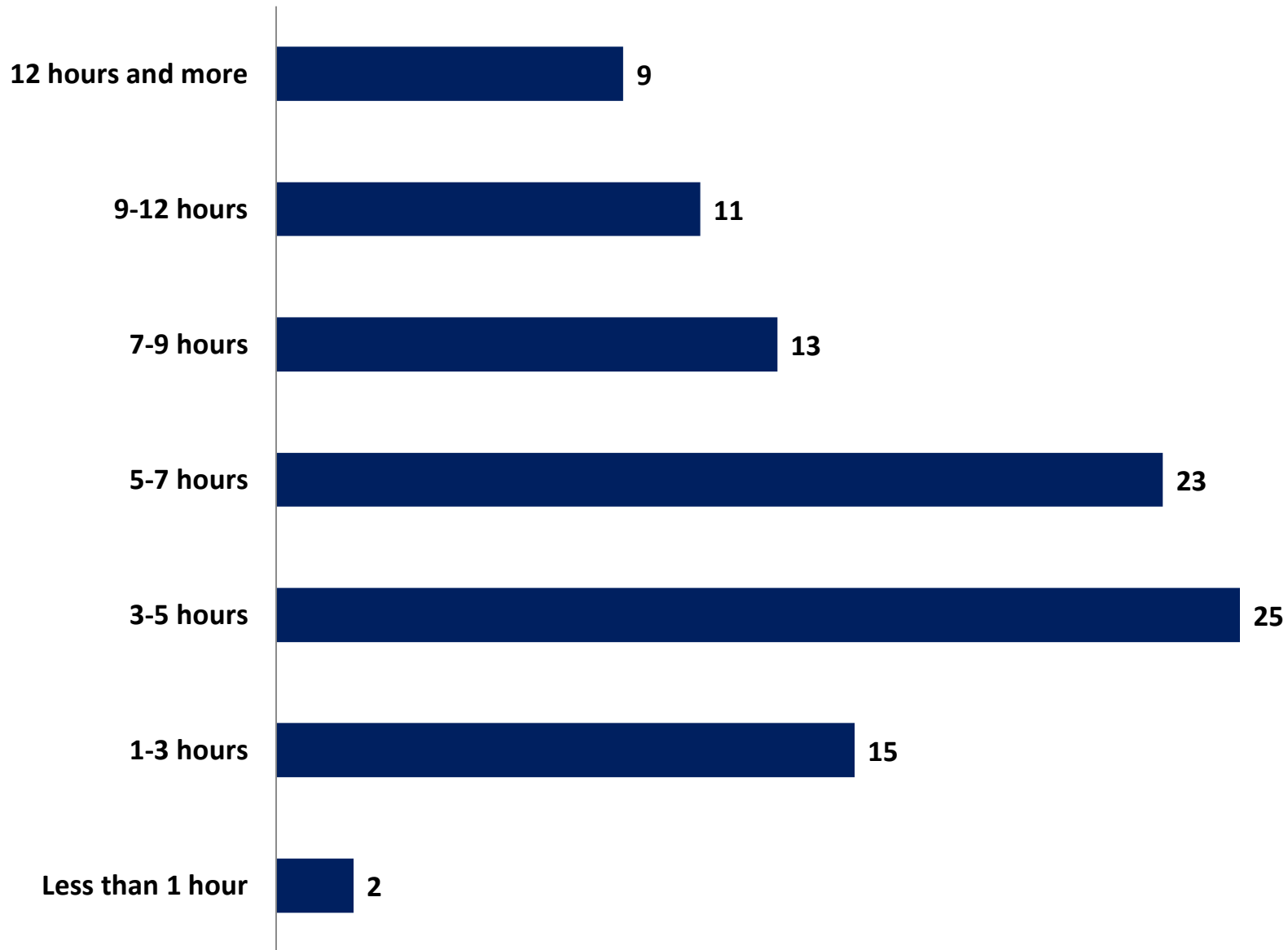
1

Watched only TV

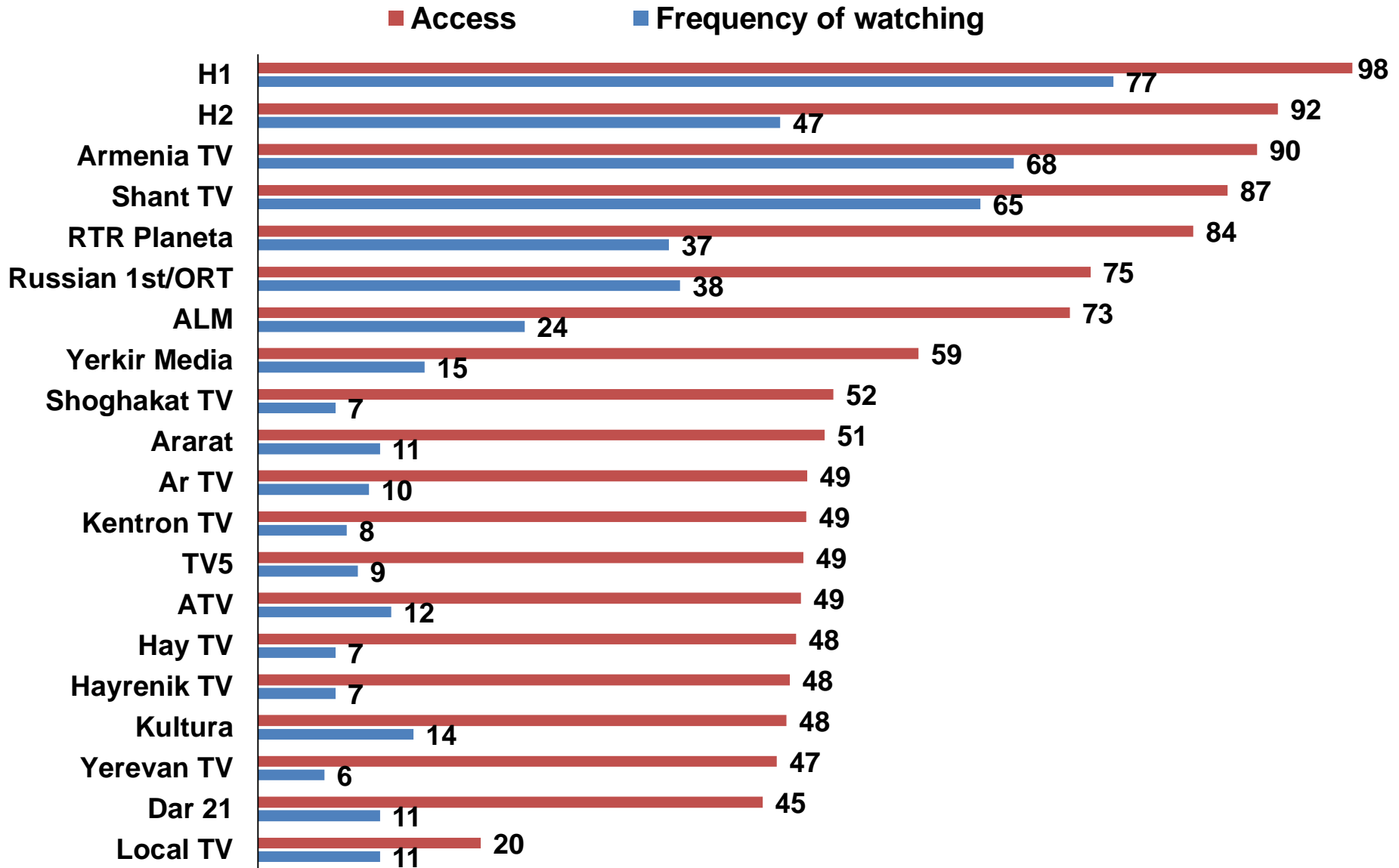
Watched TV and listened to radio

Didn't watch TV or listen to the radio

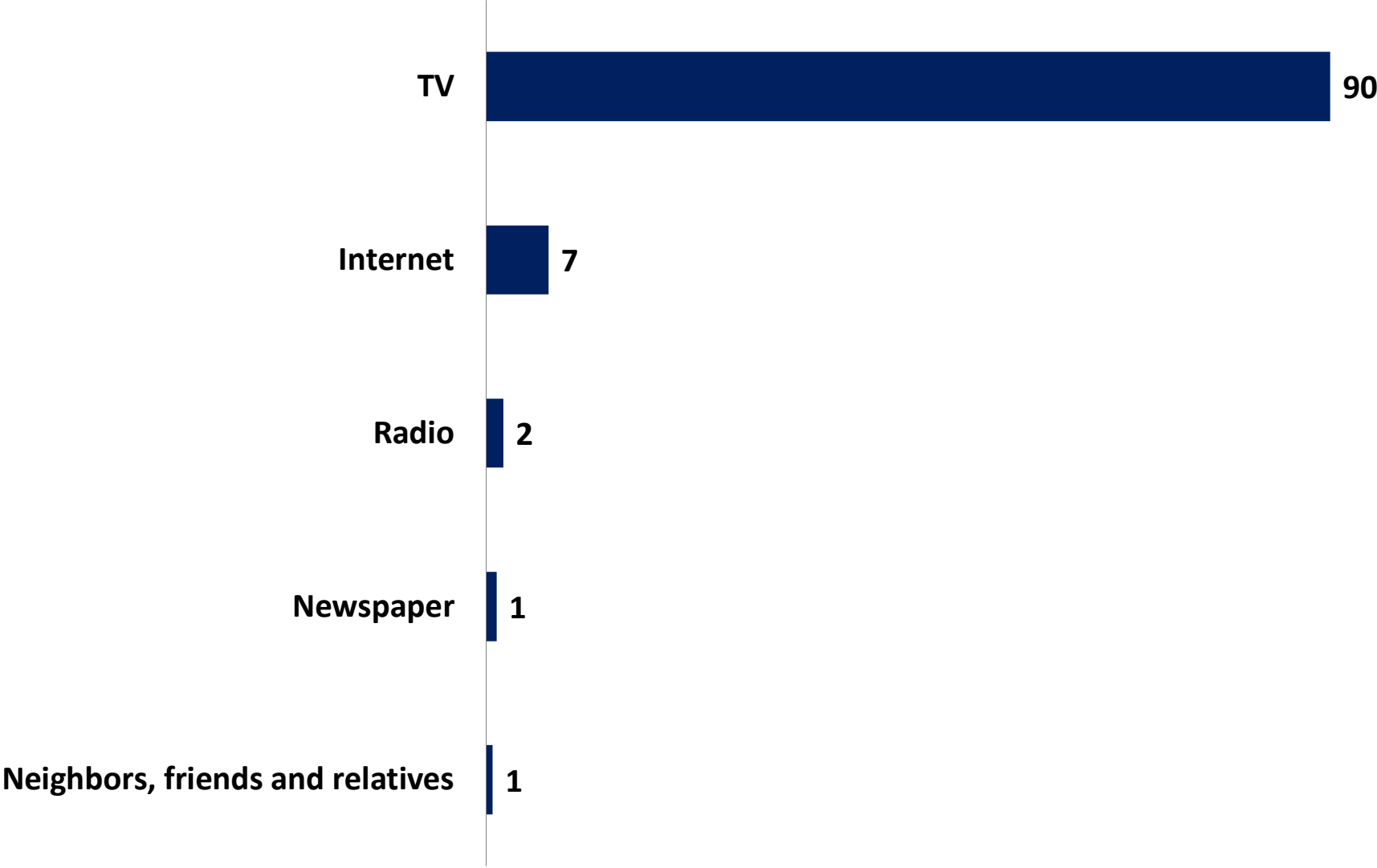
What is the average time you spend watching TV? (QB2) (%) N=1391



Which TV channels are available for you, and how frequently do you watch them (option: every day)? (QB4) (%)

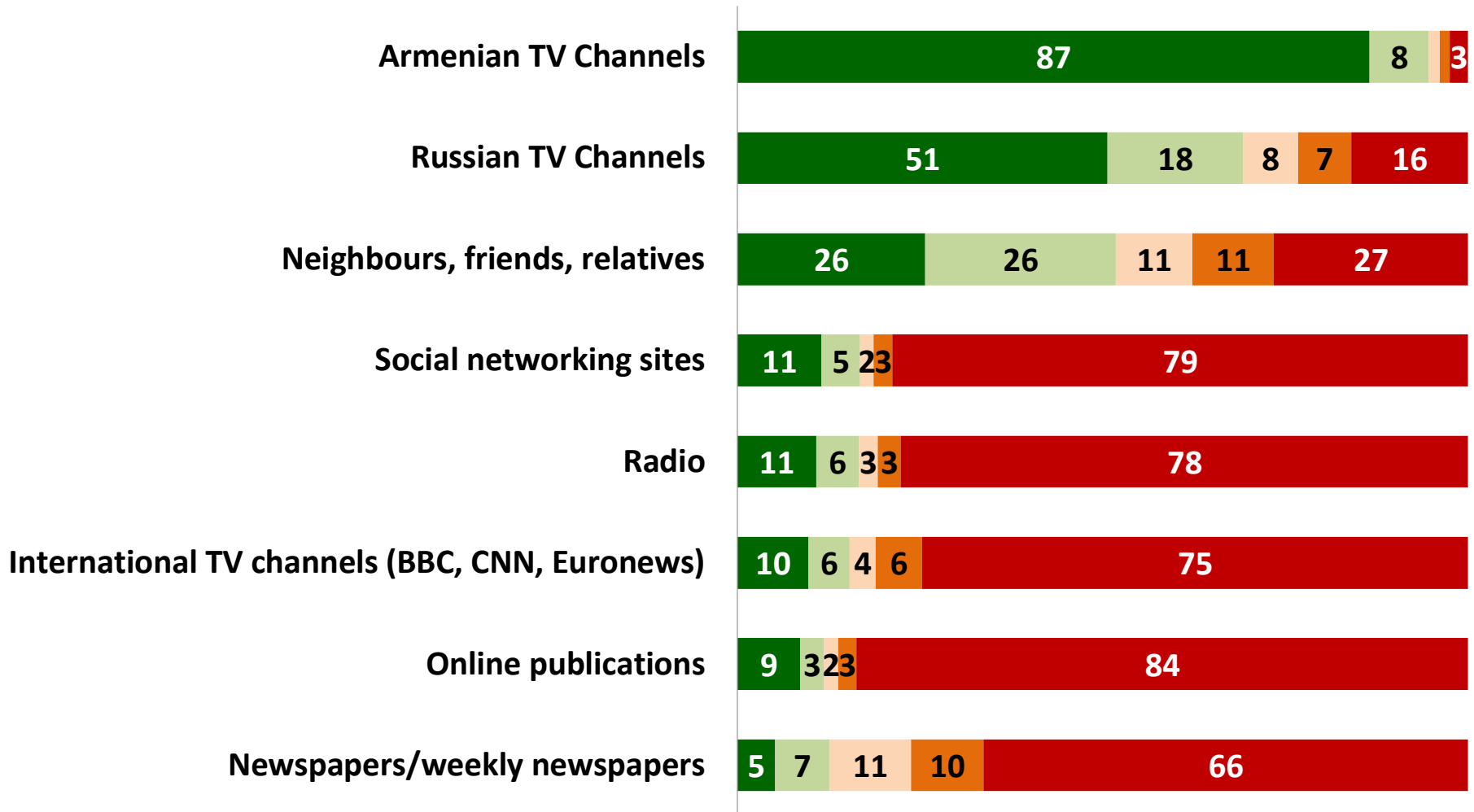


What is the most important source of information about current events and news for you? (QA1) (%)



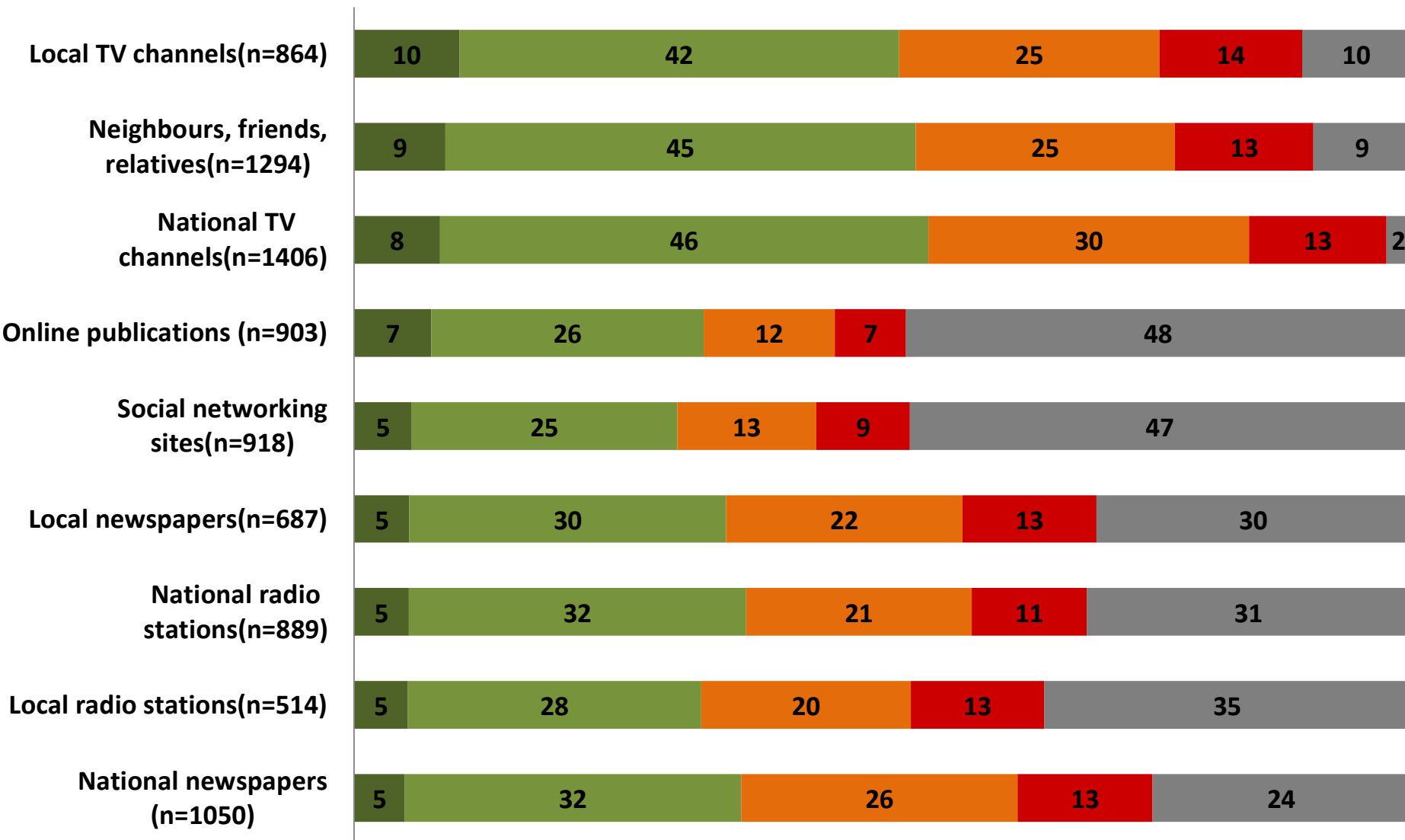
How often do you use these sources to get information about current events and news? (QA2)(%)

■ Every day
 ■ Several times a week
 ■ Once a week
 ■ Once or twice per month
 ■ Never

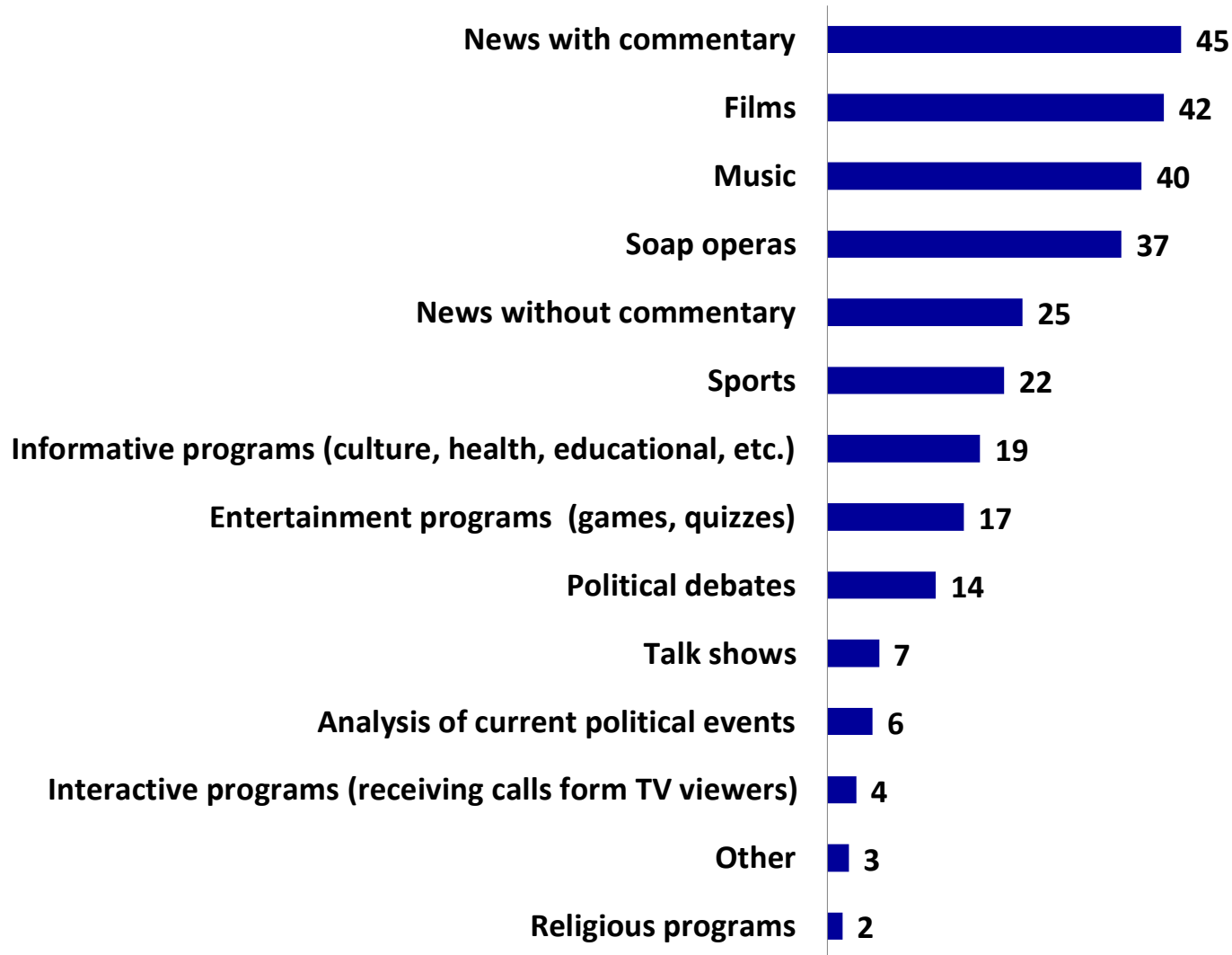


Please assess your level of trust toward each of those sources (%) (QA6)

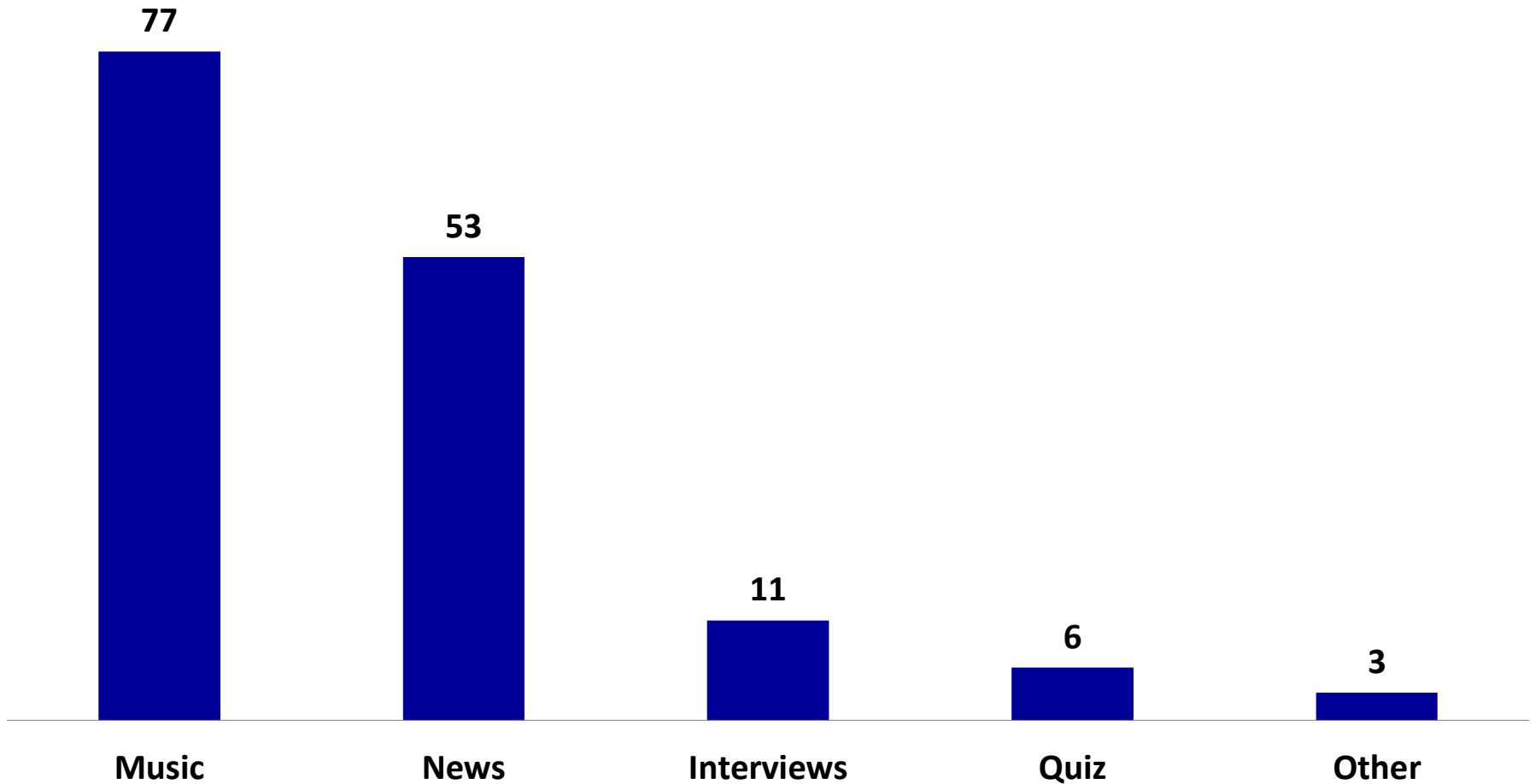
■ Trust very much
 ■ Somewhat trust
 ■ Don't trust
 ■ Don't trust at all
 ■ Dk&RA



What kind of TV programs mentioned below do you watch on TV? (QB7)(% for each, 3 possible answers)

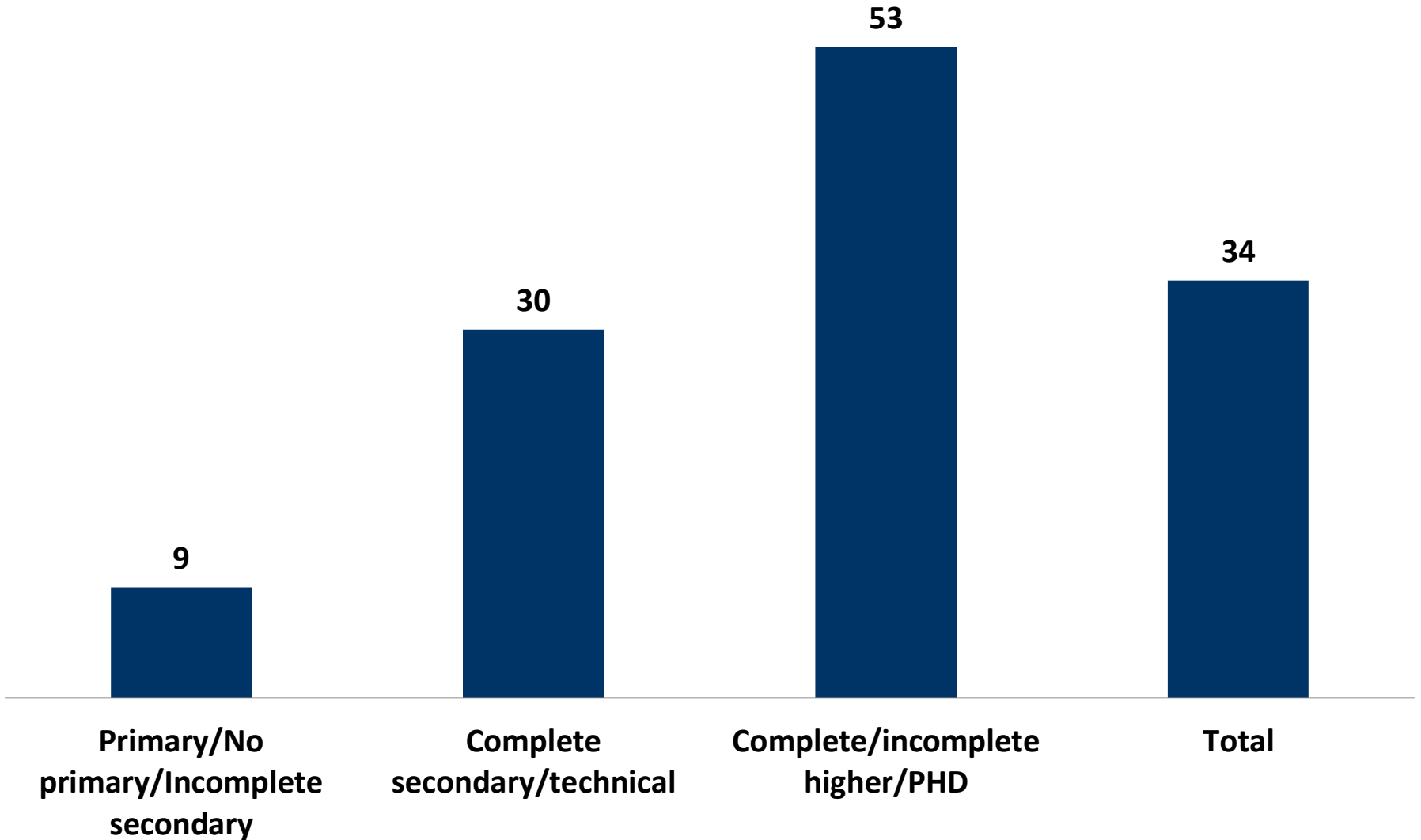


What do you like to listen to most on the radio? (QB10)(% of cases)

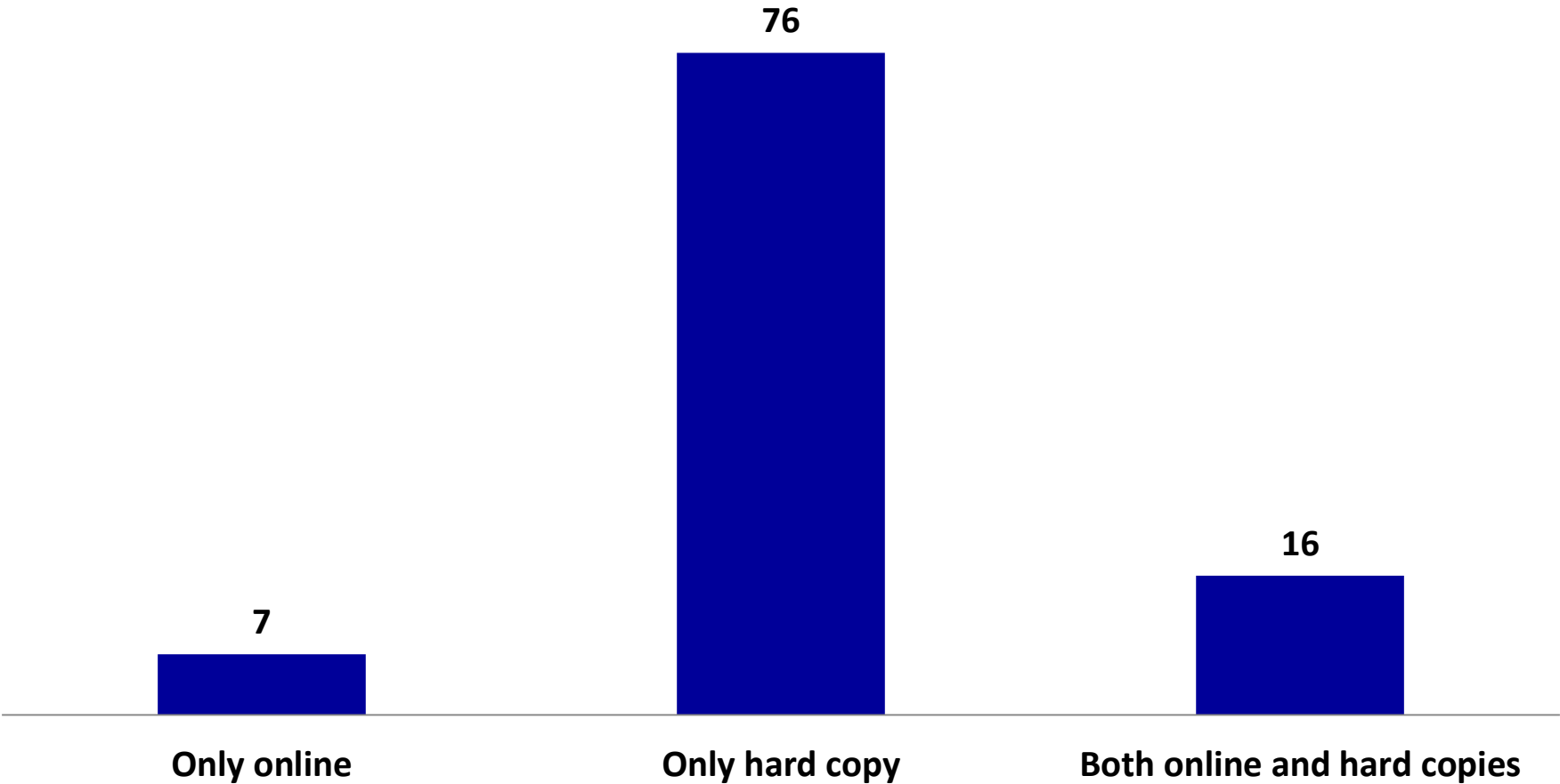


Do you read newspapers? By education (QD1)(%)

■ Yes



**In which form do you usually read newspapers?
(QD2) (% of the readers)**



**Monitoring data for print media publications
(YPC media monitoring of newspapers *Aravot* & *Golos Armenii*,
February 1- March 15, 2011)**

	Top five thematic topics measured by number of units in newspapers	(in units)
1.	Sport	322
2.	Activities of the Armenian government	284
3.	Activities of the Armenian political parties	262
4.	Resolution of the Karabakh conflict	242
5.	World news	212

What media experts have to say about newspapers:

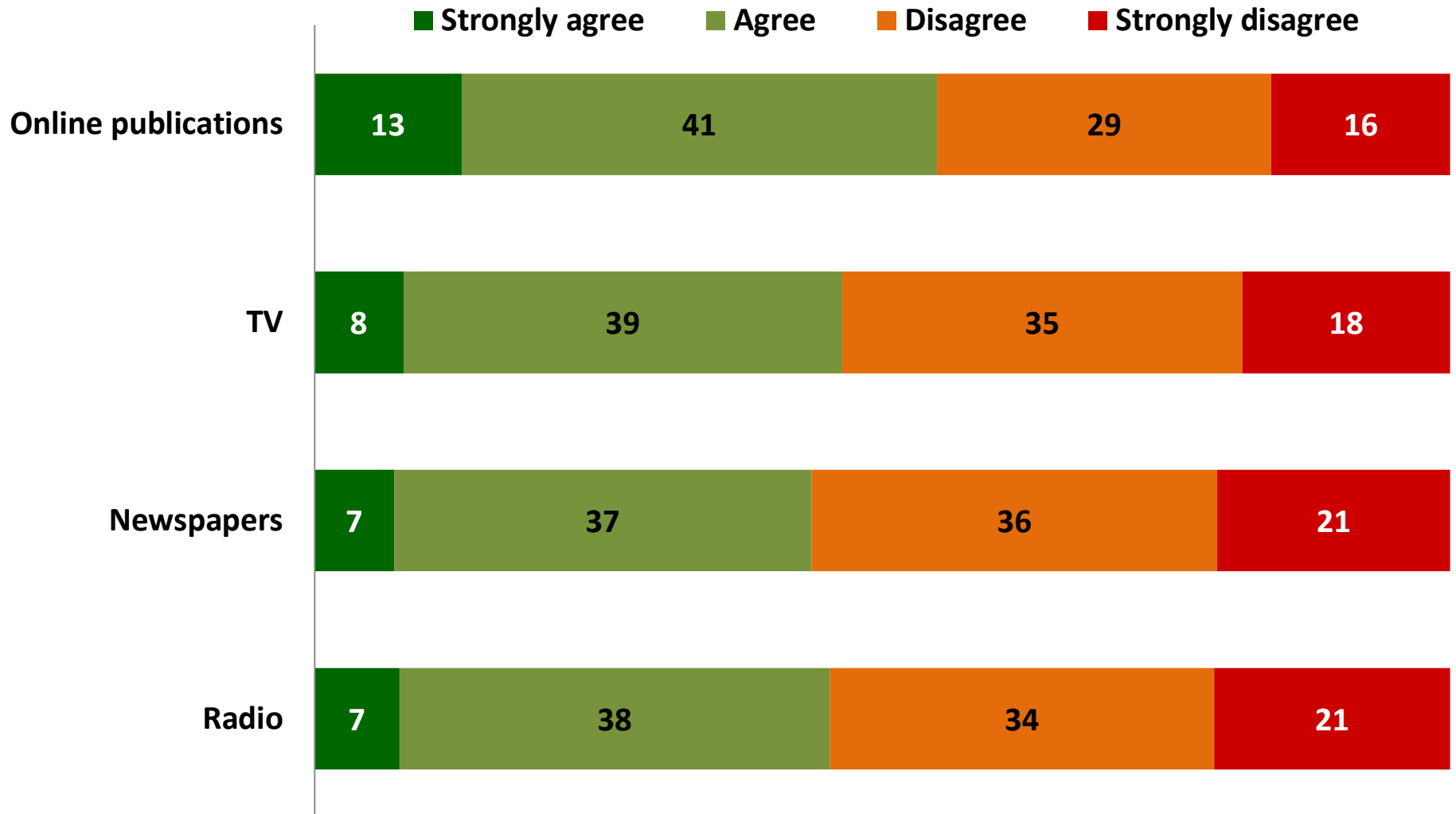
“There are no readers, no money, no reporters, dependency on a certain person and if we add up all of these similar things at the end who are we publishing these newspapers for?” (Head of a news agency, Yerevan)

“... this [print media] is a goner, and that [Internet] is a newcomer. Print media ...has also become a bit negligent itself. That is the reason it tries to get a hold of some front-pagers to make itself more attractive.” (Media professional/academic, Yerevan)

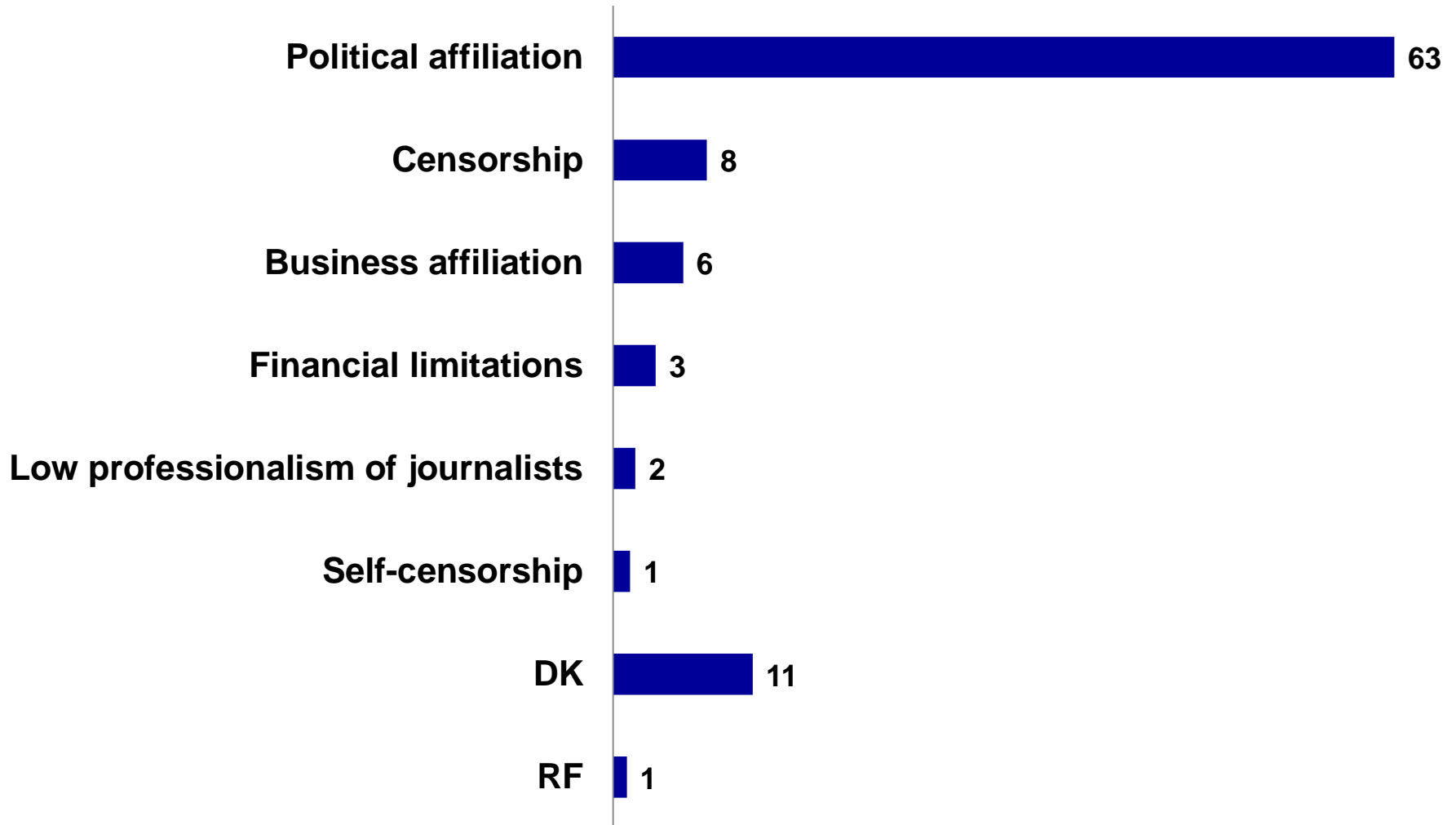
“People do not have money, one person buys [a newspaper], then everyone else in the building take turns to read it, or tell each other without the others reading. Those who can read well will read and then start retelling to the rest.” (Head of a media NGO, Yerevan)

Major Concerns on Traditional Media

How much do you agree that media covers news and events objectively? (QA4) (% , excluded DK/RA) N=1420

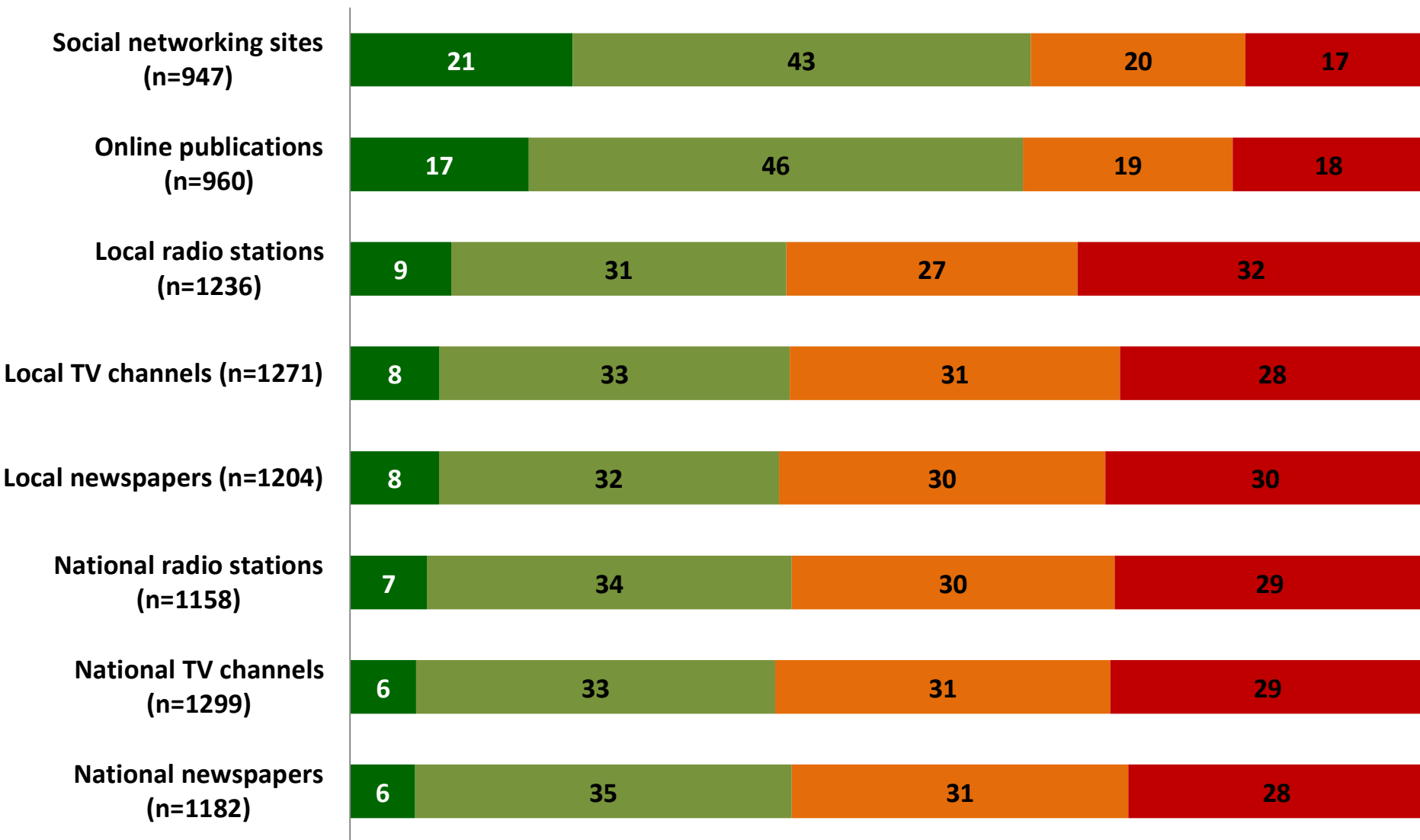


In your opinion, what may be the main reason for non-objective coverage? N=728 (QA5) (%)

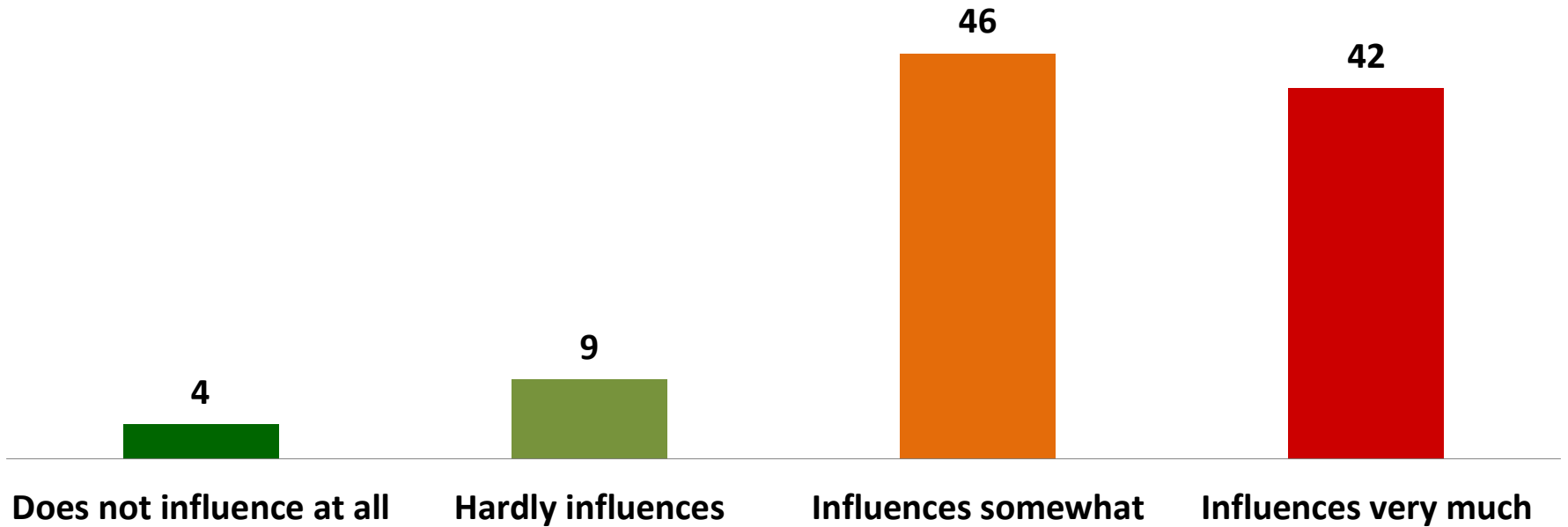


According to you, how much independence do the media have from government and business control in Armenia? (QA7) (%)

■ A lot ■ Some ■ Not much ■ Not at all



Please assess the influence of the owners of media on the content of broadcasting or publication (QA8) (%)



According to the participants of the focus groups (FG):

*“...each TV company is implementing someone's viewpoint or has a certain direction. **There is no way we can have the free, fair, light discussions you are talking about. Every discussion is someone's viewpoint** and people participating in the discussion are those who have the same view.”* (Female, 55, employed, Yerevan)

*“I have an impression that they have created some kind of a **vacuum; citizens watch a stupid comedy program, then watch official news, then again stupidity, then again official news.** A third point of view is completely absent.”* (Male, 27, employed, Yerevan)

*“It is interesting that when I watch our **Armenian TV channels, it seems to me that the virtual life is there, and the real life is in the Internet...** And the reality which is represented seems to have no connection with our life.”* (Female, 54, self-employed, Yerevan)

*“I get the impression that whatever Armenian channel I watch **is purely a state channel; no independent channels exist.**”* (Male, 33, employed, Yerevan)

According to the media professionals interviewed:

“Freedom requires money.” (Blogger, Yerevan)

*“You can see for yourself who they [free media] are. You should know that those **who are in the most difficult situation today are the free ones.**”* (Head of a news agency, Yerevan)

“Each media is like its owner.” (Head of an NGO, Regional NGO)

*“Never will the President of the country call the editor or the head of the news agency, and tell what to do... It is done through using **indirect leverages, and certain environment of constraint, fear for the future of the media outlet, the journalist...**”* (Head of a TV station, Regional NGO)

Opportunities for Traditional Media

**Monitoring data for information/news and analysis programs
(YPC media monitoring of 7 TV channels, February 1 – March 15, 2011)**

	Top five thematic topics measured by number of units in TV programs	(in units)	Proportions, %
1.	World news	3532	100.0
2.	Activities of the Armenian government	2072	58.7
3.	Sport	1986	56.2
4.	Resolution of the Karabakh conflict	1622	45.9
5.	Disaster, emergency news	1397	39.6

**Monitoring data for social-political, discussion programs
(YPC media monitoring of 7 TV channels, February 1 – March 15, 2011)**

	Top five thematic topics measured by number of hits/units in TV programs	(in units)
1.	Activities of the Armenian government	126
2.	Resolution of the Karabakh conflict	105
3.	Activities of the Armenian political parties	95
4.	Regional developments	64
5.	Increase in prices (on goods and services), low salaries, pensions and social benefits in Armenia	63

Top five topics respondents would like to receive more information about from the media	Mean, 1-10 point scale
Increase in prices (on goods and services), low salaries, pensions and social benefits in Armenia	8.85
Healthcare issues (quality of medical services, drug and medical service costs), corruption in the healthcare system	8.84
Unemployment in Armenia	8.78
Situation in the Armenian army	8.77
Issue of recognition of the Armenian genocide of 1915 in the world	8.77

According to the FG participants:

*“Entertainment programs for Armenia should be only **educational ones that promote knowledge...**”* (Female, 20, self-employed, Yerevan)

*“For adults I would have **clips from foreign channels** on science, animals and humor which are informative.”* (Male, 24, employed, Yerevan)

*“**Village life is more isolated** now, but villagers know many interesting stories.”* (unemployed, Yerevan)

“Who wouldn’t watch “Vardanank”^{} etc.? Of course they would. They can make it as a soap opera...”* (Female, 64, employed, Yerevan)

^{*}Historical novel by Derenik Demirchian

Alternative Media | General Overview

Personal computer adoption in Armenia (%), Caucasus Barometer

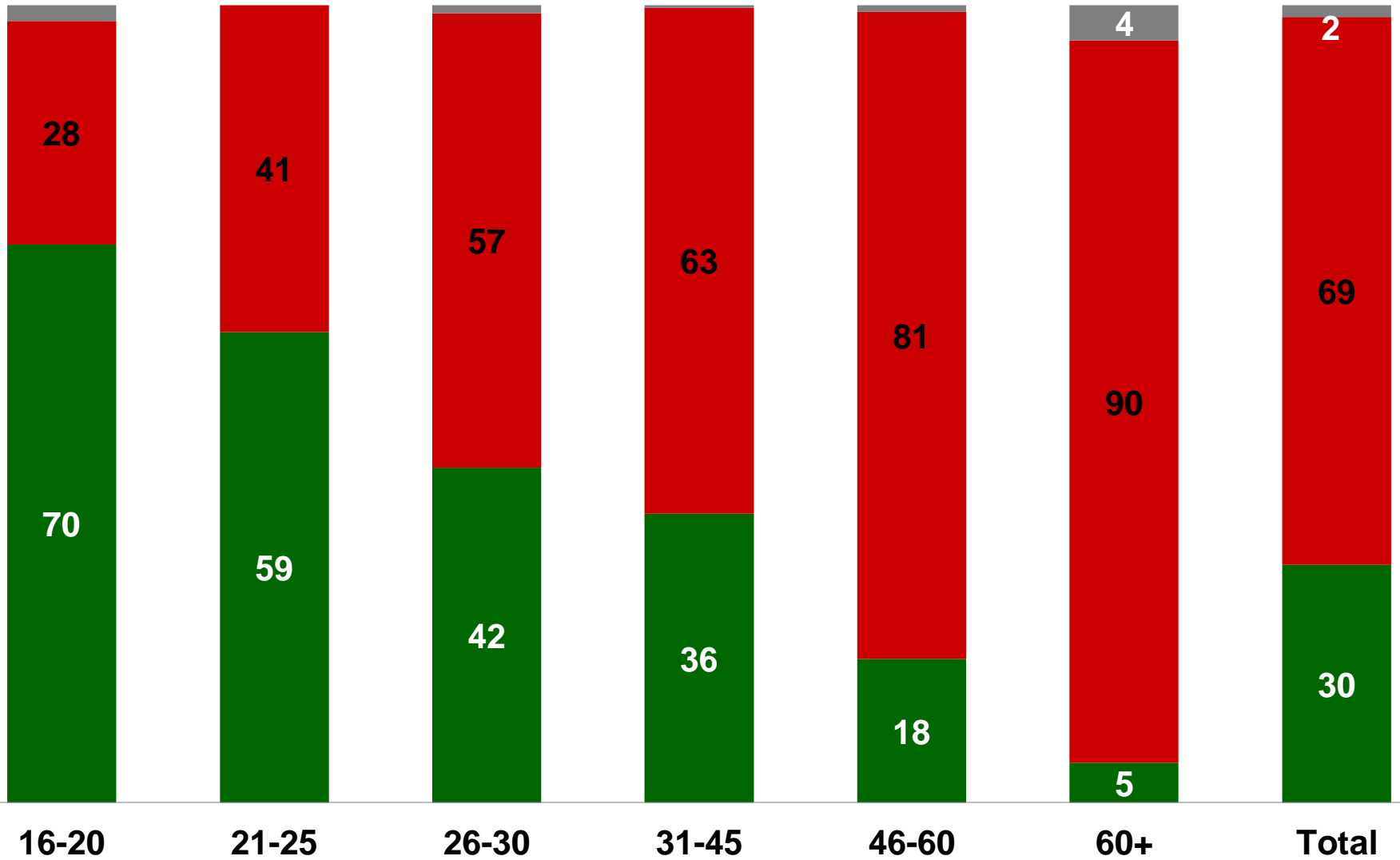
2007	2008	2009	2010
11	10	15	27

Home internet adoption in Armenia (%), Caucasus Barometer

2007	2008	2009	2010
4	5	6	19

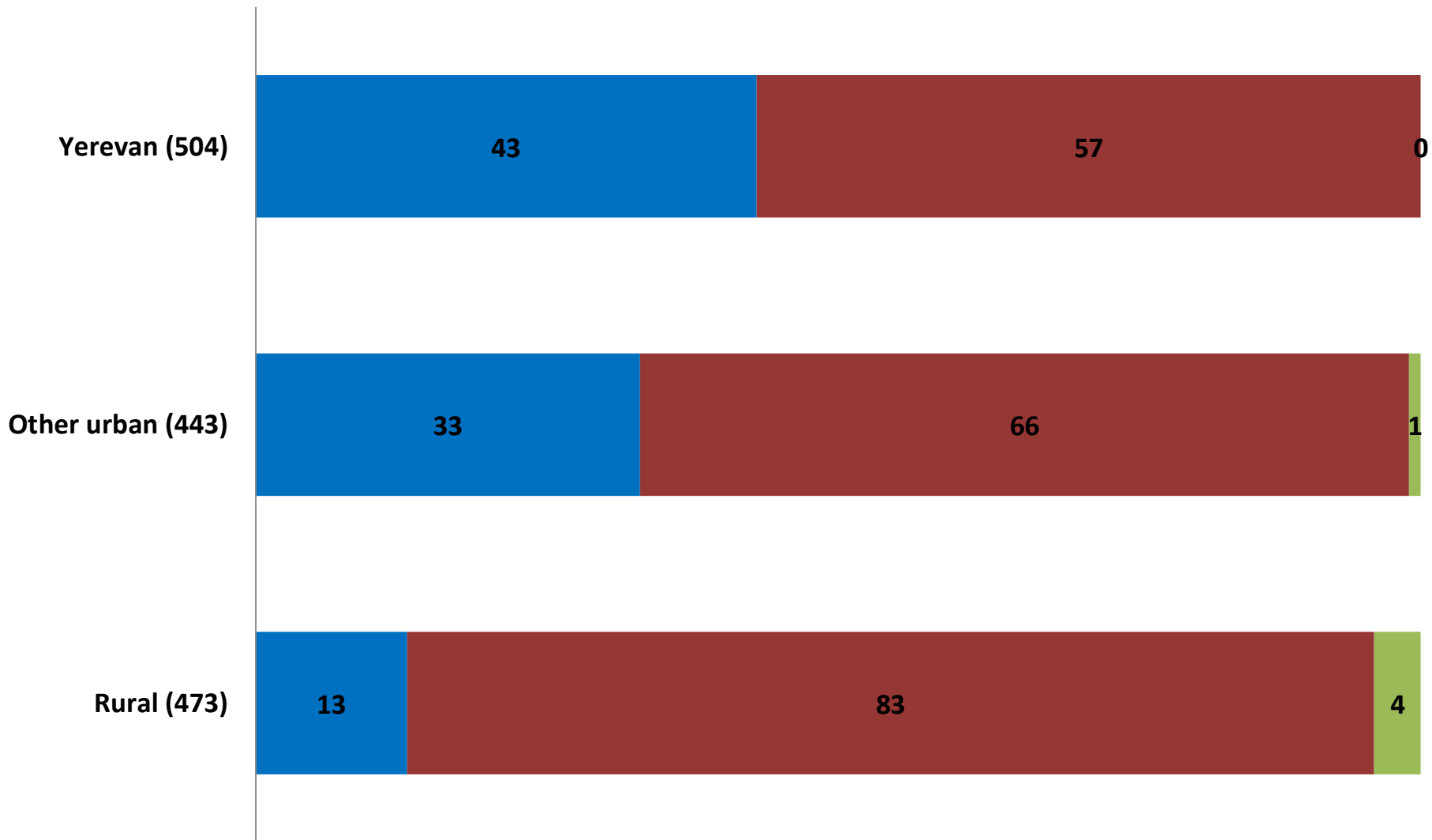
Have you used the Internet in the last 12 months? (QE1) (%)

■ Yes ■ No ■ Don't know what Internet is

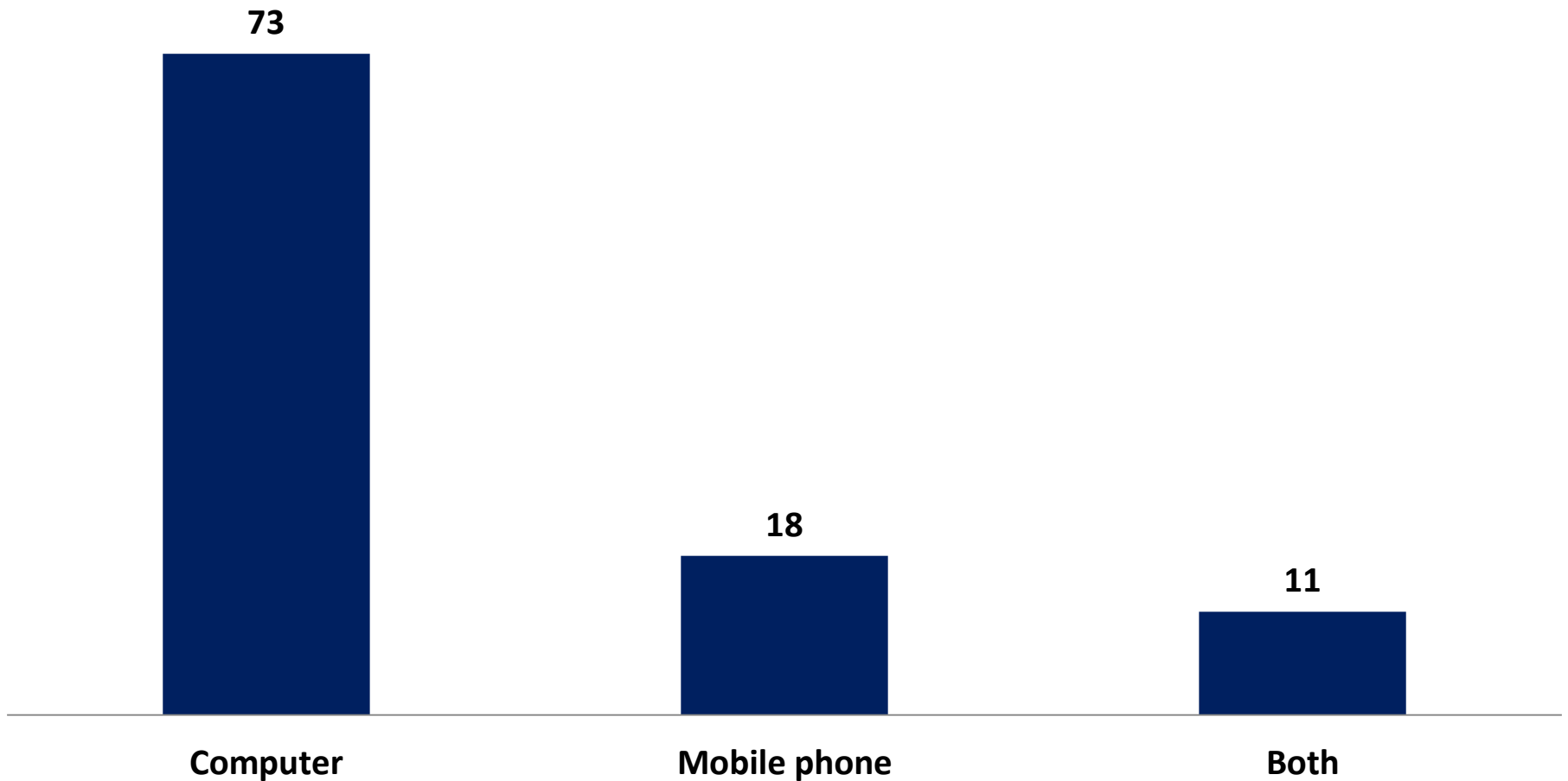


Have you used the Internet in the last 12 months? (QE1) (% , by settlement type)

■ Yes ■ No ■ Don't know what Internet is

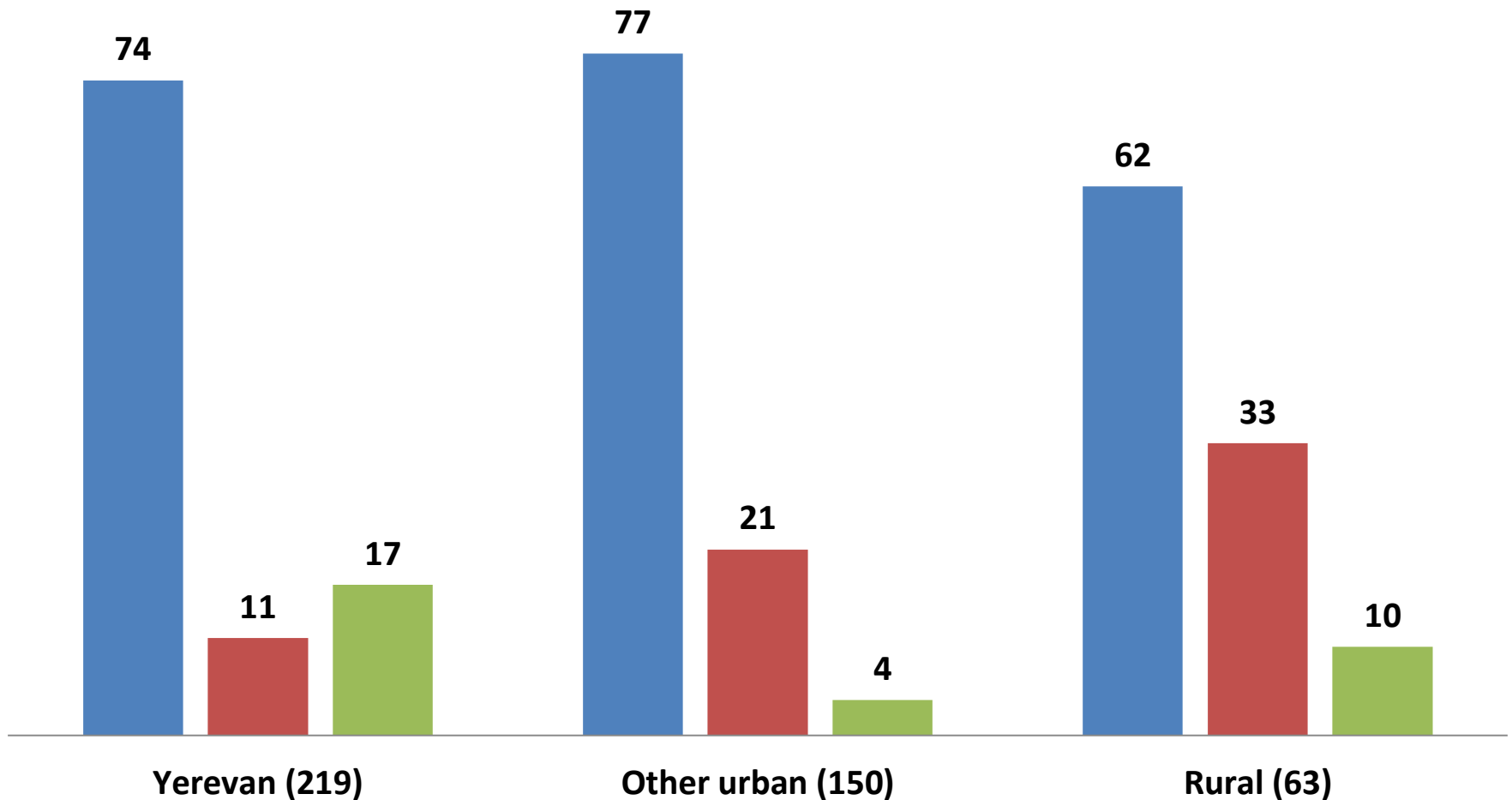


Internet access primary device (QE4) (% of all Internet users, multiple response)

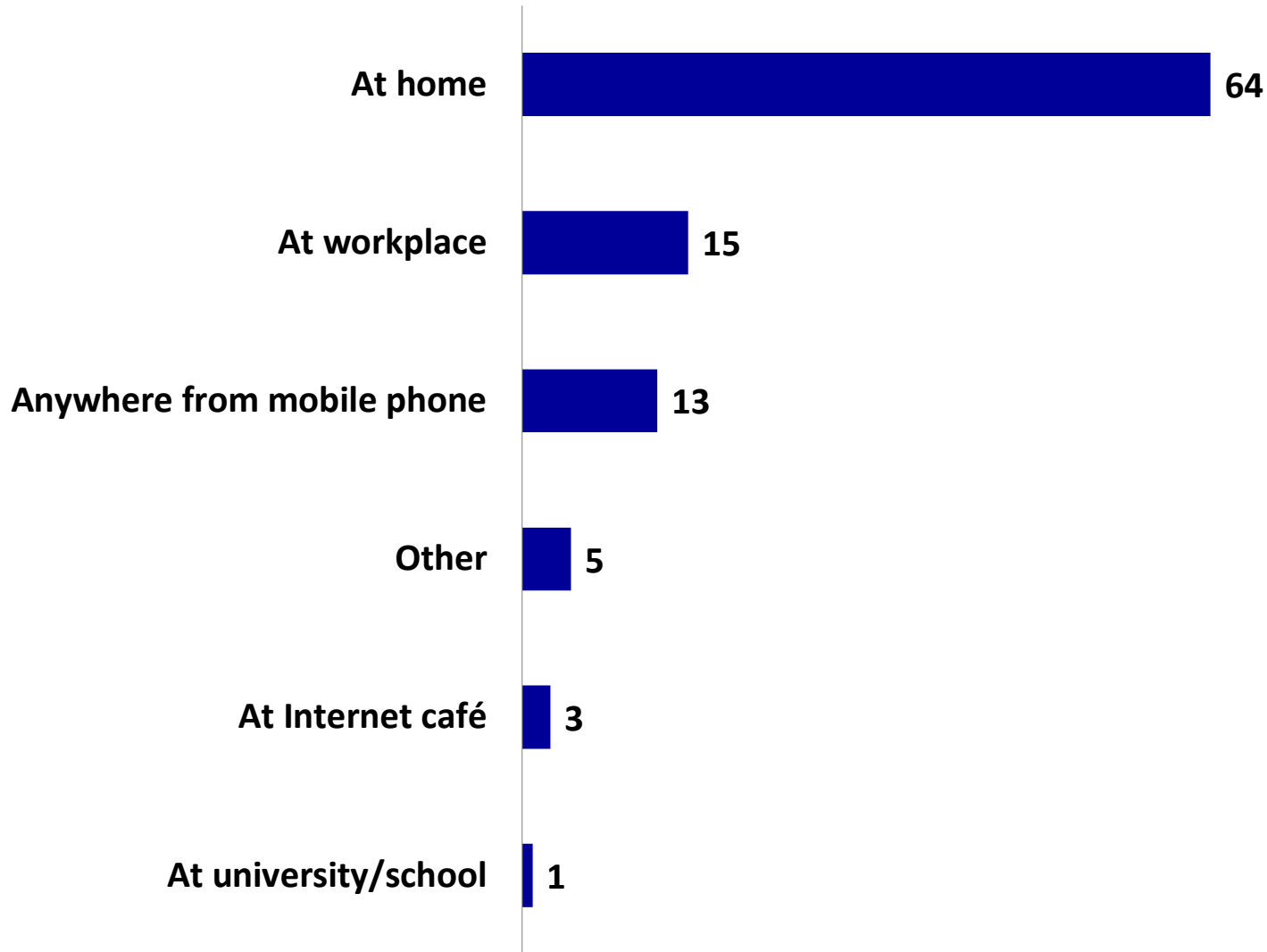


Internet access primary device (QE4) (% of all Internet users by settlement type, multiple response)

■ Computer ■ Mobile phone ■ Both

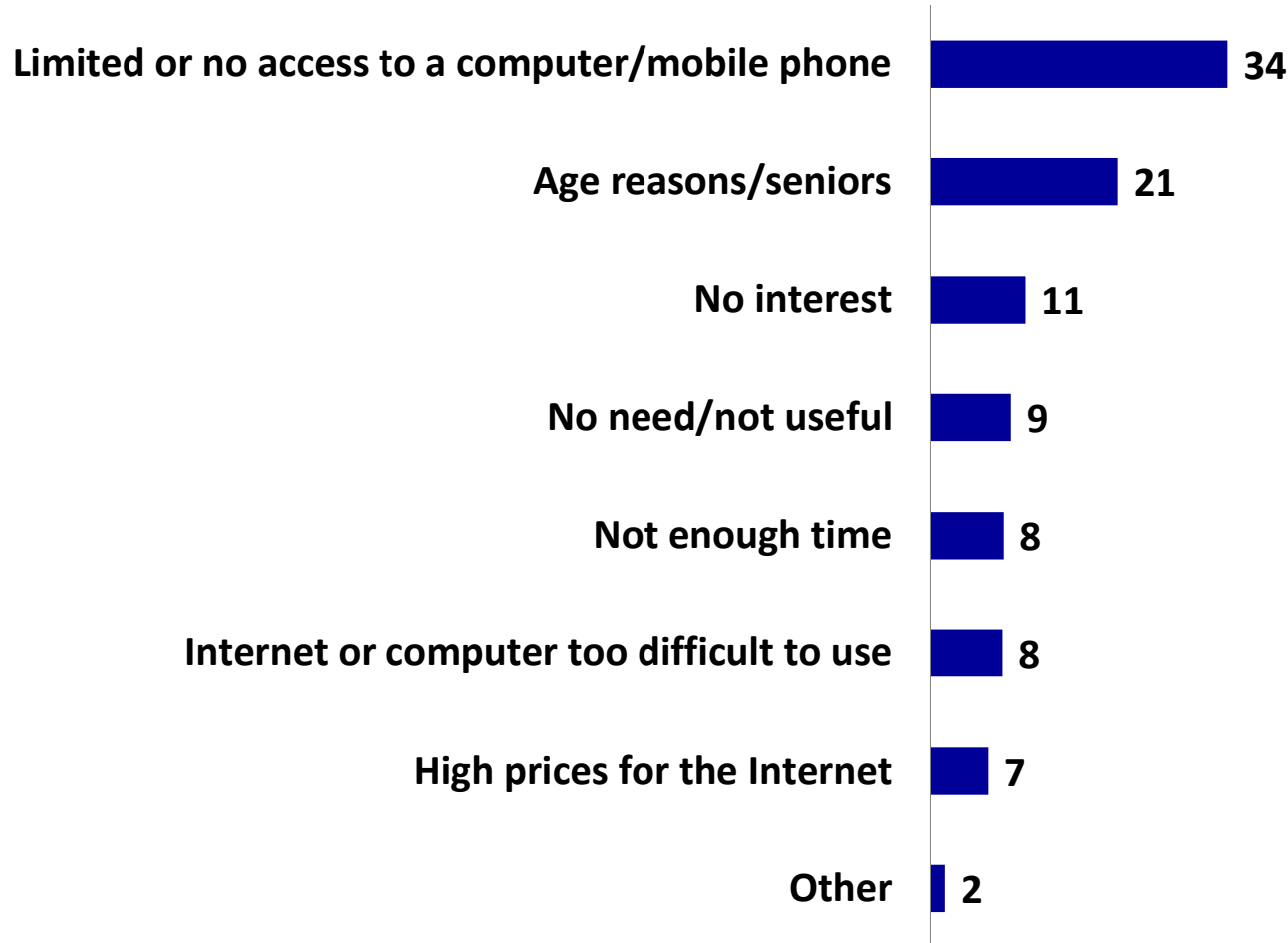


In which of the following places do you use the Internet most frequently? N=422 (QE2) (% of the users)

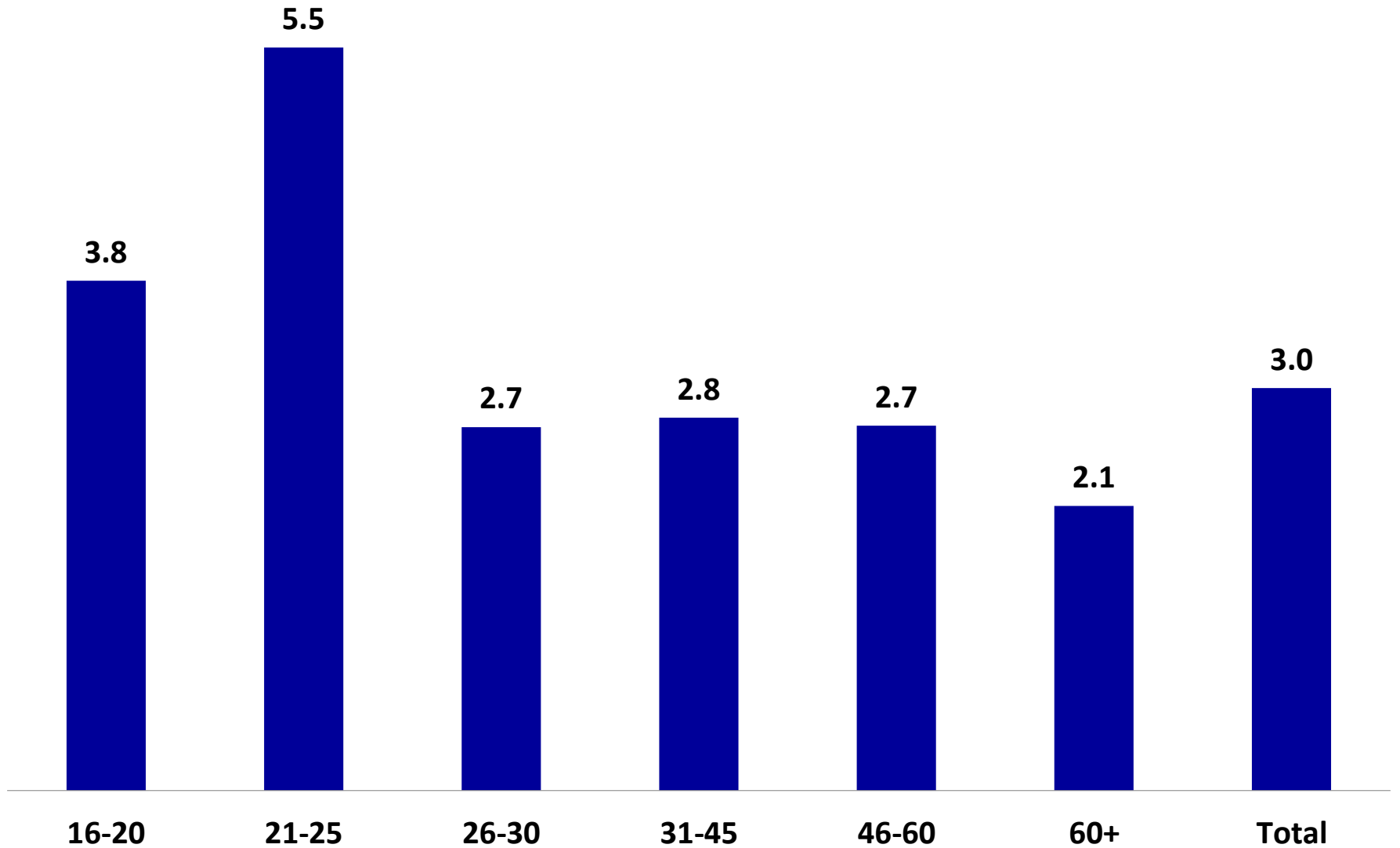


What is the main reason that you do not use the Internet?

N=977 (QE37) (% of non-users)



How many hours on average daily do you spend using the Internet? (QE6) (mean by age group)

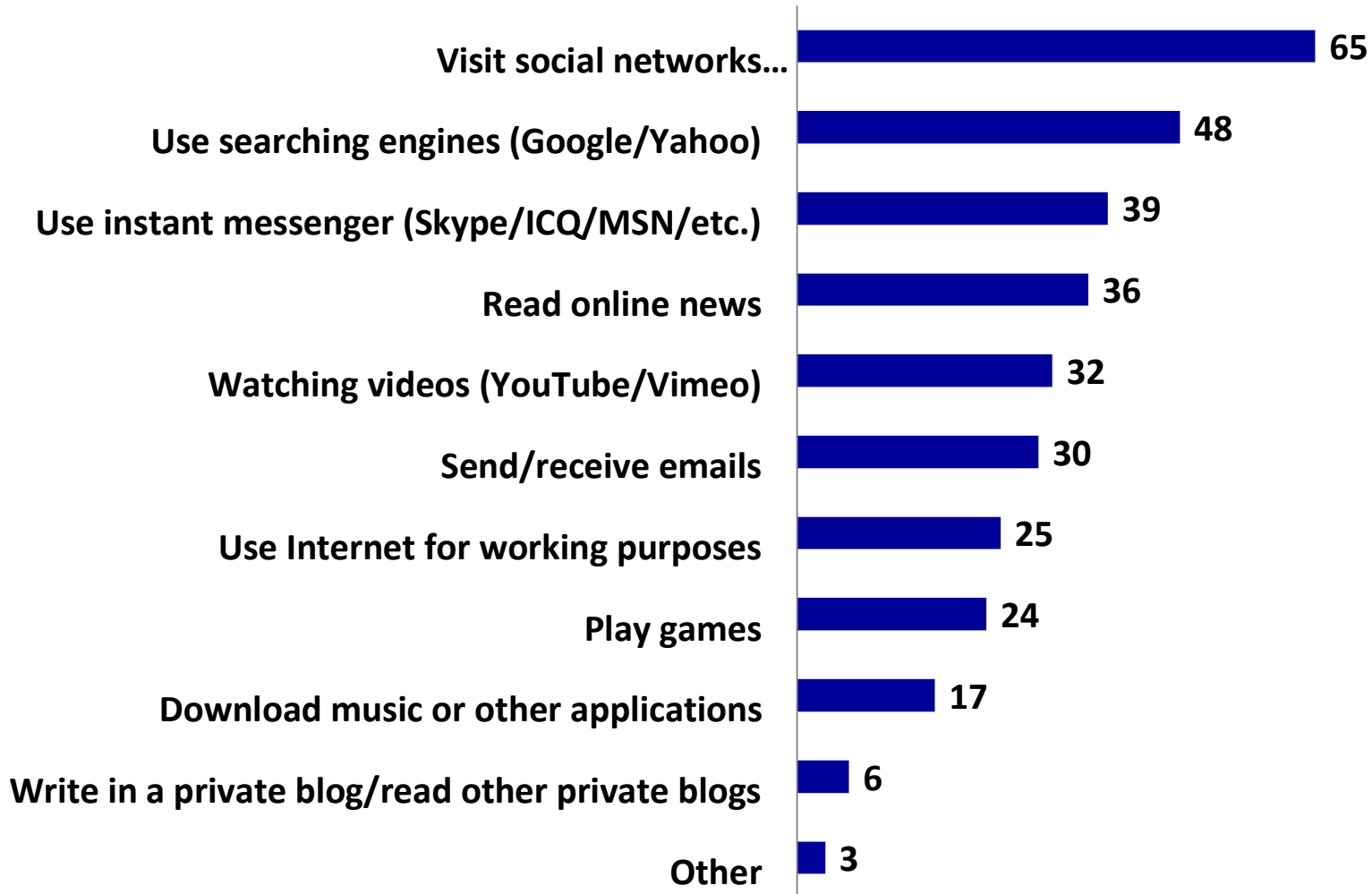


According to one of the focus group participants:

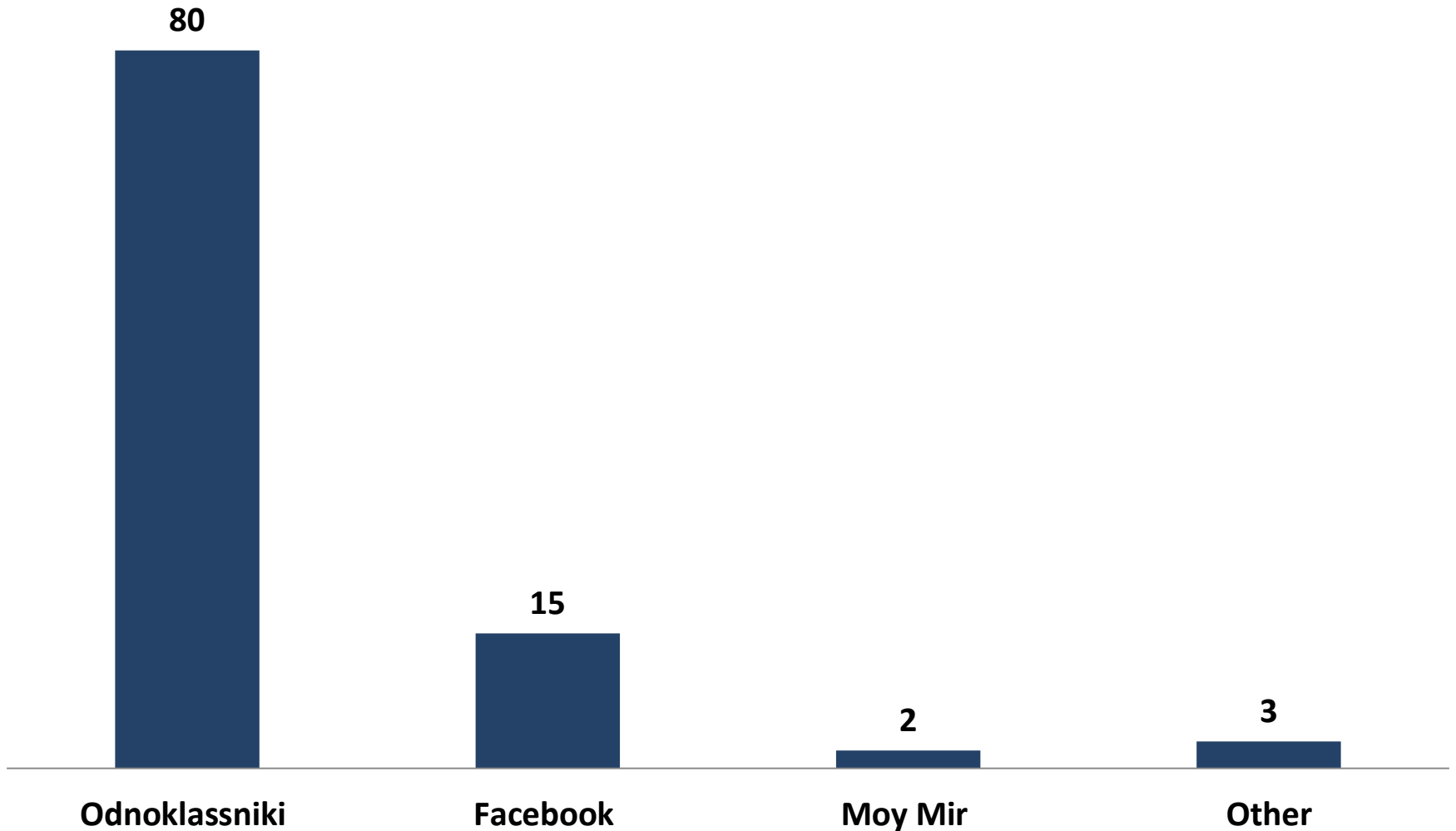
“I can say that the Internet has become an inseparable part of my life, a very important part, like food or clothing.” (Female, 26, student, Yerevan)

When you access the Internet, which of the following below do you usually do?

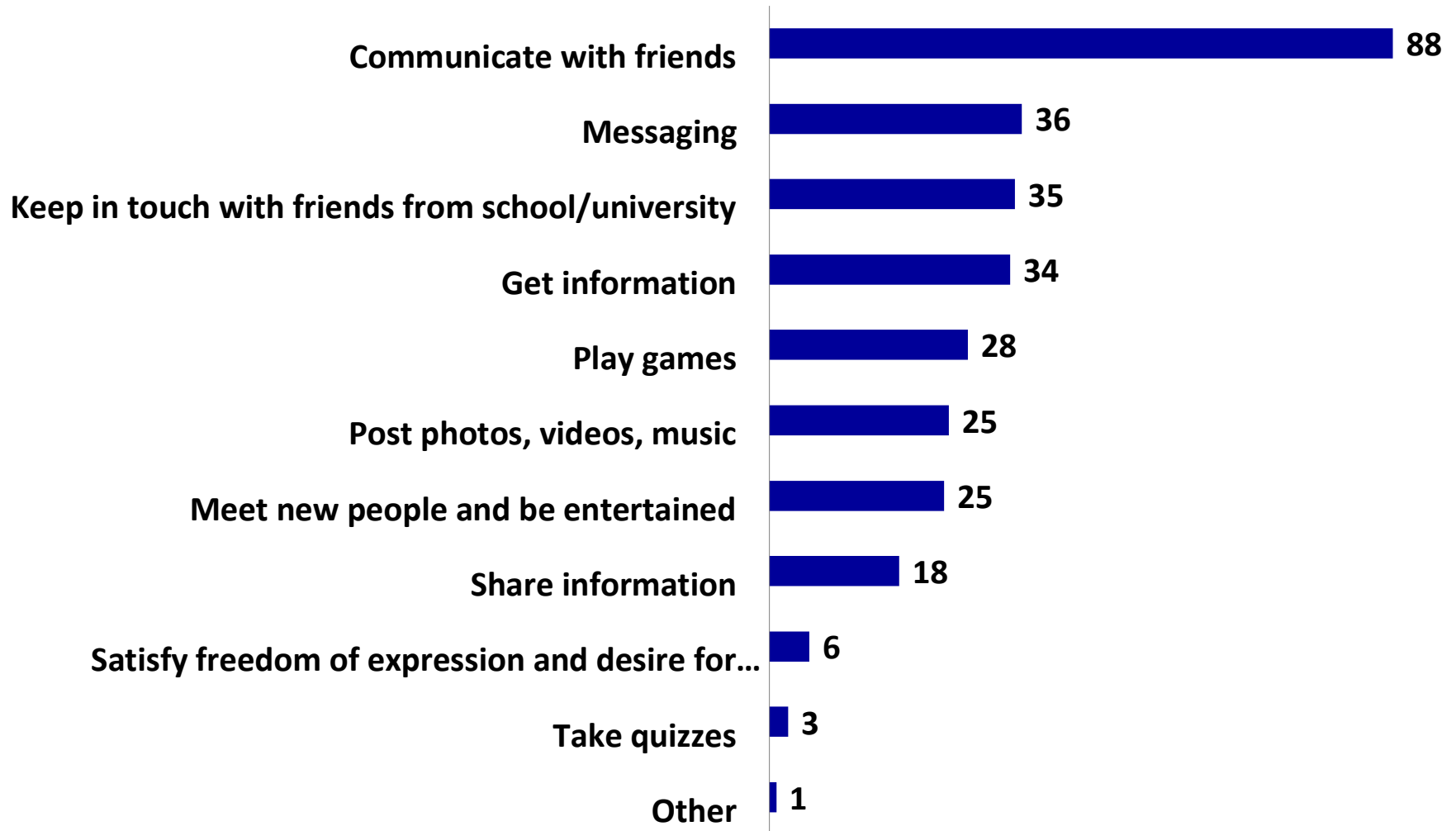
N=403, (QE7) (% of cases)



**Which of the social networking sites do you use the most?
(QE19) N=249 (% , among social-networking site users)**

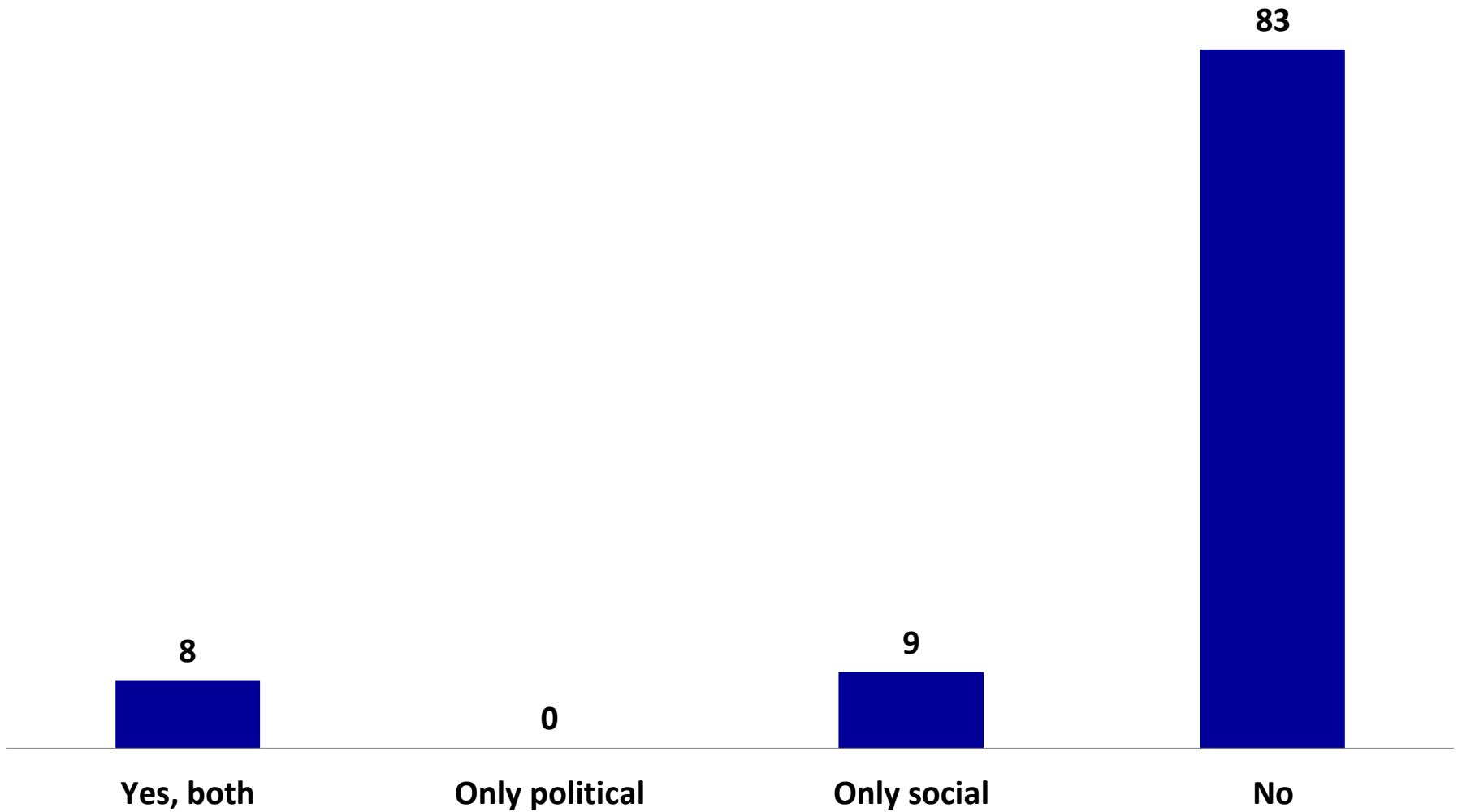


What activities do you do in social networking sites? (QE21) (% of all answers; N=894 - of social networking site users)

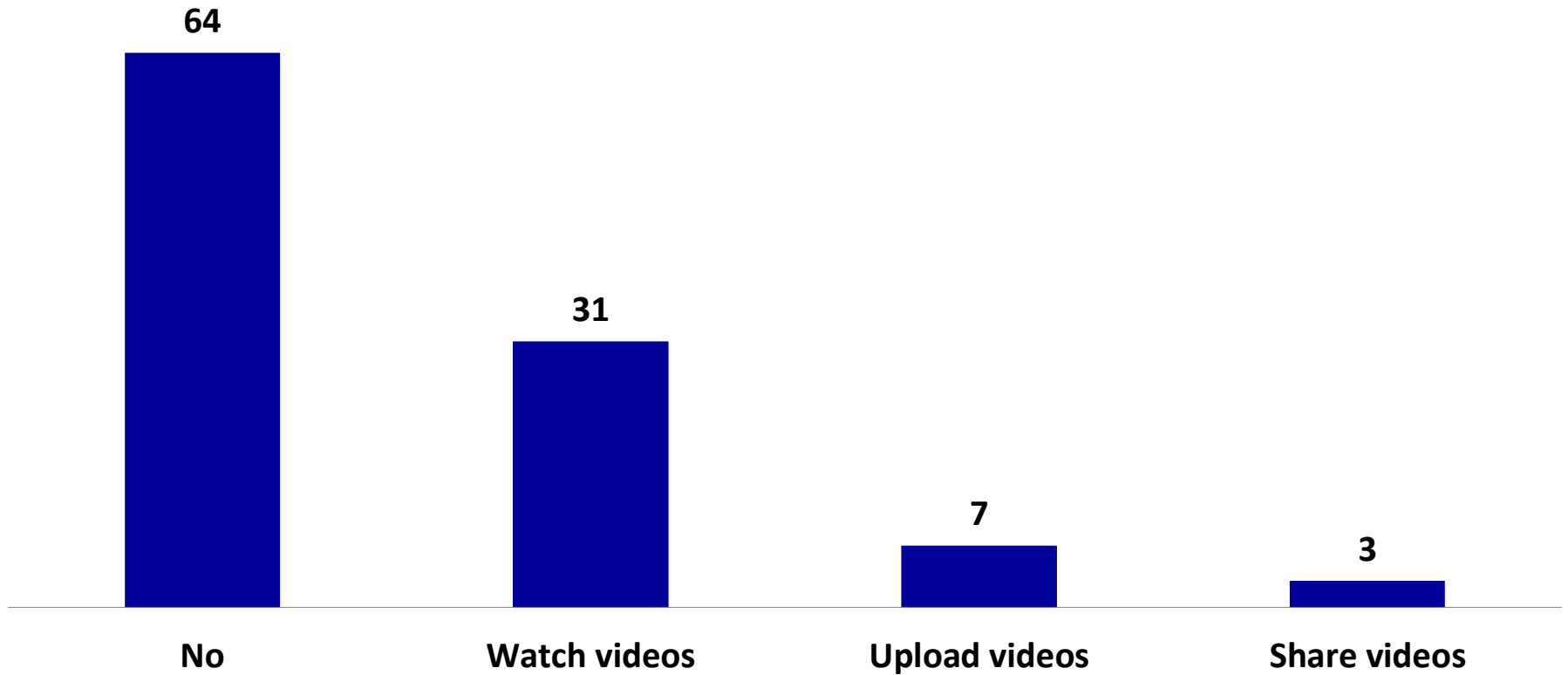


E23. Do you use social networking sites to share political or social news?

N=300, (QE23, % users)

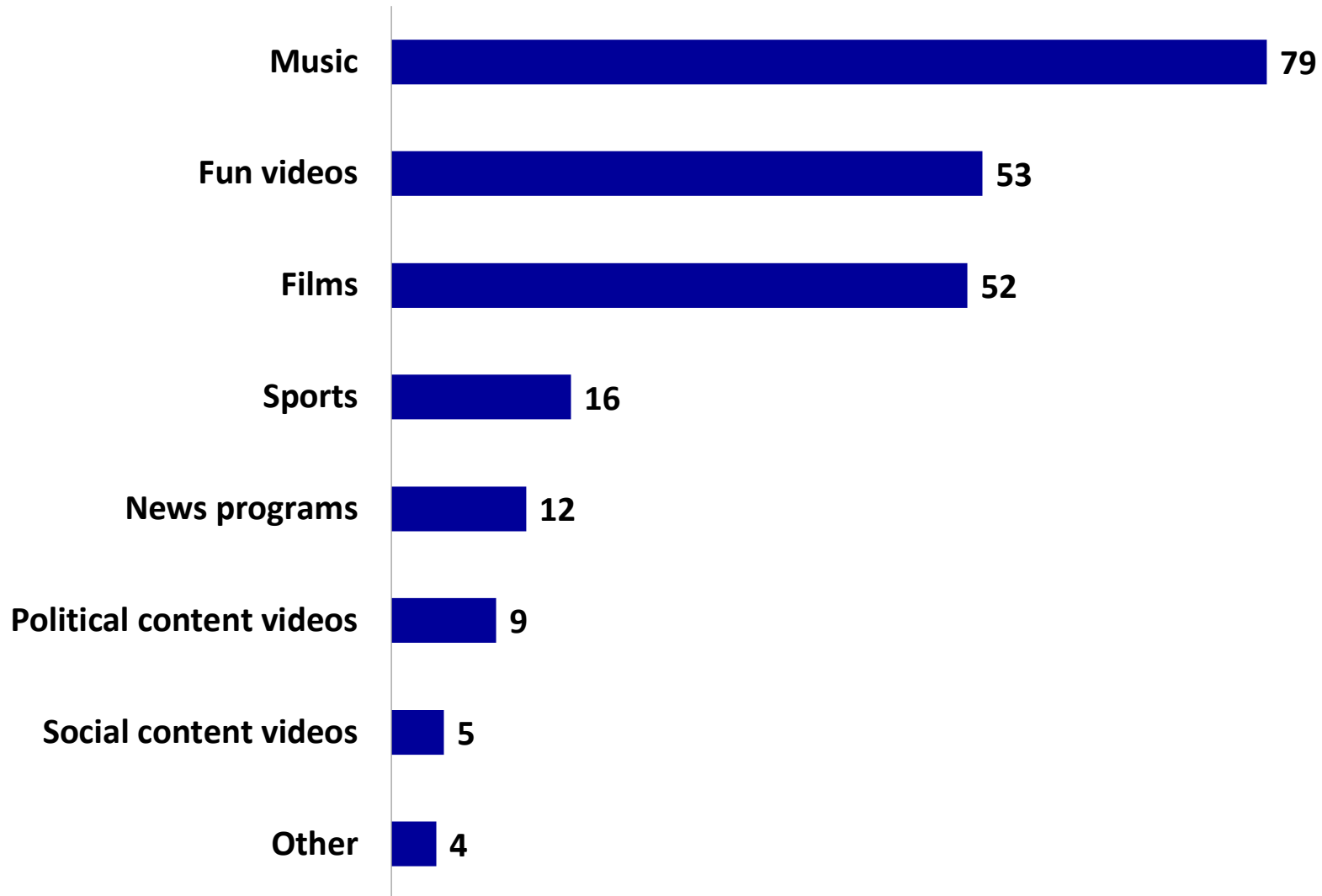


**Do you watch, upload or share videos on the Internet?
(QE29) (% of cases, multiple answers)**



What kind of videos do you watch on these sites?

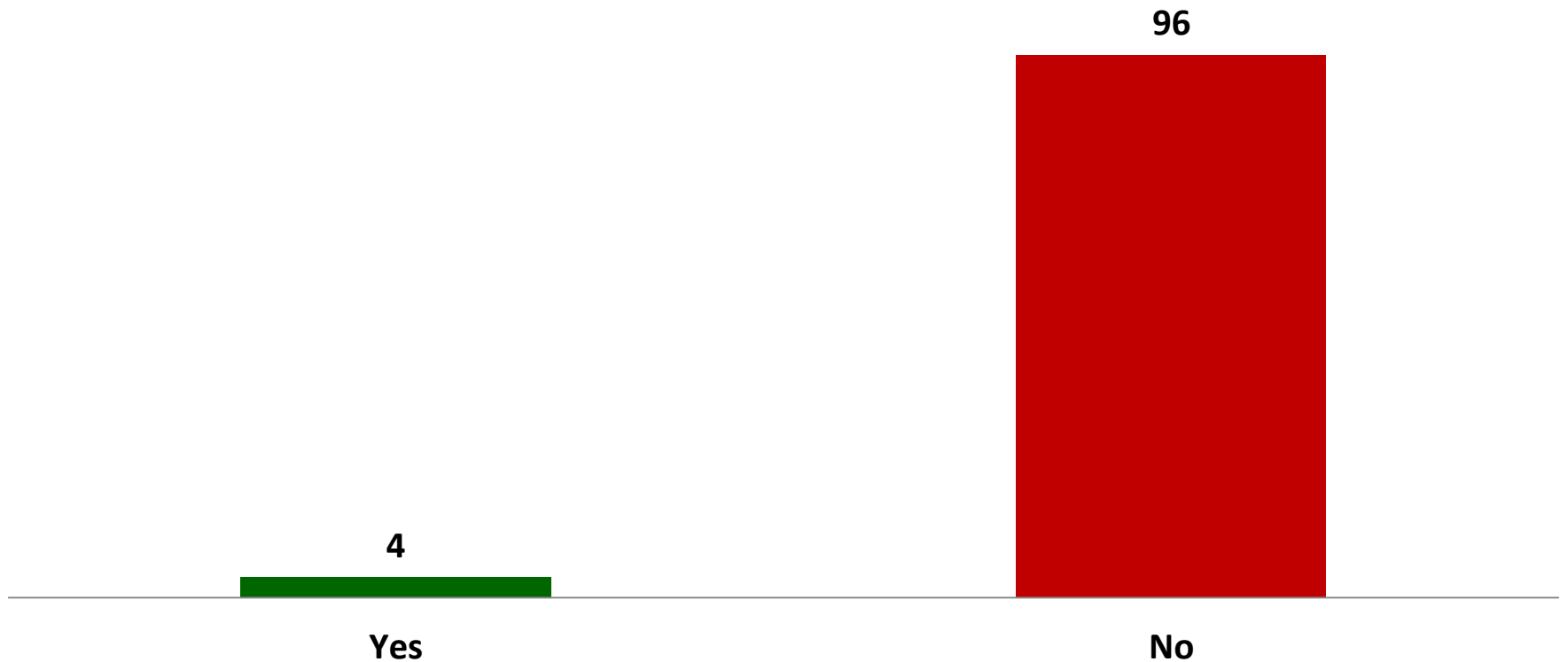
N=342, (QE31; % of cases)



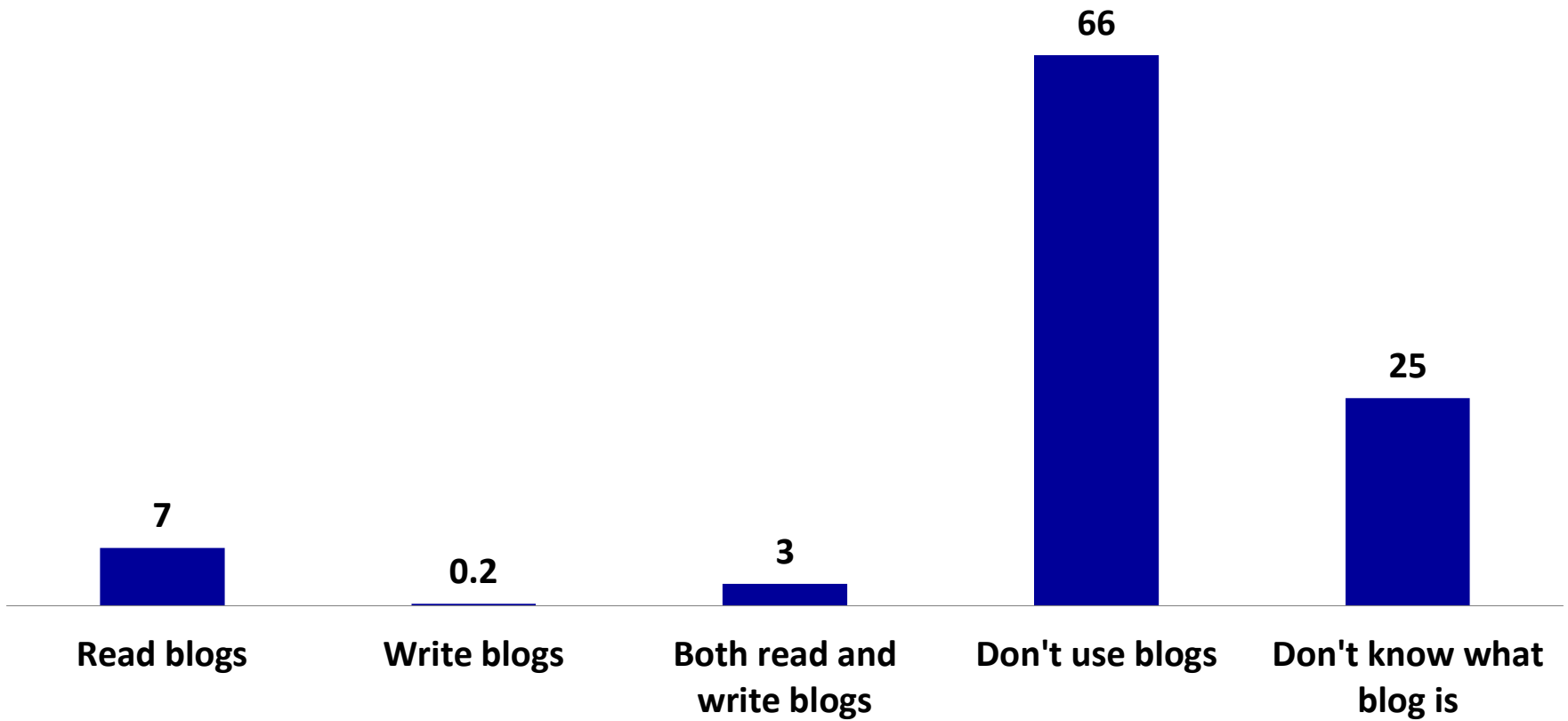
Have you ever made a political or social comment and posted online (for example, in news sites, blogs, YouTube, etc.)?

N=422, (QE32; % of users)

■ Yes ■ No



Do you read or write blogs? N=421 (QE27; % of users)



According to the FG participants:

*“They [blogs] have become an **additional source of information**. But we are talking about a small number of blogs, because most of the blogs remain personal and their existence is not important for Armenia.”* (Male, 37, blogger, Yerevan)

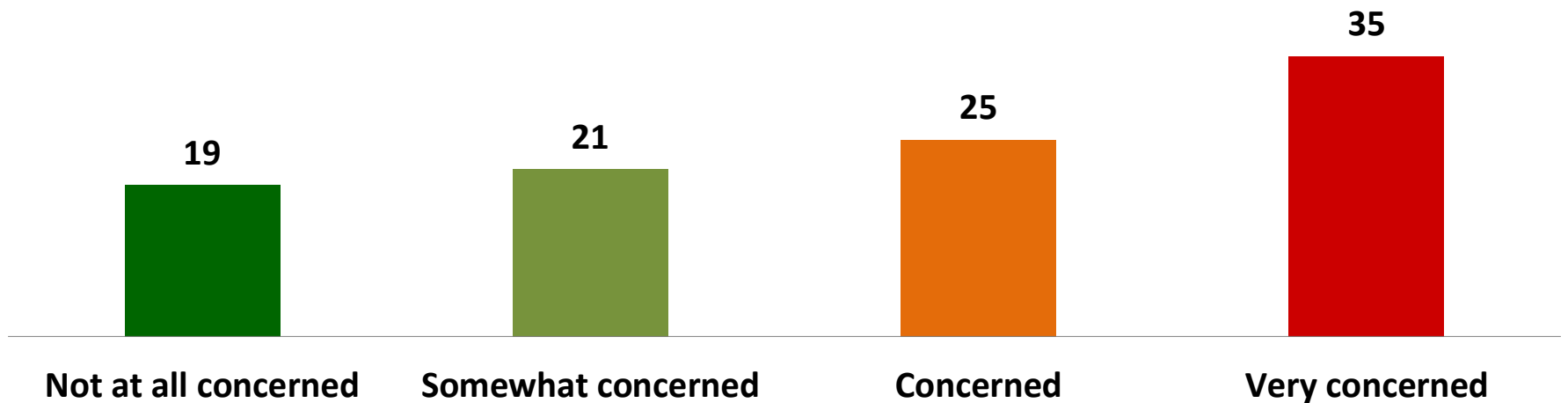
“I think there are not many bloggers in Armenia that always update their blogs. Those who do all know each other very well. They are like one family.” (Female, 19, student, Yerevan)

*“There is **no legal framework that regulates the accuracy of information** on the blogs. You can’t sue any blogger if he writes something inaccurate.”* (Female, 41, blogger, Yerevan)

“Personally for me a blog is trustworthy if the blogger is trustworthy. There are some blogs that I don’t know who is standing behind it, and when the blogger uncovers his/her face, he/she becomes more trustworthy for me, or at least I understand why he/she writes.” (Male, 37, blogger, Yerevan)

In general, how concerned are you about your data and privacy on the Internet?

N=422 (QE36; %)



According to the FG participants:

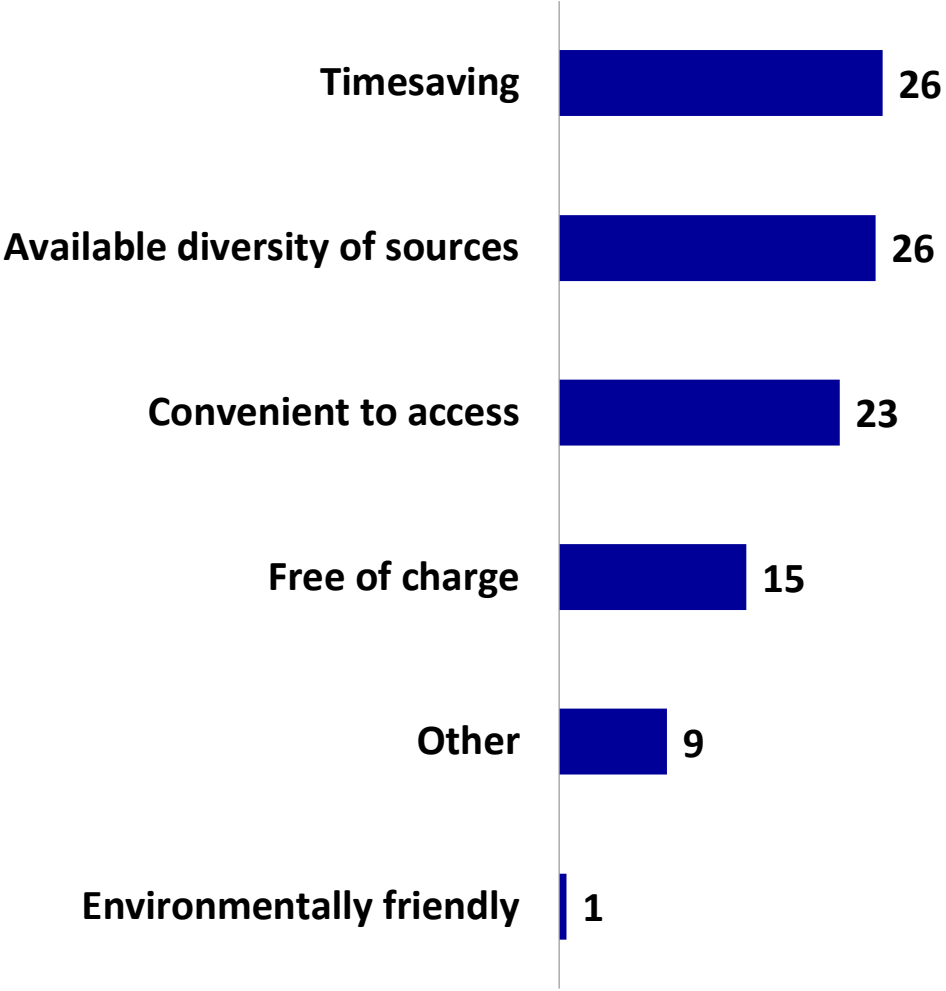
*“Today the **HR goes online to see what that person writes on Facebook or in blogs.**” (Male, 37, blogger, Yerevan)*

*“...I have started to **lock more of my stuff or make them invisible.** I used to write very openly about myself, but recently over the last three to four years I have become more careful. I have noticed the same tendency among my friends.” (Female, 27, blogger, Yerevan)*

*“I do not oppose different groups who monitor and understand what society needs are. Does that society need foreign language in schools or not? Should the border with Turkey be open or not? **I think it is a bit absurd to control.**” (Female, 22, blogger, Yerevan)*

Comparing with traditional newspapers, what is the best advantage of online publications?

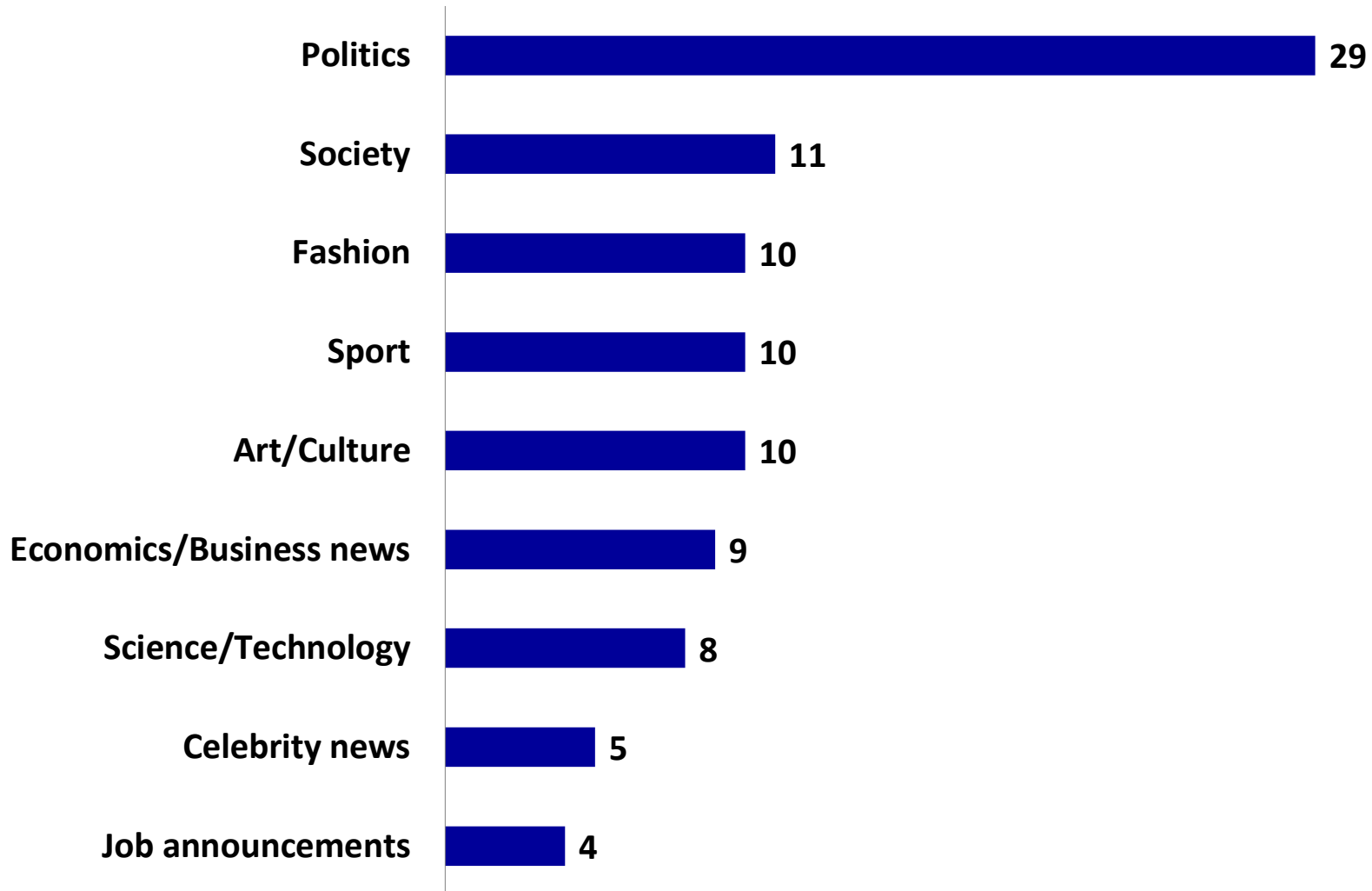
N=175 (QE12; %)



**Monitoring data for online publications
(YPC media monitoring, 3 online publications - 1in.am, Lragir.am,
Panorama.am; February 1 – March 15, 2011)**

	Top five thematic topics measured by number of hits/units in online publications	(in units)	Proportions
1.	Regional developments (in Iran, in Turkey out of the context of Armenian-Turkish relations, in Azerbaijan out of the Karabach conflict context, in Georgia, and Russia in South Caucasus)	1342	100.0
2.	World news	1199	89.3
3.	Activities of the Armenian political parties	1184	88.2
4.	Activities of the Armenian government	954	71.1
5.	Resolution of the Karabagh conflict	768	57.2

**What topics do you prefer to read in online publications / newspapers (1in.am, Lragir.am, Panorama.am)?
(QE13; N=175; % for the most read topic)**



According to the FG participants and media experts:

*“Go online and there are newspapers. You can find everything there. It is done in a way that a person can decide for himself what s/he needs. This is not like in “Lraber” where they constantly **inject, inject, inject** news.”* (Male, 22, employed, Yerevan)

“I think the best part about receiving information on social networks is that you are working and have your Facebook open, and suddenly see that someone has shared some news. Then you hear about that news only in the evening news on TV.” (Female, 26, student, Yerevan)

*“Compared to television, this sphere [online media] is growing fast, especially it is a lot easier to create websites and work. Besides the polarized ones, there are indeed websites that try to deliver impartial news. **There is competition and maybe they are the future.**”*(NGO leader, Yerevan)

THANK YOU!