



FREEDOM OF EXPRESSION AND MEDIA CONSUMPTION RESEARCH IN ARMENIA

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Prisma Research and Analysis LLC

DISCLAIMER

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ABBREVIATIONS

AMD	Armenian Dram
CAPI	Computer Assisted Personal Interview
CPFE	Committee to Protect Freedom of Expression
CRRC	Caucasus Research Resource Centre
CSO	Civic Society Organization
DK/RA	Don't Know/Refuse to Answer
FGD	Focus Group Discussion
FoE	Freedom of Expression
H/H	Household
IRI	International Republican Institute
KII	Key Informant Interview
MIC	Media Initiatives Center
MEO	Media Ethics Observatory
N	Number
PSU	Primary Sampling Unit
RA	Republic of Armenia
USAID	United States Agency for International Development
USD	United States Dollar

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EXECUTIVE SUMMARY

The Media Consumption and Freedom of Expression Research in Armenia has been carried out within the USAID-funded **Media Program in Armenia Activity** implemented by Internews.

The purpose of this study is to produce evidence on how information consumers in Armenia find, share, value, and trust information; to analyze the supply and demand of information; as well as to identify threats to and constraints on freedom of expression from the vantage point of citizens and media practitioners.

Research Methodology: The research employed a mixed-method approach, including: a) a nationally representative survey through household visits to **1,109** respondents aged 18 years old and older, b) **13 Key Informant Interviews (KIIs)** with representatives of media, policy makers, and field experts, c) **4 Focus Group Discussions (FGDs)** with media, Civic Society Organizations (CSOs), and marginalized social group representatives.

The study included 7 main domains related to Media Consumption and Freedom of Expression, and the **key findings** of the research are presented below by domain.

MEDIA CONSUMPTION AND HABITS OF CONSUMERS

- ➔ **Media sources:** Armenian TV channels (84%) and Armenian news websites (67%) are the most popular media sources among the respondents in general ([Figure 1](#)). The reverse can be observed when studying the consumption of media sources specifically for getting social and political news: here digital platforms, particularly social networks, blogs, vlogs, and podcasts, appear to be the primary sources of social and political news (58% of respondents use these sources), followed by television (56%) ([Table 6](#)).
- ➔ **Popular media sources per media type:** Armenia TV is the most consumed (57% of total surveyed respondents) TV channel, followed by Shant TV (43%) and the First (Public) Channel (43%), with notable weekly viewership for Russian TV channels (18%) ([Table 7](#)). These results can be a proxy indication of the fact that TV channels are mostly used for entertainment purposes, since the top two most popular channels appear to be those that do not focus on social and political news. In terms of news websites, Azatutyun.am is the most visited (22% of total surveyed respondents) followed by News.am (12%) and 1in.am (9%) ([Table 8](#)). This aligns with previous years' results, where News.am and Azatutyun.am were consistently popular choices among direct website users (not via social networks). With regard to radio stations, only 25% of respondents follow radio weekly, and Public Radio in Armenia stands out with the highest followers (8%), along with Radio Jan (5%) and FM 105.5 (4%) ([Table 9](#)).
- ➔ **Frequency of usage of various sources of information:** Armenian TV channels and Armenian news websites stand out as the most frequently utilized sources, with 41% and 36% of respondents respectively relying on them multiple times a day. Meanwhile, traditional media sources like the radio and print media are used daily by less than 5% of the population ([Figure 2](#)). Consistent with the quantitative data, the qualitative insights suggest that TV retains its significance as a primary information source, particularly in rural areas and among individuals aged 45 and above. However, the rise of online platforms, especially among the younger generation, is reshaping media consumption patterns. Both the qualitative and quantitative data highlight the ongoing transformation of media consumption habits, characterized by a shift from traditional sources to online platforms, most notably social networks. Furthermore, smartphones are emerging as the dominant device for media consumption across all age groups.

- ➔ **Consumption of online news media:** Social networks have become the primary means of accessing news websites for a majority of respondents (88%) (Figure 12), and, compared to 2021 survey data,¹ there is an increasing trend of accessing news websites not directly, but via social networks (76% in 2021).
- ➔ **Usage of social networks/platforms:** WhatsApp and Viber groups, alongside YouTube and Facebook, are the most widely used platforms/social networks, with 58%-59% of the total population utilizing those multiple times a day (Figure 13). YouTube, Facebook, and Instagram continue to be the most popular social networks in Armenia (which is consistent with 2021 survey data).²

TRUST IN MEDIA:

- ➔ **General trust towards news presented by Armenian media:** The quantitative data reveals that the share of the population that finds information presented by the Armenian media *somewhat* or *fully trustworthy* has significantly declined, reaching 49% in 2023 (Figure 16) compared to 73% in 2021.³ Qualitative research confirmed the low level of public trust in media with a high level of reliance on alternative sources due to the perceived lack of credibility of official news. The low level of trust in Armenian media arises from factors including a lack of media’s financial independence; the polarization of the political field, causing information wars; the prevalence of inaccurate citizen journalism on social media; and generally low levels of media literacy.
- ➔ **Factors contributing to trust towards media according to respondents:** When asked about the factors that contribute to the trust towards media, 25% of the respondents mentioned the high quality of the content, **the use of the source** for years (19%), **the fact-based nature and reliability of the information** (11%), timely delivery of news (10%), and media independence (8%; Table 13). Media experts involved in KIIs emphasize that building trust towards media is a gradual process and requires certain shifts in priorities, including prioritizing public interests, creating a favorable environment for media independence, improving content quality, government transparency and oversight, and enhancing media literacy through education initiatives.
- ➔ **Most trusted media outlets:** Public Radio of Armenia is the most trusted radio station (9%) (Figure 21), Armenia TV has the highest level of trust (32%) among the TV channels (Figure 22), and Azatutyun.am is the most trusted online news website (12%) (Figure 24). Facebook (28%) and YouTube (22%) stand out among social media platforms. However, a substantial portion of respondents lack trust in any type of social media (51%) (Figure 23).
- ➔ **Willingness to pay, support and subscribe to Armenian media:** Only 17% of respondents are willing to pay to receive reliable information (Figure 18). However, comparison with 2021 data indicates that this group is slowly growing (13% in 2021). The majority (57%) of those who are ready to pay opt for lower-cost plans (2000 AMD per month) (Figure 19).

CONSUMER NEEDS AND DEMANDS:

- ➔ **Consumer needs:** Health and well-being (93% of respondents), education (92%), and security (92%) are the most important media content topics to the respondents (Figure 25). Overall, 56% of respondents are satisfied with the coverage of topics in the local media (Figure 26). Meanwhile, 46% would like to receive

¹ “Media Consumption and Media Coverage of Reforms in Armenia,” CRRC-Armenia and Media Initiatives Center, October 2021

² *ibid*

³ *ibid*

more information on security issues, 29% on education, 21% on politics, and 20% on social issues ([Table 15](#)).

NEEDS OF MEDIA

- **Challenges faced by the media:** Media professionals today face a range of challenges, as revealed by the qualitative data. The most frequently indicated challenge relates to the financial independence of media outlets. Difficulties in fundraising, the significant diversion of advertising revenues from traditional media towards social media, the dominance of Armenian Public TV in the advertising market due to its national coverage, new legislative restrictions on gambling commercials, and a few other factors have further impaired the media sector's financial viability. These financial challenges often result in media outlets' strong reliance on political or business sponsors, which may compromise content quality, impartiality, and ethical standards in general. Ethical standards also pose a concern among interviewees, who emphasize its importance for journalists who bear the responsibility of promoting public accountability. The lack of legal regulations on adherence to ethical standards for influencers⁴ creates double standards and sometimes overshadows meticulously prepared journalistic content.
- **Proposed strategies:** Stronger support from lawmakers and the public is necessary to enhance media outlets' financial independence. Improving and maintaining ethical standards, along with equal opportunities, is crucial for journalists. Expanding academic and continuous education programs and incorporating international best practices are necessary steps for addressing the pressing challenges and fostering a healthier media landscape.

MEDIA LITERACY

- **Media literacy:** Media literacy is assessed through the measurement of three key related skills: A) the ability to separate facts from opinions and identify manipulative strategies, B) the ability to recognize and fact-check suspicious information, and C) the ability to create media content. This study shows that 39% of respondents are able to separate facts from opinions ([Table 16](#)), only 18% are able to recognize and fact-check suspicious information, and 15% are able to create media content ([Figure 31](#)). The quantitative data also indicates that the above-mentioned abilities vary significantly based on respondents' education, age, economic status, and type of population center. "Higher education," "urban residence," "young age" and "economic well-being" are the factors that are positively associated with media literacy.
- **Response to false, misleading or unethical information:** When faced with incorrect, untrue, deceptive, or unethical content from Armenian media, most participants (65%) opt for inaction, a significant portion boycott the source (30%), and a much smaller percentage engages by commenting, reporting it to social network administrators, or contacting editors ([Table 23](#)). The most prevalent reasons for not taking any action against false, misleading, or unethical information are the perceived lack of effectiveness of such action (39%), indifference (25%), and time constraints (17%) ([Table 24](#)).

ETHICAL STANDARDS:

- **Important ethical standards:** "Respect," "impartiality and integrity," as well as "independence" are ethical standards that are highly valued by 59%, 49%, and 21% of respondents, respectively, who consider them crucial for journalists to adhere to ([Table 28](#)). Meanwhile, according to the respondents, the same ethical standards are the most commonly violated in Armenian media, as mentioned by 60%, 39%, and 20% of respondents respectively ([Table 29](#)). As for ethical standards, media practitioners value objectivity and plurality of opinions, adherence to which is closely linked to the financial independence of the media

⁴ Influencers are people active in social networks (typically through social media platforms, blogs, or other online channels), have significant amount of followers/audiences, and have the ability to affect public opinion and behaviours.

practitioners. News websites and blogs, vlogs, and podcasts (44% each) are the two platforms where respondents see violations of ethical standards most frequently, followed by television (39%) ([Figure 33](#)).

- **Users' satisfaction with the ethics and professionalism:** Less than half of the population (44%) is satisfied with the level of ethics and professionalism of Armenian journalists ([Figure 32](#)). Most of these respondents include those with a secondary/high school education and those living outside of Yerevan.
- **Awareness of Media Ethics Observatory (MEO):** The proportion of people who are aware of the MEO has significantly increased, from 4% in 2021⁵ to 9% in 2023. Conversely, the proportion of people willing to appeal to the same body when needed did not change significantly, at 27% in 2023 compared to 29% in 2021 ([Table 31](#)). Skepticism about the effectiveness of the process and lack of time or knowledge are the main reasons why respondents are unwilling to send complaints or applications to the MEO.

PERCEPTIONS OF FREEDOM OF EXPRESSION

- **FoE in general public and media:** The quantitative data reveals that the majority of respondents perceive Armenia as having substantial freedom of expression both for individuals (76%) and media (70%) ([Figure 36](#)). Most respondents (56%) believe they can freely express opinions online, 53% report that they can freely comment on news articles or posts, and 48% feel they can freely criticize the government. Meanwhile, 42% of respondents feel that they can express opinions more openly online compared to offline ([Figure 38](#)). At the same time, the qualitative data suggest that many believe that the notion of FoE is often abused, and there is a need to regulate social media activity to a certain extent, aiming to maintain social harmony among individuals and communities.
- **FoE in public spaces:** Opinions about the freedom to attend peaceful protests and events in public spaces in Armenia are mixed, as 42% fully agree and 15% somewhat agree that they can attend freely, while 25% strongly believe and 11% somewhat believe they cannot do so without limitations ([Figure 40](#)).
- **The level of freedom of expression in the digital space:**⁶ A composite score for the level of freedom of expression in the digital space is categorized in three groups: low, average, and high. According to 55% of respondents, the level of FoE in the digital space is high, while 23% believe it is average, and for 22% of respondents it is low ([Table 37](#)).
- **Protection of FoE:** Only 39% of respondents believe that authorities protect individual freedom of expression in Armenia, and 42% believe authorities protect media practitioners' freedom. Moreover, 75% feel journalists in Armenia may face threats and violence when covering certain topics, indicating a widespread perception of challenges and risks in reporting ([Figure 41](#)). On the contrary, the media and CSO representatives recall only a limited number of instances involving threats and pressures against journalists. Generally, the qualitative data indicate that such cases are perceived as not as widespread today.
- **Hate speech:** The majority of respondents (84%) consider hate speech a significant issue in Armenia ([Figure 42](#)), and a significant portion (68%) frequently witnesses hate speech in digital and civic spaces

⁵ Source: "Media Consumption and Media Coverage of Reforms in Armenia," CRRC-Armenia and Media Initiatives Center, October 2021

⁶ The final composite score was calculated as a sum of six questions and ranges from 0 to 11. Final scores of 8-11 represent a high level of FoE, scores of 4-7 indicate an average level of FoE, and scores of 0-3 suggest a low level of FoE. Detailed methodology for the calculation of the score is presented in Section 2.7 Perception of Freedom of Expression

[\(Figure 43\)](#), indicating the widespread presence of hate speech in both online and offline discussions, with potential negative impacts on individuals and communities.

1. INTRODUCTION

The media landscape is diverse in Armenia including television, radio, print, and online platforms. Private media outlets have significantly contributed to this diversity by providing alternative viewpoints and content. However, concerns regarding media freedom, independence, and censorship have persisted over the years. The media landscape in Armenia is undergoing rapid evolution, with online media gaining prominence as it offers alternative platforms for news and information dissemination. In contrast, traditional media outlets are grappling with economic challenges such as limited advertising revenue and financial sustainability. Moreover, various research reports have indicated a decline in public trust in media institutions in Armenia.⁷

In response to these challenges in the media sector, the USAID-funded **Media Program in Armenia** (launched in March 2023), implemented by the Internews-led consortium, aims at strengthening the integrity of the information space in Armenia by enhancing journalistic standards and content quality, catalyzing the financial viability of public interest media, and fostering an enabling environment for independent information flow.

The activity's overall implementation strategy will be firmly grounded in the operating environment, informed by several horizontal research activities. To this purpose, the following **Media Consumption and Freedom of Expression Research** was carried out in Armenia within the **Media Program in Armenia**.

2. METHODOLOGY

2.1 RESEARCH PURPOSE, OBJECTIVES AND KEY STUDY QUESTIONS

The purpose of this study is to produce evidence on how information consumers in Armenia find, share, value, and trust information as well as to analyze the supply of and demand for information to serve as the project's baseline, inform partner selection, and identify growth opportunities, as well as to identify threats to and constraints on freedom of expression from the vantage point of citizens and media practitioners. **Key research questions** have been formulated around seven domains and are presented in Table 1.

Table 1. Key research questions

Research domains	Key research questions
Media consumption, habits of consumers	<ul style="list-style-type: none">What are the media consumption patterns among population in general and per media type?What are the media consumption habits (frequency, timing, and sharing) of media consumers?
Trust	<ul style="list-style-type: none">How trustworthy is the news presented by media in Armenia according to respondents (in general and per media type: TV, Radio, Online media, and social networks)?What are the key factors contributing to the trust level?Which are the most trusted media sources in Armenia?
Consumer needs and demands	<ul style="list-style-type: none">What are the media content preferences of respondents?What are media consumers' needs/demands in terms of information, presentation, and the professionalism of media practitioners?
Needs of Media	<ul style="list-style-type: none">What are the main needs of media and media practitioners in Armenia?

⁷ e.g., Caucasus Barometer, 2021, CRRC Armenia' International Republic Institute, Public Opinion Survey: Residents of Armenia | January-March 2023, etc.

Media Literacy	<ul style="list-style-type: none"> ▪ What is the level of media literacy-related skills among the public? ▪ What are the prevalent response practices in case of false, misleading, or unethical information?
Ethical standards	<ul style="list-style-type: none"> ▪ What is the level of satisfaction with the ethics of journalists in general and per media type? ▪ What is the level of awareness of the Media Ethics Observer body?
Freedom of expression	<ul style="list-style-type: none"> ▪ What is the perceived level of FoE in Armenia? ▪ Are there differences in the level of FoE for different social groups? ▪ What is the perceived level of FoE for media in Armenia?

2.2 RESEARCH METHODS AND SAMPLE

The primary data was collected through a combination of quantitative and qualitative sources, with the aim of gathering information from diverse beneficiary and stakeholder perspectives. Accordingly, the research employed a mixed method approach, incorporating 1) **a survey** targeting the population aged 18 years old and older in Armenia; 2) **in-depth interviews** with field experts, media representatives and other key informants; and 3) **focus group discussions** with media practitioners, CSO representatives and specific social groups whose freedom of expression is assessed at a relatively lower level by the population. The secondary data was drawn from a desk review of existing research and other relevant reports and publications. To ensure more robust and comprehensive results aligned with the research objectives, all the collected data was triangulated. Research methods are presented in more detail in the below sections, and the complete methodology description is provided in the Inception Report (*Annex 1*).

2.2.1 Survey

A nationally representative sample of 1,109 HHs of Armenian citizen respondents aged 18 and older was achieved through **household visits based on a random multi-stage stratified cluster sample** (95% significance level, 5% margin of error, and 1.5 Design Effect).⁸ The fieldwork was carried out from July 15 to August 3, 2023. The distribution of the sample size by Marz (region) is presented in the table below.

Table 2. Sample size and its distribution by Marz

Marz	Number of interviews	% of total
Aragatsotn	42	4%
Ararat	98	9%
Armavir	98	9%
Gegharkunik	85	8%
Kotayk	98	9%
Lori	71	6%
Shirak	84	8%
Syunik	56	5%
Tavush	43	4%
Vayots Dzor	28	3%
Yerevan	406	37%
Total	1,109	100%

⁸ Similar research on media consumption patterns was conducted by the Caucasus Resource Research Center Armenia (CRRC Armenia) and Media Initiatives Center (MIC) in 2015, 2017, 2019, and 2021 under the USAID-funded Media for Informed Civic Engagement (MICE) project. In cases where meaningful comparison is possible, quantitative data analysis was used to compare data with the aforementioned research. The sample sizes for the surveys were 1448 in 2015, 1178 in 2017, 1200 in 2019, and 1213 in 2021.

Sample Calculation: The survey was conducted among Armenian citizens aged 18 years and over. According to the RA voter database, updated during the last Snap Parliamentary elections on June 20, 2021, the total population of RA aged 18 and older with voting rights is 2,256,538. Therefore, **1,106 HHs** were planned to be contacted with the following parameters of significance level and margin of error used to calculate this sample size: **95%** significance level, **5%** margin of error and **1.5** Design Effect. In total, the survey reached 1,109 HHs.

The survey used a **random multi-stage stratified cluster sample**. First, all population centers in Armenia were classified by regions, with Yerevan categorized as a region (first stratification) in accordance with the number of voters. After that, the population centers in each region were grouped into two types (second stratification): urban and rural population centers. The total sample size (n=1,106) was distributed among urban and rural population centers as proportionate to the number of voters in each group (Table 2.1).

Table 2.1 Distribution of Sample per Yerevan, Urban and Rural Population centers

REGION	POPULATION			SHARE		SAMPLE		
	Total	Urban/ Capital	Rural	Urban/ Capital	Rural	Urban/ Capital	Rural	Total
Yerevan	837,423	837,423	-	37.1%	0.0%	406		406
Aragatsotn	93,100	19,562	73,538	0.9%	3.3%	14	28	42
Ararat	192,923	52,974	139,949	2.3%	6.2%	28	70	98
Armavir	200,842	61,660	139,182	2.7%	6.2%	28	70	98
Gegharkunik	171,983	50,148	121,835	2.2%	5.4%	28	56	84
Lori	159,956	95,249	64,707	4.2%	2.9%	42	28	70
Kotayk	187,806	100,908	86,898	4.5%	3.9%	56	42	98
Shirak	173,784	103,480	70,304	4.6%	3.1%	56	28	84
Syunik	108,101	74,008	34,093	3.3%	1.5%	42	14	56
Vayots Dzor	37,430	13,072	24,358	0.6%	1.1%	14	14	28
Tavush	93,190	39,734	53,456	1.8%	2.4%	14	28	42
Total	2,256,538	1,448,218	808,320	64.2%	35.8%	728	378	1,106

Clustering: 14 households were interviewed in each cluster. The whole sample was divided into $k=1106/14=79$ clusters. The number of clusters in each group (e.g., Yerevan, urban and rural) was calculated using the same formula [$k = \text{number of interviews}/14 = \text{number of clusters in the region}$] (Table 2.2).

Table 2.2 Number of Clusters per Yerevan, Urban and Rural Population centers

Region	SAMPLE			SAMPLE/CLUSTERS (number of population centers)		
	Rural	Urban/ Capital	Total	Rural	Urban/ Capital	Total
Yerevan		406	406		29	29
Aragatsotn	28	14	42	2	1	3
Ararat	70	28	98	5	2	7
Armavir	70	28	98	5	2	7
Gegharkunik	56	28	84	4	2	6
Lori	28	42	70	2	3	5
Kotayk	42	56	98	3	4	7
Shirak	28	56	84	2	4	6
Syunik	14	42	56	1	3	4
Vayots Dzor	14	14	28	1	1	2
Tavush	28	14	42	2	1	3
Total	378	728	1,106	27	52	79

Selection of clusters: During the first selection stage, electoral precincts as Primary Sampling Units (PSU) were grouped per their regional location (Yerevan and regions (first strata)), after which they were organized per type of population center (urban and rural (second strata)). Random selection of primary clusters was performed as modelled by random systematic selection. Within each stratum, PSUs were assigned with a random number from 0 to 1, after which the list was sorted from the largest to the smallest based on the assigned random number value. The clusters appearing first on the list were selected using the number of clusters in each stratum.

Selection of HHs: HHs to be interviewed within each cluster (electoral precincts) were selected using the **random walk method**. Each interviewer was given a selected PSU as a starting point, after which HHs were selected using the random walk protocol.

Selection of respondents: Respondents within HHs were selected using the last birthday method. Only HH members with permanent residency in Armenia (at least during the last year) were interviewed. One interview was conducted in each HH.

Response Rate: Only 26% of successful HH visits ended with an interview. The total number of HH visits is 4,136. 3,047 HH visits were unsuccessful. 1,003 (42%) HH members refused to take part in the survey. 1,447 (34%) HHs were closed, and interviewers could not contact any HH members. In the case of other HHs, adults were not at home, the respondent had language barriers or were temporary residents, etc. The low response rate was mainly due to the high number of refusals among the respondents in Yerevan, especially in Kentron district. Addressing the challenge of declining response rates has been a consistent concern across all surveys conducted in Armenia. The low response rate can be attributed to a combination of factors, including the broader national context and security concerns. The analysis also indicates that individuals residing in urban areas, especially in Yerevan, exhibit a lower inclination to participate in surveys. For this particular survey, there were two additional factors that contributed to the low response rate: a) during the field stage, it became apparent that multiple concurrent surveys were being carried out by different organizations on similar topics, and b) the data collection coincided with the summer's hottest weather in Yerevan, as a result of which many had left the city.

Interviews were conducted **face-to-face/in person using a Computer Assisted Personal Interview (CAPI)** system loaded onto tablets. The survey was designed to include only respondents whose family members do not work in specific industries related to media, newspaper/magazine sales, or distribution. To ensure the accuracy of participant selection, a filter question was used to verify whether respondents meet this criterion.

Quantitative data analysis: Data analysis was constructed around the main research domains. Descriptive statistics (frequency distributions, cross-tabulations, central tendency measures, etc.) and inferential statistical methods (mean comparisons, correlation analysis, etc.) were used, especially regarding confounding factors (gender, age, education, population center type, and economic status). The association/correlation with identified confounding factors was tested for individual variables and indexes to determine whether confounding factors significantly affected the variables and indexes. The analysis per confounding factors was performed for five criteria: the sex of the respondent (male/female), age groups of respondents (from 18 to 35, from 36 to 55, and 56 and older), education levels (secondary and high school, vocational, higher education, and postgraduate), family economic status (low, middle, and upper), and population center type (urban, rural, and Yerevan).

All variables have been tested against normality criteria, and respective statistical tests have been selected according to the test results. Namely, as variables did not follow normal distribution, Mann-Whitney or Kruskal Wallis non-parametric mean comparison tests were applied to detect differences for the variables per confounding factors (See Annex 2). Additionally, the chi-square test was applied to check if two categorical variables were related or independent.

During statistical analysis, as multiple tests were simultaneously performed on a single data set, the study took into account the Bonferroni correction for the p-value, applying $p < 0.01$ threshold instead of $p < 0.05$.

This criterion is used to reduce the risk of receiving false-positive results (type I errors). For the mean comparison tests, only factors with statistically significant results are reported.

The number of observations for the analyzed data and groups is reported. For cases in which the reported number of observations is less than the sample size (1,109), the “difficult to answer” or “refuse to answer” options are deducted and the percentage of data is calculated accordingly.

2.2.2 Focus Group Discussions and Key Informant Interviews

KIIs and FGDs were conducted with experts, media representatives, and specific social group representatives to understand the state of FoE in Armenia more deeply, including what kind of constraints on FoE exist from the point of view of active citizens and media practitioners, what the needs and limitations of journalists and overall media are, and what kind of support they need.

Four FGDs were conducted: 2 FGDs were conducted with regional media representatives (7 participants per FGD), 1 with CSO representatives, including CSOs from regions and Yerevan (6 participants), and 1 among representatives of marginalized social groups⁹ (6 representatives).

Overall, **13 KIIs were conducted with media representatives** (including journalists, editors, media managers, bloggers, social media influencers, etc.), **policy makers**, and **experts in the field**.

During data collection, the data saturation/information richness principle was applied. The latter implies that participants must be sufficiently knowledgeable about the situation to be able to provide their perspectives and observations. The diversity of perspectives was implied, ensuring that representatives of different groups were involved in the FGDs and KIIs.

2.2.3 Secondary data review

Prisma started the research with an overall mapping of online resources, statistical data, and other resources shared by the Internews “Media Program in Armenia” team to draft the contextual background about the research objectives to later be triangulated with the primary data and analyzed as part of the research report. Where possible, primary data from the survey was compared with the data/info from previous research conducted either by Internews, MIC, or by other partners, highlighting how the situation has evolved and emerging trends. All secondary data was thoroughly assessed for quality and reliability.

2.3 LIMITATIONS

The research implies the following limitation:

- The final distribution of the number of interviews by respondent gender was slightly different from the gender distribution of the general population. As a result, data weighting by gender was applied. However, as the comparison of results between the weighted and unweighted databases did not reveal any significant deviations, the research team decided to report the results from the unweighted database.
- Two key governmental focal points initially identified for key informant interviews were unavailable, necessitating their replacement by the research team.
- Overall, the response rate of the survey was 26%, which posed a limitation both to the field work stage and the data analysis.

⁹ The analysis of quantitative data revealed that people with lower socio-economic status, the elderly, and people living in remote communities, are perceived to have a relatively lower level of FoE. Accordingly, an additional FGD was conducted with this group to ensure that their perspective was heard.

2.4 KEY CHARACTERISTICS OF STUDY POPULATION

62% of respondents involved in the survey were female and 38% were male. The highest percentage of respondents were 56 years old and older (42%), followed by the age group from 36 to 55 (31%), and then the age group from 18 to 35 (27%). The other socio-demographic characteristics of the study population are presented in Table 3.

Table 3. Key socio-demographic characteristics of study population

Criteria	Number	Percent (%)
OVERALL	1,109	100%
Gender		
Female	686	62%
Male	423	38%
Age		
18-35	298	27%
36-55	344	31%
56-and older	467	42%
Education		
Incomplete secondary	32	3%
Secondary	340	31%
High school	94	8%
Vocational	289	26%
Higher education (Diploma, BA, MA, PhD)	353	32%
Refuse to answer	1	0%
Marital Status		
Single / Never married	152	14%
Married/living together	755	68%
Divorced/ Living separately	42	4%
Widowed	157	14%
Refuse to answer	3	0%
Economic status of family		
Family income is not sufficient to purchase food	116	10%
Family income is sufficient to purchase food, but not clothes.	209	19%
Family income is sufficient to purchase food and clothes, but is insufficient for buying expensive household items	338	30%
We can afford to buy expensive items, such as a refrigerator or washing machine.	121	11%
Our income is enough to buy household appliances, but not enough to buy a car	114	10%
Our income is sufficient for anything except buying a house/apartment	110	10%
We can afford to buy anything we want.	56	5%
Refuse to answer	45	4%
Employment status%		
Employed	382	34%
Retired	257	23%
Housewife/husband	203	18%
Unemployed	105	9%
Self-employed (including businessmen/traders, farmers, and craftsmen)	97	9%
Student	44	4%
Maternity/paternity leave	15	1%
Refuse to answer	6	1%

Association with the sector		
Public sector representative	186	36%
Private sector representative	223	43%
Non-governmental/civil society sector representative	103	20%
Non formal, active group (civic initiatives)	10	2%

All respondents indicated that they know the Armenian language. Eighty three percent of the respondents reported knowing the Russian language and 26% mentioned they know English. French, German, Azerbaijani, and Georgian account for smaller percentages of language proficiency (with no more than 3% of respondents).

Table 4. Which languages do you know (read and understand)?¹⁰ (n=1,109)

The circumstances the information is considered suspicious/unreliable	N	Percent of responses	Percent of surveyed respondents
Armenian	1,109	46%	100%
Russian	919	38%	83%
English	285	12%	26%
French	36	1%	3%
German	27	1%	2%
Azerbaijani	7	0%	1%
Georgian	6	0%	1%
Other	19	1%	2%
Total	2,408	100%	

Overall, 97% of respondents have a working TV. More than 84% have an internet connection, either through Wi-Fi or a landline connection. Additionally, 81% have access to a smartphone with internet usage restricted to Wi-Fi only (without internet included in their subscription), and 64% have access to a smartphone with internet included in their subscription or package. Combining the latter two indicators, it is estimated that only 9% of respondents throughout the country do not have access to smartphones connected to the internet (either via Wi-Fi or mobile data). Furthermore, 59% of respondents have access to a TV connected to cable television, while 53% have access to a TV connected to the internet/IPTV (smart TV). Lastly, 55% have access to a computer (laptop or desktop) connected to the internet, and 21% have access to a tablet connected to the internet. **Overall, only 5% of respondents do not have access to any device (TV, smartphone, laptop, desktop, or tablet) that is connected to internet (Table 5).**

Table 5. Percent of respondents that have access to following (n=1,109):

Access to devices/internet	% who have access
TV that works	97%
Internet connection via Wi-Fi or landline	84%
Smart phone with internet access via Wi-fi, without internet included in subscription	81%
Smart phone with internet included in subscription/package	64%
TV connected to cable television	59%
Computer (laptop or desktop) connected to internet	55%
TV connected to internet/IPTV (smart TV)	53%
Tablet connected to internet	21%

¹⁰ Multiple choice question, 2408 total responses received, respondents know 2 languages on average.

3. KEY FINDINGS

3.1 MEDIA CONSUMPTION AND HABITS OF CONSUMERS

Research Questions

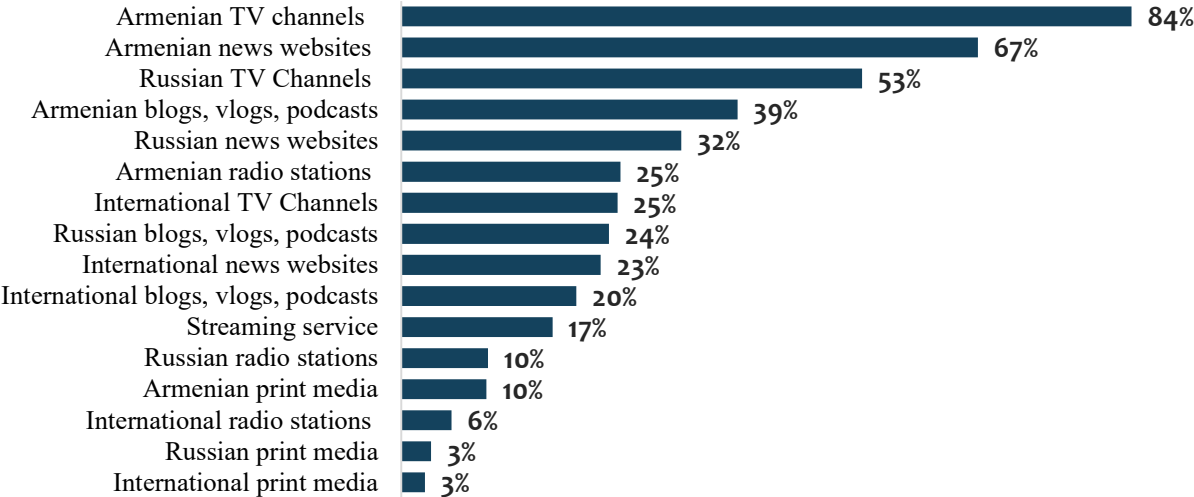
Question 1: What are the media consumption patterns among the population in general and by media type?

Question 2: What are the habits (the frequency, timing, and sharing) of media consumers?

➔ **Question 1: What are the media consumption patterns among the population in general and by media type?**

General consumption of the media sources: Armenian TV channels (used by 84% of total respondents) and news websites (67%) are the most popular among the respondents, followed by Russian TV channels (53%), Armenian blogs/vlogs/podcasts (39%), and Russian news websites (32%). These sources are followed by international TV channels (25%), Armenian radio stations (25%) Russian blogs, vlogs, and podcasts (24%), international news websites (23%), and international blogs, vlogs, and podcasts (20%). Other sources, such as streaming services, Russian radio stations, and Armenian print media, have a lower level of consumption compared to the aforementioned sources.¹¹

Figure 1. % of respondents who use or have an account for the following media sources
(n=1,109, options presented to the respondents, one answer per bar)



Popular media sources for getting social and political news: The respondents have been asked to specify the main sources of information for getting social or political news. Data analysis results highlight the increasing prominence of digital platforms like **social networks, blogs, vlogs, and podcasts** (text/audio/video) as primary sources of social and political news (58% of the surveyed population). **Television** is the second most common source of information, with 56% of respondents using this traditional medium to stay informed about social and political events, followed by **family and friends** (18%) and **news websites** (16%). Other traditional media sources like radio and print media (newspapers, magazines) appear to have the least impact

¹¹ Data breakdown by gender, age, education, and population center type will be presented in Annex 2

on the surveyed population, with only a small fraction relying on them for their news consumption (6% and 2%, respectively (Table 6)).

Meanwhile, it is interesting to note that according to the “Media Consumption and Media Coverage of Reforms in Armenia” report,¹² internet resources and social networks were also the primary information sources (67%) in Armenia in 2021. Traditional sources like National Television, which dominated in previous years, saw a decline in consumption over the past seven years, dropping from 82% in 2015 to 59% in 2021.¹³ When comparing the 2021 data with this survey, it becomes clear that the trend of social and political **information** consumption from internet sources continues to grow (at 75% in 2023 vs 67% in 2021) and continues to decline for television (at 56% in 2023 vs 59% in 2021).

Table 6. What is your main source of information for getting social or political news?¹⁴
(*n=1,109, options were presented to the respondents, up to 2 answers permitted*)

Media sources	N	Percent of responses	Percent of surveyed respondents ¹⁵
Social Networks, Blogs, Vlogs, Podcasts	645	37%	58%
Television	620	36%	56%
Family, friends	203	12%	18%
News websites	177	10%	16%
Radio	62	4%	6%
Print Media	18	1%	2%
Difficult to answer	10	1%	1%
Total	1,735	100%	

Popular media sources by media type: Overall, **86%** of respondents named a TV channel that they follow at least once a week. Table 7 provides insights into the TV channel preferences of the surveyed respondents. Namely, the table presents the list of the top ten TV channels that respondents watch at least once a week. According to the results, **Armenia TV** leads the field, with 57% of surveyed respondents turning on the TV channel at least once a week, followed by **Shant TV** (43%) and the **First (Public) Channel**¹⁶ (37%). **Russian TV channels** also have a notable weekly viewership (18%). Other popular TV channels include Kentron TV (12%), ATV (9%), 5TV Channel (8%) and the First (public) news channel (8%) (Table 7).¹⁷ The finding on Armenia and Shant TV channels being the most popular TV channels is a proxy indication of the fact that TV is mainly consumed for entertainment purposes, as providing social and political news is not the primary focus of these channels.

¹² “Media Consumption and Media Coverage of Reforms in Armenia,” CRRC-Armenia and Media Initiatives Center, October 2021

¹³ A comparison between internet sources and TV for the current research and the MIC research conducted in 2021 is not feasible because the MIC research evaluated "internet resources and social networks," whereas the current research focuses solely on "Armenian news websites." Meanwhile, the current research assesses "Armenian TV Channels," while the MIC research categorized TV into "national TV" and "local TV."

¹⁴ Multiple choice question, 1725 total valid responses received. Respondents provided 1.6 answers on average

¹⁵ Percent of responses reflects the distribution of individual responses among the answer options. Percent of respondents represents the percentage of survey participants who selected a particular answer option. Percent of respondents is typically used for public presentations of the findings.

¹⁶ When interpreting data, it should be taken into account that First (Public) news channel was evaluated separately and data for this TV channel is introduced separately

¹⁷ The complete ranking of the TV channels is presented in Annex 4.

Table 7. Which TV channels do you watch at least once a week? (n=1,109, top ten responses listed only, open-ended question, up to 5 answers permitted)¹⁸

TV Channels	N	Percent of valid responses	Percent of total surveyed respondents
Armenia TV	629	26%	57%
Shant TV	479	20%	43%
First (Public) Channel	411	17%	37%
Russian TV channels	203	8%	18%
Kentron TV	128	5%	12%
ATV	104	4%	9%
5TV Channel	89	4%	8%
First (public) news channel	84	3%	8%
Yerkir Media	50	2%	5%
Armenian 2nd channel	40	2%	4%
Other TV channels	201	8%	18%
Total	2,418	100%	

As for news websites, **65%** of the respondents specified at least one news website they visit at least once a week. According to the results, **Azatutyun.am** is the most frequently visited news website among the respondents (22% of total surveyed respondents), followed by **News.am** (12%) and **lin.am** (9%). **Panorama.am** and **Aravot.am** are fourth and fifth in the ranking, with 6% of weekly visits each (Table 8). It should be noted that a similar question was asked to the respondents during MIC surveys conducted from 2017 to 2021. Namely, the respondents who accessed 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). For all years, News.am was the most popular news website in Armenia, while Azatutyun.am was the second most popular. The next most popular websites in Armenia in 2021 were Armnews and Lurer.com. News web-sites popular during the previous years also included Shamshyan.com and Tert.am.¹⁹

Table 8. Which news websites do you visit at least once a week?
(n=1,109, top ten responses listed only, open-ended question, up to 5 answers permitted)²⁰

News websites	N	Percent of total valid responses	Percent of total surveyed respondents
Azatutyun.am	241	24%	22%
News.am	134	13%	12%
lin.am	105	10%	9%
Panorama.am	69	7%	6%
Aravot.am	67	7%	6%
Tert.am	41	4%	4%
Civilnet.am	31	3%	3%
Russian news-websites	29	3%	3%
168.am	27	3%	2%
Hetq.am	25	2%	2%

¹⁸ Multiple choice question, 2,418 total valid responses received. On average, a respondent who watches TV regularly follows 2.6 channels at least once a week. 14% of total respondents reported that they do not follow any TV channel. Less than 1% of respondents had difficulty naming any particular TV channel that they follow

¹⁹ Source: Media Consumption and Media Coverage of Reforms in Armenia,” CRRC-Armenia and Media Initiatives Center, October 2021

²⁰ Multiple choice question, 1,002 total valid responses received. On average, a respondent who follows news websites regularly follows 1.5 channels at least once a week, 35% of total respondents do not follow any news website, and 17% of total respondents had difficulty mentioning any particular news website that they follow.

Other	233	23%	21%
Total	1,002	100%	

As for radio stations, overall, only **25%** of respondents mentioned at least one radio station that they follow at least once a week. Among those who follow radio stations, **Public Radio in Armenia** has the highest percentage of followers, with 8% of total respondents tuning in at least once a week. **Radio jan** and **FM 105.5** also have a notable following, with 5% and 4% respectively. The remaining stations have lower follower percentages ranging from 1% to 3% (Table 9).²¹

Table 9. What radio stations do you follow at least once a week?
(*n=1,109, top ten responses listed only, open-ended question, up to 5 answers permitted*)²²

Radio Stations	N	Percent of valid responses	Percent of total surveyed respondents
Public Radio in Armenia	91	22%	8%
Radio jan	57	14%	5%
FM 105.5	38	9%	4%
Radio Aurora	31	7%	3%
Radio Van	26	6%	2%
Radio Hay	23	5%	2%
Lratvakan Radio	22	5%	2%
Other Russian radio stations	17	4%	2%
Radio Yerevan	12	3%	1%
Avto Radio	12	3%	1%
Other radio stations	91	22%	8%
Total	420	100%	

Lastly, a mere **5%** of respondents indicated that they follow at least one print media source on a weekly basis. Notably, none of the mentioned print media sources garnered popularity among more than 2% of the surveyed population. Of these, the "**Aravot**" newspaper was the most frequently mentioned, with 2% of respondents reporting that they read it weekly. Other print media sources such as TV aliq, Time newspaper, Yeter, Hayastani Hanrapetutyun, 4rd Ishkhanutyun, Hraparak, Iravunq, Shrijapat, and various international English-language newspapers and magazines were mentioned by only 1% of the population.

The qualitative data collected within the scope of this research fully confirms the quantitative data presented above. As for general media consumption, the qualitative data indicate that that TV continues to remain one of the primary outlets for obtaining various kinds of information (political, social, and entertainment), alongside online platforms. According to the respondents, this trend is particularly pronounced in RA's regions and among the population aged 45 and above. Moreover, some respondents believe that the older generation and those living in villages or smaller urban towns maintain a particular respect towards "official" sources, most often in the form of state-owned television channels (e.g., Armenian Public TV).

As for the younger age group, research participants believe that they primarily rely on online resources, especially social networks. Facebook, YouTube, and – occasionally – Telegram are cited as main sources of information and news, while Instagram, TikTok, and YouTube are widely used for entertainment purposes by this group of respondents (in addition to TV). According to the respondents, younger people mostly consume media on their phones or computers for all purposes.

The qualitative data also suggest that one of the factors contributing to the media consumption via social networks is the fact that many political figures and government officials have begun utilizing their social

²¹ The complete ranking of the radio stations is presented in Annex 2.

²² Multiple choice question, 420 total responses received. On average, a respondent following radio stations mentioned 1.6 stations that they follow at least once a week, 75% of the respondents do not follow any radio station, and 3% of total respondents had difficulty naming any particular radio station that they follow

platforms as a method for distributing information. This situation puts some pressure on the media sector as the main source for information dissemination, as the public is getting accustomed to receiving information directly from the personal pages of political actors on social networks.

*According to our teams' evaluations, people in the rural communities of Lori and Tavush still rely on TV, including the TV that is available to them, and the Armenian public television occupies a very large place in it. In that way, they receive one-sided information.
(FGD with regional media representatives, Female)*

*The majority of people access media via their phones, with social media being the primary content source. Materials are predominantly transmitted through social networks, including Telegram, Facebook, Instagram, and the rapidly growing TikTok. These platforms serve as main sources where individuals obtain both information and misinformation.
(KII with a media representative, Male)*

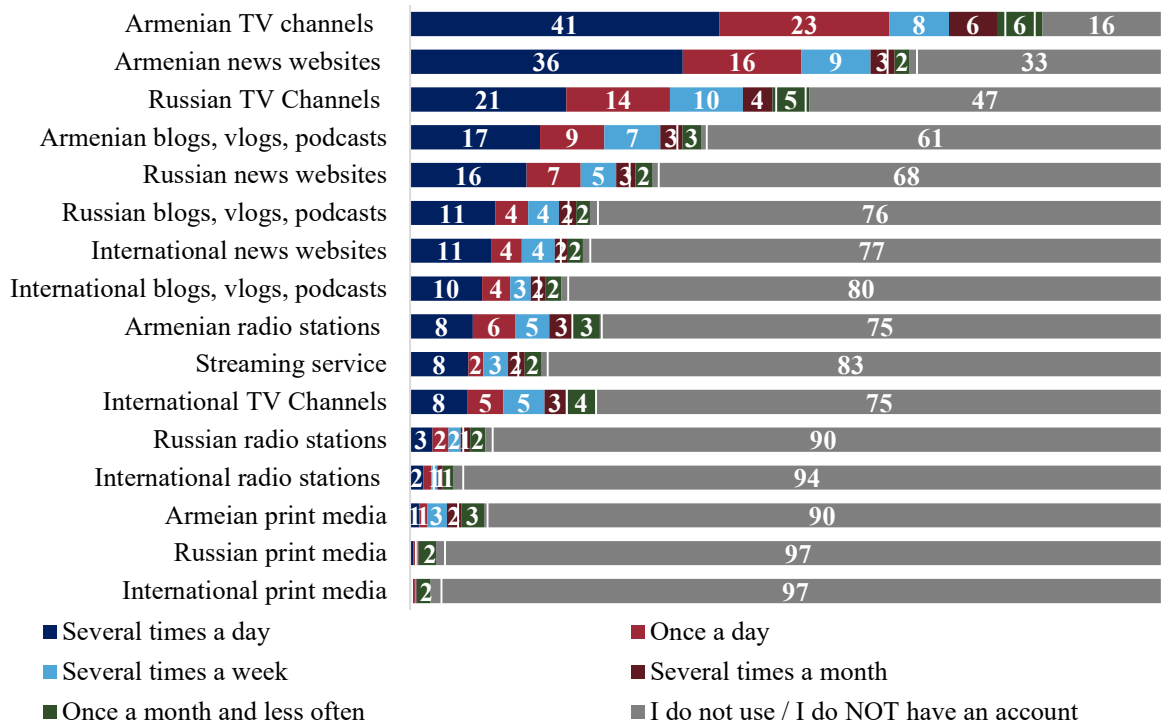
*Recently, the government has also encouraged us to obtain information from their Facebook pages instead of media outlets. This approach has become a common practice, where people now frequently get news from the social media pages of government officials.
(KII with a media representative, Female)*

The majority of respondents highlight a clear shift from traditional sources of information (TV, radio, and print media) towards online media and particularly towards social networks. In terms of devices used, the majority of respondents believe that smartphones will fully overtake TV in the near future. Thus, the media field has been in a transformation phase for some time. Traditional media are making efforts to provide content through online platforms and online media, on the other hand, are actively working to establish a presence on social platforms (e.g., Facebook, Telegram, Instagram, and even TikTok). According to the respondents, another aspect of transformation is that, if news websites posed a “threat” to more traditional television and newspapers a few years ago, the same websites now appear to be under pressure from individual content producers.

→ Question 2: What are the habits (the frequency, timing, and sharing) of media consumption?

Frequency of use of various sources of information: The respondents were asked to specify the frequency with which they use various media sources. According to the results, **Armenian TV channels** and **Armenian news websites** are the most frequently used sources of information, with 41% and 36% of respondents using them several times a day, respectively. **Russian TV channels** and **Russian news websites** are also used regularly by a notable portion of respondents, at 21% and 16%, respectively. Engagement with **Armenian and Russian blogs, vlogs, and podcast websites** is comparatively lower but still significant, at 17% and 11%, respectively. International sources, both in terms of news websites and blogs/vlogs/podcasts, seem to exhibit somewhat similar usage patterns, with around 10% of respondents using them several times a day. Other information sources, such as streaming services, Armenian radio stations, and international TV channels, are used by 8% of the population several times a day. Less than 3% of the population engages with Russian and international TV channels or print media several times a day (Figure 2).

Figure 2. How often do you use the following sources? (%)
 (n=1,109, options presented to the respondent, one answer per bar)



When and where? According to data reflecting the breakdown of the times at which people typically **watch TV**, evening is the most popular time for TV viewing among the respondents (73% of surveyed population who use TV). Some 16% of the respondents watch TV throughout the entire day (Figure 3). As for devices, the majority of respondents (91%) use a traditional television to consume TV content. While traditional television is still dominant, a notable number of people also rely on mobile devices to access TV programming (19%). Desktop computers/laptops (4%) and tablets (1%) appear to be used less frequently for this purpose (Figure 4).

Figure 3. When do you typically consume TV?
 (Options were presented to the respondents, up to 2 answers permitted)²³

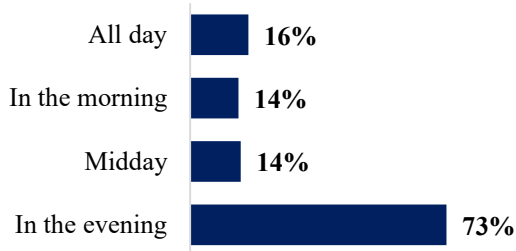
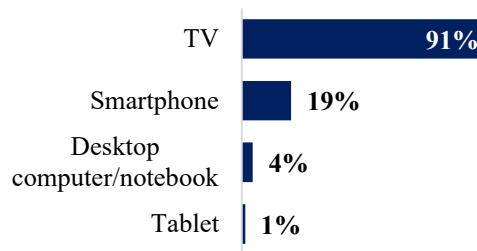


Figure 4. What kind of device do you use to consume TV?
 (Options were presented to the respondents, up to 2 answers permitted)²⁴



In contrast to TV, the data shows that midday and morning are the preferred times for respondents to listen to the **radio**, with 41% and 35% among those who consume radio, respectively (Figure 5). The majority of radio listeners rely on dedicated radio devices (67% of this group), indicating a strong attachment to traditional radio

²³ Multiple choice question, 1,129 total responses received. On average, a respondent consuming TV provided 1.2 answers. Less than 1% of respondents had difficulty answering this question. See Annex 6 for the chart incorporating the % of those who refused to answer.

²⁴ Multiple choice question, 1,134 total responses received. On average, a respondent following TV specified 1.6 devices of use, 2% of respondents had difficulty answering this question. See Annex 6 for the chart incorporating the % of those who refused to answer.

equipment. Additionally, a significant portion of respondents utilizes smartphones for radio consumption, at 24% (Figure 6).

Figure 5. When do you typically listen to the radio?
(Options were presented to the respondents, up to 2 answers permitted)²⁵

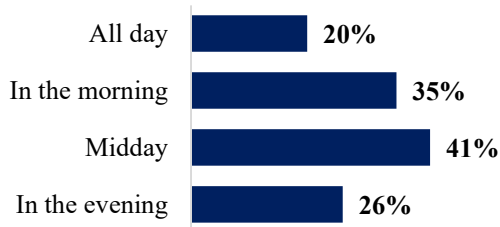
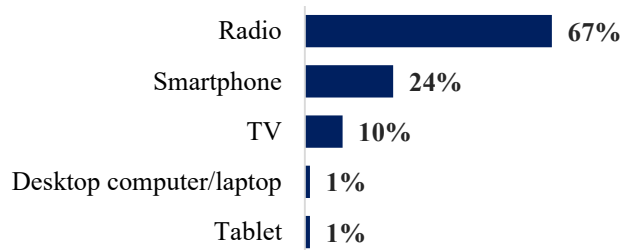
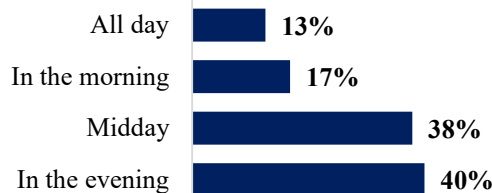


Figure 6. What kind of device do you use to listen to the radio?
(Options were presented to the respondents, up to 2 answers permitted)²⁶



When it comes to **print media**, respondents show a preference for reading at midday and in the evening, with 38% and 40% of them selecting these time periods, respectively (Figure 7).

Figure 7. When do you typically read print media?
(Options were presented to the respondents, up to 2 answers permitted)²⁷



The majority of respondents appear to prefer reading **news websites** in the evening hours, while 26% of them reported reading news websites throughout the entire day (Figure 8). As for the devices used, the overwhelming majority of respondents use smartphones to access news websites, while the use of desktops/ laptops (13%), TV sets (8%), and tablets (2%) for this purpose is relatively less common (Figure 9).

Figure 8. When do you typically read news websites?
(Options were presented to the respondents, up to 2 answers permitted)²⁸

Figure 9. What kind of device do you use to follow news websites?
(Options were presented to the respondents, up to 2 answers permitted)²⁹

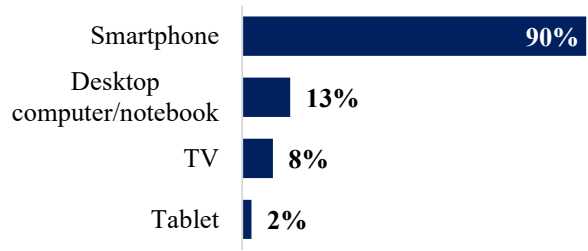
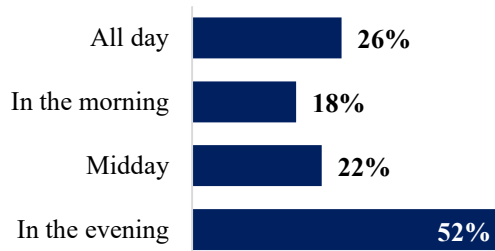
²⁵ Multiple choice question, 319 total responses received. On average, a respondent following radio provided 1.2 answers. 2% of respondents had difficulty answering this question. See Annex 6 for the chart incorporating the % of those who refused to answer.

²⁶ Multiple choice question, 295 total responses received. On average, a respondent following radio specified 1 device of use, 17% of respondents had difficulty answering this question. See Annex 6 for the chart incorporating the % of those who refused to answer.

²⁷ Multiple choice question, 102 total responses received. On average, a respondent who reads print media provided 1 answer, 1% of respondents had difficulty answering this question. See Annex 6 for the chart incorporating the % of those who refused to answer.

²⁸ Multiple choice question, 865 total responses received. On average, a respondent who reads news websites provided 1.2 answers, and none of the respondents had difficulty answering this question. See Annex 6 for the chart incorporating the % of those who refused to answer.

²⁹ Multiple choice question, 1,134 total responses received. On average, a respondent following TV specified 1.6 devices they use to follow TV. 6% of respondents had difficulty answering this question. See Annex 6 for the chart incorporating the % of those who refused to answer.



When it comes to consuming **blogs, vlogs, and podcasts**, the data indicates that the evening is the most preferable time, with 51% of those consuming these content types choosing this time period (Figure 10). Similar to news websites, the majority of respondents utilize smartphones to access blogs, vlogs, and podcasts, while the use of desktops/laptops, TVs, tablets, and radio for this purpose is less common (Figure 11).

Figure 10. When do you typically consume blogs, vlogs, and podcasts?

(Options were presented to the respondents, up to 2 answers permitted)³⁰

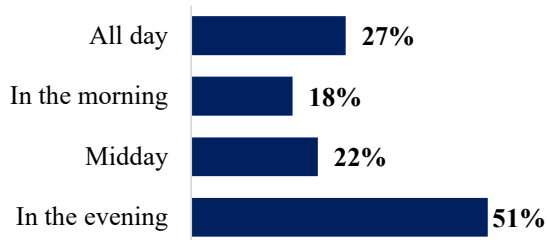
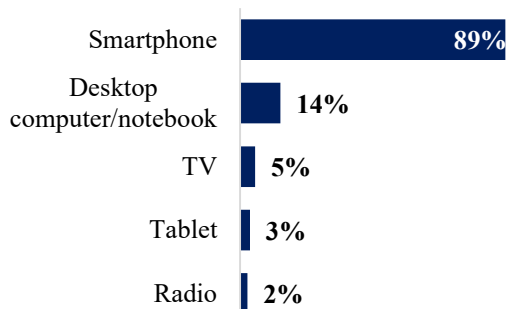


Figure 11. What kind of device do you use to consume blogs, vlogs, and podcasts?

(Options were presented to the respondents, up to 2 answers permitted)³¹



Consumption of online news media: The respondents were asked how they usually consume online news media: directly or via social networks. As the analysis shows, social networks have become the primary means for accessing news websites for a majority of respondents, while direct visits to news websites have significantly decreased, from 24% in 2021 to 12% in 2023³² (Table 10).

Table 10. Online news media consumption patterns

Indicator	2021 (n=598)	2023 (n=835)	Difference
The proportion of people who access online news media directly	24%	12%	-12% Chi-square =35.5 p<0.001

Accordingly, more people **access online news media** through social networks in 2023 compared to 2021. 88 percent of respondents now access online news media via social networks, compared to 76% in 2021. **This shift highlights the growing influence of social networks as a primary channel for accessing news website and platforms** (Figure 12).³³

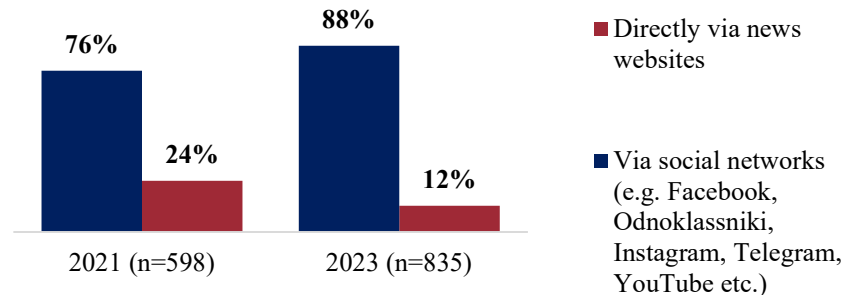
³⁰ Multiple choice question, 488 total responses received. On average, a respondent who follows blogs, vlogs, and podcasts provided 1.2 answers. 2% of respondents had difficulty answering this question

³¹ Multiple choice question, 510 total responses received. On average, a respondent following blogs, vlogs, and podcasts reported using 1.1 devices. 14% of respondents had difficulty answering this question

³² To conduct a meaningful comparison across two surveys' data, only valid responses were calculated (excluding "difficult to answer" and "refuse to answer" options). % data is calculated among respondents who consume online news media. Overall, 22% of respondents had difficulty answering this question in the survey conducted in 2023

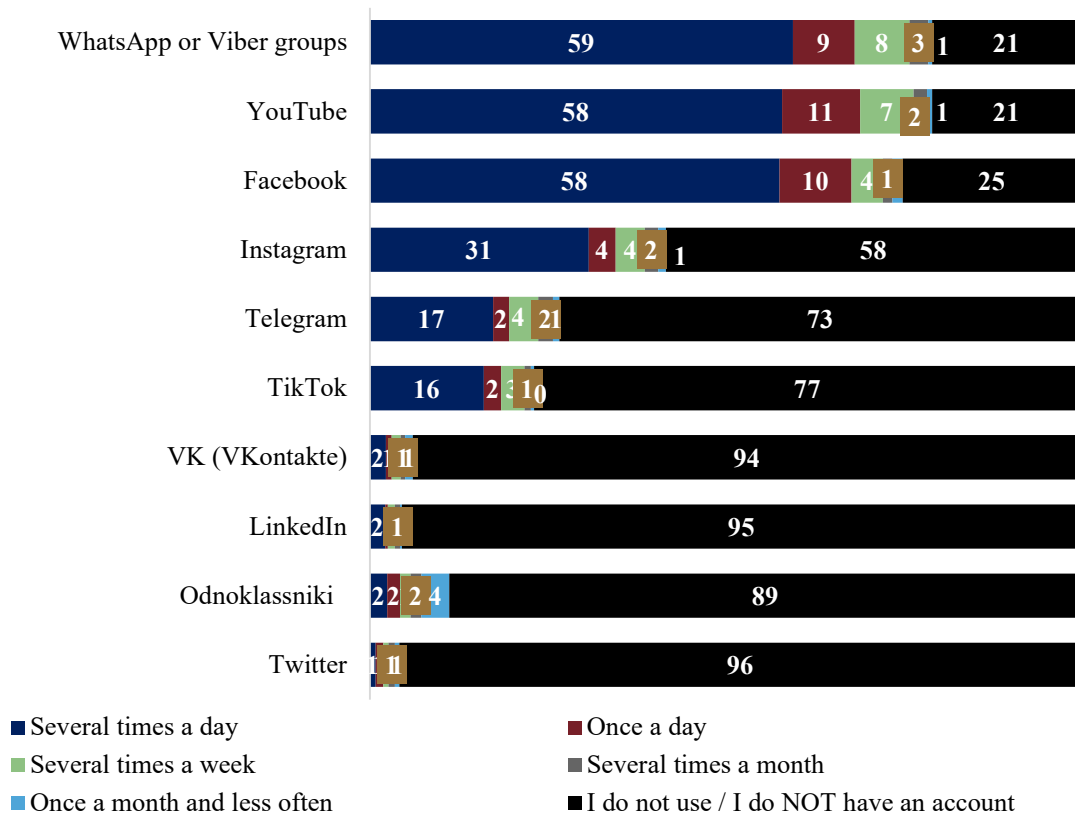
³³ The analysis of this variable by confounding factors, including gender, age, settlement type, economic status, and education, did not reveal any statistically significant associations, (Chi-square test, p>0.01)

Figure 12. How do you usually consume online news media?



Usage of social networks: Messaging platforms like **WhatsApp** and **Viber groups**, along with **YouTube** and **Facebook**, are the most frequently used platforms/social networks, with 59% and 58% of the total population using those platforms several times a day. **Instagram** and **Telegram** also have significant engagement, with 31% and 17% of respondents using them several times a day, respectively. TikTok is used by a notable portion of respondents, at 16%. The usage of VK, LinkedIn, Odnoklassniki, and Twitter is comparatively lower, with percentages ranging from 1% to 2% (Figure 13).

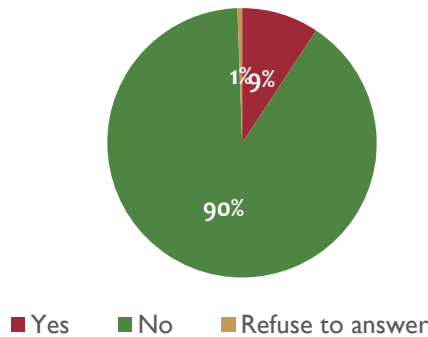
Figure 13. How often do you use the following social network(s)/platforms? (%)
(n=1,109, options presented to the respondents, one answer accepted per bar)³⁴



³⁴ Less than 0.6% of respondents had difficulty selecting any option for different social networks/platforms

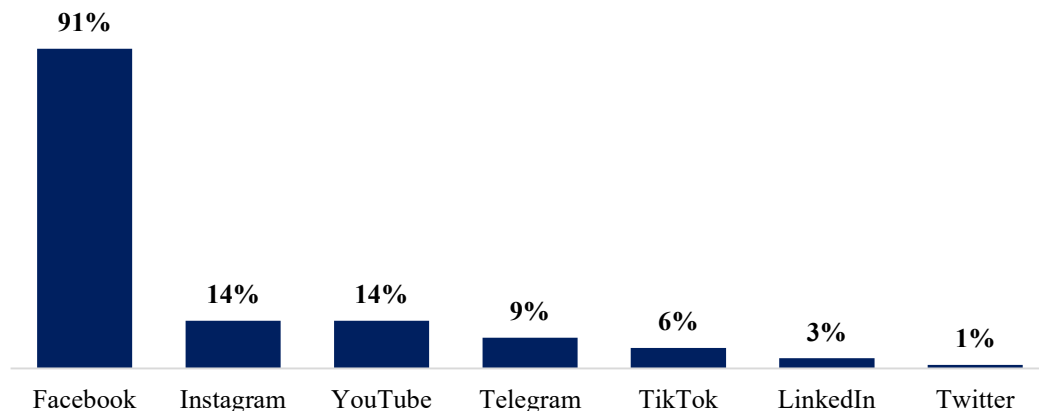
Sharing news on social network platforms: Among the participants surveyed, **9%** reported using social networking platforms to share news (not personal news).³⁵

Figure 14. Do you use any social network platform to share news (not personal news)
(n=1,109, options presented to the respondents, one answer accepted)?



Among those who use social media platforms to share news, **Facebook is the overwhelmingly dominant platform**, with **91%** of the respondents who share news choosing it as their primary platform. In contrast, platforms like **Instagram, YouTube**, and others exhibit significantly lower levels of usage for news sharing, with each used by less than 15% of respondents who share news content (Figure 15).

Figure 15. Which platforms do you use to share news?³⁶
(n=103, open-ended question, all possible answers accepted)



3.2 TRUST IN MEDIA

Research Questions

- Question 1: How trustworthy is the news provided by media in Armenia according to the population (in general and by media type (TV, radio, online media, social networks))?
- Question 2: What are the key factors contributing to trust?
- Question 3: Which are the most trusted media sources in Armenia?

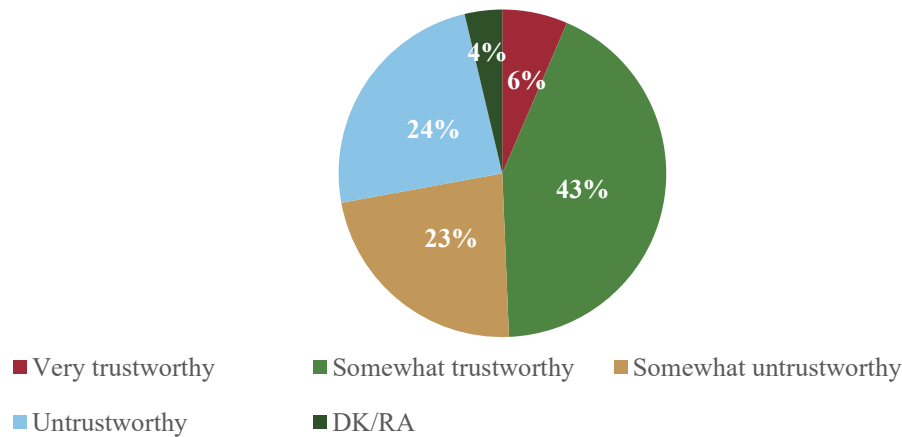
³⁵ The analysis of this variable by confounding factors, including gender, age, settlement type, economic status, and education, did not reveal any statistically significant associations (Chi-square test, p>0.01)

³⁶ Multiple choice question, a total of 103 respondents provided answer to this question, 141 total responses received. Respondents shared news on 1.4 platforms on average

→ **Question 1: How trustworthy is the news presented by media in Armenia according to the population (in general and by media type /TV, radio, online media, social networks)?**

General trust towards news: The respondents have been asked to evaluate the trustworthiness of news presented by Armenian media. According to the results, **49% of respondents** do find it trustworthy, while **47%** do not trust news presented by Armenian media. Overall, 4% of respondents had difficulty answering this question or refused to answer (Figure 16).³⁷

Figure 16. How trustworthy do you find the news presented by Armenian media?
(n=1,109, options presented to the respondents, one answer accepted)



Past research efforts also indicate a low level of trust towards the media. According to the Caucasus Barometer conducted in 2021, the media is the least trusted **institution** among the other 16 institutions, with 1% fully trusting it and 8% finding it somewhat trustworthy.³⁸ It is worth mentioning that compared to data from previous surveys, trust levels have drastically decreased, dropping from 29% to 9% from 2019 to 2021.³⁹ This is in line with the International Republic Institute’s (IRI) 2023 Public Opinion Survey, where 22% of the respondents reported a backsliding in media independence during the preceding six months compared to 3% of respondents in 2019.⁴⁰ With regard to the level of trustworthiness of the **news** presented by the Armenian media, this study again indicates a significant decline: only 49% of the respondents in 2023 consider the news presented by the Armenian media to be somewhat/very trustworthy compared to 73% in 2021.⁴¹

Trust towards various sources: Figure 17 presents the levels of trust that respondents have in the news presented by various sources in Armenia. As the data indicates, radio (60% view it as “fully trustworthy” and “somewhat trustworthy” combined) and television (59%) sources are perceived as more trustworthy by the

³⁷ The analysis of this variable by confounding factors, including gender, age, settlement type, economic status, and education, did not reveal any statistically significant differences (Mann-Whitney and Kruskal-Wallis non parametric tests, p>0.01)

³⁸ Source: Caucasus Barometer, 2021, CRRC Armenia, link to source: https://www.crrc.am/wp-content/uploads/2022/06/Barometer-2021_pptx_ENG_Final_14%E2%80%A406%E2%80%A422.pdf

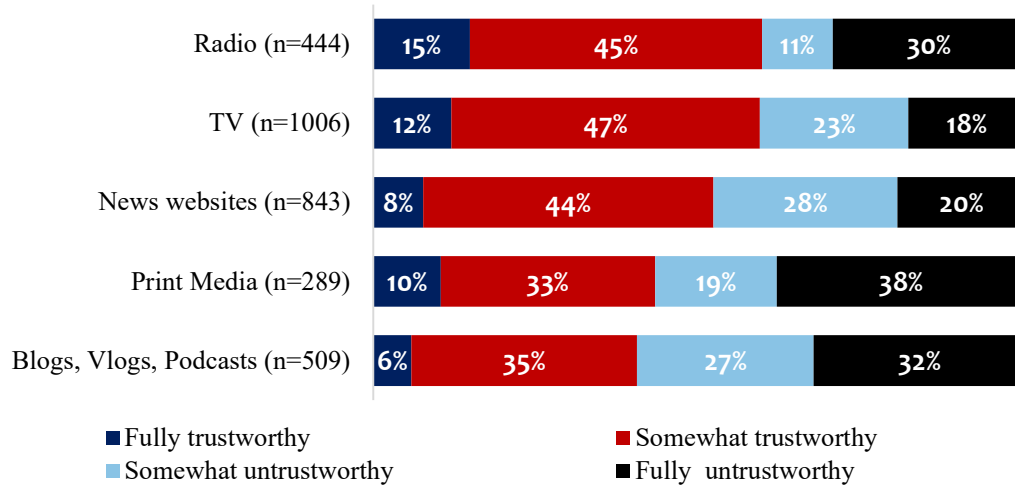
³⁹ It is important to note that the formulation of questions in various surveys had different focuses. Namely, the Caucasus Barometer concentrated on public trust towards media as an institution as evaluated alongside other institutions. In contrast, the current survey specifically targeted the assessment of the trustworthiness of news presented in the media.

⁴⁰ Source: International Republic Institute, Public Opinion Survey: Residents of Armenia | January-March 2023, link to source: <https://www.iri.org/resources/public-opinion-survey-residents-of-armenia-january-march-2023/>

⁴¹ Source: <https://media.am/hy/newsroom/2022/01/31/31508/>

respondents, followed by online news websites (52%). Print media (43%) and alternative sources like blogs, vlogs, and podcasts (40%) have slightly lower levels of trust among the surveyed population. A chart presenting data including “difficult to answer” and “refuse to answer” options is presented in Figure 44 (see Annex 6). It worth mentioning that, according to MIC survey conducted in 2021, 73% of respondents perceive news presented in Armenian media as trustworthy (13% as “fully trustworthy” and 60% as “somewhat trustworthy”), while only 45% consider news presented in online resources and social media platforms as trustworthy (5% as “fully trustworthy” and 40% as “somewhat trustworthy”).⁴²

Figure 17. How trustworthy do you find the news presented by the following sources in Armenia?
(Only valid data reported, options presented to the respondents, one answer accepted per bar)



Qualitative research also indicates that the public’s trust in the media is relatively low. Participants of KIIs and FGDs often refer to the findings of some sociological surveys (e.g., International Republican Institute (IRI) or Caucasus Research Resource Centre Armenia (CRRC Armenia) surveys). In the meantime, the qualitative data suggest that the level of trust towards official sources of information is lower, causing the society to seek information from alternative sources such as friends, family members, and “influencers” active on social networks. The respondents also note that Facebook posts and videos can sometimes garner greater visibility and credibility than materials published by official media platforms.

However, there are a few experts with a different point of view, according to whom mistrust or a low level of trust may not be an accurate assessment. According to these experts, the issue lies in the intense polarization of the media landscape. Individuals tend to align themselves with particular sides and subsequently trust the media outlets that align with their perspectives. When discussions about mistrust arise, they often center on media outlets belonging to the opposing pole, which these individuals are inclined not to trust.

Look at the latest IRI poll, there is a lot of mistrust of the media. It's very dangerous, that's why they trust their neighbor, godfather, close friends, or even Facebook statuses. (KII with a media representative, Female)

Global trust levels are notably low, which has led people to frequently rely on secondary sources such as individuals speaking on YouTube as their primary information sources. This situation underscores the prevailing lack of trust in journalism.

⁴² Source: [Media consumption in Armenia](#)” conducted by the Media Initiatives Center and the Caucasus Resource Center-Armenia Foundation, 2022

(KII with a media expert, Male)

Trust in the media cannot be generalized. Society has polar opposite media serving its interests. And some people trust the media of this pole, and the other contingent trusts the media of the other pole.
(KII with a media expert, Male)

When people answer questions about trust in the media, they remember more of what they didn't like, and they remember messages from the opposite camps right away, and they get angry and say they don't trust it, but actually, considering the impact of what is reported to the media matters, and the media has an influence on public opinion with us.
(KII with a media representative, Male)

FGD participants also observe the existence of contradictory information in today's media landscape. In this context, they acknowledge the importance of media literacy, particularly the ability to recognize the false and accurate information. In this regard, participants in the focus groups emphasize that citizens with lower educational levels are at a higher risk of not being able to recognize fake news.

Nevertheless, participants in FGDs maintain that the level of trust in regional media remains higher within the marzes (regions). People often view these media outlets as instrumental for resolving their socio-economic concerns.

Reasons behind low trust level: Qualitative research explored the reasons behind the rather widespread low level of trust towards media in Armenia. According to the qualitative data analysis, these reasons include the key aspects presented below:

1. **Media outlets' lack of financial independence:** Per the respondents, a significant portion of the media lacks financial independence. They believe that a majority of media outlets serve the interests of specific economic and political entities, causing them to often portray reality through the lens of their interests. This frequently compromises the objectivity and well-founded nature of their reporting. As stated by one of the media experts, *“the media in RA fails to meet the public demand.”*
2. **The polarization of the political field.** This polarization of the media field further exacerbates the situation, compelling media outlets from opposing perspectives to engage in an information war against each other. Consequently, there is a scarcity of media outlets dedicated to serving the public's interests.
3. **Citizen journalism on social media platforms.** The prevalence of citizen journalism on social media platforms has contributed to a situation where individuals receive information that is often inaccurate, contradictory, unsupported, unverified, and biased. At the same time, the respondents note that the general public encounters difficulties in distinguishing between information shared by ordinary individuals and information presented by established media sources. This confusion only contributes to the further decrease in the level of trust towards all media outlets in general.
4. **In general, low levels of media literacy.** According to the respondents, this pertains to the level of education of both media professionals and the broader society. According to respondents, a dual challenge exists. Firstly, there is a dearth of professionalism within the field of journalism, resulting in subpar media content quality. Simultaneously, there is an issue with the inadequate level of general media literacy among the population, who are unable to distinguish credible from manipulative and misleading information.
5. **Mistrust towards official information.** This issue has gained prominence particularly in the context of the 2020 Artsakh-Azerbaijani war. During this period, the government called on citizens to rely on official information, yet the information provided turned out to be inaccurate. According to the respondents, this situation has resulted in low level of trust towards official information and had a spillover effect for media outlets overall.

*There are so many players in our media field, but unfortunately, there are few who prioritize providing honest and objective information over advancing a political agenda.
(KII with a media representative, Male)*

*I have never seen such a polarized media, intolerance towards each other, and this kind of obsession to destroy each other, which affects professional qualities. Anti-journalism measures such as disinformation and unreliable news are used to misrepresent and discredit the opposite pole. Most of the media outlets construct their strategies on the basis of creating opposition or conflict.
(KII with a media representative, female)*

*They spread so much fake news. Hate speech and Facebook have led to people [disengaging] and not following the news
(KII with a media representative, Male)*

*There is a crisis of trust in RA: everyone suspects, distrusts, and hates everyone, especially in the last 5 years. The media is not fulfilling its ultimate goal of serving society.
(KII with a media representative, Male)*

*Journalists are very biased and heavily involved in political processes as directly involved persons. Everyone knows whose interests are served by the given media, so the specific trust depends on the political approaches of the person at that moment.
(KII with a media representative, Male)*

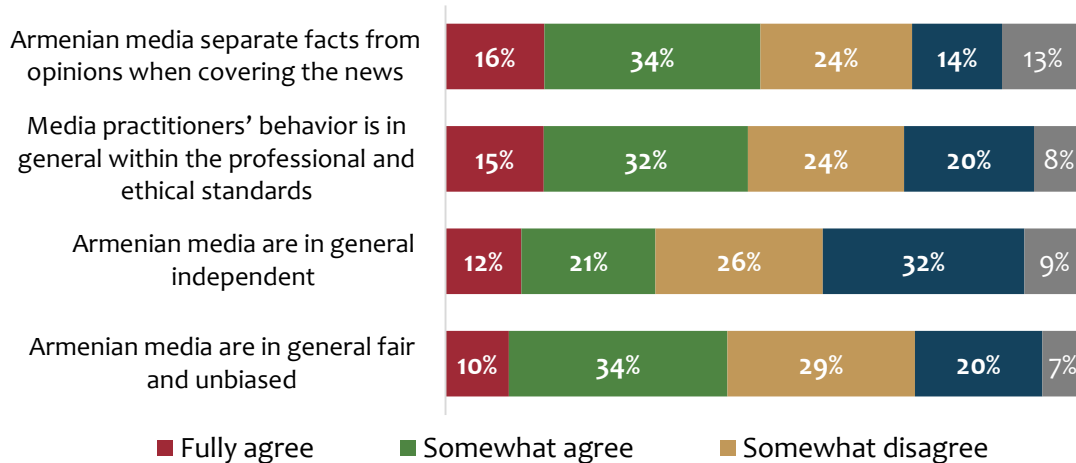
*After the 44-day war, the media, lacking the opportunity to objectively verify information from official sources, relied on official news, which also resulted from the conditions of the emergency situation. However, it later turned out that the information provided was false. Meanwhile, the media were just its reproducers. But people began to trust the media less after that.
(KII with a media representative, Male)*

→ Question 2: What are the key factors contributing to the trust?

Trust level towards key factors contributing to the trust: The respondents were asked to specify the extent to which they agree or disagree with a series of statements. **Almost half of respondents** (49%, combining “fully agree” and “somewhat agree” responses) expressed agreement that **Armenian media are effective in distinguishing between factual information and opinions** when reporting news. Additionally, less than half of the respondents (47%) agreed that media practitioners in Armenia generally **adhere to professional and ethical standards in their behavior**.

A relatively smaller number of respondents expressed belief in the **fairness, unbiased nature, and overall independence of the media**. Specifically, less than half (44%) of the respondents agreed that Armenian media are unbiased and impartial in their reporting, while a larger percentage (58%) disagreed with the notion that Armenian media are independent from government, political party, or business control (Figure 18).

Figure 18. To what extent do you agree or disagree with the following statements?
(n=1,109, options presented to the respondents, one answer accepted per bar)



Reasons for trust or distrust: As the data indicates, respondents attribute their trust in media sources to a variety of reasons. The most prominent factor is the **presence of high-quality content**, mentioned by 25% of the respondents. This is closely followed by **familiarity**, with 19% noting that they trust media sources they have known and followed for an extended period. Another crucial factor is the perception that sources provide information based on **facts, reliability, and objectivity**, with 11% attributing trust to this aspect. Additionally, 10% of respondents value media sources that **deliver news promptly**. The independence of media sources from governmental influence, political parties, and businesses also plays a pivotal role in establishing trust. Furthermore, a small percentage of respondents attribute their trust to personal connections, adherence to ethical codes, international presence, and the absence of state control over the media. (Table 8).

Table 11. What is the main reason for the trustworthiness of media sources you mentioned above?⁴³
(open-ended question, all possible answers accepted)

Reasons for trustworthiness	N	Percent of valid responses	Percent of total surveyed respondents
They have high quality content	282	32%	25%
I have been following them for many years	215	25%	19%
They are fact-based, reliable, and objective	118	14%	11%
They are always the first one to cover news	107	12%	10%
I know they are independent (from government, political party, or business control)	86	10%	8%
I know somebody from there	25	3%	2%
I have seen their ethical codes on the website	25	3%	2%
I know they have an international presence and funding	5	1%	0%
It is state controlled	5	1%	0%
Total	868	100%	

During KIIs, field experts shared the perspective that building trust in the media field is a gradual process due to the need to reshape established norms and behavioral patterns. To enhance trust, research participants propose the implementation of the following measures:

⁴³ Multiple choice question, 858 total responses received. Respondents who answered this question provided 1.2 answers on average. Overall, 34% of respondents had difficulty answering this question or refused to answer it

1. **Media Independence:** Experts stress that fostering trust in the media requires a shift towards agendas that prioritize the public interest. As long as media outlets prioritize the agendas of their financiers, public confidence will remain limited.
2. **Enhancing Content Quality:** Many media outlets currently structure their content according to public demand, potentially compromising quality. Experts believe that by offering high-quality content and increasing its prevalence in the news landscape, demand can be generated, leading to improved public trust. Enhancing the skills and knowledge of media professionals is also viewed as vital in this context.
3. **Government supervision:** Experts advocate for transparent media practices through legal policies that hold media outlets accountable for their financial activities, policies, and operations. According to research participants, the government should have mechanisms in place to enforce consequences for spreading misinformation, hate speech, or incomplete information.
4. **Enhancing Media Literacy:** Experts suggest that increasing public media literacy is crucial for discerning between professional and non-professional media outlets. This will prompt media outlets to improve their content quality to gain public trust. This requires an emphasis on education initiatives to empower the public with the skills needed to navigate the media landscape effectively.

Willingness to pay, support and subscribe to Armenian media: Most respondents (81%) are not willing to pay, support, or subscribe to Armenian media in order to access quality and trustworthy content. This indicates a notable level of reluctance among the respondents to invest financially in media consumption. On the other hand, a minority of respondents (17%) expressed a willingness to pay, support, or subscribe to Armenian media, while very small portion of respondents (1%) have already taken action and currently do so (Figure 19).⁴⁴ It should be noted that compared to an MIC survey conducted in 2021, the number of people who are willing to pay or are currently paying for media has increased, as 13% of respondents demonstrated willingness to pay for online media resources to receive reliable information regularly in 2021 overall.

The majority of respondents who are willing to pay (57%) are either willing or are currently paying up to 2,000 AMD per month for these services. A notable portion of respondents (23%) express their willingness to pay or are currently paying between 2,001 and 4,000 AMD (approx. 10 USD) per month, while around 15% of respondents can afford between 4,001 (approx. 10 USD) and 6,000 (approx. 15 USD) AMD per month. A very small percentage of respondents (2%) are willing to pay or are currently paying between 6001 (approx. 15 USD) and 10,000 AMD (approx. 26 USD) per month, and 3% of respondents are inclined to pay more than 10,000 (approx. 26 USD) AMD per month. As the data shows, **the majority of respondents lean toward lower-cost options**, while a smaller percentage is willing to invest more in these services (Figure 20).

⁴⁴ The analysis of this variable by confounding factors, including gender, age, settlement type, economic status, and education, did not reveal any statistically significant differences (Chi-square tests, $p > 0.01$)

Figure 19. Are you willing to pay/support/subscribe to Armenian media for getting quality, trustworthy content?

(Options presented to the respondents, one answer accepted) (n=1,109)

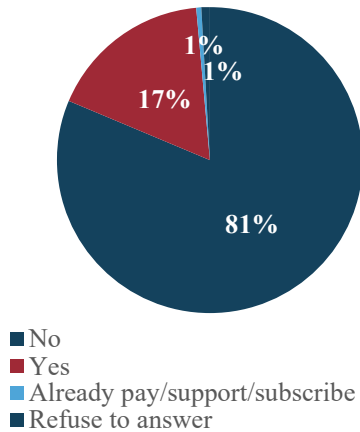
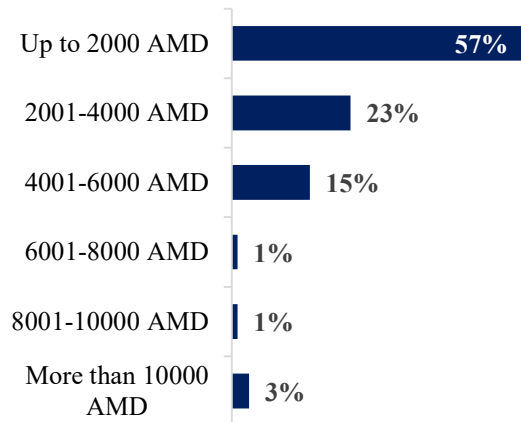


Figure 20. What is the amount of money you are paying (or willing to pay) in a one-month period?

(Options presented to the respondents, one answer accepted) (n=180)



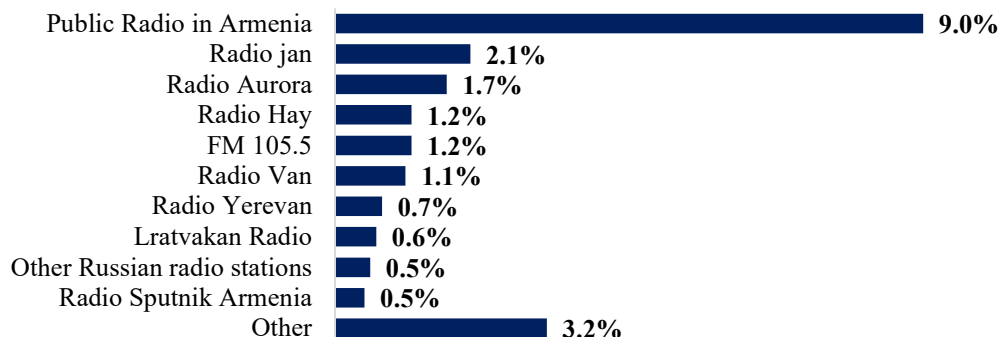
As for one-time donations, the majority of respondents (**86%**) indicated that they are not willing to make a **one-time donation to media organizations**. About 12% of respondents are open to making a one-time donation to media organizations and even specified the amount of money they are willing to donate, while 2% of respondents had difficulty answering this question. However, among those who are willing to make a one-time donation, the majority (74%) are not prepared to donate more than 5,000 AMD (approx. 12 USD). Meanwhile, 18% are willing to contribute between 6,000 AMD (approx. 15 USD) and 20,000 AMD, and only 8% are willing to donate more than 20,000 AMD (approx. 51 USD), but no more than 100,000 AMD (approx. 260 USD).

→ Question 3: Which are the most trusted media sources in Armenia?

Most trusted Radio stations, TV channels, news websites, print media, and social network platforms: Figure 21 illustrates the levels of trust that respondents have in different **radio stations** in Armenia. The data indicates that **Public Radio in Armenia** is the most trusted radio station among respondents, with 9% of respondents naming it as the most trusted.

Figure 21. Most trusted radio stations

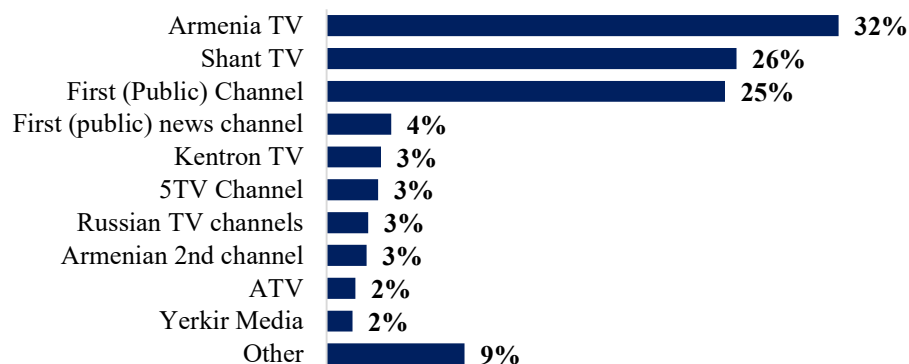
(n=192, open-ended question, up to 3 answers permitted, % of total surveyed respondents who mentioned a particular radio station)⁴⁵



Overall, in regard to **TV channels**, **Armenia TV** holds the highest level of trust among respondents, with 32% considering it the most reliable. Following closely behind are **Shant TV**, with 26%, and the **First (Public) Channel**, with 25% (Figure 22).

Figure 22. Most trusted TV Channels

(n=1,109, open-ended question, up to 3 answers permitted, % of total surveyed respondents who mentioned a particular TV channel)⁴⁶



Very few respondents responded to the question regarding trusted **print media**. The results indicate that Aravet newspaper, Football+, Times newspaper, and Zhoghovurd newspaper were the print media sources most frequently mentioned as being trusted. Overall, the names of each print media were mentioned by less than 1% of the respondents.

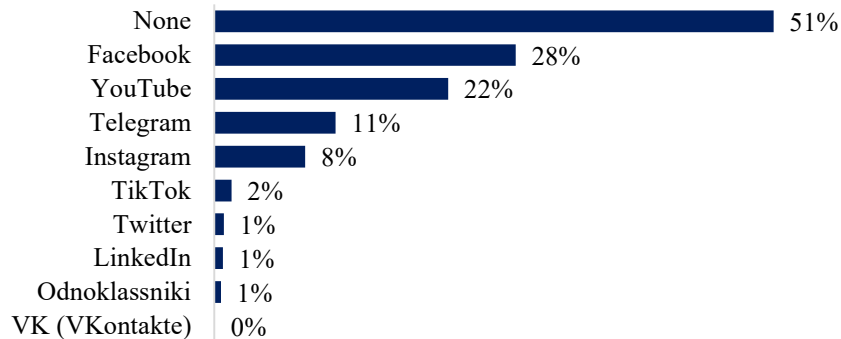
In contrast to the other sources discussed above, the data highlights a substantial segment of respondents who lack trust in any **social media platform**. Namely, 51% of surveyed respondents mentioned that they do not trust any social media. On the other hand, **Facebook** (trusted by 28% of surveyed respondents) and **YouTube** (trusted by 22%) stand out as the most trusted platforms among those who do place their trust in social media sources. Additionally, platforms like Telegram and Instagram also hold some degree of trust within the surveyed population, with 11% and 8%, respectively (Figure 23).

⁴⁵ Multiple choice question, 242 total responses received. On average, a respondent who answered this question mentioned 1.3 radio stations they trust. Overall, 83% of respondents had difficulty answering this question

⁴⁶ Multiple choice question, 1,216 total responses received. On average, a respondent who answered this question mentioned 1.8 TV channels they trust. Overall, 1% of respondents mentioned that they do not trust any TV channel

Figure 23. Most trusted social media networks

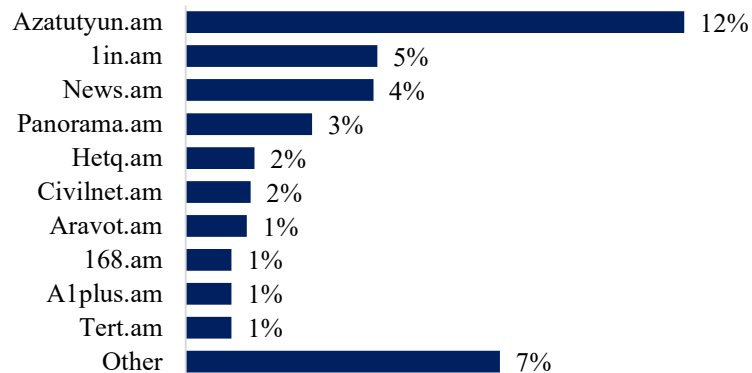
(n=1,109, open-ended question, up to 3 answers permitted, % of total surveyed respondents who mentioned a particular social media)⁴⁷



As for online news websites, Azatutyun.am is the most trusted among the respondents, with 12% naming it as a reliable source of news. Other websites were mentioned less frequently, with 1in.am, News.am, and Panorama.am named by 5%, 4%, and 3% of the respondents, respectively. The remaining websites were mentioned by less than 2% of the respondents (Figure 24).

Figure 24. Most trusted news websites

(n=265, open-ended question, up to 3 answers permitted, of total surveyed respondents who mentioned a particular news website)⁴⁸



3.3 CONSUMER NEEDS AND DEMANDS

Research Questions

Question 1: What are the media content preferences of population?

Question 2: What are the media consumer needs/demands in terms of information, presentation, and the professionalism of media practitioners?

→ Question 1: What are the media content preferences of respondents?

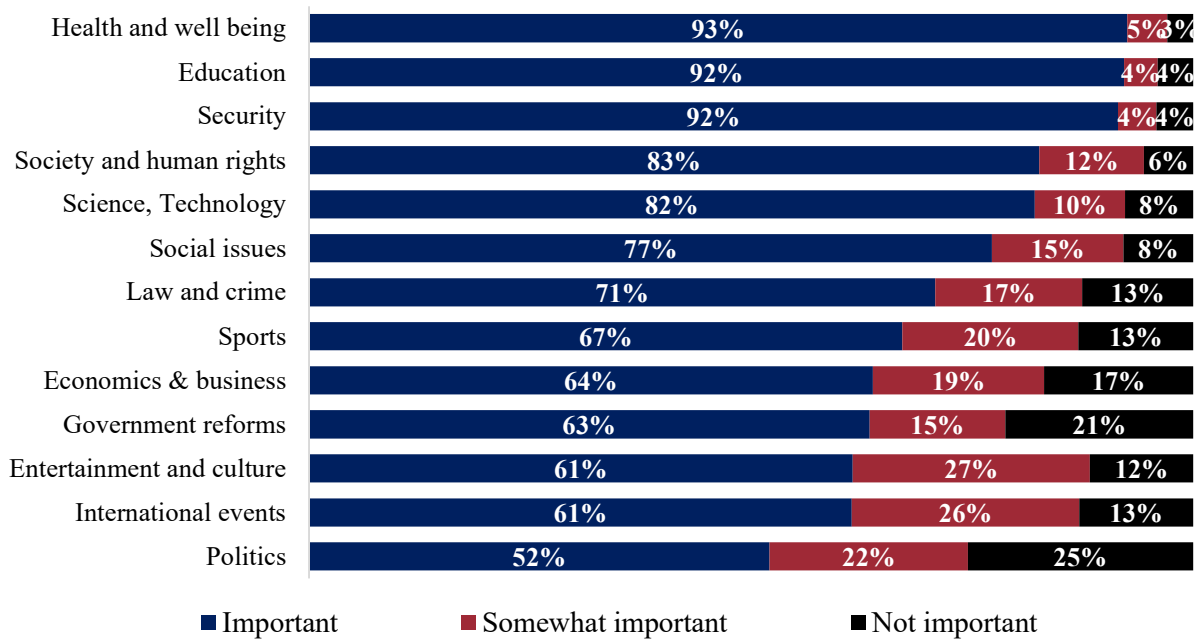
Importance of media content topics: The respondents were presented with various media content topics and were asked to evaluate their importance. The data indicates that **health and well-being** (93%), **education**

⁴⁷ Multiple choice question, 809 total responses received. On average, a respondent who answered this question mentioned 1.5 social media platforms they trust. Overall, 1% of respondents had difficulty to answer this question

⁴⁸ Multiple choice question, 431 total responses received. On average, a respondent who answered this question mentioned 1.8 news website they trust. Overall, 76% of respondents had difficulty answering this question

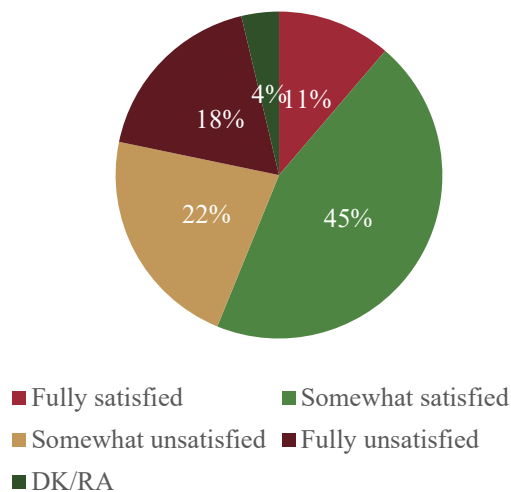
(92%), and **security** (92%) are the most significant topics to the respondents. In contrast, politics (52%), international events (61%), and entertainment/culture (61%) received comparatively lower importance ratings when compared to other areas (Figure 12).

Figure 25. Rate the importance of these topics for you? (n=1,109)



Satisfaction with the coverage of topics: Overall, a majority of respondents expressed some level of **satisfaction** with the coverage of important topics in the local media. Namely, 11% of the respondents reported being fully satisfied and 45% expressed being somewhat satisfied with the coverage of topics that are important to them. However, there is still a percentage of respondents who feel unsatisfied (40%), with a notable portion being fully unsatisfied (18%). Overall, 4% of respondents had difficulty answering this question. This suggests that there may be room for improvement in the media's efforts to address the concerns and interests of their audience (Figure 26).

Figure 26. How satisfied are you with the coverage of topics in the local media that are important to you? (n=1,109, options presented to the respondents, one answer permitted)



As the analysis by confounding factors reveals, the level of satisfaction with the coverage of topics in the local media significantly differs by the level of **education, age, and location of the respondents**. Namely, respondents with a secondary and high school education background have the highest level of satisfaction (64%, with “Very satisfied” and “Rather satisfied” options combined), followed by those with a vocational background (60%). Lastly, respondents with a higher and postgraduate education background exhibit the lowest level of satisfaction with the coverage of topics in the local media that are important to them (50%). Respondents aged 18 to 35 have the highest level of satisfaction (67%), followed by those aged 36 to 55 (57%). Lastly, respondents aged 56 and older have the lowest level of satisfaction (54%). Lastly, respondents living in rural areas have the highest level of satisfaction (67%), followed by those from urban areas (64%), while respondents living in the city of Yerevan have the lowest level of satisfaction with media coverage (46%) (See Annex 2, Table 2).

➔ **Question 2: What are the media consumer needs/demands in terms of information, presentation, and the professionalism of media practitioners?**

Media coverage needs: Table 12 reflects the proportion of respondents who expressed a desire for more coverage of each respective topic. **Security issues** (46% of the respondents mentioned this option), **education** (29%), **politics** (21%), **social issues** (20%) and **health and well-being** (19%) are the main domains where respondents see a need for more coverage. Meanwhile it is important to highlight that most of these topics were primarily emphasized by respondents as being important to them (see Figure 25). Accordingly, respondents feel a need for enhanced coverage of mostly those domains that are important to them.

Table 12. Which topics you would like to be reflected more in Armenian media?⁴⁹
(*n=1,109, open-ended question, up to 3 answers permitted*)

Topics	N	Percent of responses	Percent of surveyed respondents
Security	459	23%	46%
Education	285	15%	29%
Politics	206	11%	21%
Social issues	197	10%	20%
Health and well being	187	10%	19%
Science, Technology	163	8%	16%

⁴⁹ Multiple choice question, 1,957 total responses received. Respondents provided 2.0 answers on average. 7% of respondents had difficulty answering this question

Economic & business	153	8%	15%
Entertainment and culture	87	4%	9%
Sports	61	3%	6%
Society and human rights	49	3%	5%
Law and crime	41	2%	4%
International events	30	2%	3%
Agriculture	15	1%	2%
National values, patriotism	14	1%	1%
Children's upbringing	10	1%	1%
Total	1,957	100%	

2.4 NEEDS OF MEDIA

Research Question

Question 1: What are the main needs of media and media practitioners in Armenia?

→ Question 1: What are the main needs of media and media practitioners in Armenia?

According to the KII and FGD participants, media professionals today confront the following range of challenges:

- 1. Financial independence:** According to the survey participants, contemporary media encounters significant challenges in fundraising, a circumstance that drives many to accept sponsorship from various political or economic entities in order to sustain their existence. This situation has a direct impact on the upholding of ethical and professional standards, as media outlets often find themselves catering to the interests of these entities or adhering to their imposed agendas. Respondents indicate that very few media entities have diverse sources of funding today. The rise of social media has further compounded this scenario by diverting the advertising market away from traditional and/or online media platforms. Advertisers now directly target consumers through social media, bypassing conventional media outlets.

Changes in advertising legislation present an additional challenge, with certain sectors being restricted from advertising (for example, the prohibition on advertising for gambling companies, which was a significant contributor to media advertising budgets). This reduction in financial inflow has impacted the media field. Furthermore, the possibility of commercial advertising on Armenian Public TV has created an uneven playing field. Advertisers opt for the Armenian Public TV station due to its broad coverage across the country, leading to an imbalance in the media field.

Hence, the media outlets are in need of stronger support both from legislators and the public in order to improve their financial independence. Public awareness initiatives that could promote the culture of financial support for media outlets to ensure their objectivity and reliability could be effective in this regard.

*The ban on bookmaker advertising was a surprise for us, because the media is funded by them. I understand that families are being destroyed by gambling, but since then, many media outlets have laid off their staff or limited their operations.
(FGD with regional media representatives, Female)*

*Giving an opportunity to advertise to Armenian Public TV was a problem, because they receive funding from the government, they don't lack financing. Currently, Armenian Public TV is receiving funds that would have otherwise been directed towards media outlets. There is an impression that after the Revolution, the work of journalists has been limited by the government.
(FGD with regional media representatives, Female)*

*In the regions, media outlets mainly received their financial income from bookmakers; now they have accumulated a lot of debts since, and there are no statistics that gambling has decreased to convince us that we achieved a decrease in this regard.
(FGD with media representatives, Female)*

- 2. Ethical standards:** Interviewees highlighted the importance of the ethical aspects of entities engaged in the provision of information in the public sphere. According to the respondents, ethical activity is important for everyone that produces and disseminates public information, but it is of particular

importance for journalists. This is explained by the fact that journalists carry the responsibility of public accountability, while other information disseminators may work with a client and perform the function of advertising or promoting certain items and are not committed to providing actual facts to the public. The interviewees also singled out the ethical aspects related to influencers' activities, noting that there is no legislation that regulates the ethical standards of the influencers' activity in any way. Currently, they can generate and circulate content without undergoing checks, verification, or proper collation. This enables them to swiftly capture the audience's attention. Meanwhile, journalists, who meticulously prepare information adhering to ethical and professional norms, might find that their content loses relevance in the interim.

Hence, journalists need both support and equal opportunities for improving and maintaining ethical standards while not losing their audience.

It is difficult to find a workplace where you can best demonstrate your abilities while not going against ethical principles. This is directly related to the fact that respect for professional and ethical norms is quite low in the media, which is due to financial dependence.
(KII with a media representative, Male)

An ascribed agenda is one of the most important challenges. Almost every day, almost all media, even those who have signed a code of ethics, face this problem. The most serious ethical problems are inside a media outlet, and the most serious conflicts are there as well: serious conflicts even occur within an editorial office.
(KII with a media representative, Male)

Another problem is the presence of journalists on social networks. Today, a journalist should also behave properly on social networks. And many journalists write something, but they have a political orientation on social networks, or label people, then you read their "objective" article, and you feel that there is a dilemma. Influencer-journalist is the most common dilemma, which is unclear for me.
(KII with a media representative, Male)

There are various players in the Armenian information field who are able to successfully become public opinion shapers, and they shape opinion using methods and forms of communication that are unacceptable from the point of view of journalism, but acceptable by the public. A journalist cannot be a YouTuber. If they give in to it, cross that line and begin to present themselves as influencers, they will exit the realm of journalism. And here the public suffers, because the journalist checks the facts and reports in the public interest, while in the case of YouTubers, the goal is to provide sensationalism and engagement.
(KII with a media representative, Male)

- 3. Professionalism of media practitioners:** Research participants criticized the quality of education at the Faculty of Journalism at Yerevan State University. They believe that students do not acquire adequate practical skills, and the theoretical knowledge provided is obsolete, failing to align with contemporary standards. As a result, media outlets often need to train professionals themselves and sometimes hire individuals with non-professional education who are agile and quick-learning and have an adaptable approach to taking on the editorial office's professional and ethical requirements. The participants also highlight the challenge related to journalists with specialized expertise who can effectively address specific field-related issues. On the other hand, many media outlets are constrained by limited financial resources, making it difficult to employ specialized journalists. This directly impacts the overall quality of media content, as a single individual cannot comprehensively cover all areas in equal depth.

A lack of language proficiency poses a challenge as well, impeding journalists from accessing and studying international experience and best practices.

Hence, the media practitioners need expanded and improved opportunities both for academic and continuous education programs. Media representatives also emphasize incorporating international experiences and modern approaches from the global media landscape in the Armenian context.

Journalists come to work, their editors send them to various places and they do not specialize in specific fields, they remain general journalists. This leads to a lower quality of the news product. But if a journalist focuses on specific topics, he will provide a much better product.
(KII with a media representative, Male)

4. **Government responsiveness:** According to respondents, the RA government has increasingly presented obstacles in supplying information to journalists in recent years. While responses are given within the legally mandated timeframes, the actual information requested is often withheld. In essence, the response generally cites that the requested information pertains to state secrets or is not meant for public disclosure, thereby placing additional hurdles in the path of journalists seeking information. Media professionals who were part of the research have the perception that the government is attempting to restrict the flow of information to the media.

It is quite difficult to get information from the government. It is getting more and more difficult, and the representatives of the government are not so willing. A journalist has to find other sources to ensure the versatility of the material. There is a lot of information being silenced and closed.
(FGD with regional media representatives, Female)

Before, we used to call the government and check the information we needed. Now they say to submit a written application so that we can provide it. You hang up the call to write an application, and you see that another media outlet (mainly, a government-oriented media outlet) has already reported that information. In other words, they were given it.
(FGD with regional media representatives, Male)

3.4 MEDIA LITERACY

Research Questions

Question 1: What is the level of media literacy among the public?

Question 2: What are the prevalent practices for responding to false, misleading, or unethical information?

Question 1: What is the level of media literacy related skills among the public?

Based on international evidence-based methodologies, three main skills were identified for the assessment in the scope of this study:

1. ability to separate facts from opinions and identify manipulative media strategies;
2. ability to recognize and fact-check suspicious information; and
3. ability to create media content.

1. Ability to separate facts from opinions and identify manipulative media strategies

This study revealed that **39%** of the respondents have the ability to separate facts from opinions and to identify the manipulative strategies. The respondents were provided with 3 optional headlines and were asked to identify the one(s) that is/are fact-based rather than opinion-based. The correct answer was the first option. The distribution of the responses is presented below (Table 13).

Table 13. **Headline(s) which are fact based, not opinion based**⁵⁰ (n=1109)

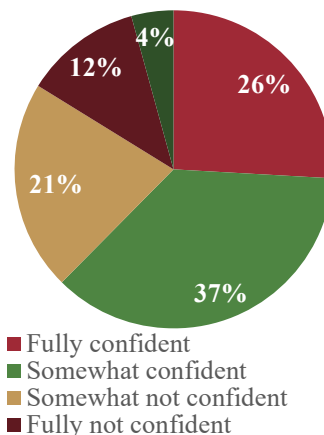
The public debt of the RA has increased by 15.3%, exceeding 10 billion USD (correct answer)	The Armenian government will fail the education reforms in the country	Cancer can be cured with homemade remedies	None of the above
39%	27%	6%	28%

The analysis by confounding factors revealed statistically significant associations with population center type, age, education, and economic status of the respondents. As indicated by the analysis of confounding factors, the number of respondents who were able to distinguish between facts and opinions varies according to respondents' **education, age, economic status, and the type of population center** they reside in. A higher percentage of respondents with higher and postgraduate education demonstrated the capability to separate facts from opinions in media (49%) compared to those with secondary/high school and vocational education (37% and 35%, respectively). Similarly, a larger proportion of younger respondents aged 18 to 35 exhibited the ability to differentiate facts (57%) in comparison to those aged 36 to 55 (39%) and those aged 56 and older (30%). Economic status also exhibits a positive correlation, as a greater percentage of respondents with middle and high incomes were able to distinguish facts (45% and 46%, respectively) compared to those with a low income (28%). Lastly, more respondents living in urban population centers demonstrated the ability to separate facts from opinions (51%) compared to those living in rural areas and Yerevan (36% and 35%, respectively) (See Annex 2, Table 1).

In addition, the respondents were asked to self-assess their ability to **distinguish factual information from opinion in news articles or reports**. The results show that 63% of the respondents are somewhat/fully confident that they have this ability (Figure 27), although only 39% could correctly identify a fact-based news headline correctly.

Figure 27. **To what extent do you feel confident in your ability to distinguish factual information from opinions in news articles or reports?**

(n=1,109, options presented to the respondents, one answer permitted)



Ability to recognize and fact-check suspicious information

According to the results, only **18% of respondents** fall into the category of being able to recognize and fact-check suspicious information. The analysis of confounding factors reveals that the ability to recognize and fact-check suspicious information varies based on respondents' education and age. Respondents with higher and postgraduate education exhibited higher levels of recognition and fact-checking (25%) compared to those with secondary/high school and vocational education, at 17% and 14% respectively. Among age groups, a

⁵⁰ Multiple choice question, total 1135 responses received, each respondent provided 1 answer on average

higher percentage of younger respondents demonstrated fact-checking abilities (27%) in comparison to respondents of middle age (18%) and older individuals (12%). (See Annex 2, Table 1).

Methodological note:

“**Ability to recognize and fact-check suspicious information**” was assessed as the share of respondents who correctly mentioned at least two circumstances in which information is considered to be suspicious/unreliable or mentioned at least two concrete methods they would apply to verify or check the suspicious information.

With regard to cases in which the respondents would find information to be suspicious or unreliable, the most common reasons are if the information seems very unlikely (31%), if the source is not clearly cited (26%), or when the headline and the content do not match (26%). The credibility of the source sharing the content also matters to 20% of respondents, while a smaller percentage (14%) of respondents are suspicious of news if it appears unprofessional (i.e., if it contains spelling mistakes or features low-quality images or videos). For 12% of respondents, the lack of a clear distinction between fact and opinion in news content is a red flag, while only 4% of respondents consider information suspicious if it is impossible to cross-verify from different sources. Lastly, just 1% of respondents are concerned about news being interpreted differently by different media outlets (**Error! Reference source not found.**).

Table 14. Under what circumstances is information provided by media considered to be suspicious/unreliable?⁵¹
(*n=1,109, open-ended question, all possible answers accepted*)

The circumstances the information is considered suspicious/unreliable	N	Percent of valid responses	Percent of surveyed respondents
If it is very unlikely	284	23%	31%
If the source is not mentioned	236	19%	26%
If the headline and the content do not match	235	19%	26%
If the content is shared by a website/people I don't know or don't trust	185	15%	20%
If the news looks unprofessional (e.g., there are spelling mistakes, the images or videos do not look high quality, etc.)	131	11%	14%
If fact is not separated from opinion	107	9%	12%
If it is impossible to verify from different sources	32	3%	4%
If the same news is interpreted differently by different media	6	0%	1%
Total	1,216	100%	

Table 15 provides insights into the diverse methods that individuals would employ to verify and check the accuracy of suspicious news, with a significant emphasis on using the internet (55% of respondents) and relying on trusted individuals as sources for verification (32%). Other strategies include searching for more information on the organization/person presenting the news (13%) and finding the original source of information (10%). Methods such as checking the comments/what people are saying about the article/news as well as examining the URL and website were mentioned by fewer than 10% of respondents. It is also noteworthy that overall, 41% mentioned that they will not do anything to fact check suspicious information.

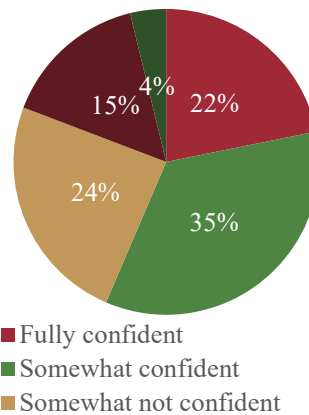
⁵¹ Multiple choice question, 1,216 total valid responses received. Respondents provided 1.3 answers on average. 16% of respondents had difficulty answering this question

Table 15. In case of suspicious news, how would you verify and check the information?⁵²
(n=649) (open-ended question, all possible answers accepted)

Methods to verify information	N	Percent of valid responses	Percent of respondents
I will search for and compare the same topic on the internet	343	44%	55%
I will discuss it with someone who I trust	197	25%	32%
I will search for more information on the organization/person presenting the news	79	10%	13%
I will find the original source of information	64	8%	10%
I will check the comments/ what people are saying about the article/news	42	5%	7%
I will check the URL and website	28	4%	5%
I will make a formal inquiry for more information	20	3%	3%
I will act based on my knowledge and logic	11	1%	2%
Other	1	0%	0%
Total	785	100%	

Lastly, the respondents were again asked to self-assess their ability to recognize and fact-check suspicious news. The results again reveal a discrepancy between the self-assessment and action-based results, showing that 57% of the respondents are very/somewhat confident of having that ability (Figure 28), while only 18% could demonstrate that ability through verifying questions.

Figure 28. To what extent do you feel confident in judging whether a piece of news you read/watch/listen to is true or fake?
(n=1,109, options presented to the respondents, one answer permitted)



2. Ability to create media content:

The ability to create media content was measured through studying actual practice. According to the results, a small, but notable percentage of the surveyed participants (15%) have experience in producing media content (Figure 29), and therefore have that ability.

⁵² Multiple choice question, 785 total valid responses received. Respondents provided 1 answer on average. 3% of respondents had difficulty answering this question.

Figure 29. Have you ever crated any media content?
(n=1,109, options presented to the respondents, one answer permitted)

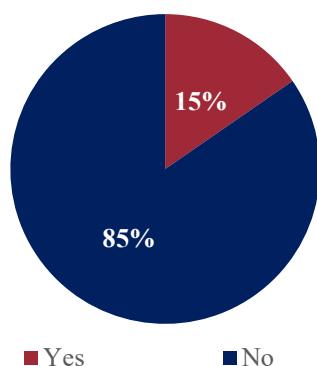


Table 16 data reflects the purposes of media content creation, with informing the audience being the most prominent response (60% of those who created media content), followed by gaining an audience (13%), human rights protection (12%), and revenue generation (7%), among others.

Table 16. What was/is the purpose of media content?
(n=170, open-ended question, all possible answers accepted)⁵³

Purpose of media content	N	Percent of valid responses	% of those who created media content
To inform the audience	96	52%	60%
To gain an audience	21	11%	13%
For human rights protection	20	11%	12%
To make money	11	6%	7%
Entertainment	9	5%	6%
Fundraising	8	4%	5%
To share about one’s personal life	7	4%	4%
To spread scientific information	5	3%	3%
I am interested in it	5	3%	3%
To discuss a topic	4	2%	2%
Total	186	100%	

Content creation by respondents included occasional text/comments on social media (67%), video clips and reels (26%), hosting/leading social network sites/channels (22%), creating analytical texts (18%), going live (15%), and organizing live meetings (4%) (Table 17).

Table 17. What content do you create? (n=170, open-ended question, all possible answers accepted)⁵⁴

Purpose of media content	N	Percent of responses	% of those who created media content
Occasional text/comment in social media	111	44%	67%
Video clips, reels	43	17%	26%
Hosting/leading a social network site/channel (YouTube/TikTok channel, Instagram/Facebook page, etc.)	37	15%	22%
Analytical texts	30	12%	18%
Going live	24	10%	15%
Organizing live meetings	7	3%	4%

⁵³ Multiple choice question, 186 total responses received. Respondents who created media content provided 1.1 answers on average

⁵⁴ Multiple choice question, 252 total responses received. Respondents who created media content provided 1.5 answers on average

Total	252	100%
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Most frequently, content creators used Facebook (84%), Instagram (40%), YouTube (13%), TikTok (11%), and Telegram (10%) to disseminate news (Table 18).

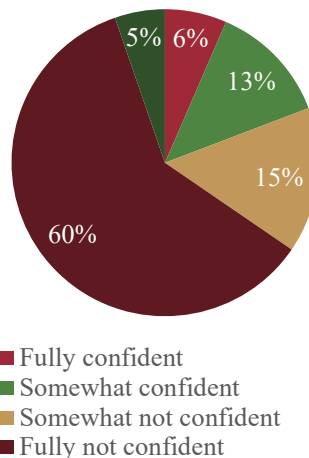
Table 18. Which social networks do you use to disseminate it? (n=170, open-ended question, all possible answers accepted)⁵⁵

Purpose of media content	N	Percent of responses	% of those who created media content
Facebook	141	48%	84%
Instagram	67	23%	40%
YouTube	22	8%	13%
TikTok	19	6%	11%
Telegram	17	6%	10%
LinkedIn	14	5%	8%
Twitter	10	3%	6%
Odnoklassniki	2	1%	1%
VK (VKontakte)	1	0%	1%
Total	293	100%	

The respondents were again asked to assess their level of confidence in creating media content, which includes activities like posting occasional texts, commenting on social media, creating video clips, and going live. According to the results, the majority of respondents appear to lack confidence (75% combined for “somewhat not confident” and “fully not confident” responses), with only 6% of the respondents feeling fully confident in their ability to create media content (Figure 30).

Figure 30. To what extent do you feel confident in your ability to create media content

(n=1, 109, options presented to the respondents, one answer permitted)



Qualitative research participants assess the level of media literacy in RA as low. They attribute this not only to the general lack of media literacy, but also to the extensive flow of information from various internet sources. According to interview responses, a common characteristic that makes people more vulnerable is a lack of critical thinking and the inability to double-check or verify information.

Another factor that was noted is the psychological inclination of individuals to consume information that aligns with their preferences, regardless of its accuracy. Within this context, individuals may derive satisfaction from

⁵⁵ Multiple choice question, 293 total responses received. Respondents who created media content provided 1.8 answers on average

hearing negative remarks or derogatory language about political figures they hold unfavorable opinions of, irrespective of the level of trustworthiness of that information.

*People today consume more information than before, and people have not yet learned how to deal with this huge influx. Starting with school and families, we should explain to children how to consume media and navigate an overwhelming amount of information.
(KII with a media representative, Male)*

*One of the reasons is that social networks entered public life very quickly. Society was not ready for such an abundance of information and to distinguish right from wrong information.
(FGD with CSO representatives, Female)*

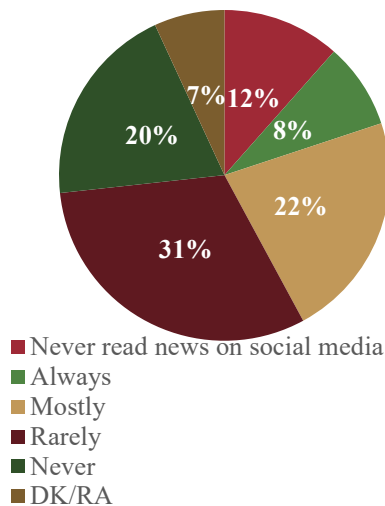
Research participants perceive the enhancement of media literacy as achievable primarily through ongoing education, beginning with preschool and general education institutions. Continuing education is deemed crucial due to the rapidly evolving form and content of information in the contemporary information era, necessitating the constant adaptation of media literacy tools.

Experts highlight the significance of imparting media literacy education to children and the younger generation. They note that educating adults in this regard can be challenging. Nevertheless, the participants also highlight the importance of integrating media literacy programs and courses into popular platforms such as media outlets (especially TV) as a means of reaching a wider audience and promoting media literacy education.

➔ **Question 2: What are the prevalent practices for responding to false, misleading, or unethical information?**

As the data shows, 31% of respondents indicate that they always or mostly click on the news link when reading news through social media, while 51% do not. Meanwhile, 12% of respondents reported they never read news on social media, and 7% had difficulty answering this question (Figure 31).

Figure 31. How often do you click on the news link that you read via the social networks?
(n=1,109, options presented to the respondents, one answer permitted)



Participants were also asked about their stance on addressing incorrect, untrue, deceptive, or unethical content disseminated by the Armenian media. The majority of respondents (65%) indicate that they take no specific action when they encounter false, misleading, or unethical information. A substantial portion of respondents

choose to boycott the source (30%), while smaller percentages engage with the content by leaving comments, reporting it to social network administrators, or directly contacting editors. The data also indicates that emotional responses such as getting nervous or more formal channels such as reporting it to media ethics bodies or NGOs are rarely pursued (Table 19).

Table 19. What is your response to false, misleading, or unethical information?⁵⁶
(*n=1,109*) (open-ended question, all possible answers accepted)

Response to false, misleading or unethical information	N	Percent of valid responses	Percent of respondents
Nothing	700	64%	65%
Boycott (unfollow or do not watch or read)	321	29%	30%
Leave a comment	21	2%	2%
Report the source to social network administrators	13	1%	1%
Call the editors and complain/verify	9	1%	1%
Discuss with friends/relatives	8	1%	1%
Get nervous	4	0%	0%
Complain to the body dealing with the issues of media quality or ethics (The media ethics observatory)	2	0%	0%
Report to media NGOs	2	0%	0%
Other	12	1%	1%
Total	1,092	100%	

The data indicates that the most prevalent reasons for not taking action against false, misleading, or unethical information are a perceived lack of effectiveness (39% of those who will not take any action), indifference (25%), and time constraints (17%). There is also a notable percentage of respondents who lack knowledge about appropriate actions or who lack trust in the authorities handling such cases (Table 20).

Table 20. If nothing, why?⁵⁷
(*n=700*, open-ended question, all possible answers accepted)

Reasons for inaction	N	Percent of valid responses	Percent of of those who will not take any actions
I don't think that if I do anything, it will bring change	262	35%	39%
I am indifferent	168	23%	25%
I don't have time	114	15%	17%
I don't know what to do in such cases	103	14%	15%
I don't have the motivation	31	4%	5%
I don't trust authorities dealing with such cases	27	4%	4%
Because of my age/a health condition	12	2%	2%
I have no agency	7	1%	1%
It's meaningless	5	1%	1%
Other	15	2%	2%
Total	744	100%	

⁵⁶ Multiple choice question, 1,092 total valid responses received. Respondents provided 1 answer on average. 3% of respondents had difficulty answering this question

⁵⁷ Multiple choice question, 744 total responses received. Respondents provided 1.1 answers on average. 12% of respondents who were given this question had difficulty answering it

3.5 ETHICAL STANDARDS

Research Questions

Question 1: What is the level of satisfaction with the ethics of journalists for each media type?

Question 2: What is the level of knowledge related to the Media Ethics Observer body?

→ Question 1: What is the level of satisfaction with the ethics of journalists for each media type?

Important ethical standards: The respondents were asked to specify the ethical standards they believe journalists should follow. As the analysis reveals, **respect** is the most highly valued ethical standard, with 59% of respondents considering it crucial for journalists to adhere to. **Impartiality and integrity** are also considered essential, with 49% of respondents emphasizing their importance, followed by **independence**, which is valued by 21% of respondents. Lastly, transparency and accountability, along with the other listed standards, received lower importance ratings, with percentages ranging from 1% to 7%. (Table 21).

Table 21. What kind of ethical standards should journalists follow?⁵⁸
(*n=1,109*) (open-ended question, all possible answers accepted)

Ethical Standards	N	Percent of valid responses	Percent of respondents who provided valid answers
Respect	594	40%	59%
Impartiality and integrity	491	33%	49%
Independence	214	14%	21%
Transparency and accountability	69	5%	7%
Competent and well-spoken	52	3%	5%
Ability to listen, modesty, courtesy, respectful approach	26	2%	3%
Reporting correct information	17	1%	2%
Appearance and behavior appropriate to the screen	14	1%	1%
Professionalism	6	0%	1%
Development and literacy	6	0%	1%
Total	1,489	100%	

At the same time, respondents have been asked to specify the ethical standards that are most commonly violated in Armenian media. As the analysis shows, 60% of respondents believe that **respect** is the most commonly violated ethical standard in Armenian media, followed by **impartiality and integrity** (39%) and **independence** (20%). Some 11% of respondents feel that **transparency and accountability** are sometimes lacking in Armenian media, while other ethical standards such as lack of competence, inappropriate appearance and behavior during interviews, etc. were perceived as less commonly violated, with percentages ranging from 1% to 2% (Table 22).

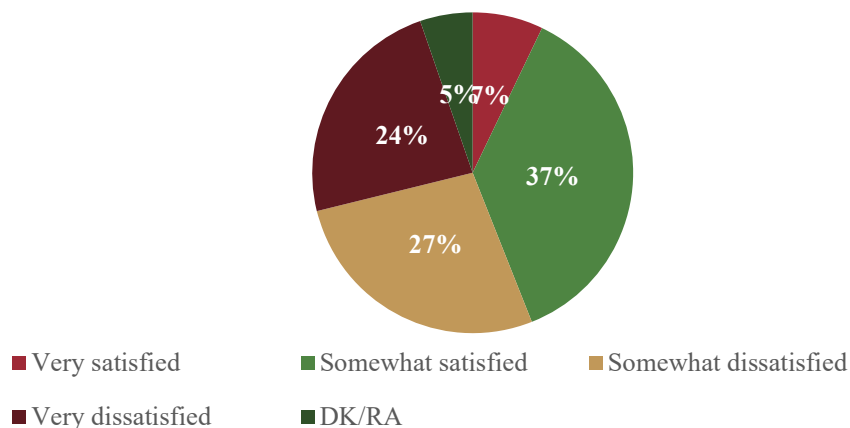
⁵⁸ Multiple choice question, 1,489 total responses received. Respondents provided 1.5 answers on average. 10% of respondents had difficulty answering this question or refused to answer it

Table 22. What kind of journalistic ethical standards are most often violated in Armenian media?⁵⁹
(n=1,109) (open-ended question, all possible answers accepted)

Ethical Standards	N	Percent of valid responses	Percent of respondents who provided valid answers
Respect	471	44%	60%
Impartiality and integrity	308	29%	39%
Independence	159	15%	20%
Transparency and accountability	90	8%	11%
Competence and articulateness	17	2%	2%
They ask provocative questions	12	1%	2%
They don't listen to the other person. Lack of restraint	8	1%	1%
Appearance and behavior are appropriate to the screen	6	1%	1%
The title does not match the content. They are spreading misinformation	5	0%	1%
Total	1,076	100%	

Users' level of satisfaction with ethics and professionalism: Furthermore, respondents were asked to assess their level of satisfaction with the ethics and professionalism of Armenian journalists. Overall, 44% of the respondents expressed satisfaction, with only 7% reporting being very satisfied, while 51% indicated dissatisfaction. Overall, 5% of respondents had difficulty answering this question (Figure 32).

Figure 32. How satisfied are you with the ethics and professionalism of Armenian journalists in general?
(n=1109, options presented to the respondents, one answer permitted)



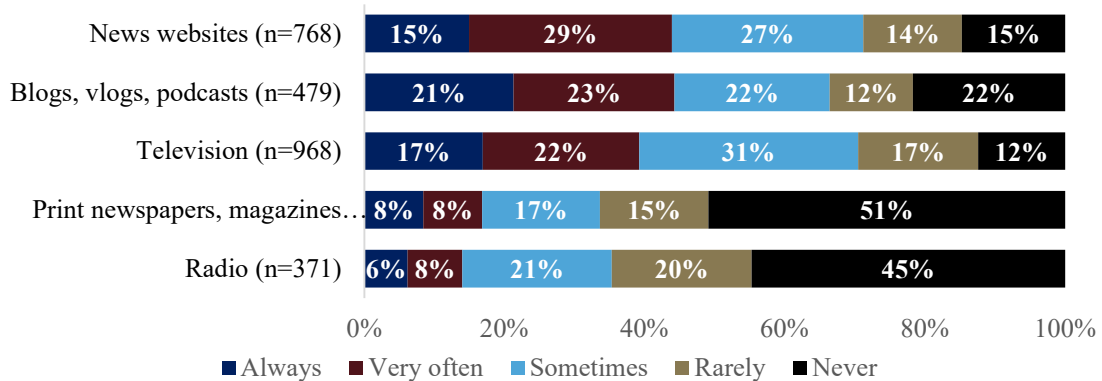
The analysis of confounding factors reveals that satisfaction levels with the ethics and professionalism of Armenian journalists vary among different **education groups** and **types of population centers** where respondents live. Respondents with secondary and high school education demonstrate the highest level of satisfaction at 52%, followed by those with vocational education at 48%. Respondents with higher levels of education (higher and postgraduate) display a slightly lower level of satisfaction, with 37%.

Similarly, respondents from rural areas exhibit the highest satisfaction at 56%, followed by those from urban areas at 47%. On the other hand, respondents from Yerevan, the capital city, have a slightly lower satisfaction rate at 37% (See Annex 2, Table 4).

⁵⁹ Multiple choice question, 1,076 total valid responses received. Respondents provided 1.4 answers on average. 26% of respondents had difficulty answering this question or refused to answer it

A significant portion of the respondents believe that **news websites and blogs, vlogs, and podcasts** frequently exhibit ethical norm violations (44%, with the “always” and “very often” options combined), followed by **television** (39%). A smaller proportion of respondents see ethical concerns in traditional print media (17%) and radio (14%) compared to the other types of media listed (Figure 33). A graph showing responses including the “difficult to answer” and “refuse to answer” options is presented in Figure 45 in Annex 6.

Figure 33. How often do you see ethical violations in the following types of media?
(Valid responses presented, options presented to the respondents, one answer received per bar)



Challenges in maintaining professionalism and ethical standards: Interviewed media experts understand professional activity first and foremost as protecting the public interest, stressing that only a journalist who complies with ethical standards instead of satisfying individual curiosity or political and economic interests protects the public interest. Hence, the ethical dimension of journalistic professionalism is directly linked to the protection of the public interest and media accountability. At the same time, the interviewees also indicate that as the media acts in the public interest, it is crucial not to abuse the power of the media and overstep boundaries.

The research participants present a mixed assessment of the level of professionalism among media practitioners. On the one hand, they acknowledge the presence of dedicated media practitioners who adhere to established professional and ethical standards. On the other hand, there are individuals in the field who may lack awareness of these standards or are compelled to act contrary to them due to the influence of market demands or their editorial policies.

I think the overall quality of media specialists is relatively low when we consider the average. High-quality journalists constitute a small percentage. A significant portion of those who identify themselves as editors lack even basic knowledge. There are also individuals who possess an understanding of sensationalism, recognizing that it can be exploited for financial gain or offered to certain political or economic entities for their own purposes. (KII with a media expert, Male)

We, old journalists, just like adults, often think about how journalism used to be more responsible in our time. The global reasons are the effects that have emerged as a result of navigating exceedingly challenging phases over the past five years. These phases have subtly molded the media landscape and shaped this particular approach (KII with a media representative, Female)

Research participants drew attention to the negative impact of market relations on media accountability and social responsibility, as nowadays everything depends on the media owner. The bias of journalists prevents them from being fully accountable to the public. As the research participants state, market relations and connections with political and government actors affect the activities of the media from the ethical standpoint. Violations of ethical standards named by interviewees may be categorized into several groups:

- Market impact (related to popularity or clickbait, satisfaction of audience’s curiosity)
- Competition
- Political, economic, and financial influence on the journalist’s work,
- Status and activities (many journalists have also become influencers in the public sphere on social networks).

➔ **Question 2: What is the level of knowledge related to the Media Ethics Observer body?**

As the comparative analysis shows, **the proportion of people who are aware of the Media Ethics Observatory Body has significantly increased**, from 4% in 2021 to 9% in 2023. Conversely, the proportion of people **willing to appeal to the same body if required did not change significantly**, remaining at 29% in 2021 and 27% in 2023 (Table 23).

Table 23. Awareness of the Media Ethics Observer Body and willingness to appeal to it⁶⁰

Indicator 1	2021 (n=1,204)	2023 (n=1,098)	Difference
The proportion of people who are aware of the Media Ethics Observatory	4%	9%	5% Chi-square=24.0 p<0.00
Indicator 2	2021 (1,164)	2023 (1,071)	Difference
The proportion of people who are willing to appeal to the Media Ethics Observatory if required	29%	27%	2% Chi-square=1.11 P = 0.29

Despite these positive developments, the vast majority of respondents (91%) are still not aware of the activity of the Media Ethics Observatory (Figure 34). After introducing them to the key function of the Media Ethics Observatory (MEO),⁶¹ the survey asked respondents whether they would be willing to send a complaint or appeal to the MEO if necessary. According to the results, **the majority of the surveyed individuals (71%) would not be willing to send a complaint or appeal** to the MEO if the situation required it (Figure 35).

⁶⁰ To conduct a meaningful comparison across two surveys’ data, only valid responses were calculated (excluding “difficult to answer” and “refuse to answer” options). % data is calculated among respondents who consume online news media. Overall, 22% of respondents had difficulty answering this question in survey conducted in 2023

⁶¹ Specifically, the following text was provided to the respondents: “The Media Ethics Observatory is authorized to review the actions and publications of media representatives and their compliance with the provisions of the present Code of Ethics, and it has the authority to investigate complaints about violations and to draw conclusions from the results of the investigation.”

Figure 34. Are you aware of the activity of the Media Ethics Observatory?

(n=1,109, options presented to the respondents, one answer permitted)⁶²

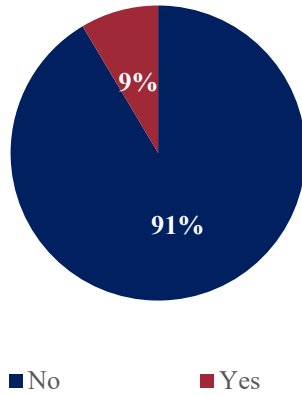
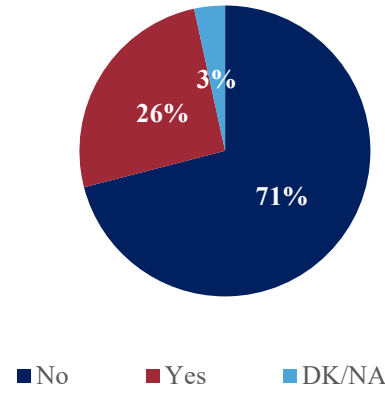


Figure 35. Would you be willing to send a complaint/appeal to the MEO if necessary?

(n=1,109, options presented to the respondents, one answer permitted)



This data illustrates the various reasons contributing to respondents' unwillingness to send complaints or applications to the Media Ethics Observatory. These reasons include disinterest (45% of the surveyed population who are not willing to appeal to the MEO if needed), skepticism about the effectiveness of the process (27%), lack of time or knowledge (16% and 5%, respectively), distrust (7%), personal disposition, or a preference to handle problems independently.

Table 24. The reasons people are not willing to send a complaint/appeal to the MEO if necessary?

(n=787, open-ended question, all possible answers accepted)⁶³

Reasons people are not willing to appeal to MEO	N	Percent of responses	Percent of Cases (among those who are not willing to appeal to MEO)
I am not interested	332	42%	45%
I don't think that if I appeal, it will bring change	200	25%	27%
I don't have time	116	15%	16%
I don't trust them	55	7%	7%
I don't know how to appeal	39	5%	5%
I am not a complainer	25	3%	3%
Too much of a hassle	9	1%	1%
Because of my age and health problems	8	1%	1%
I solve my own problems	2	0%	0%
Total	786	100%	

Similarly to the quantitative survey, only a limited number of journalists and NGO representatives who participated in the focus group discussions are familiar with the **Media Ethics Observer body**. Among the experts, while many are aware of the body's existence, not all are very familiar with its operations.

For those who are knowledgeable about the body's activities, their assessment is generally moderate. They express the following viewpoints:

1. The body's influence and participation within the media sphere is low.

⁶² 1% of total respondents had difficulty answering this question

⁶³ Multiple choice question, 786 total responses received. Respondents provided 1 answer on average. 5% of respondents who are not willing to send a complaint/appeal to the MEO had difficulty answering this question

2. The awareness among both the media industry and the public is low. Experts note that these groups lack familiarity with the body's functions and activities. This lack of awareness is attributed to the body's status as a self-formed and self-regulated entity, lacking significant financial resources to undertake substantial efforts. Resolving funding challenges for the members would likely improve the body's appeal. However, some believe that the body's limited visibility might be due to a lack of active engagement.
3. There is a perception that the body's decisions lack legal grounding and hold only advisory weight.

3.6 PERCEPTIONS OF FREEDOM OF EXPRESSION (FoE)

Research Questions

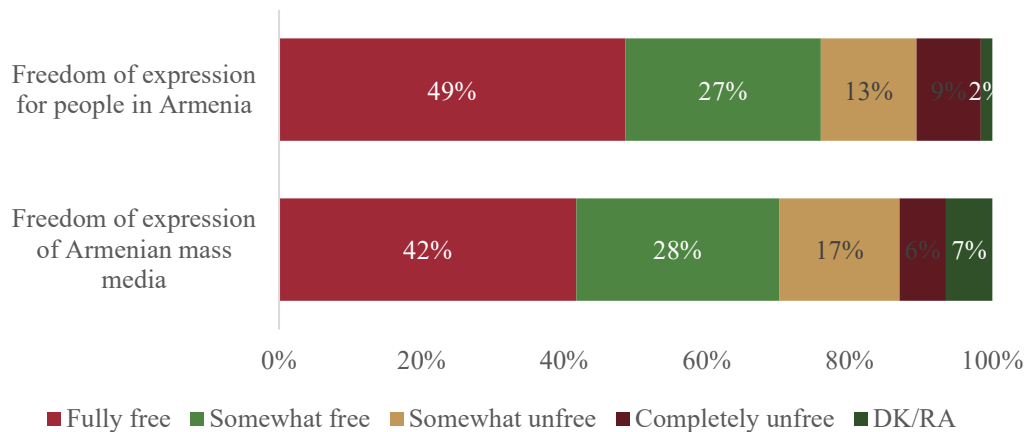
- Question 1: What is the perceived level of freedom of expression (FoE) in Armenia?
- Question 2: Are there differences in the level of FoE for different social groups and topics?
- Question 3: What is the perceived level of FoE for media in Armenia?

→ Question 1: What is the perceived level of FoE in Armenia for citizens in general and for online and public spaces separately?

FoE in general public and media: The data suggests that a considerable portion of respondents view Armenia as a country with a high level of freedom of expression both for people (76%, for “fully free” and “somewhat free” combined) and for media (70%, for “fully free” and “somewhat free” combined). However, a significant minority also expressed concerns about the limitations on freedom of expression, with 13% indicating that it is somewhat unfree and 9% stating that it is completely unfree for people, and 17% stating that it is somewhat unfree and 6% indicating that it is completely unfree for media (Figure 36).

Figure 36. How would you rate the level of freedom of expression for people in Armenia and freedom of expression of Armenian media

(n=1,109, options presented to the respondents, one answer accepted per bar)



An analysis of the assessment of freedom of expression for Armenians with respect to confounding factors revealed a significant difference based on the economic status of the respondents. As indicated by the analysis, respondents with higher economic status tend to perceive levels of freedom of expression for Armenians as higher compared to those with lower economic status. Specifically, 44% of respondents with low economic status believe that a certain level of freedom of expression exists for Armenians, whereas this belief is held by 49% of respondents with middle economic status and 55% of respondents with high economic status. (See Annex 2, Table 5)

The assessment of freedom of expression for Armenian media differs according to the gender and area of residence of the respondents. Namely, female respondents tend to perceive a higher level of freedom of expression for Armenian media (47%) compared to male respondents (40%). Respondents from rural areas tend to have the highest perception of freedom of expression for Armenian media (49%), followed by urban areas (46%). Respondents from Yerevan have the lowest perceived level of freedom of expression for media (39%) (See Annex 2, Table 6).

FoE among the general public: In line with the quantitative data, both the participants of the focus group discussions and the experts share the belief that freedom of expression in RA is currently at a relatively high level. They attribute this in part to the role played by social media platforms. Freedom of expression on social media has both benefits and drawbacks, according to the research participants.

Thus, according to them, FoE is exercised in social media to an enormous extent. They also state that social media has made information sharing across boundaries in real-time possible. FoE is exercised to a greater extent on all social media platforms. The respondents also highlighted that sometimes issues which cannot be covered by mainstream media in a timely manner can be reported on social media.

Moreover, the findings of this study indicate that people are currently well-informed and proactive in terms of their right to free speech. They use social networking sites, social groups, and various social mediums to raise obscure issues to draw the attention of others.

However, it was also found in this research that the notion of freedom of expression is sometimes misused by the people. It was shared by most of the participants that people are using FoE for the sake of their own interest and neglecting its actual purpose, incorporating offensive and hateful language. On the one hand, there is recognition that individuals should possess the freedom of expressing their opinions in cyberspace. On the other hand, there is an acknowledgment of the need to regulate social media activity to a certain extent, aiming to maintain social harmony among individuals and communities.

*We equate FoE with hate speech and insult, which is disturbing. The citizen thinks that commenting is FoE, and he/she resorts to hate speech and insults. We don't have a problem with FoE, but with understanding what FoE is.
(FGD with regional media representatives, Female)*

*In General, there is FoE, but the problems may lie in the fact that there is also a problem of valuing FoE.
(FGD with CSO representatives, Male)*

*The speech is so free that its value has diminished. There was a time when freedom of speech was limited, yet that speech held significance. With numerous speakers now, the value is declining
(KII with a media expert, Male)*

FoE in Media: Regarding the media sector, qualitative research participants acknowledge the presence of Freedom of Expression but do not perceive complete freedom of the media, mainly due to financial and ideological dependencies. Drawing a comparison between the pre-revolutionary and post-revolutionary eras, participants observe a relative reduction in pressure on journalists. However, a degree of tension persists, particularly when journalists cover subjects related to foreign policy and security matters.

Having worked in the field for many years, I can confirm that now our freedom of expression is relatively higher, especially when compared to the surrounding regions. However, addressing the current tense situation, I believe that the government's efforts to curtail expressions have become somewhat excessive. There seems to be heightened sensitivity to public discourse. (KII with a media representative, Female)

During the war, the FoE was quite limited. At first, information came only from official sources, and all media spread the official. I'm not saying it's wrong, but after that, anyone can say what they want (KII with a media representative, Female)

In discussions about self-censorship within the journalism community, media representatives engaged in the research assert that they personally do not experience self-censorship and feel free to address any topic. However, when assessing other media outlets, they highlight that self-censorship at both the editorial and journalistic levels is contingent on the economic and political orientation of the respective media, as well as financial considerations.

Nevertheless, research participants emphasize that numerous media outlets may opt to avoid covering certain subjects to sidestep potential waves of public unrest. These topics include views on the Artsakh issue (often focusing on objective facts rather than proposing solutions or expressing stances), matters related to national security, and subjects concerning sexual minorities.

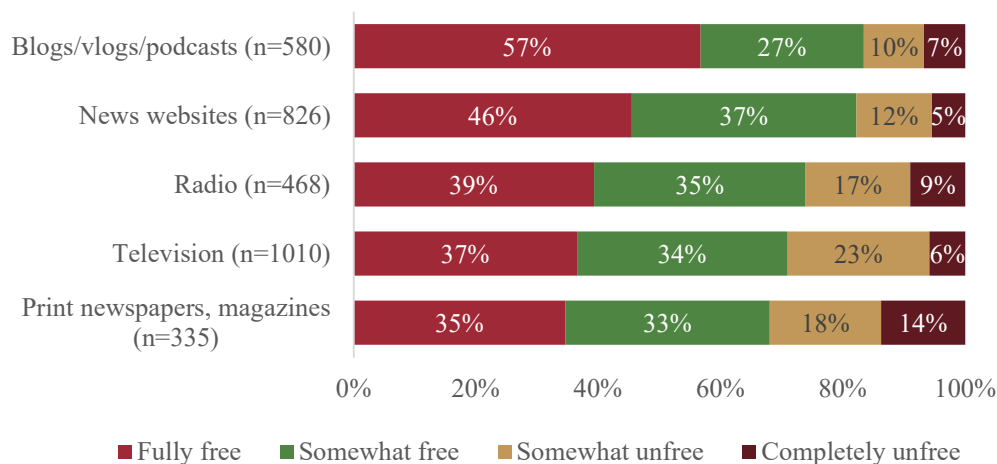
In certain instances, research participants mention that they exercise restraint in liking statuses, comments, or posts, as well as in leaving comments and expressing opinions on social networks. They do so with the intention of upholding journalistic neutrality.

I cannot give a general answer, but in the case of our editorial office, we do not have any problems with self-censorship or internal editorial censorship. But I guess in case of other media outlets it might exist.
(KII with a media representative, Male)

I don't click the like button under any material to maintain neutrality.
(FGD with regional media representatives, Female)

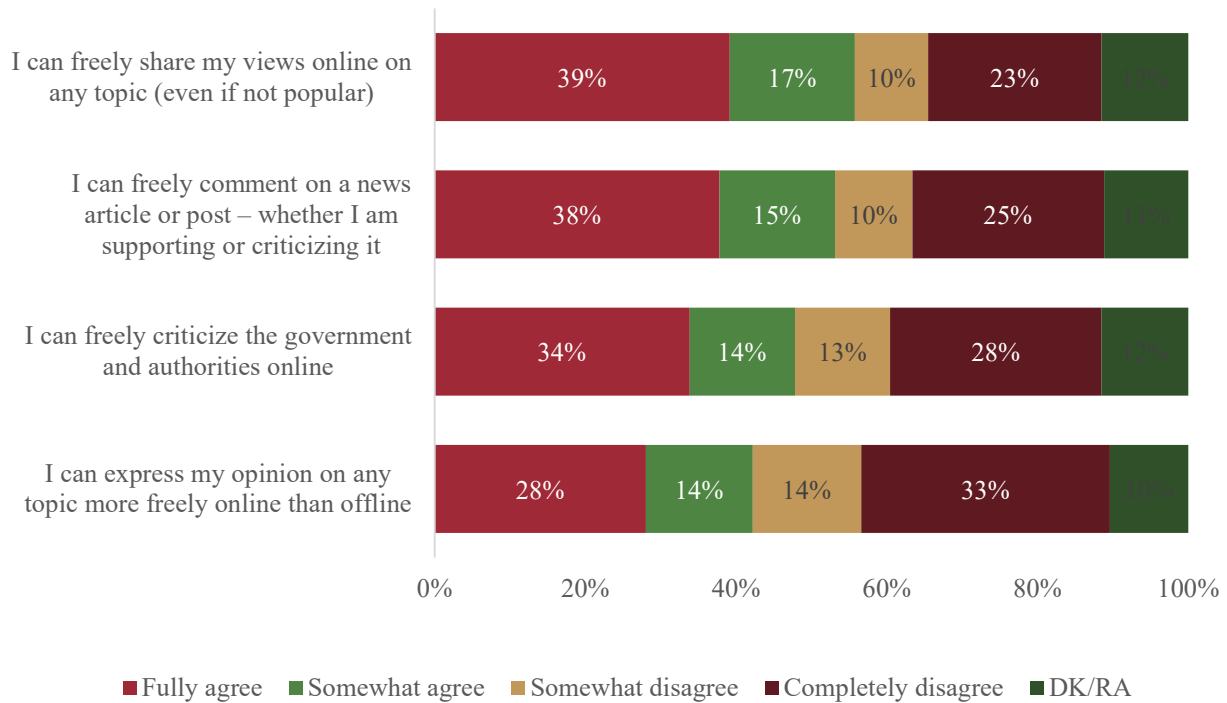
FoE in various types of Armenian media: According to the respondents, blogs/vlogs/podcasts and news websites are perceived as having the highest levels of freedom of expression among the listed types of Armenian media, with 83% and 82% respectively (combining responses for “fully free” or “somewhat free”). In contrast, radio and television are perceived as having slightly lower levels of freedom of expression, at 74% and 71%, respectively. Print newspapers and magazines have the lowest perceived level of freedom of expression among the respondents, at 68%. (Figure 37). A graph presenting responses with “difficult to answer” and “refuse to answer” options is presented in Figure 46 in Annex 7.

Figure 37. How would you rate the level of freedom of expression in the following types of Armenian media?
(Options presented to the respondents, one answer accepted per bar)



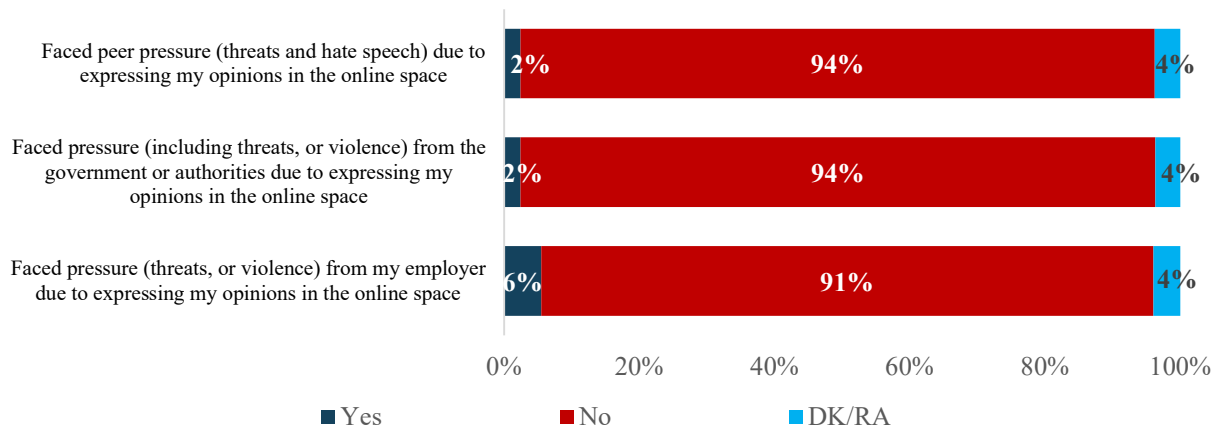
Freedom of expression in digital spaces: Overall, the majority of respondents (56%) feel that they have the freedom to express their opinions online, regardless of the popularity of those opinions (“fully agree” and “somewhat agree” combined). An additional 53% of respondents feel they are able to comment on news articles or posts and express their opinions, regardless of whether they are supportive or critical. More than half of the respondents (48%) believe they have the freedom to criticize the government and authorities online and less than half (42%) feel that they can express their opinions more freely on any topic online compared to offline. From 10% to 12% of the respondents had difficulty expressing agreement or disagreement with the abovementioned statements (Figure 38).

Figure 38. To what extent do you agree or disagree with the following statements?
(n=1,109, options presented to the respondents, one answer accepted per bar)



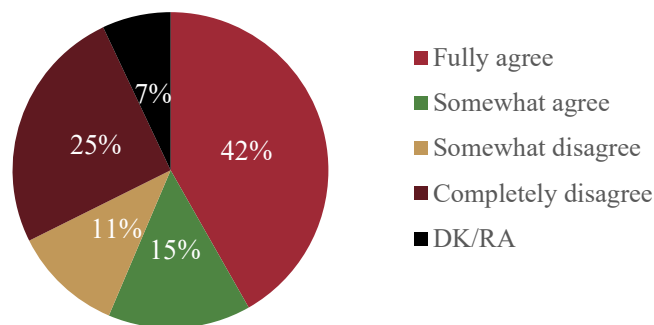
Overall, 6% of respondents have experienced peer pressure, including threats and hate speech, specifically due to expressing their opinions in the online space. Similarly, 2% of respondents have experienced pressure, such as threats or violence, from the government or authorities, and another 2% of respondents reported facing pressure from their employers specifically due to expressing their opinions in the online space. For each category, 4% of respondents had difficulty answering or refused to answer the question (Figure 39).

Figure 39. Have you ever experienced pressure (including threats, hate speech, or violence)?
(n=1,109, options presented to the respondents, one answer accepted per bar)



Freedom of expression in public spaces: As the data suggests, there is a mixture of opinions about the freedom to attend peaceful protests and organized events in public spaces in Armenia, with a notable percentage of respondents expressing doubts about this freedom. Namely, 42% of respondents fully agree and 15% somewhat agree that they can freely attend peaceful protests or organized events. However, 25% strongly believe and 11% somewhat believe that they cannot freely attend such events without limitations. Overall, 7% of respondents had difficulty answering this question (Figure 40).

Figure 40. I can freely attend a peaceful protest or organized political or other type of event
(n=1,109, options presented to the respondents, one answer accepted)



As analysis by confounding factors shows, there are varying levels of agreement regarding the extent to which individuals in Armenia feel they can freely exercise their freedom of expression in public spaces **depending on their economic status**. Individuals in the lower income group are less inclined to believe that they can freely exercise their freedom of expression in public spaces (52%) compared to those from the middle (64%) and high (67%) income groups (See Annex 2, Table 7).

➔ **Question 2: Are there differences in the level of FoE for different social groups and topics?**

FoE for different social groups: According to the respondents, various social groups are perceived to have differing levels of freedom of expression. Families with low income were the group most commonly mentioned as having relatively less freedom of expression (23% of total respondents). The elderly (12%), people living in remote or bordering regions (12%), and disabled individuals (11%) were also perceived to have less freedom of expression (Table 25).

Table 25. Which groups have comparably less freedom of expression?
(n=1,109) (The list of groups was provided to the respondent, up to 3 answers permitted)⁶⁴

Social Groups	N	Percent of valid responses	Percent of respondents
Low-income families	225	17%	23%
Elderly	116	9%	12%
People living in the remote or border regions	116	9%	12%
People with disabilities	104	8%	11%
The LGBT community	63	5%	6%
Women	51	4%	5%
Children	50	4%	5%
Religious minorities	49	4%	5%
Refugees	36	3%	4%
National minorities	33	2%	3%
Youth	29	2%	3%
Employees of state bodies	19	1%	2%
Opposition	14	1%	1%
Men	8	1%	1%
Intellectuals	8	1%	1%
Media representatives/Journalists	7	1%	1%
Parents of fallen soldiers	6	0%	1%
Politicians	6	0%	1%
All	45	3%	5%
Other	17	1%	2%
None of the above	345	25%	35%
Total	1,347	100%	

The qualitative data echoes the quantitative findings, as the KII and FGD participants also believe that people in financial need, the elderly, and people from border and remote communities have relatively less freedom of speech. At the same time, most respondents believe that this is not connected to targeted limitations, but rather to the fact that the elderly have less ability to raise their voice in online platforms, that socially vulnerable groups have various pressing needs and are not that interested in sharing their views, and that people know each other in remote rural areas and prefer to keep their opinions to themselves so as not to create public arguments among peers.

*Socially vulnerable people are passive in everything, including in expressing their opinions. They believe that because they have limited resources, no one will listen to them. They have a number of difficulties and prefer dealing with those, rather than sharing their views.
 (FGD with marginalized social group representatives, Female)*

⁶⁴ Multiple choice question, 1,347 total valid responses received. Respondents provided 1.4 answers on average. Overall 12% of respondents had difficulty answering this question

➔ **Question 3: What is the perceived level of FoE for media in Armenia?**

Methodological note: A composite score for the level of freedom of expression in digital space was calculated by processing the answers to the following questions:

1. I can freely comment on a news article or post, whether I am supporting or criticizing it
2. I can freely share my views online on any topic (even if they are not popular)
3. I can freely criticize the government and authorities online
4. I faced pressure (including threats, or violence) from the government or authorities due to expressing my opinions in the online space
5. I faced peer pressure including (threats and hate speech) due to expressing my opinions in the online space
6. I faced harassment (pressure, threats, or violence) from my employer due to expressing my opinions in the online space

Questions 1, 2, and 3 were assessed using the following scale: fully agree = 3, somewhat agree = 2, somewhat disagree = 1, completely disagree = 0. Questions 4, 5, and 6 were assessed as binary variables (0 = yes, 1 = no). The final composite score was calculated as a sum of these figures and ranges from 0 to 11. Final scores of 8-11 represent a high level of FoE (Freedom of Expression), scores of 4-7 indicate an average level of FoE, and scores of 0-3 suggest a low level of FoE.

The level of freedom of expression in digital space: Table 26 presents the distribution of a composite score for the level of freedom of expression in the digital space as categorized into three groups: low, average, and high. 55% of respondents’ perceptions produced a composite score that falls into the "high" category. A smaller portion (23%) perceive an average level of FoE in the digital space, and 22% of respondents’ perceptions resulted in a composite score that falls into the "low" category.

Table 26. A composite score for the level of freedom of expression in digital space (n=947)

Low Score: 0-3	Average Score: 4-7	High Score: 8-11
22%	23%	55%

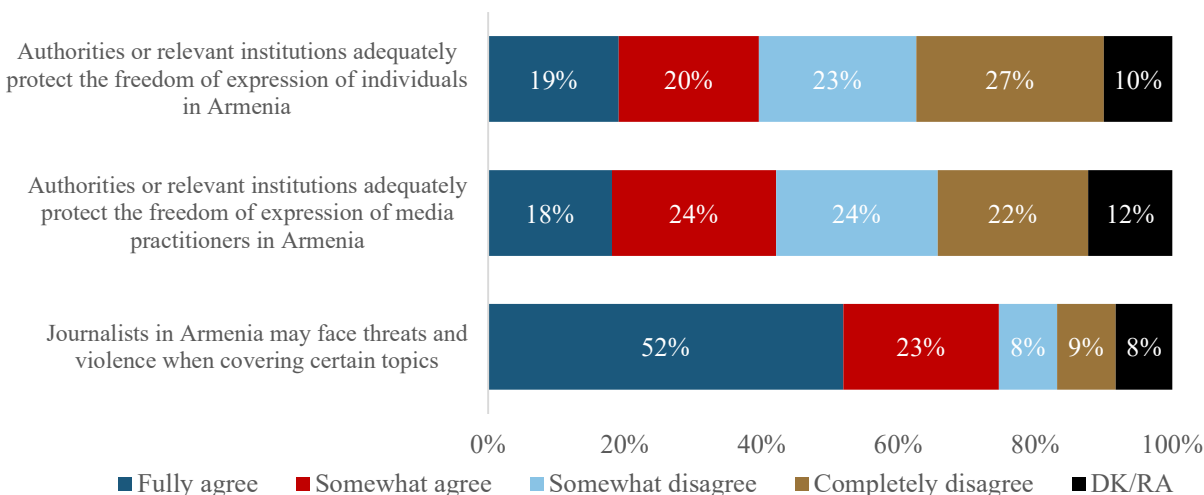
The analysis of the composite score across confounding factors reveals statistically significant differences based on the **economic status, age group, and education of respondents**. Specifically, respondents with a high economic status displayed the highest percentage perceiving a “high” level of freedom of expression (65%), followed by those with “middle” and “low” economic statuses, with percentages of 59% and 40%, respectively. This indicates a trend in which a higher economic status is associated with a relatively greater level of freedom of expression in the digital space. Similarly, the perception of freedom of expression in the digital space is negatively correlated with the age of the respondents. It is notably high among respondents aged 18 to 35 (70%) in comparison to those aged 36 to 55 (56%) and 56 and older (42%). Respondents with a secondary, high school, and vocational education exhibit a similar level of perception of freedom of expression in the digital space, at 50% and 46%, respectively. Conversely, this perception is highest among respondents with a higher and postgraduate educational background, at 68% (See Annex 2, Table 8).

➔ **Question 4: What is the level of protection for FoE?**

Protection of FoE: Only 39% of respondents agree that the authorities or relevant institutions adequately protect the freedom of expression of individuals in Armenia (“fully agree” and “somewhat agree” combined)

and 42% agree that authorities or relevant institutions adequately protect the freedom of expression of media practitioners in Armenia. A notable 75% of respondents believe that journalists in Armenia may face threats and violence when covering certain topics. This high percentage indicates a widespread belief that journalists in the country encounter challenges and risks when reporting on specific subjects. Overall, 8%-12% of respondents had difficulty expressing an opinion on the relevant statements (Figure 41).

Figure 41. To what extent do you agree or disagree with the following statements
(n=1,109, options presented to the respondents, one answer accepted per bar)



Analysis by confounding factors reveals a difference in perception regarding the extent to which authorities or relevant institutions adequately protect the freedom of expression of media practitioners in Armenia based on gender and economic status. A higher percentage of males (55%) agree that the protection of freedom of expression for media practitioners is adequate, compared to females (44%). Individuals with low economic status are the least likely to agree that authorities or relevant institutions adequately protect the freedom of expression of media practitioners (39%). Those with middle and high economic status are more likely to agree with the statement, 49% and 57%, respectively. As the data suggests, as economic status increases, there is a trend of increasing agreement that authorities or relevant institutions are adequately protecting the freedom of expression of media practitioners in Armenia (See Annex 2, Table 9).

The perception that journalists face threats and violence when covering certain topics is relatively consistent across age groups, with a slightly higher level of agreement with the relevant statement among individuals aged 36 to 55 (86%) and 18 to 35 (85%). Individuals aged 56 and older have a slightly lower level of agreement (76%), indicating that they are somewhat less likely to believe that journalists face threats and violence when covering certain topics compared to the younger age groups (See Annex 2, Table 10).

During qualitative interviews and group discussion, the participants were able to recall only a limited number of instances involving threats and pressure against journalists. Generally, these cases are not perceived as widespread today, and when they do occur, they often remain under wraps. Two primary reasons are commonly cited for the non-disclosure of such cases:

1. **Complexity of Proof:** Participants note that it can be challenging to establish legal evidence of pressure or threats. Proving such instances can be legally complex.
2. **Authority and Influence:** Individuals who exert pressure and threats are often influential figures with substantial authority. Consequently, journalists may find it difficult to confront such individuals openly.

A significant portion of respondents are familiar with the operations of **the Committee to Protect Freedom of Expression (CPFE) and Freedom of Information Center of Armenia**. These organizations have been

active in the field for several years. However, it is challenging to comprehensively evaluate their activities, as their visibility is mostly limited to their published reports. The organizations' stated objectives are generally regarded favorably. Nevertheless, there is a certain level of skepticism concerning the potential for these organizations to operate without bias.

Hate speech: The data indicates that the majority of respondents (with 84% selecting the “fully agree” and “somewhat agree” options combined) view hate speech as a significant problem in Armenia (Figure 42). The data also indicates that a significant majority of respondents (with 68% choosing the “always” and “very often” options combined) frequently witness hate speech in digital or civic spaces (Figure 43). This highlights the prevalence of hate speech in online and offline discussions, which can have negative effects on individuals and communities.

Figure 42. To what extent do you agree or disagree with the following statement? “Hate speech is a significant problem in Armenia”

(n=1,109, options presented to the respondents, one answer accepted)

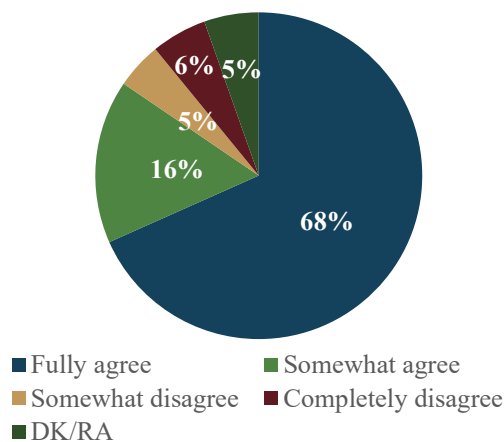
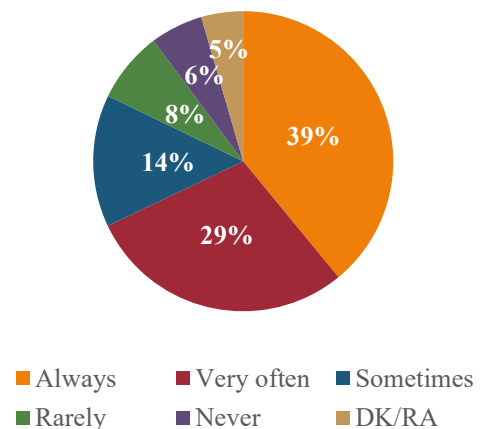


Figure 43. How often do you witness hate speech in digital or civic spaces?

(n=1,109, options presented to the respondents, one answer accepted)



The analysis of the assessment of hate speech as a significant problem by confounding factors reveals a statistically significant difference by age and population center type. Namely, hate speech is perceived as a more significant problem in Armenia among older age groups (76% and 75% “fully agree” among respondents aged 36 to 55 and 56 and older, respectively) compared to younger ones (64%). As for population center type, individuals in Yerevan are more likely to perceive hate speech as a significant problem (79%) compared to those in rural (71%) and urban (65%) areas. Additionally, rural areas show a higher level of agreement than urban areas, indicating a relatively higher level of concern about hate speech in those regions (See Annex 2, Table 11).

In terms of the spread of hate speech, individuals in Yerevan are more likely to witness hate speech in digital or civic spaces (81% “always” or “very often” witness hate speech) compared to those in urban (67%) and rural (64%) areas. Rural areas show the lowest frequency of witnessing hate speech in such spaces (See Annex 2, Table 12).

4. CONCLUSIONS AND RECOMMENDATIONS

In this section, the research team presents its key conclusions and recommendations based on both quantitative and qualitative key findings:

The main conclusions are as follows, presented by key research domain:

Media consumption

- The study revealed that TV channels remain the main media source for general consumption. However, the shift from traditional sources to internet-based sources continues when it comes to consuming political and social news. The comparison of these research findings with the 2021 “Media Consumption and Media Coverage of Reforms in Armenia” report⁶⁵ specifically shows that consumption of information/news from internet resources and social networks has grown from 67% in 2021 to 75% in 2023, while for television, it has declined from 59% in 2021 to 56% in 2023.
- Another identified trend is the growing role of social networks in accessing news websites: in 2023, 88% of respondents report accessing news websites not directly, but rather via social networks compared to 76% in 2021.
- With regard to the popularity of channels by media type, Armenia TV is the most popular among the television channels, followed by the Shant TV and 1st Public TV channels. In terms of news websites, Azatutyun.am and News.am continue to be most consumed sites in Armenia over the last few years.
- Messaging platforms like WhatsApp and Viber groups, as well as YouTube and Facebook, are the most used social networks, indicating their popularity for news consumption. Meanwhile, Facebook is the most popular platform for sharing news, indicating its role in disseminating information.
- The growing role of social networks as an information source has a wide-ranging impact on the quality and nature of content production. On the one hand, it is an alternative and agile source of information. On the other, it can serve as a major source of disinformation.

Trust in media

- The level of trust towards media in Armenia is rather low: only half of the population finds the news delivered by media to be trustworthy. The qualitative data indicate that the reasons for insufficient trust towards media are related to: a) the lack of financial independence of media outlets, b) the polarization of the political ideologies of consumers, c) citizen journalism on social media platforms, d) overall low levels of literacy, and e) mistrust towards official information, especially after the 2020 war.
- As for trust by media type, Public Radio has the most among radio stations, Armenia TV among television channels, and Facebook among social networks.
- Only 17% of the surveyed respondents expressed willingness to pay/subscribe for credible news, the majority of whom are willing to pay up to 2,000 AMD per month. This group of respondents has grown slightly compared to 2021, when only 13% were willing to pay.
- Older generations show more trust in state media, while younger generations demonstrate trust towards online platforms.
- Building trust requires reshaping norms, promoting media literacy, and enhancing transparency and content quality. Regional disparities and platform-specific trust patterns are also notable trends.

Consumer needs and demands

⁶⁵ “Media Consumption and Media Coverage of Reforms in Armenia,” CRRC-Armenia and Media Initiatives Center, October 2021

- Health and well-being, education, and security are the most important topics to respondents, with security, education, politics, social issues, and health noted as domains where more coverage is needed.

Media Literacy

- Both the qualitative and quantitative data indicate a rather low level of media literacy among the general population. An assessment of media literacy related skills showed that, in general, less than 40% of respondents has at least one of the 3 key skills measured.
- There is widespread need for improved media literacy among the population. However, the lack of sufficient media literacy manifests differently among different groups. The older population appear to be easy victims of disinformation and may have difficulties with cross-checking information due to a lack of relevant technical skills. In turn, younger people are generally apolitical and often lack up-to-date skills needed to double-check the information they consume online. Rural people and those from lower income groups are also seen to have lower media literacy, making them easier targets of informative manipulations.

Professionalism and ethical standards

- Although ethical standards like respect, impartiality, integrity, and independence are highly valued by the respondents, they perceive these standards as commonly violated among Armenian media. Violations are often attributed to market impact, competition, political and economic influence, and journalists' role as influencers.
- Awareness of the Media Ethics Observatory Body (MEO) has increased from 4% in 2021 to 9% in 2023, but willingness to appeal to the MEO remains relatively low at 27% in 2023.
- Media practitioners consider the ethical aspects of professional journalism to be crucial for the implementation of the role of the media as a defender of the public interest and are significant for media accountability and social responsibility. These ethical aspects include objectivity, impartiality, and plurality of opinion. All aspects are closely linked to the financial independence of the media practitioners.
- While some experts recognize the Media Ethics Observer body and acknowledge its potential, there are concerns about its power to influence, funding sustainability, and level of authority.

Freedom of expression

- The study concludes that there is rather high level of FoE both among the population and among media outlets.
- This study reveals that people feel more comfortable sharing their problems and experiences online. Social media is widely utilized to by individuals to make their voices heard. At the same time, unregulated freedom of speech within the strongly polarized society has resulted in the unprecedented spread of hate speech and insults.
- While instances of threats and pressure against journalists appear infrequent, their non-disclosure is attributed to difficulties establishing evidence of the incidents and in challenging the influential authorities behind the threats.
- The data implies that a relatively small fraction of respondents have encountered various forms of pressure and negative consequences for expressing their opinions in the online space. These pressures can come from peers, the government/authorities, and employers. While the majority of respondents may not have experienced such pressures, the data shows that some individuals do face challenges and potential risks when expressing their views in the digital realm.
- While there may be concerns about the adequacy of protection of freedom of expression for both individuals and media practitioners in Armenia, there is a significant consensus that journalists may face threats and violence when covering certain topics.

- A significant majority of respondents view hate speech as a significant problem in Armenia and frequently witness hate speech in the digital or civic spaces. This highlights the prevalence of hate speech in online and offline discussions, which can have negative effects on individuals and communities.

Key recommendations for the Project are as follows:

- **Promote Media Literacy and Ethical Standards:** Develop comprehensive media literacy programs that target different age groups and socio-economic backgrounds. These programs should focus on critical thinking, fact-checking, and discerning reliable sources of information, particularly for online content. The Project may also collaborate with educational institutions to incorporate media literacy and digital literacy courses into curricula. Collaborate with journalism associations and media outlets to promote responsible and ethical journalism practices. Encourage accurate reporting, diverse viewpoints, and transparency in news coverage.
- **Enhance Online Content Quality:** Encourage content creators on digital platforms to adhere to ethical standards as well as fact-checking and responsible journalism practices. Consider partnerships with reputable organizations to provide training and guidelines for content creators.
- **Support Fact-Checking Initiatives:** Invest in fact-checking organizations or initiatives that can independently verify the accuracy of news stories and combat misinformation. Promote their findings through accessible channels to raise awareness. Raise awareness about online fact-checking tools and resources. Encourage individuals to use these tools to verify information before sharing it on social networks.
- **Media Diversity and Transparency:** Encourage the diversity of media sources and viewpoints. Support initiatives that promote transparency in media ownership and funding to ensure that audiences are aware of potential biases.
- **Promoting Media Ethics Observatory Body (MEO):** Further increased awareness of the MEO through public awareness campaigns, emphasizing its role in ensuring ethical standards and media accountability. Address the reasons for the reluctance to submit complaints to the MEO by providing clearer information about its processes, effectiveness, and outcomes.
- **Continuous Research and Monitoring:** Regularly conduct surveys and research to monitor changes in media consumption habits, sources of information, and trends in media literacy. This information can guide the development of targeted interventions.

ANNEXES

ANNEX 1: INCEPTION REPORT, INCLUDING RESEARCH TOOLS



FoE and MC
Research Inception |

ANNEX 2: TABLES ON CONFOUNDING FACTOR ANALYSIS



Annex 2.

ANNEX 3: LIST OF STUDIES ON MEDIA SITUATION IN ARMENIA



Annex 3. LIST OF
STUDIES ON MEDIA

ANNEX 4: POPULAR MEDIA SOURCES BY MEDIA TYPE



Annex 4.

ANNEX 5: COMPLETE LIST OF MOST TRUSTED RADIO STATIONS



Annex 5.

ANNEX 6: GRAPHS PRESENTING DATA INCLUDING DIFFICULT TO ANSWER AND REFUSE TO ANSWER OPTIONS



Annex 6. GRAPHS
PRESENTING DATA IN

ANNEX 7: LIST OF ALL REPORT TABLES WITH DISAGGREGATED DATA



ANNEX 7.

ANNEX 8: LIST OF KII AND FGD PARTICIPANTS



ANNEX 8