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RESEARCH AND ANALYSIS

FREEDOM OF EXPRESSION AND MEDIA CONSUMPTION RESEARCH IN ARMENIA

August 2024

DISCLAIMER

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Except as acknowledged by the references in this paper to other authors and publications, the contents described in this Report consist of the work of Prisma LLC.

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Prisma LLC

Yerevan, 2024

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ABBREVIATIONS

AMD	Armenian Dram
CAPI	Computer Assisted Personal Interview
CRRC	Caucasus Research Resource Centre
FGD	Focus Group Discussion
FoE	Freedom of Expression
HH	Household
MIC	Media Initiatives Center
MEO	Media Ethics Observatory
PSU	Primary Sampling Unit
RA	Republic of Armenia
USAID	United States Agency for International Development

EXECUTIVE SUMMARY

The **Media Consumption and Freedom of Expression Annual Research** in Armenia is 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 **1,106** respondents aged 18 years old and older, and b) **8 focus group discussions (FGDs)** with men, women, youth as well as urban and rural population.






KEY FINDINGS







The study included the following 6 main domains related to media consumption and freedom of expression, and the **key results** of the research are presented below by domain.

Media Consumption and Habits of Consumers	Trust in Media	Consumer Needs and Demands	Media Literacy	Ethical Standards	Perceptions of Freedom of Expression
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Table 1. Summary table of key dimensions measured for 2023 and 2024

Key Figures		2023	2024
MEDIA CONSUMPTION AND HABITS OF CONSUMERS			
	Popular media sources for getting social and political news	Social networks (58%) Television (56%)	Social networks (62%) Television (45%)
	Percentage of respondents sharing news on social network	9%	8%
TRUST IN MEDIA			
	Percentage of respondents who find news presented by Armenian media trustworthy	49%	53%
	Percentage of respondents who are willing to pay for Armenian media for getting quality content	17%	24%
CONSUMER NEEDS AND DEMANDS			
	Percentage of respondents who are satisfied with the coverage of topics in the media that are important to them	56%	66%
MEDIA LITERACY			
	Percentage of respondents who have the ability to separate facts from opinions and identify manipulative media strategies	39%	31%
	Percentage of respondents who have the ability to recognize and fact-check suspicious information	18%	18%
	Percentage of respondents who have the ability to create media content	15%	15%
ETHICAL STANDARDS			
	Percentage of respondents who are satisfied with the ethics and professionalism of Armenian journalists in general	44%	44%

	Percentage of respondents who are aware of the Media Ethics Observatory	9%	15%
PERCEPTIONS OF FREEDOM OF EXPRESSION			
	Percentage of respondents who view freedom of expression for people in Armenia as free	76%	75%
	Percentage of respondents who view freedom of expression for Armenian media as free	70%	72%
	Percentage of respondents who completely disagree that they can freely attend a peaceful protest, or organized political or other type of event	25%	40%
	Percentage of respondents who agree that “Hate speech is a significant problem in Armenia”	84%	80%

Key Figures		2023	2024
Most Consumed			
	Top 5 most consumed TV channels	Armenia TV (57%)	Armenia TV (66%)
		Shant TV (43%)	Shant TV (50%)
		First Channel (37%)	First Channel (45%)
		Russian channels (18%)	Russian channels (18%)
		Kentron TV (12%)	Kentron TV (12%)
	Top 5 most consumed radio stations	Public Radio (8%)	Radio Aurora (17%)
		Radio Jan (5%)	Public Radio (17%)
		FM 105.5 (4%)	Radio Jan (14%)
		Radio Aurora (3%)	FM 105.5 (9%)
		Radio Van (2%)	Radio Hay (7%)
	Top 5 most consumed news websites	Azatutyun.am (22%)	Azatutyun.am (17%)
		News.am (12%)	1in.am (13%)
		1in.am (9%)	News.am (10%)
		Panorama.am (6%)	Lurer.com (7%)
		Aravot.am (6%)	168.com (5%)
Most trusted			
	Top 5 most trusted TV channels	Armenia TV (32%)	Armenia TV (53%)
		Shant TV (26%)	First Channel (42%)
		First Channel (25%)	Shant TV (38%)
		First Channel News (4%)	5TV Channel (8%)
		Kentron TV (3%)	Kentron TV (6%)
	Top 5 most trusted radio stations	Public Radio (9%)	Public Radio (25%)
		Radio Jan (2%)	Radio Aurora (14%)
		Radio Aurora (2%)	Azatutyun (13%)
		Radio Hay (1%)	Radio Jan (7%)
		FM 105.5 (1%)	FM 105.5 (5%)
	Top 5 most trusted news websites	Azatutyun.am (12%)	Azatutyun.am (23%)
		1in.am (5%)	1in.am (16%)
		News.am (4%)	News.am (14%)
		Panorama.am (3%)	Lurer.com (7%)
		Hetq.am (2%)	Aravot.am (5%)

Media Consumption and Habits of Consumers

The research reveals that traditional television channels and online news websites continue to be the most popular sources of **general media consumption**, with 80 percent and 73 percent of respondents using them, respectively. Despite minor variations, media consumption habits have remained stable between 2023 and 2024, indicating no significant changes in preferences. Social networks and television continue to be the primary sources for **social and political news**, with 62 percent of respondents relying on social networks and 45 percent on television.

The overall analysis of media consumption patterns in Armenia shows a stable yet evolving media landscape. Users are increasingly shifting towards internet-based sources, particularly social networks, for accessing and sharing news. Seven out of ten individuals now choose to access news through social networks rather than directly visiting websites.

While Facebook remains the leading platform for news sharing, its usage has declined as Instagram gains popularity as a preferred alternative. This shift mirrors the broader global trends and highlights the changing dynamics of media engagement in Armenia.

Recommendation¹

Enhance Digital Engagement Strategies: Given the rise of social networks as the primary sources for news consumption, media organizations should invest in more actively creating and distributing content that is specifically tailored for platforms such as Instagram and other emerging networks. This includes leveraging video content, stories, and interactive posts to engage a wider audience.

General Trust towards News Presented by Armenian Media

The research reveals a slight increase in the number of respondents who find Armenian media trustworthy and are willing to pay for credible information, although nearly half remain skeptical. The top three most trusted media sources operating through television, radio, and news websites have remained consistent.

However, trust in the media is complicated by the complex interplay between subjective perceptions and objective reality. Many respondents distrust social networks but continue to use them for news, prioritizing convenience over credibility. Additionally, the level of trust often correlates with how closely the news align with an individual's personal values and opinions rather than the quality of the information, raising questions about the effectiveness of traditional methods for assessing media trust. Furthermore, the overlap between the most trusted and most viewed media outlets could be because viewers prefer to watch sources they trust. It could also mean that people tend to list the channels they watch most as the ones they trust the most, due to the familiarity principle. These findings suggest the need for a more nuanced approach that considers both the subjective and objective dimensions of media trust to better understand the motivations behind media consumption.

Recommendations

Encourage Diverse and Balanced Media Consumption: To mitigate the impact of confirmation bias, media outlets and educators should encourage the public to consume a diverse range of media sources. Campaigns that promote the value of engaging with multiple perspectives can help audiences recognize and challenge their own biases, leading to a more informed and balanced media environment.

Reassess and Innovate Trust Measurement Methods: Traditional methods of measuring trust in media may no longer be sufficient. Researchers and media analysts should develop more nuanced tools that consider both subjective perceptions and objective media qualities. These tools should account for the complex interplay between personal biases, media consumption behaviors, and trust.

¹ The complete list of recommendations for each domain is presented in the “Recommendations” section of the report.

Consumer Needs and Demands

The research shows a growing satisfaction among the Armenian population with local media coverage of topics of interest, though a significant portion (40 percent) still feels underserved. This gap presents an opportunity for media outlets to realign their content strategies, especially in areas such as education, health, well-being, and security, which remain highly demanded. The lower interest in politics may stem from fatigue with sensationalized news, often leading to a general disinterest in news consumption. People prefer positive, informative content, with a strong demand for analytical programming on science, culture, and Armenia-specific topics. There is also a preference for reading news over watching it, as well as concise, fact-based content delivered in various formats, including podcasts for those with limited time.

Recommendations

Diversify and Deepen Coverage of Key Topics: Media outlets should focus on expanding and enhancing their content in areas such as education, health, well-being, and security, as people highly value these topics.

Expand Digital and Multiformat Content Delivery: Recognizing the preference for concise content, media outlets should invest in developing content that is easily accessible across various platforms. This includes offering quick-read articles, podcasts, and short video segments tailored to different audience needs and time constraints.

Media literacy

The data on media literacy shows that many people feel confident in their ability to distinguish between facts and opinions, recognize manipulative media strategies, and fact-check suspicious information. However, fewer individuals actually possess these skills in practice, revealing a gap between self-perceived and actual media literacy. Additionally, over a third of respondents do not verify suspicious information they encounter, emphasizing the need for media literacy programs that focus on practical, evidence-based strategies for fact-checking and identifying manipulation. The increase in respondents avoiding news links on social networks, along with the significant number of media consumers who take no action against false information, reflects growing cautiousness but also highlights the media fatigue and disengagement. Qualitative insights show that people recognize the importance of critical thinking and media literacy, especially for children and seniors.

Recommendations

Implement Practical Media Literacy Initiatives and Training: Develop and offer targeted media literacy initiatives that focus on hands-on, practical skills. These initiatives should teach individuals critical thinking, how to effectively fact-check information, recognize manipulative strategies, distinguish between fact and opinion, avoid confirmation bias when consuming media content, and better understand quality content and ethics. Emphasizing real-world application will help bridge the gap between perceived and actual media literacy skills.

Encourage Active Engagement with Media Content: To combat media fatigue and disengagement, encourage the public to actively verify information and engage with media content critically. Campaigns that raise awareness about the dangers of information manipulation and the importance of fact-checking could motivate individuals to act rather than passively avoid news links or ignore false information.

Ethical Standards

Satisfaction with the ethics and professionalism of Armenian journalists has remained at around 44 percent since 2023, with sentiments of dissatisfaction being particularly pronounced in urban areas such as Yerevan. This highlights media audiences' concerns over journalistic standards, especially in the capital, where media consumption and scrutiny are higher. The higher frequency of observed ethical violations in digital and visual media, compared to print and radio, suggests that the rapid, often unregulated growth of online

media is contributing to these ethical lapses. The fast-paced nature of digital journalism, combined with less oversight, seems to exacerbate the challenges of maintaining high ethical standards.

Although there has been an increase in public awareness of the Media Ethics Observatory (MEO), this heightened visibility has not led to a corresponding increase in the number of people willing to engage with the MEO when necessary. This points to a possible disconnect between awareness of the body and trust in its effectiveness.

Recommendation

Enhance Awareness of MEO: Continue to raise public awareness and engagement with the Media Ethics Observatory to strengthen oversight and accountability in media practices. Highlight specific examples of MEO activities and cases it has addressed, showcasing how these actions have effectively addressed issues within the media. This transparency can foster greater trust in and bolster the perceived reliability of the MEO.

Perceptions of Freedom of Expression

In 2024, the perceived level of freedom of expression (FoE) in Armenia remains high, showing no significant change from 2023. However, there is evidence of a decline in perceived freedom of expression in online spaces since 2023. Additionally, 40 percent of respondents in 2024 (compared to 25 percent in 2023) completely disagree with the statement that they can freely attend peaceful protests or organized political events. This shift reflects increasing concerns about the right to freedom of assembly in the wake of recent political events.

The public complex views on hate speech among respondents reveal a broad recognition of it as a problem, but also show varying definitions and perceptions of its nature and impact. These differing views highlight the need for clearer guidelines and educational initiatives to address hate speech effectively. To tackle this issue, it is crucial to implement not only legal and regulatory measures but also to foster a cultural shift toward greater tolerance and respect. Overall, there is a call for balanced approach by the state to ensure that efforts to reduce hate speech do not unintentionally infringe upon freedom of expression. This nuanced strategy is crucial for safeguarding free expression while effectively addressing hate speech.

Recommendation

Facilitate Dialogue Between Government, Media, and Civil Society: Establish forums or regular dialogues that bring together government officials, media practitioners, and civil society organizations to discuss and address concerns related to freedom of expression and press and the freedom of assembly in peaceful demonstrations, and journalist safety. These discussions can help create mutual understanding, identify key challenges, and develop collaborative solutions to protect these fundamental rights.

INTRODUCTION

The media landscape is diverse in Armenia with multiple media outlets operating over television, radio, print, and online platforms. Private media outlets have significantly contributed to this diversity by providing alternative viewpoints and content. Nevertheless, media ecosystem in Armenia faces serious challenges. Resource-strapped public interest media struggle to reach broad audiences, including youth, minorities, and residents of rural areas. Few independent media outlets in Armenia are financially viable, which poses a threat to their long-term sustainability. At the same time, the media sector in Armenia is undergoing rapid evolution, with digital media gaining greater prominence as it offers alternative platforms for news and information dissemination.

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. For this purpose, the Media Consumption and Freedom of Expression Research is carried out in Armenia annually within the Media Program in Armenia.

METHODOLOGY

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 and demand of information to identify threats to and constraints on freedom of expression from the vantage point of citizens and media practitioners.

Key research questions were formulated around six domains and are presented in Table 2.

Table 2. 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 by media type?What are the media consumption habits (the frequency, timing, sharing) of media consumers?
Trust	<ul style="list-style-type: none">How trustworthy is the news presented by media in Armenia according to population (in general and by media type/ TV, Radio, Online media, 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 the population?What are the media consumers' needs/demands in terms of information, presentation and professionalism of media practitioners?
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 by media type?What is the level of awareness of Media Ethics Observatory?
Freedom of expression	<ul style="list-style-type: none">What is the perceived level of FoE in Armenia for people and for media?What does FoE look like online and in public spaces?

RESEARCH METHODS AND SAMPLE

The research team employed a mixed methods approach, incorporating: 1) a **survey** targeting the population aged 18 and older in Armenia, and 2) **focus group discussions** among the 18+ population. The desk review of existing research pieces and other relevant reports and publications provided secondary data.² To ensure robust and comprehensive results aligned with the research objectives, the team triangulated all the collected data.

The following sections provide more details on the research methods, and the complete methodological description is available in the Inception Report (Annex 1).

Survey

A nationally representative sample of 1,106 households (HHs) of population aged 18 and above of Armenia was achieved through household visits based on a random multi-stage stratified cluster sample (95 percent significance level, 3.6 percent margin of error, and 1.5 Design Effect).

The research team conducted the fieldwork from July 3 to July 26, 2024. The distribution of the sample size by Marz (region) and Yerevan is presented in the table below.

Table 3. Sample size and its distribution by Marz

Marz	Number of planned interviews	Number of completed interviews
Yerevan	406	406
Aragatsotn	42	42
Ararat	98	97
Armavir	98	98
Gegharkunik	84	84
Kotayk	70	70
Lori	98	98
Shirak	84	85
Syunik	56	56
Tavush	28	28
Vayots Dzor	42	42
Total	1106	1106

The survey used a **random multi-stage stratified cluster sample**. Each cluster included 14 households. The whole sample was divided into $k=1106/14=79$ clusters. The number of clusters in each group (e.g., Yerevan, urban and rural) has been calculated using the same formula [$k = \text{number of interviews}/14 = \text{number of clusters in the region}$].

Selection of clusters: During the first stage of selection, the team grouped electoral precincts, serving as Primary Sampling Units (PSUs), by their regional location – Yerevan and other marzes (first strata) – and then organized them by settlement type: urban and rural (second strata). The team then performed a random selection of primary clusters using a systematic random sampling method. Within each stratum, PSUs were assigned a random number from 0 to 1, and the list was then sorted from largest to smallest based on these

² Similar research on media consumption patterns was conducted by the Caucasus Resource Research Center Armenia (CRRC Armenia) and the Medica Initiative 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 conducted were 1448 in 2015, 1178 in 2017, 1200 in 2019, and 1213 in 2021.

values. The first clusters appearing on the list were selected according to the required number of clusters in each stratum.

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

Selection of respondents: The interviewers selected the respondents within HHs using the last birthday method. They only interviewed those HH members who had permanent residency in Armenia (at least during the last year). One interview was conducted in each HH.

Interview mode: Interviews were in person, using the Computer Assisted Personal Interview (CAPI) system loaded on tablets.

Focus Group Discussions

To gain a deeper understanding of the public's perceptions on various aspects of media consumption, media literacy, and freedom of expression, the team conducted focus group discussions with representatives from the general population. Participants also discussed their media consumption habits, the ability to recognize information manipulation, and strategies for verifying information. The FGDs examined how participants define, and encounter hate speech, factors influencing trust in media, and self-perception of media literacy skills. Additionally, the discussions explored the extent of the freedom to express opinions online and associated challenges.

Overall, the research conducted **8 FGDs**: 2 with youth, 2 with Yerevan residents, 2 with region residents, 1 with women, and 1 with men. FGDs consisted of 8-12 participants.

During the data collection, the team applied the data saturation/information richness principle.

Secondary Data Review

Prisma started the research with an overall mapping of the online resources, statistical data, and other resources shared by the Internews' "Media Program in Armenia" team to which were later 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 from previous research conducted either by Internews, MIC, or other partners highlighting how the situation has evolved, and emerging trends are. All the secondary data was thoroughly assessed for quality and reliability.

Data Analysis

The team conducted data analysis around the main research domains. For quantitative data, 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, settlement type, and economic status). The team tested association/correlation with identified confounding factors for individual variables and indexes to understand whether confounding factors significantly affect the variables and indexes. The analysis by confounding factors was performed for five criteria: sex of respondent (male/female), age groups of respondents (from 18 to 35, from 36 to 55, and 56 and older), education (secondary and high school, vocational, higher/postgraduate), economic status of the families (low, middle, high)³ and settlement type

³ "The 'Low' income group includes respondents who provided the responses 'Family income is not enough for the purchase of food' and 'Family income is enough for the purchase of food, but not for clothes' to the question, 'Which of the following best describes your family's economic situation?' The middle-income group includes those who selected the following options: 'Family income is enough for the purchase of food and clothes but is insufficient for buying expensive household items' and 'We can afford to buy expensive items, such as a refrigerator or washing

(urban, rural, Yerevan).⁴ The respective statistical tests have been selected based on variable scales. Mainly, the Chi-square test was applied to check if two categorical variables are related or independent.

During statistical analysis, as multiple tests were simultaneously performed on a single data set, the study considered Bonferroni correction for P-value, applying $p < 0.01$ threshold instead of $p < 0.05$. This criterion is used to reduce the risks of receiving false-positive results (type I errors). For the comparison tests, only factors performing statistically significant results are reported in the “Findings” section.

The team analyzed the qualitative data using a thematic approach, where the information was systematically organized by codes and themes. These were aligned with the research questions and the research domains, allowing for a focused and coherent analysis. Cross-referencing the qualitative data with the quantitative data allowed for a deeper understanding of the underlying patterns and relationships.

LIMITATIONS

The research faced the following limitation:

- The final distribution of the number of interviews by respondent’s gender was different from the gender distribution of the general population. As a result, data weighting by gender was applied. However, since 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.
- The response rate of the survey was 30 percent, which posed a limitation both to the field work stage and the data analysis. The low response rate was mainly determined by the high number of refusals among the respondents in Yerevan. The rate of declined responses is a consistent concern across all surveys conducted in Armenia.

machine.’ The ‘High’ income group includes those who mentioned the following options: ‘Our income is enough to buy household appliances, but not enough to buy a car’; ‘Our income is sufficient for everything except buying a house/apartment’; and ‘We can afford to buy anything we want.’”

⁴ Hereinafter, the analysis by confounding factors has been conducted according to the specified five factors. Only results of the factors demonstrating statistically significant differences are reported. The exclusion of results for any of the factors from the report indicates that the respective test has been performed but did not show any significant differences by group.

All tables with the disaggregation of various questions by confounding factors are presented in Annex 2. Supplementary figures not included in the main report are available in Annex 3.

KEY CHARACTERISTICS OF THE STUDY POPULATION

The survey respondents comprised 69 percent females and 31 percent males. The age distribution was relatively balanced, with 36 percent of respondents aged 56 and older, 33 percent aged 36-55, and 32 percent aged 18-35. In terms of educational attainment, 37 percent of respondents had higher education, 33 percent had secondary education, and 24 percent had vocational education. Further socio-demographic details of the study population are presented in Table 4.

Table 4. Key socio-demographic characteristics of study population

Criteria	Number	Percent (%) ⁵
Overall	1106	100
Gender		
Male	345	31
Female	761	69
Age		
18-35	348	32
36-55	361	33
56 and older	397	36
Education		
Incomplete secondary	24	2
Secondary	365	33
High school	49	4
Vocational	264	24
Higher education (Diploma, BA, MA, PhD)	404	37
Marital Status		
Single / Never married	699	63
Married/ Living together	56	5
Divorced/ Living separately	133	12
Widowed	212	19
Refuse to answer	6	1
Economic status of family		
Family income is not enough for the purchase of food	113	10
Family income is enough for the purchase of food, but not for clothes	199	18
Family income is enough for the purchase of food and clothes, but is insufficient for buying expensive household items	348	32
We can afford to buy expensive items, such as a refrigerator or washing machine	83	8
Our income is enough to buy household appliances, but not enough to buy a car	119	11
Our income is sufficient for anything, except buying a house/apartment	126	11
We can afford to buy anything we want.	85	8
Refuse to answer	33	3
Employment status		
Employed	381	34
Retired	223	20
Homemaker	185	17
Unemployed	153	14

⁵ Henceforth, in some cases, proportions may not add up to 100 or may have discrepancies of up to 1 percent between actual and reported data due to rounding errors.

Self-employed (including businessmen/traders, farmers, and craftsmen)	97	9
Student	44	4
Maternity/paternity leave	20	2
Refuse to answer	3	0.3
Association with the sector		
Public sector representative	166	15
Private sector representative	226	20
Non-governmental/civil society sector representative	203	18
Informal active group (civic initiatives)	20	2
None of the above	491	44

Table 5 illustrates that that nearly all respondents are proficient in Armenian, with a significant majority (88 percent) also knowing Russian. Additionally, 33 percent of respondents are fluent in English. Other languages were mentioned infrequently.

Table 5. Which languages do you know?⁶ (n=1,106)⁷

Languages	N	Percent of surveyed respondents
Armenian	1101	100
Russian	975	88
English	364	33
French	44	4
German	30	3
Yezidi	13	1
Georgian	11	1
Turkish	10	1
Other	14	1

Table 6 shows that **only 4 percent of respondents do not have access to any device (TV, Smart phone, laptop, desktop or tablet) that is connected to the internet.** This pattern is similar to 2023, when 5 percent did not have access to any internet-connected device.

Table 6. Percent of respondents that have access to following

Access to devices/internet	Percent of respondents who have access	
	2024 (n=1106)	2023 (n=1109)
TV that works	95	97
Internet connection (Wi-Fi or landline)	84	84
Smart phone with internet used only via Wi-Fi, without internet included in subscription	78	81
Smart phone with internet included in subscription/package	78	64
TV connected to internet/IPTV (smart TV)	65	53
TV connected to cable television	63	59
Computer (laptop or desktop) connected to internet	52	55
Tablet connected to internet	22	21

⁶ Multiple response question, 2,567 total responses received. One respondent knows 2.3 languages on average.

⁷ For multiple-answer questions, respondents are permitted to select multiple options, resulting in a total percentage exceeding 100 percent. Therefore, tables and figures where the total exceeds 100 percent indicate that respondents provided more than one answer to the question.

KEY FINDINGS

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?

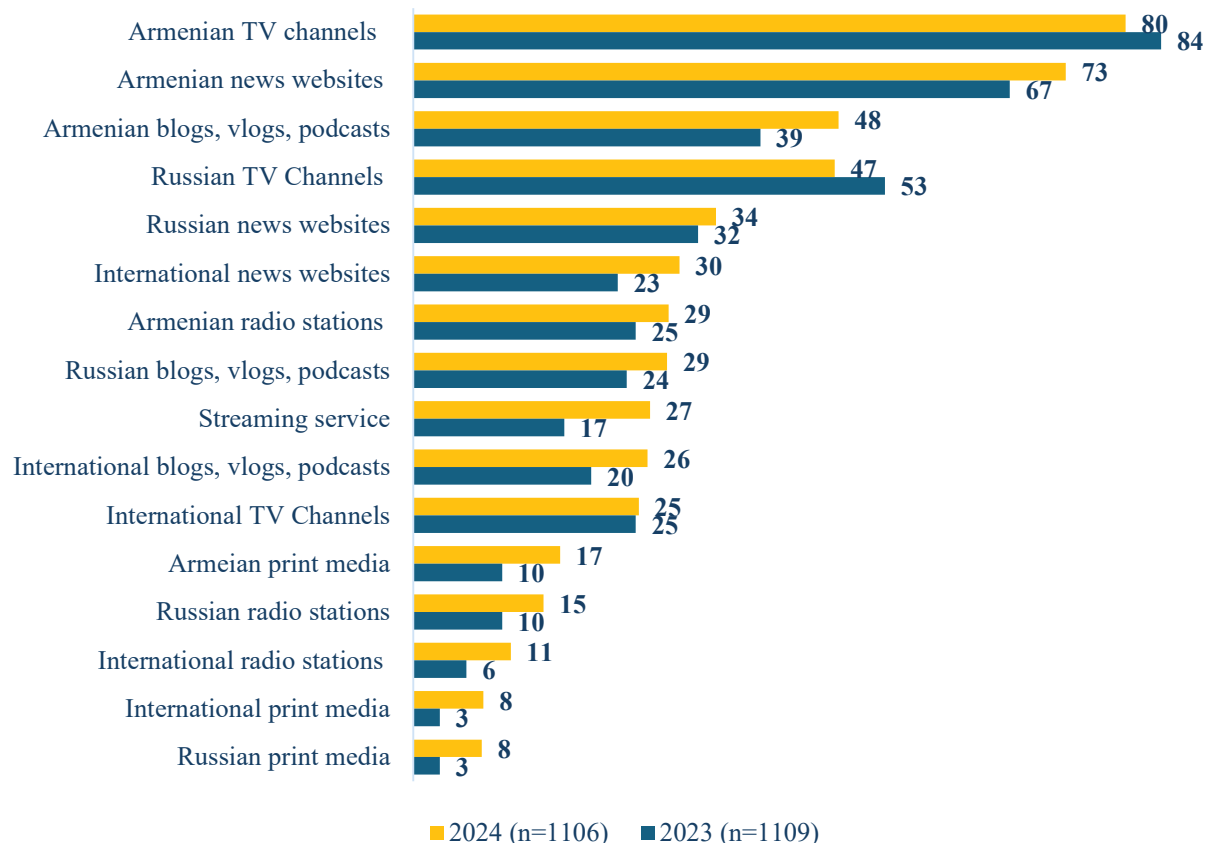
Question 2: What are the habits (the frequency, timing, sharing) of media consumers?

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 (80 percent) and Armenian news websites (73 percent) are the most popular media sources among respondents, followed by Armenian blogs, vlogs, and podcasts (48 percent), and Russian TV channels (47 percent) (Figure 1).

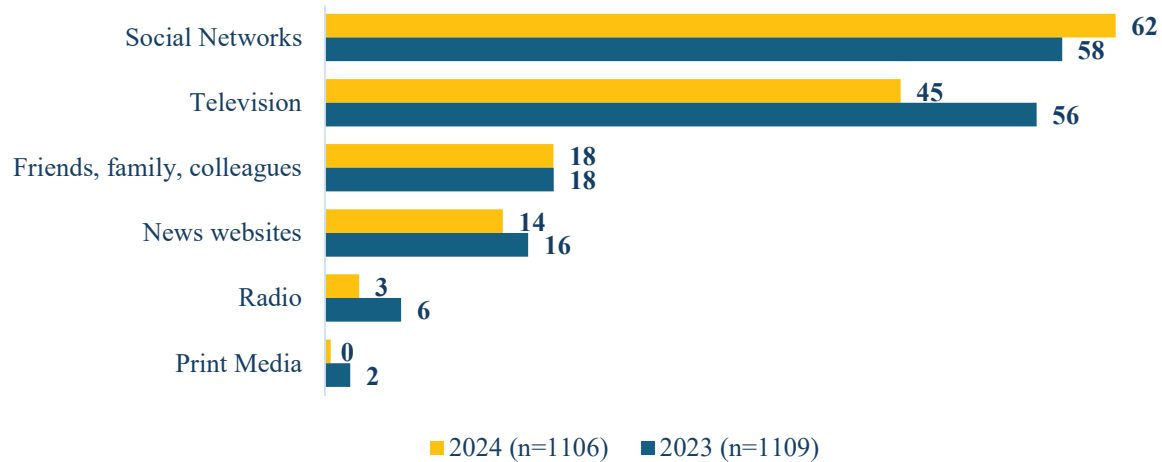
While there are slight variations in the percentages of media source consumption between 2023 and 2024, these differences are not statistically significant, indicating no substantial changes in media consumption habits in 2024 compared to 2023.

Figure 1. Percentage of respondents who use the following media sources, %



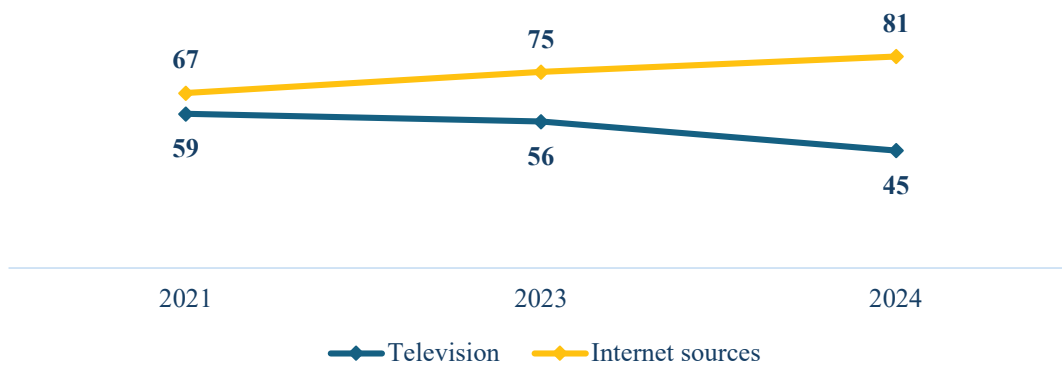
Consumption of media sources for getting social and political news: In 2024, the main sources of social and political news for respondents have remained consistent with the 2023 results: the main sources are social networks (62 percent of respondents) followed by television (45 percent) (Figure 2).

Figure 2. What is your main source of information for getting social or political news?⁸



Overall, the trend observed in previous studies continues,⁹ showing that traditional sources like television are seeing a decline in news consumption (45 percent in 2024 and 56 percent in 2023, compared to 59 percent in 2021), while the use of social networks and internet sources is on the rise (81 percent¹⁰ in 2024, and 75 percent in 2023, compared to 67 percent in 2021) (Figure 3).

Figure 3. Comparison of television and internet resources consumption over the years, %



Popular media sources by media type

TV: Armenia TV (66 percent), Shant TV (50 percent), and First (Public) Channel (45 percent) are the most frequently cited TV channels that respondents watch at least once a week, followed by Russian TV channels (18 percent). The pattern has remained consistent since 2023, with almost all channels maintaining the same order of consumption popularity in 2024. The only exceptions are Yerkir Media, which respondents did not mention in 2024, and New Armenia TV, which did not appear in 2023 but was indicated in 2024 (Figures 4 and 5).

As in 2023, this year's findings indicate that Armenia TV and Shant TV remain the most popular channels, suggesting that television in general, and these channels in particular, are primarily consumed for

⁸ Multiple response question, 1,593 total responses received, one respondent provided 1.4 answers on average.

⁹ “Media Consumption and Media Coverage of Reforms in Armenia”, CRRC-Armenia and Media Initiative Center, October 2021

¹⁰ Percentage of those respondents that mentioned using news websites and social networks.

entertainment purposes. Although delivering social and political news is not their primary focus, these channels do offer some analytical programs, which can also serve as sources of social and political news.

Figure 4. Which TV channels do you watch at least once a week? (top ten listed)¹¹ (open-ended question, n=914), % 2024

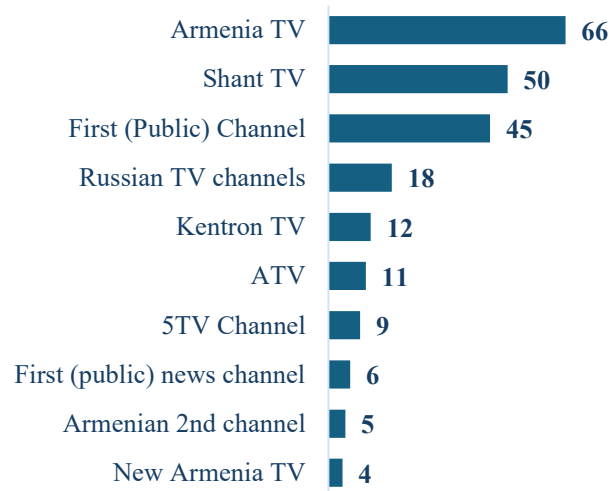


Figure 5. Which TV channels do you watch at least once a week? (top ten listed)¹² (open-ended question, n=1,109), % 2023



Radio: According to the data, 27 percent of respondents listen to at least one radio station at least once a week. Among the stations, Radio Aurora (17 percent), Public Radio of Armenia (17 percent), and Radio Jan (14 percent) are the most frequently mentioned ones.

Overall, compared to 2023, the percentage of respondents listening to specific radio stations has increased, with Radio Aurora gaining popularity among listeners. However, statistical tests cannot be conducted for multiple response questions to determine if these changes are significant (Figures 6 and 7).

¹¹ Multiple response question, 2,236 total responses received. On average, one respondent mentioned 2.5 channels. 4 percent of respondents had difficulty mentioning any TV channel they follow.

¹² 14 percent do not follow TV channels and 1 percent chose “Difficult to answer”

Figure 6. Which radio stations do you listen to at least once a week? (top ten listed)¹³ (open-ended question, n=296), % 2024

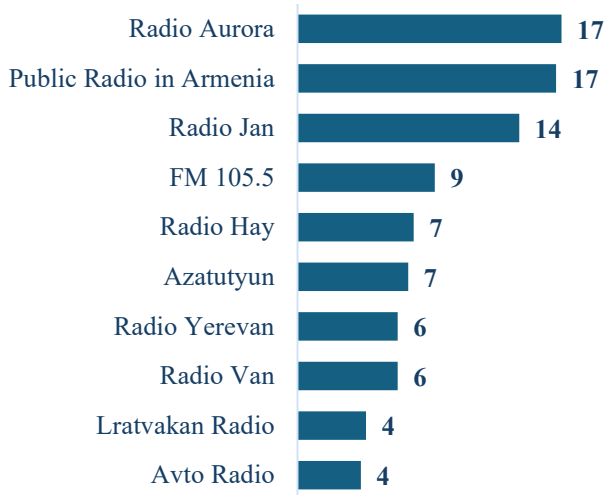
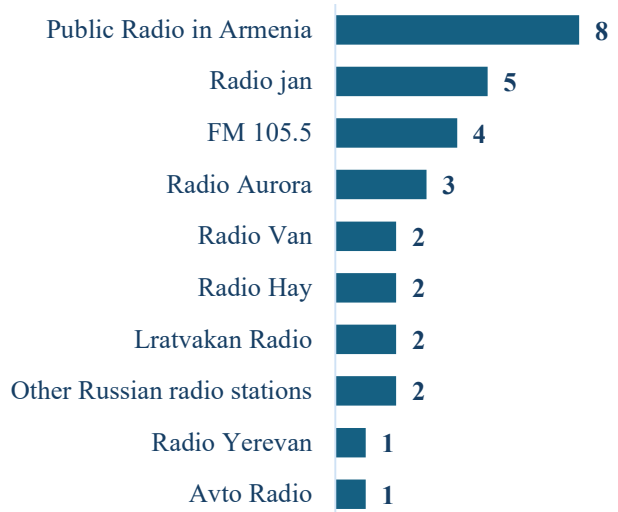


Figure 7. Which radio stations do you listen to at least once a week? (top ten listed)¹⁴ (open-ended question, n=1,109), % 2023



News websites: Regarding news websites, 72 percent of respondents indicated that they visit at least one news website once a week. Azatutyun.am (17 percent), 1in.am (13 percent), and News.am (10 percent) are the most frequently cited websites. Overall, the pattern has remained consistent since 2023, with no significant changes (Figures 8, 9).

A similar question was asked in the MIC surveys conducted from 2017 to 2021. Throughout these years, News.am was the most popular news website in Armenia, with Azatutyun.am ranking second.¹⁵ However, in the past two years, these two websites have swapped positions, with Azatutyun.am now being cited more frequently.

¹³ Multiple response question, 452 total responses received. On average, one respondent mentioned 1.5 radio stations. 23 percent of total respondents had difficulty mentioning any particular radio station they follow.

¹⁴ 75 percent do not follow any, 3 percent chose “Difficult to answer”

¹⁵ Source: Media Consumption and Media Coverage of Reforms in Armenia,” CRRC-Armenia and Media Initiative Center, October 2021

Figure 8. Which news websites do you visit at least once a week? (top ten listed)¹⁶ (open-ended question, n=801), %
2024

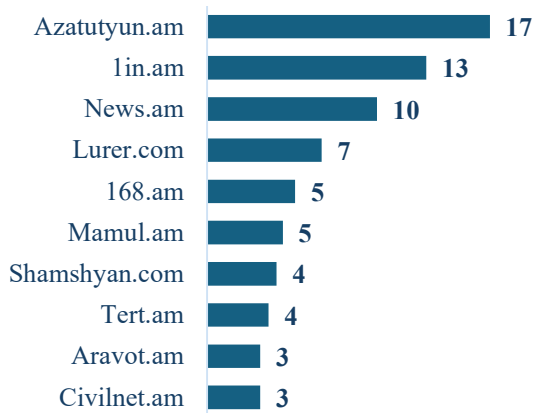


Figure 9. Which news websites do you visit at least once a week? (top ten listed)¹⁷ (open-ended question, n=1,109), %
2023



Print media: Furthermore, 15 percent of respondents reported following at least one print media source on a weekly basis, with TV Aliq weekly newspaper¹⁸ (9 percent), Hraparak newspaper (6 percent), and Aravot newspaper (6 percent) being the most cited (see Annex 3, Figure 1). In 2023, only 5 percent of respondents reported weekly engagement with print media, with Aravot newspaper being the most frequently mentioned, at 2 percent.

Question 2: What are the habits (the frequency, timing, information sharing of media consumers) of media consumption?¹⁹

Consumption of online news media: The analysis indicates that social networks have increasingly become the primary means of accessing news websites for the majority of respondents. While the data over the past three years do not reveal a clear pattern, they highlight the influence of social networks as a primary channel for engaging with news websites and platforms (Figure 10).

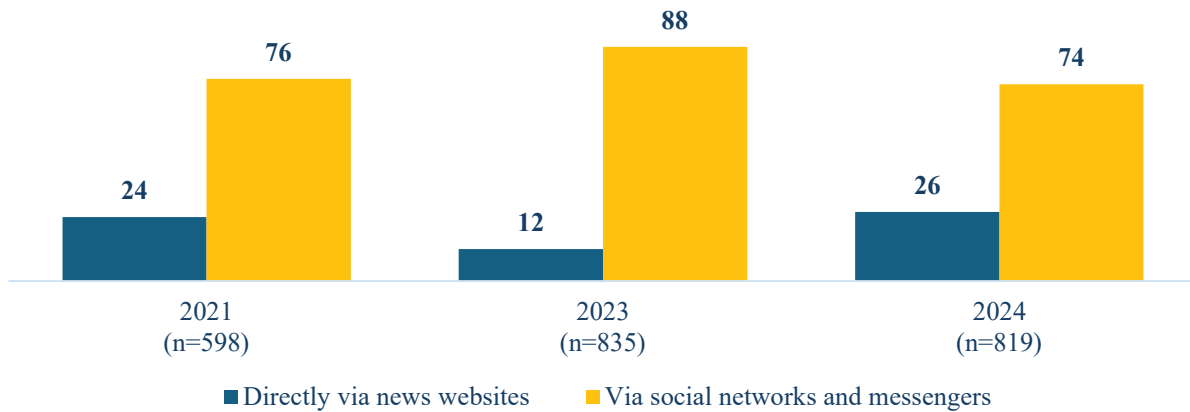
¹⁶ Multiple response question, 1,193 total responses received. On average, one respondent mentioned 1.5 news websites. 39 percent of total respondents had difficulty mentioning any particular news website they follow.

¹⁷ 35 percent do not follow any, 17 percent chose “Difficult to answer”

¹⁸ Please note that TV Aliq is a weekly newspaper, not to be confused with the Aliq Media news website.

¹⁹ The figures showing the frequency, timing, and devices respondents use for each media source are presented in Annex 3, Figures 2-14.

Figure 10. How do you usually consume online news media?



Usage of social networks and messengers: Among social networks, YouTube and Facebook are the most commonly used, with 81 percent and 77 percent of respondents using them, respectively. Notably, Instagram usage has increased significantly, rising from 42 percent in 2023²⁰ to 52 percent in 2024 (Chi-square test, $p < 0.001$).

In terms of messaging platforms, Viber (73 percent), WhatsApp (72 percent), and Facebook Messenger (65 percent) are the most frequently used. Additionally, Telegram usage has seen a significant increase, rising from 27 percent in 2023 to 41 percent in 2024 (Chi-square test, $p < 0.001$) (Figures 11 and 12).

²⁰ The data for 2023 is presented in Annex 3, Figure 3.

Figure 11. The most used social networks and messengers, (open-ended question, n=1,106), % 2024

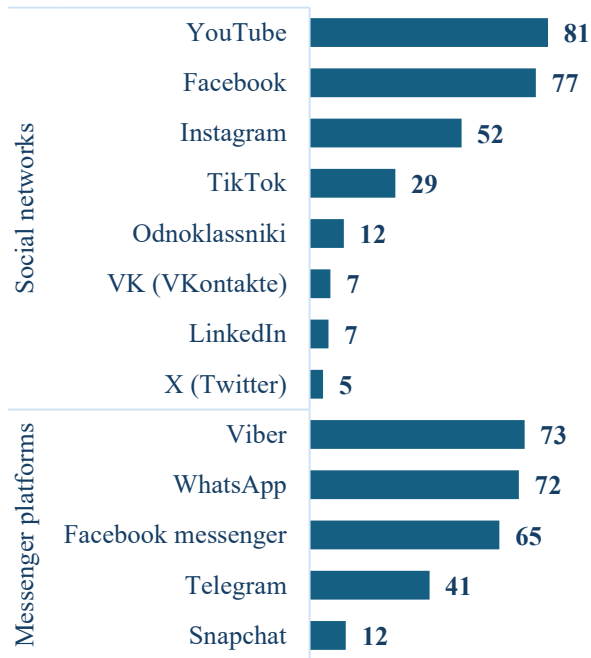
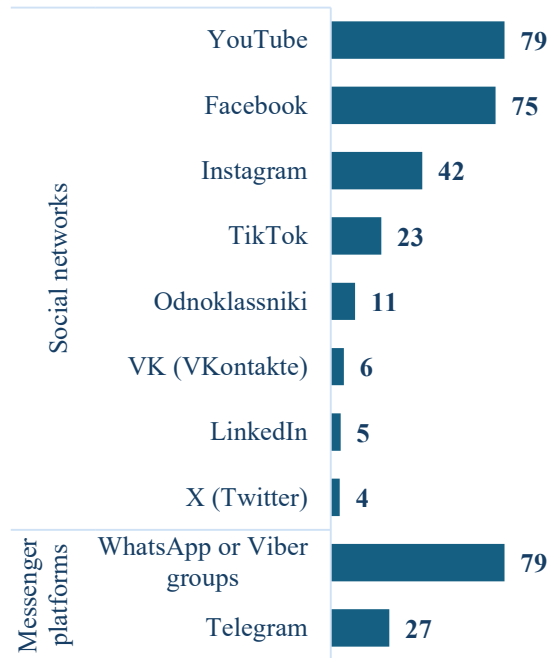


Figure 12. The most used social networks and messengers, (open-ended question, n=1,109), % 2023



Sharing news on social network platforms: Among respondents, 8 percent use social network platforms to share non-personal news, a figure that remains relatively unchanged from 2023, when 9 percent reported similar usage (Figure 13).

Facebook stands out as the dominant platform for sharing non-personal news, with 80 percent of these users opting for it. Respondents also use Instagram and Telegram, though less so, with 19 percent and 12 percent of respondents using these platforms, respectively (Figure 14).

Figure 13. Do you use any social network platform to share news (not personal news), %

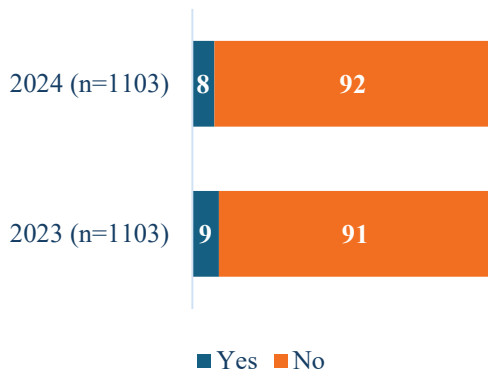
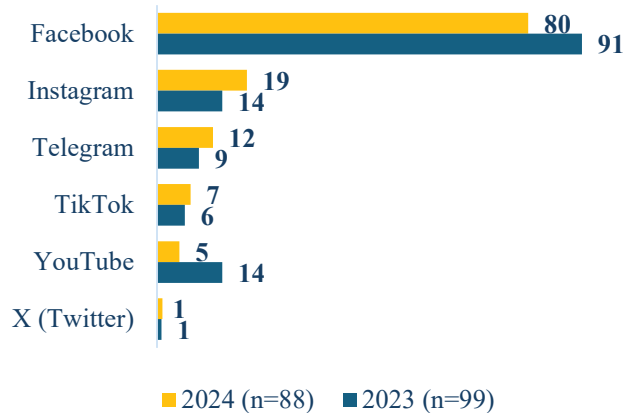


Figure 14. Which platforms do you use to share news?²¹



Conclusions

- The analysis of media consumption patterns in Armenia reveals a complex and evolving landscape that generally reflects broader global trends. The use/consumption of different media sources has not changed significantly from 2023 to 2024.
- The top three most popular TV channels, radio stations and news websites, remained almost unchanged from 2023 to 2024.
- The trend observed in recent years continued from 2023 to 2024, with an increasing number of people utilizing social networks to access social and political news. Seven out of ten individuals prefer to access online news through social networks rather than visit websites directly. Moreover, social networks are not just channels for news access, but also for news sharing and interaction.
- While Facebook continues to be the most popular social network for sharing news, research shows a decline in its usage from 2023 to 2024. Conversely, more people are turning to Instagram for news sharing.

TRUST IN MEDIA

Research Questions

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

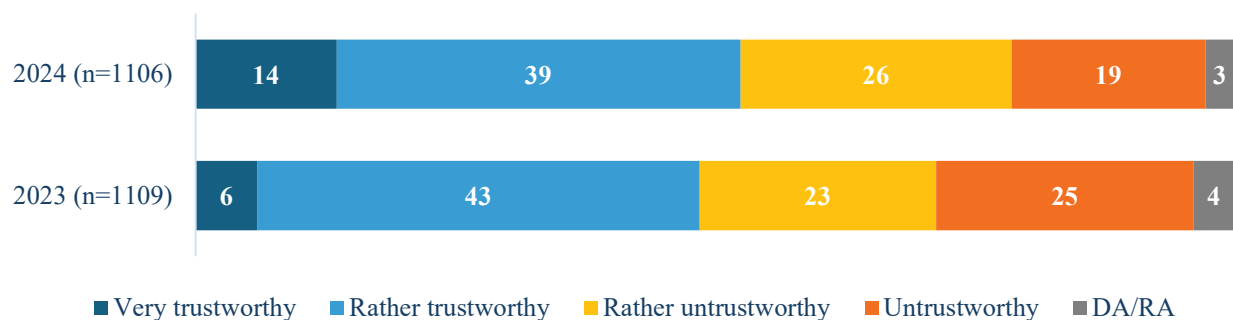
Question 1: How trustworthy is the news presented by media in Armenia according to the population (in general and by media type /TV, Radio, Online media, social networks)?

General trust towards news: Respondents assessed the trustworthiness of news presented by Armenian media. As shown in the figure below, there has been an increase in the percentage of respondents who find

²¹ Multiple response question, a total of 83 respondents answered this question, with 111 total responses received. One respondent shared news on 1.3 platforms on average.

Armenian media news trustworthy, rising from **49 percent** in 2023 to **53 percent** in 2024, which is a statistically significant increase (Chi-square test, $p < 0.001$).

Figure 15. How trustworthy do you find the news presented by Armenian media? %

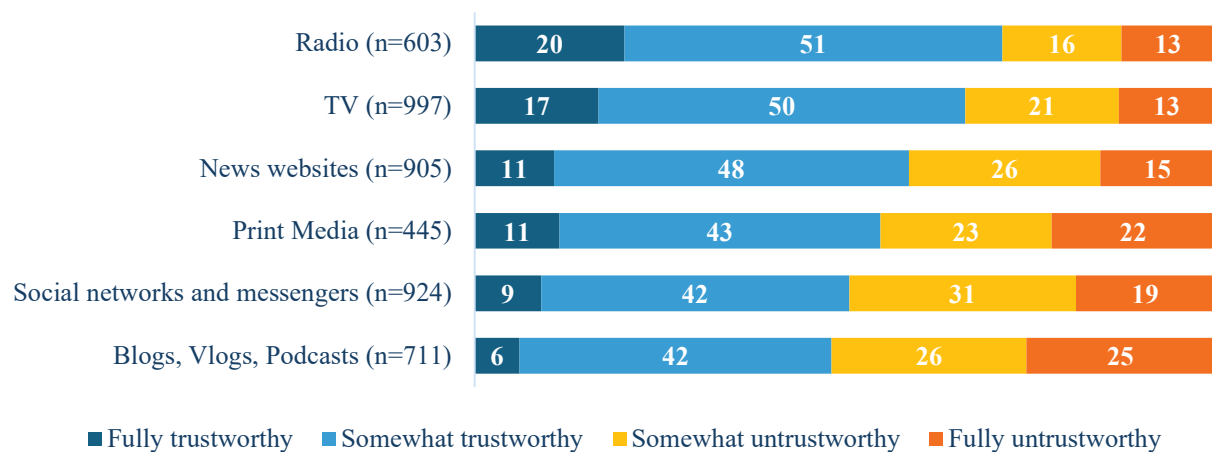


The analysis also shows that among respondents who find Armenian media untrustworthy, 66 percent cited social networks as their source of social and political news, compared to 59 percent of those who consider Armenian media trustworthy (see Annex 2, Table 22).²²

These data need to be considered while interpreting the research findings on trust. In other words, more than half of the respondents who assessed the news presented by Armenian media as untrustworthy, mainly receive the news from social networks.

Trust towards various sources: In terms of the trustworthiness of individual media sources, respondents regard news from Armenian radio (71 percent) and TV (67 percent) as fully or somewhat trustworthy. Conversely, blogs/vlogs and podcasts (48%) and social networks/messengers (51 percent) are seen as the least trustworthy sources (Figure 16).

Figure 16. How trustworthy do you find the news presented by the following sources in Armenia? %



Most focus group participants expressed a lack of trust in the media. Participants most frequently cited political bias, believing that political agendas or affiliations influence media outlets, leading to skewed reporting. They also mentioned sensationalism, noting that media often prioritizes dramatic stories to capture attention, which can distort the true nature of events. Thus, many informants reported avoiding any

²² Please note that the question about sources of social and political news allowed for multiple responses, so no statistical test could be conducted to determine if the difference is significant.

news channels, instead opting to follow the analytical programs or articles of specific experts or public figures they trust. Additionally, some informants indicated a preference for obtaining information through social networks like Telegram or alternative news websites.

"I don't trust any mass media. The same topic with sensationalized headlines may be featured in 10-15 multiple news reports, often altering the original context." FGD, males

"I don't trust any mass media." FGD, marz, male

"For example, I avoid news channels and instead follow individuals, acquaintances, and analysts for political news because I don't trust the mainstream media." FGD, Yerevan, female

At the same time, nearly all informants observe that trust toward media is very subjective. People often trust mass media outlets primarily when the content aligns with their personal values and viewpoints, rather than basing their trust on the objective factors mentioned above. This tendency demonstrates that alignment with personal beliefs plays a significant role in determining trust in media, often overshadowing more impartial evaluation methods.

"To me, trust is defined by providing information based on facts, not opinions." FGD, females

"Media are trustworthy if they are unbiased and follow ethical principles." FGD, youth, female

"If a person hears something that resonates with their own beliefs and values, they are more likely to believe it. Similarly, if I encounter information in the news that aligns with my views, I accept it as true, regardless of its actual accuracy." FGD, youth, male

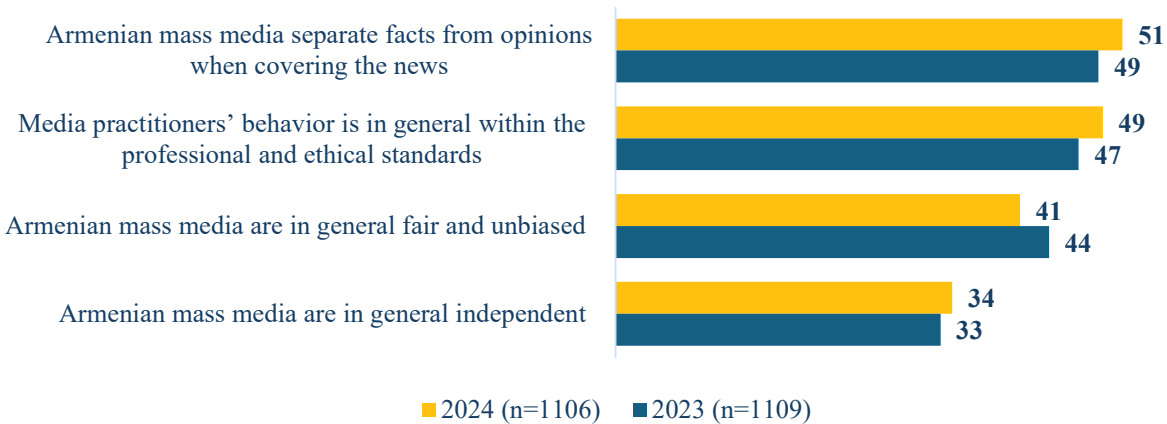
"If something appears in the media that you agree with, you automatically believe it." FGD, females

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

Key factors contributing to trust: Respondents also evaluated their agreement with several statements, as illustrated in the figure below. Half of the respondents (51 percent) believe that Armenian mass media effectively separate facts from opinions in their news coverage. Nearly as many (49 percent) feel that media practitioners generally adhere to professional and ethical standards. However, fewer respondents agree that Armenian mass media are overall fair and unbiased (41 percent), and even fewer consider them to be independent (34 percent) (Figure 17).

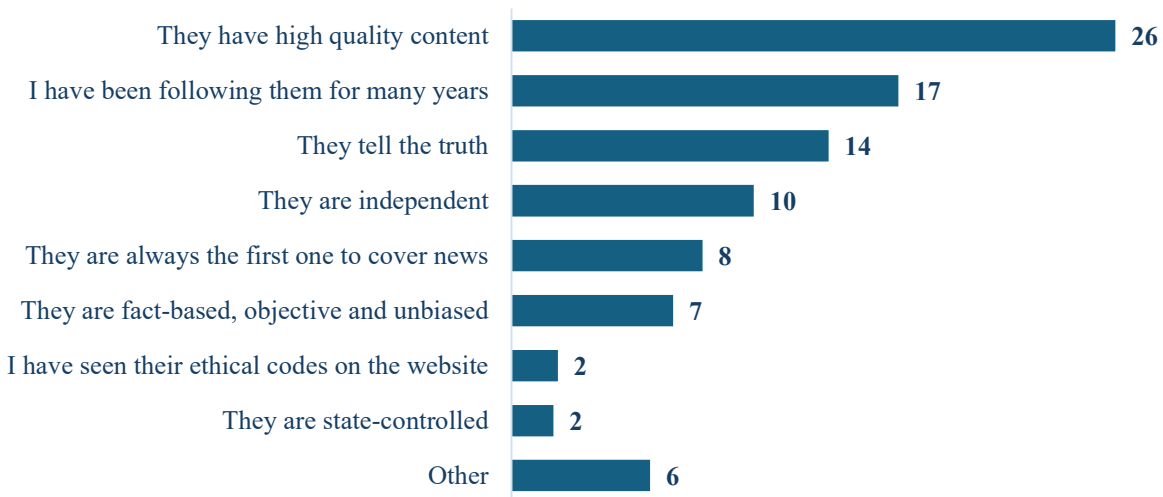
Compared to 2023, the only significant change is in the perception of fairness and impartiality. The proportion of respondents who view Armenian mass media as generally fair and unbiased has decreased by 3 percent (Chi-square test, $p < 0.001$).

Figure 17. Percentage of respondents that agree (“fully agree” and “somewhat agree” options combined) with the following statements, %²³



Reasons for trust or distrust: Respondents attribute their trust in media sources to several key factors. The most common reason is **high-quality content**; 26 percent of respondents cited this option. **Familiarity** follows closely, with 17 percent trusting media sources they have known and followed for a long time. Additionally, 14 percent of respondents trust media sources because they believe these sources **convey the truth**, while 10 percent value the perceived **independence of media outlets** from government, political parties, or business interests (Figure 18).

Figure 18. What is the main reason of trustworthiness for media sources you mentioned above?²⁴ (open-ended question, n=991), %



The qualitative data collected through the FGDs among the population aligns with the quantitative findings. Overall, FGD participants identified several factors, similar to those mentioned above, that can enhance trust in the media. These factors include:

²³ The figure displaying responses for the same statements in 2024 including all answer options is presented in Annex 3, Figure 16.

²⁴ Multiple response question, 1,138 total responses received. On average, one respondent mentioned 1.1 reasons. 24 percent of total respondents had difficulty mentioning any particular reason.

- Quality and grammatically correct information,
- Alignment between the headline and information provided,
- Objectivity,
- Adherence to ethical principles, and
- Financial independence of the media outlet.

These criteria are seen as essential for establishing and maintaining trust in media sources.

"The more polished and well-written a text is, the more I tend to trust it." FGD, Yerevan, female

"Much depends on the training of journalists and adherence to established journalistic ethics. Trust in the media will be earned when it demonstrates impartiality." FGD, marz, male

Willingness to pay, support, and subscribe to Armenian media: Consistent with previous years' findings, the vast majority of respondents in 2024 remain unwilling to pay, support, or subscribe to Armenian media for quality content (Figure 19). At the same time, the data indicate a slow but steady increase among those ready to contribute financially for the quality and trustworthy media content. Among those who are willing to contribute, most are prepared to pay up to 4,000 AMD (approximately 10 USD) per month (72 percent) (Figure 20).

Respondents under 55, those with higher levels of education, and those with average or higher economic status are more likely to pay for, support, or subscribe to Armenian media compared to other groups (Chi-square test, $p < 0.01$) (see Annex 2, Table 21).

Additionally, when asked about one-time donations, 58 percent of respondents express their willingness to contribute, with an average one-time donation amounting to 7,000 AMD (approximately 18 USD).

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

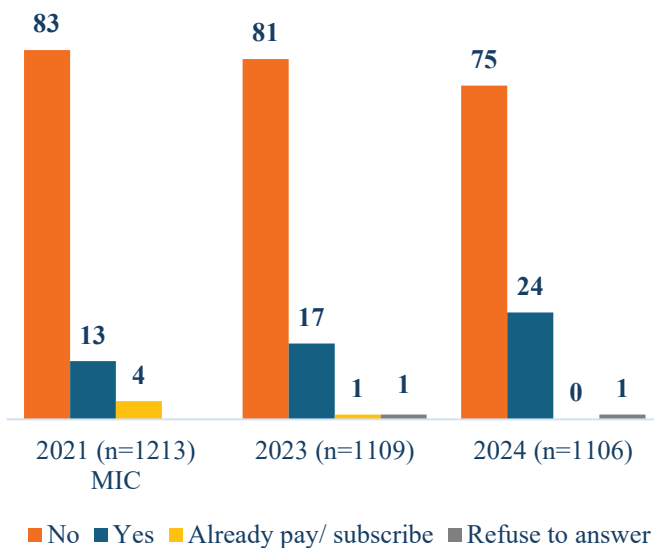
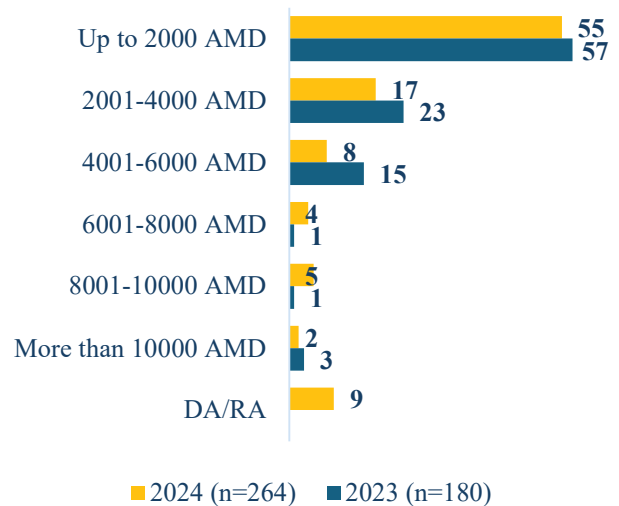


Figure 20. What is the amount of money you are paying (or are willing to pay) in a one-month period? %



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 for getting news: The figure below shows the radio stations that respondents trust the most. In 2024, the top three most trusted stations are Public Radio in Armenia (25 percent), Radio Aurora (14 percent), and

Azatutyun (13 percent). Public Radio in Armenia continues to be the most trusted station, a position it has held since 2023 (Figures 21 and 22).

Figure 21. Most trusted radio stations²⁵, (open-ended question, n=271), % 2024

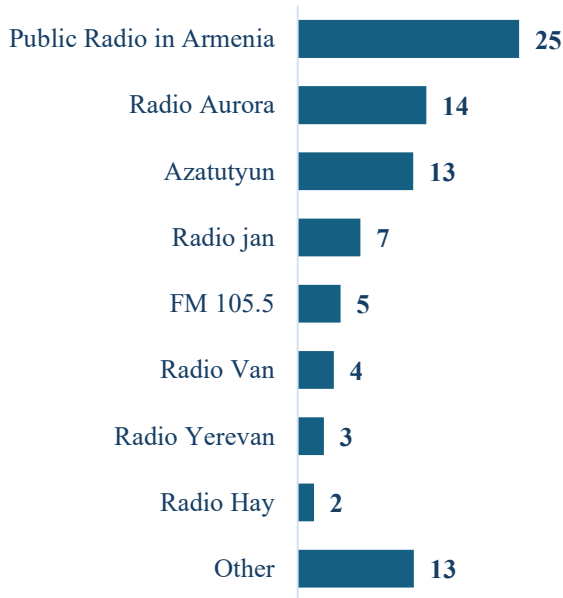
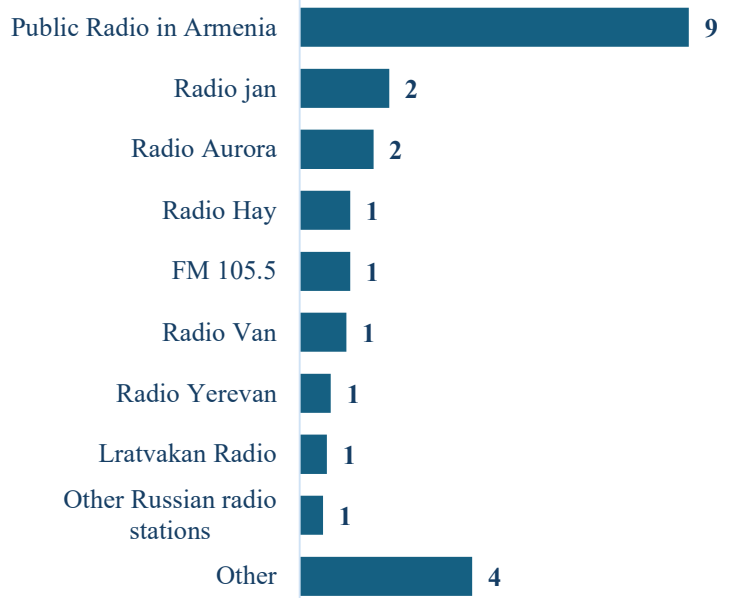


Figure 22. Most trusted radio stations, (open-ended question, n=192), % 2023



For TV channels, the top three trusted options in 2024 are Armenia TV (53 percent), First (Public) Channel (42 percent), and Shant TV (38 percent). When comparing the top five most trusted channels, the data reveals that First (public) news, which was among the top five in 2023, has now been replaced by the 5TV channel (Figures 23 and 24).

²⁵ Multiple response question, 321 responses received. On average, one respondent mentioned 1.2 radio stations they trust. 32 percent of respondents had difficulty answering this question.

Figure 23. Most trusted TV channels²⁶, (open-ended question, n=797), % 2024

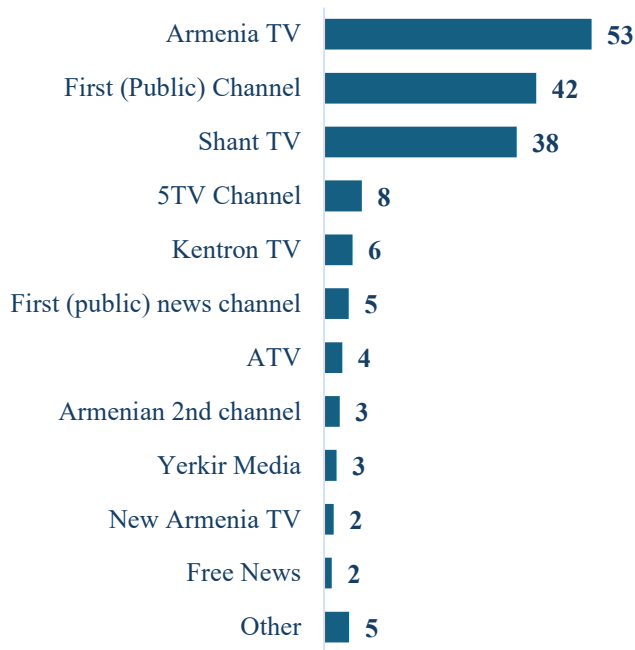
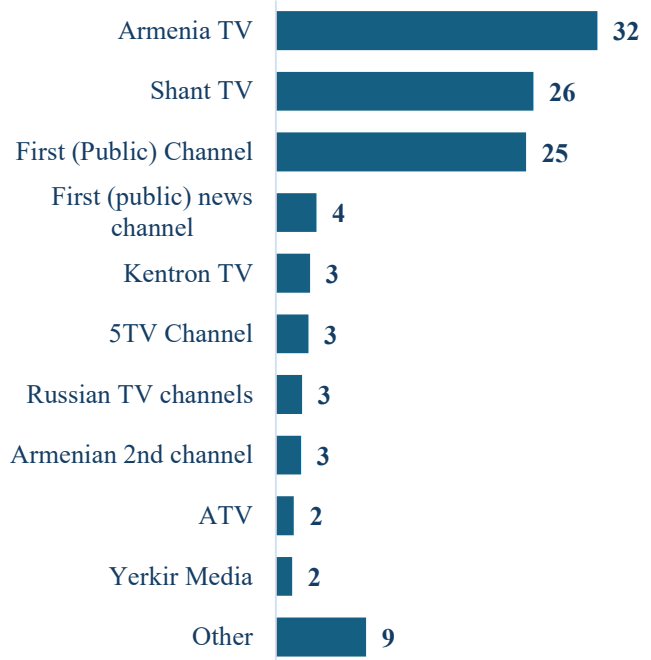


Figure 24. Most trusted TV channels, (open-ended question, n=1,097), % 2023



When it comes to news websites, Azatutyun.am (23 percent), 1in.am (16 percent), and News.am (14 percent) are the most trusted by respondents. This trust pattern remains consistent with 2023 (Figures 25 and 26).

²⁶ Multiple response question, 1,365 responses received. On average, one respondent mentioned 1.7 TV channels they trust. 2 percent of respondents had difficulty answering this question.

Figure 25. Most trusted news websites²⁷, (open-ended question, n=444), % 2024

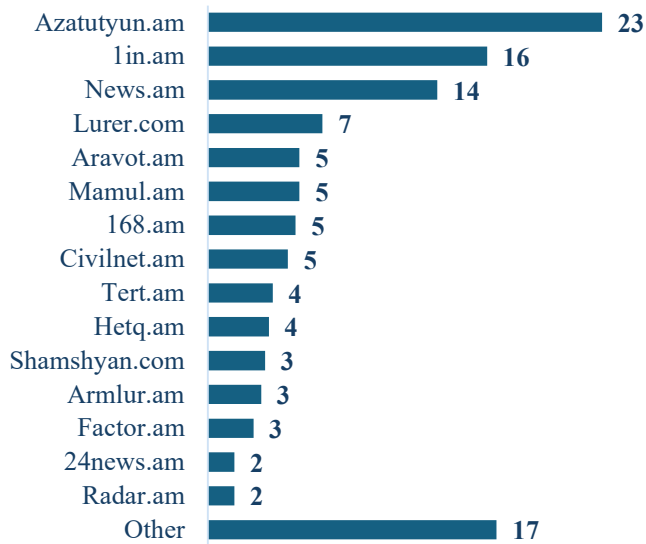
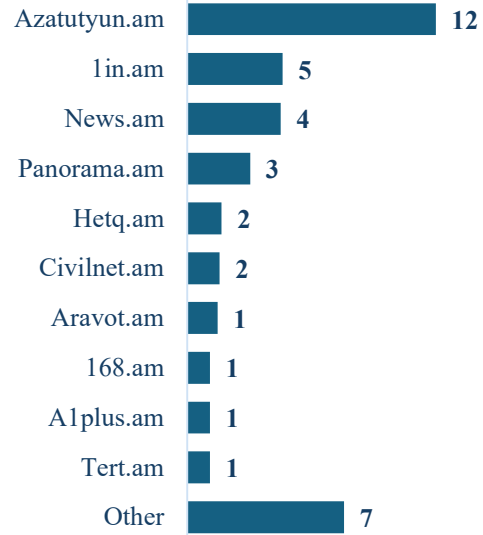


Figure 26. Most trusted news websites, (open-ended question, n=265), % 2023



Additionally, fewer respondents mentioned trusted print media. Aravot newspaper is the most frequently cited, with 11 percent, followed by Iravunq at 6 percent. As in 2023, Aravot remains the most trusted print media source.

As for the most trusted social networks and messenger platforms in 2024, Facebook (57 percent), Telegram (22 percent), YouTube (20 percent), and Instagram (18 percent) are the most frequently mentioned. These preferences show no major differences compared to 2023 (Figures 27 and 28).

²⁷ Multiple response question, 597 total responses received. On average, one respondent mentioned 1.3 news websites they trust. 17 percent of respondents had difficulty answering this question.

Figure 27. Most trusted social networks and messengers²⁸,
(open-ended question, n=640), %
2024

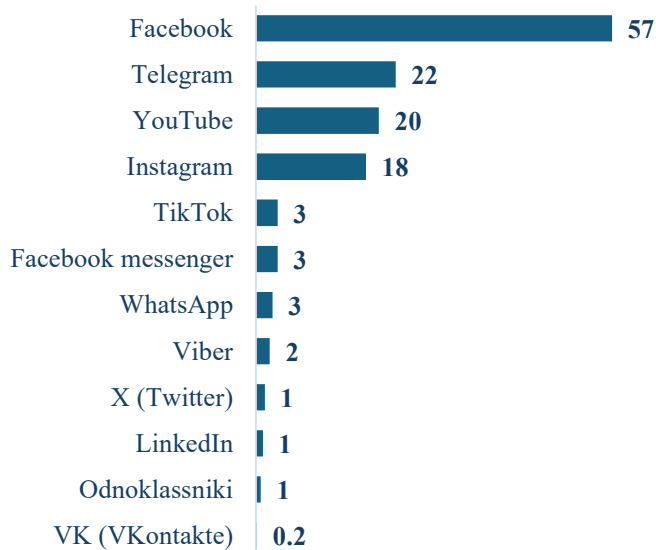
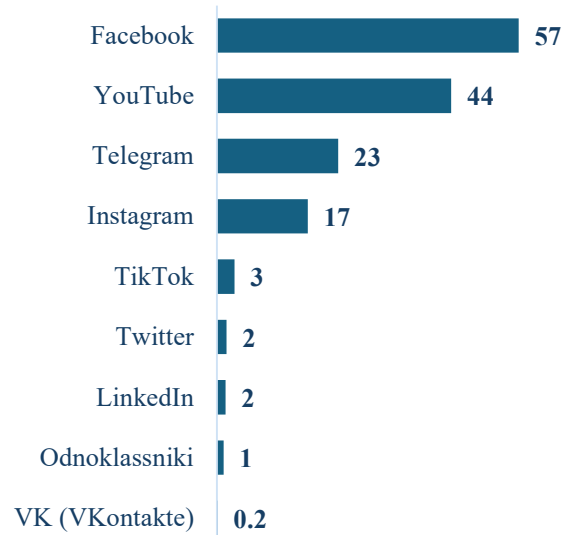


Figure 28. Most trusted social networks and messengers,
(open-ended question, n=538), %
2023



Misinformation and Disinformation

In the focus group discussions, the concepts of misinformation and disinformation emerged as topics of considerable interest. Participants generally had ambiguous understandings of these concepts, with most respondents primarily familiar with disinformation. When asked to define misinformation and disinformation, many struggled and attempted to translate the terms into Armenian, trying to discern the key differences between them. Participants mostly described both concepts in similar terms, as involving unclear or incomplete information that often results in inaccuracies and misleading content.

"Misinformation is perhaps incomplete in some sense, and it is unverified information but may contain some elements of truth, still it can confuse people. And disinformation is inaccurate information." FGD, youth, female

"Misinformation refers to information that is incomplete, while disinformation is inaccurate information." FGD, marz, female

Only a few could clearly articulate the differences between misinformation and disinformation.

"Misinformation is incomplete information, disinformation is for manipulating people." FGD, marz, male

"Misinformation presents incomplete information, and disinformation purposefully conveys inaccurate information to the audience." FGD, females

When discussing whether Armenian media disseminates false or misleading information intentionally or unintentionally, the majority of focus group participants believe that the inaccuracies are deliberate. They attribute this to a strategy designed to manipulate public opinion for the benefit of their media outlets or their funder in the context of the general society's low level of education and media literacy. Informants also suggest that this strategy distracts the public from significant national events and issues.

²⁸ Multiple response question, 883 total responses received. On average, one respondent mentioned 1.4 social networks and messengers they trust. 7 percent of respondents had difficulty answering this question.

Some participants also note that the intentional spread of inaccurate news often depends on the topic. For example, political issues are more likely to feature deliberate misinformation, while inaccuracies can also occur unintentionally. In some cases, media outlets may simply copy information from other sources without verifying it.

“In the advanced age of information technology, nothing happens by chance. If something is published that does not correspond to reality, there is some motive.” FGD, males

“False materials and fabricated facts are often used to damage an individual's reputation and undermine their credibility.” FGD, youth, female

“False information is deliberately disseminated in Armenia according to a planned schedule.” FGD, marz, male

“I think that it is mostly intentional, either it is a political directive, or it is a matter of money.” FGD, Yerevan, male

“Whether the dissemination of misinformation is accidental or intentional often depends on the topic, regardless of the potential dangers involved.” FGD, females

Regarding the main sources of disinformation and misinformation, FGD participants provide two contrasting views. The first perspective highlights television and radio, especially news programs, as major sources of disinformation. These traditional media outlets are seen as powerful tools for shaping public opinion and managing public perception, making them significant sources of misleading information.

On the other hand, the second perspective focuses on social networks as the primary source of misinformation and disinformation. This view emphasizes that social networks are rife with unverified content from independent bloggers and everyday users, who can spread information without any oversight or accountability.

Both viewpoints highlight the challenges in navigating information accurately across different media channels.

“Many television programs and specific channels, particularly those focusing on news or political analysis, attempt to manipulate information.” FGD, youth, female

“Misinformation predominantly circulates on major social networks. In contrast, disinformation is more commonly found on news websites.” FGD, Yerevan, female

“Naturally, there is a lot of false information in social networks, in any information field on the internet. It doesn't appear that much and often on television.” FGD, females

“In the case of television and radio, criminal liability can be imposed for spreading false information, unlike social networks. That is why television is perceived to have less misinformation and disinformation compared to online platforms.” FGD, Yerevan, male

Overall, nearly all FGD participants recognize the severe risks posed by misinformation and disinformation. These tactics are seen as dangerous tools that can be wielded at multiple levels, from inciting public panic during conflicts—such as those recently involving Armenia—to manipulating public sentiment and influencing political outcomes. According to them, this widespread impact highlights the urgent need for improved media literacy and rigorous fact-checking to counteract the spread of false information.

“I think it is a dangerous phenomenon. Slight false news can cause panic. As the last war showed, we are not ready at all.” FGD, Yerevan, female

“Misinformation and disinformation can be integral components of state policy, whether that policy is directed at influencing another country or managing internal affairs.” FGD, youth, male

Conclusions

- There is a slight increase in the proportion of respondents who find news in Armenian media trustworthy; however, nearly half of the respondents still disagree with this.
- There is a slow but steady increase in the proportion of respondents who are willing to financially contribute and pay for credible and accurate information.
- There is consistency in the top three most trusted TV channels, radio stations, and news websites from 2023 to 2024, suggesting a stable reliance on certain traditional media sources.
 - The findings on “trust in media” and “trustworthiness of information” reveal nuanced and sometimes opposing behaviors related to news consumption and trust, challenging the objectivity of the assessed concepts. The complex interplay between subjective perception and objective reality is evident in the opposing perceptions between respondents’ conscious judgments and their actual media consumption behaviors. For instance, while many respondents express distrust toward social networks, especially regarding the credibility of news shared on these platforms, they increasingly rely on these networks for social and political news. This suggests a preference for convenience and accessibility over the perceived credibility of information, highlighting a gap between what people say they trust and what they actually use.
 - Furthermore, the study reveals that trust in media is not solely about the media itself, but also about the respondents’ own perspectives and biases. Many individuals tend to consume and trust media sources that align with their personal viewpoints, indicating that trust is often less about the objective quality of the information and more about how well it resonates with pre-existing beliefs. This tendency complicates the assessment of trust in media, as it raises questions about whether the trust being measured is truly in the media itself or in the validation of the respondents’ own views.
 - Additionally, the similarity between the most trusted and most viewed media outlets may not necessarily indicate that viewers actively seek out trusted sources for their news. Instead, it could suggest a reverse causality known as “familiarity principle” when respondents are more likely to report trusting the media outlets they frequently watch, even if these channels are primarily known for entertainment rather than news content.

In light of these findings, the traditional methods of assessing trust in the media may require re-evaluation. It is important to consider whether the assessed “trust in media” truly reflects the inherent qualities of the media or is more indicative of the biases and preferences of the respondents. This calls for a more nuanced approach that integrates both the subjective and objective dimensions of media trust.

CONSUMER NEEDS AND DEMANDS

Research Questions

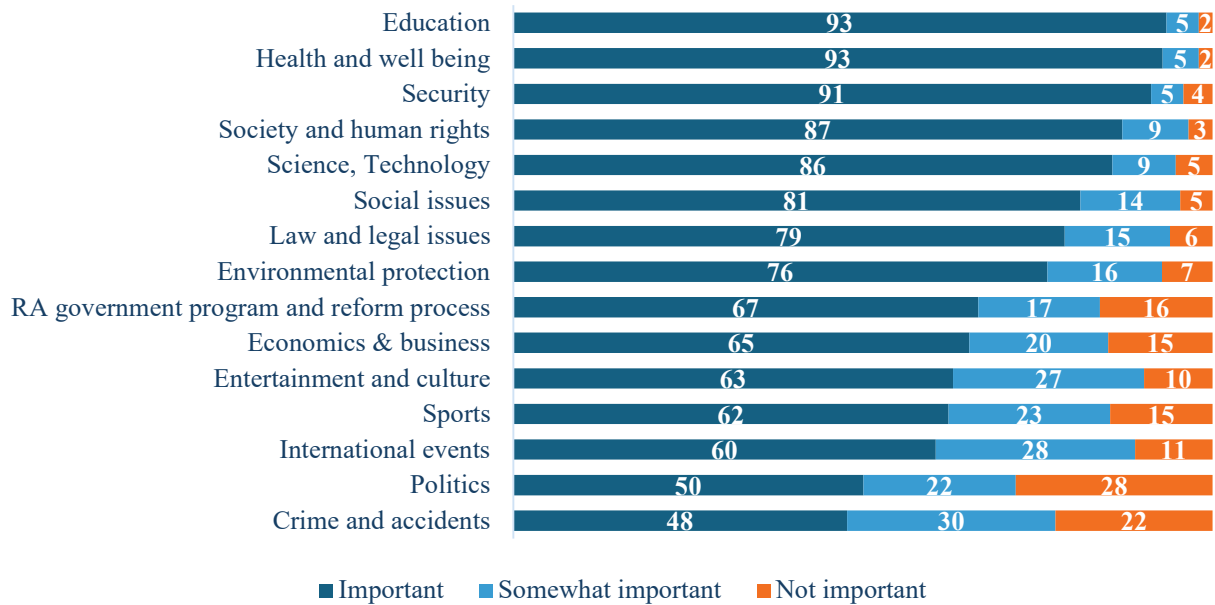
Question 1: What are the media content preferences of population?

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

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

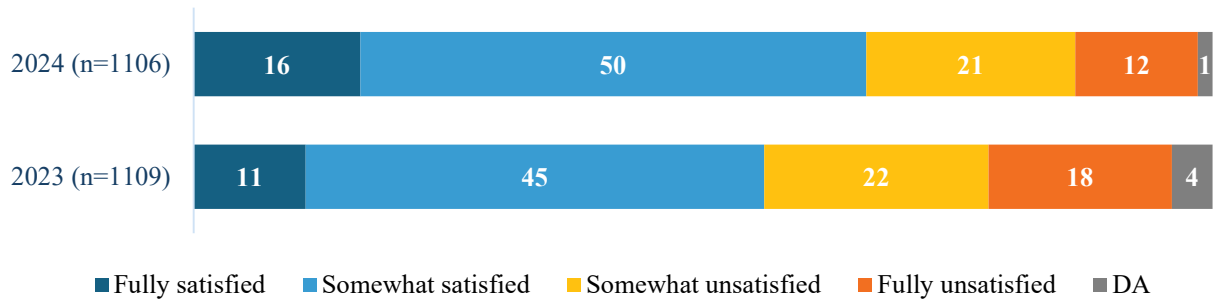
Importance of media content topics: Respondents evaluated the importance of various topics to them. Over 90 percent of respondents deemed **education** (93 percent), **health and well-being** (93 percent), and **security** (91 percent) as important. In contrast, politics (50 percent) and crimes and accidents (48 percent) were rated as less important compared to other areas (Figure 29).

Figure 29. Rate the importance of these topics for you, (n=1,106), %



Satisfaction with the coverage of topics: Overall, 66 percent of respondents are satisfied with how important topics are covered in the local media. This represents a significant 10 percent increase in satisfaction compared to 2023, when only 56 percent felt this way (Chi-square test, $p < 0.001$). Despite this improvement, 33 percent of respondents (compared to 40 percent in 2023) still feel that the coverage of topics important to them falls short, highlighting areas for further improvement (Figure 30).

Figure 30. How satisfied are you with the coverage of topics in the local media that are important to you? %



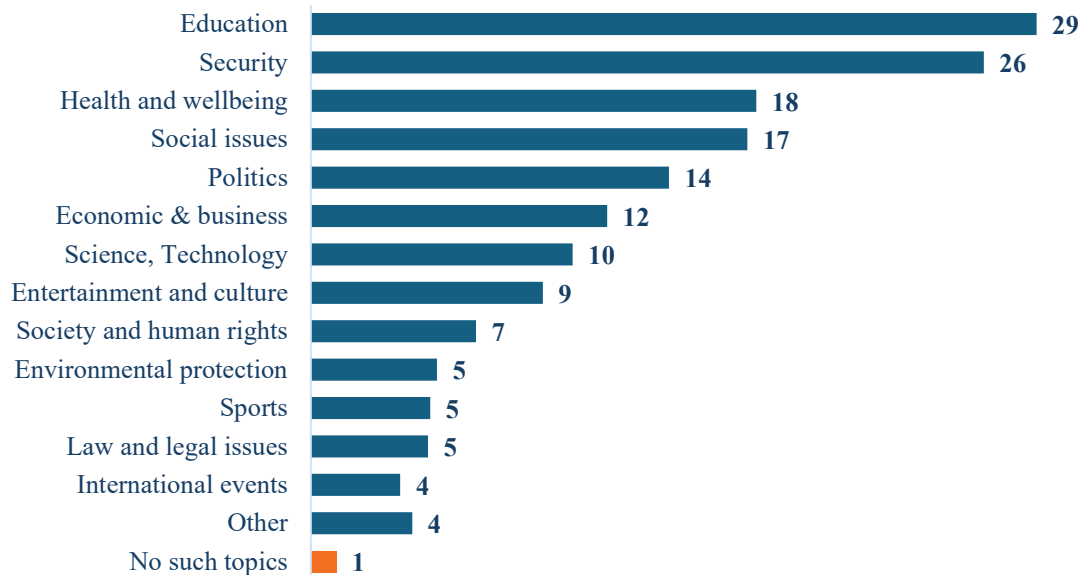
The analysis of confounding factors such as gender, age group, education, settlement type, or economic status shows no significant changes in satisfaction with the coverage of topics in the local media (see Annex 2, Table 1).

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

Media coverage needs: The figure below highlights the topics respondents want to see more coverage of in Armenian media. Education (29 percent), security (26 percent), health and well-being (18 percent), and social issues (17 percent) top the list.

Notably, these are the same topics that respondents emphasized as most important to them, indicating a clear desire for enhanced coverage in the areas that matter most to them (Figure 31). Overall, the topics that are important to respondents and those they wish to see covered more have remained consistent since 2023.

Figure 31. Which topics you would like to be reflected more in Armenian media?²⁹ (open-ended question, n=1,106), %



Qualitative data from focus group discussions reveal that participants generally prefer motivational programs, as these offer a positive alternative to the predominantly negative content available on television. Additionally, several informants mentioned that after the 44-day war in Artsakh in 2020, they have stopped following political news due to a significant loss of trust in news channels. This loss of trust is attributed to the widespread dissemination of false or misleading information during the war, which has led to a general skepticism towards news sources.

Many participants express a strong interest in programs or podcasts centered on culture, history, and sports. A recurring theme among informants was the demand for more analytical and research-focused content, especially in the areas of science and culture, which they believe are underrepresented. There is also a noted gap in the coverage of topics related to Armenia. Informants suggest that programs emphasizing Armenia’s everyday life in border communities, as well as stories highlighting individual successes in villages and smaller cities, would be highly valued.

“I would like to see creative women, men, or families. For example, a family in a remote village does inspiring work, etc.” FGD, females

“I would address the lack of scientific materials by also including content on cultural events.” FGD, Yerevan, male

“I don’t read political news, especially after the war.” FGD, females

In terms of news consumption, the majority of informants indicate a preference for reading over watching the news, citing ease of concentration and time efficiency as key reasons. They tend to favor concise, fact-based content over opinion pieces and view interview formats as an acceptable approach for news delivery.

²⁹ Multiple response question, 1,961 responses received. One respondent provided 1.8 answers on average. 13 percent of respondents had difficulty answering this question.

Informants with limited time often opt for podcasts as a convenient alternative. For entertainment, social networks, particularly Instagram and YouTube, are the primary choices.

"I don't watch TV; instead, I follow news on Facebook and look at what's interesting to me at the time. I primarily use social networks for updates." FGD, marz, female

"Video clips usually capture my attention, but I prefer to read to get information, so I prefer the text format." FGD, Yerevan, female

"Mostly I would say I read text news because it saves time." FGD, Yerevan, male

"I appreciate it when news is presented in a concise format. Whether in the form of an article or an interview, it should be very brief and based on facts rather than rumors." FGD, females

"I don't have time to follow the media during the day, so I prefer listening to podcasts." FGD, Yerevan, male

Conclusions

- There is an increase in the proportion of the population satisfied with the coverage of the topics of their interest in the local media. The rise in satisfaction with media coverage, although significant, still leaves a substantial portion of the population feeling underserved. This gap highlights an opportunity for media outlets to realign their content strategies, focusing on the topics that resonate most with their audience. The consistency in preferred topics from 2023 to 2024 suggests a stable demand that media providers can capitalize on by deepening and broadening their coverage in these areas.
- Education, health and well-being and security are the most frequently mentioned topics for broader media coverage. On the other hand, the relatively lower interest in politics suggests a growing fatigue, possibly exacerbated by the Artsakh war and its aftermath. At the same time, lack of interest in politics often translates into a lack of interest in the news.
- People prefer positive content over negative content. The qualitative insights from focus group discussions reveal a clear preference for content that uplifts and informs, rather than content that merely entertains or shocks. There is a demand for more analytical and research-based programming on science, culture, and Armenia-specific topics.
- People prefer reading the news rather than watching it because they find it easier to concentrate on text and it saves time. Additionally, they favor concise, fact-based content over opinion pieces and find interview formats acceptable for news. Those with limited time often opt to listen to podcasts. For entertainment, informants primarily turn to social networks like Instagram and YouTube.
- Thus, media outlets that can provide concise, fact-based content in various formats, particularly through digital platforms, are likely to engage a broader audience. This trend highlights the need for media to adapt not only in content, but also in delivery, offering diverse options that cater to different consumption preferences and time constraints.
- Overall, the findings suggest that media outlets must not only respond to but also anticipate and shape public demand. By focusing on quality, relevance, and accessibility, Armenian media can better meet the needs of the public.

MEDIA LITERACY

Research Questions

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

Question 2: What are the prevalent response practices in case of false, misleading, or unethical information?

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

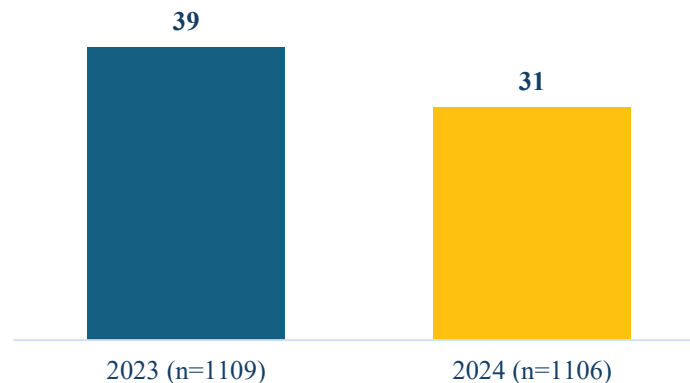
Based on the international evidence-based methodologies, the study assesses three main skills:

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

According to the analysis, **31 percent** of respondents can effectively separate facts from opinions and recognize manipulative media strategies. This marks a decrease from 39 percent in 2023 (Figure 32). However, it is important to note that the project team revised the answer options for this question and included additional responses compared to last year. Therefore, this change should be considered when interpreting the results.

Figure 32. Percentage of respondents who have the ability to separate facts from opinions and identify manipulative media strategies, %



The question measuring this indicator presented five pieces of information, and respondents needed to identify which were fact-based and which opinion-based (Table 7). As a multiple-response question, respondents could select as many options as they deemed appropriate. The correct answer was only the first option presented in the table below. Overall, 57 percent of respondents selected the first option, but some also chose additional options. **The indicator value of 31 percent reflects only those respondents who selected the first option exclusively**, without choosing any other options.

Table 7. Which pieces of information are fact based, not opinion based? (n=1,106)³⁰

According to the NWS statement the heavy rainfall leading to the flooding was	Many people say that the flooding was a result of poor infrastructure and could have been	A group of citizens are claiming that the flooding could have been	Some residents believe that the government's response to the flooding in Lori	The flooding of Debed and Aghstev rivers was organized	None of them

³⁰ Multiple response question

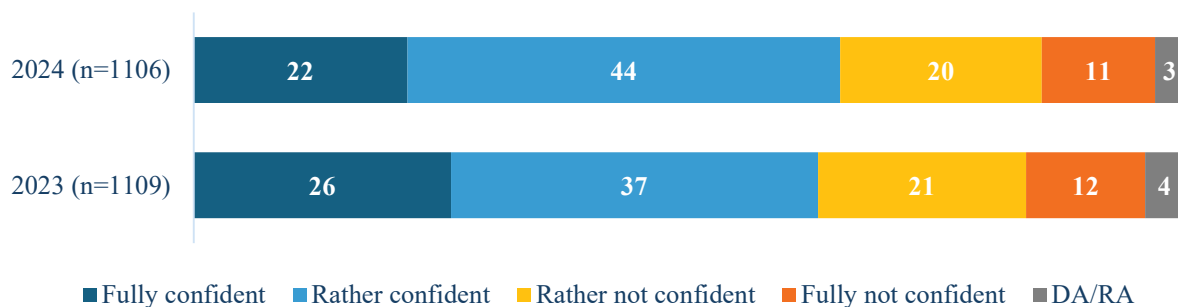
unprecedented in the last 50 years.	avoided with better planning.	predicted and the disaster could be prevented.	was inadequate and delayed.	deliberately for political reasons.	
57%	36%	17%	17%	8%	28%

The analysis of confounding factors revealed statistically significant differences based on respondents' education, age group, and economic status. Specifically, a higher percentage of respondents with higher education levels, younger respondents (aged 18-35), and those with higher economic status demonstrated a greater ability to separate facts from opinions in media compared to the other groups (see Annex 2, Table 2).

There is a considerable discrepancy between self-assessment and actual results. While 66 percent of respondents feel confident in their ability to distinguish between factual information and opinions in news articles or reports (Figure 33), only 31 percent could correctly identify a fact-based piece of information.

Further analysis revealed that a higher percentage of male respondents and those with average or higher economic status expressed greater confidence in their ability to distinguish fact from opinion compared to female respondents and those with lower economic status (see Annex 2, Table 25).

Figure 33. To what extent do you feel confident in your ability to distinguish factual information from opinions in news articles or reports? %



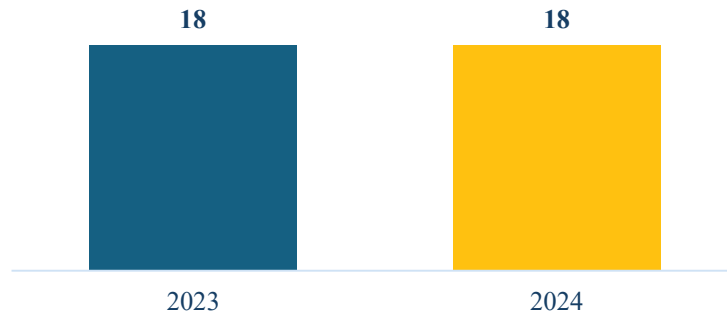
2. Ability to recognize and fact-check suspicious information

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

Overall, **18 percent** of respondents are able to recognize and fact-check suspicious information, a figure consistent with 2023 (Figure 34).

The analysis of confounding factors revealed statistically significant differences based on respondents' education, settlement type, age group, and economic status. Specifically, a higher percentage of respondents with higher education levels, those living in Yerevan, younger respondents (aged 18-35), and those with average or higher economic status demonstrated a greater ability to recognize and fact-check suspicious information compared to other groups (see Annex 2, Table 3).

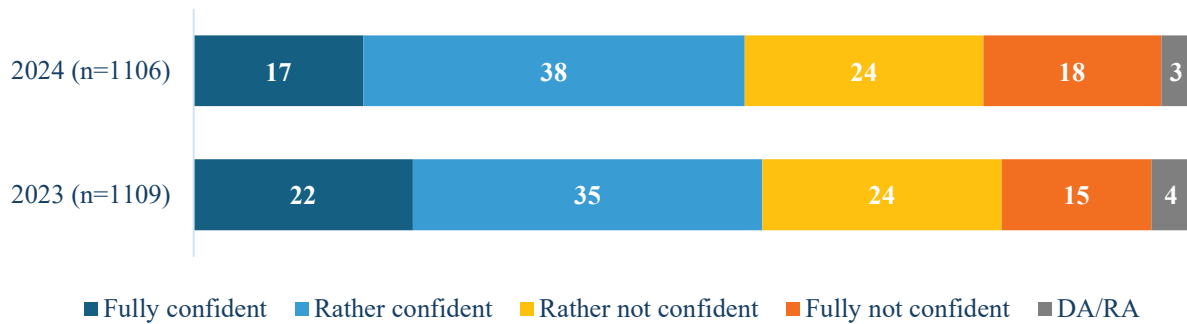
Figure 34. Percentage of respondents who have the ability to recognize and fact-check suspicious information, %



On the other hand, self-assessments of this ability are notably higher, with 55 percent of respondents expressing confidence in their capability to recognize and fact-check suspicious information (Figure 35).

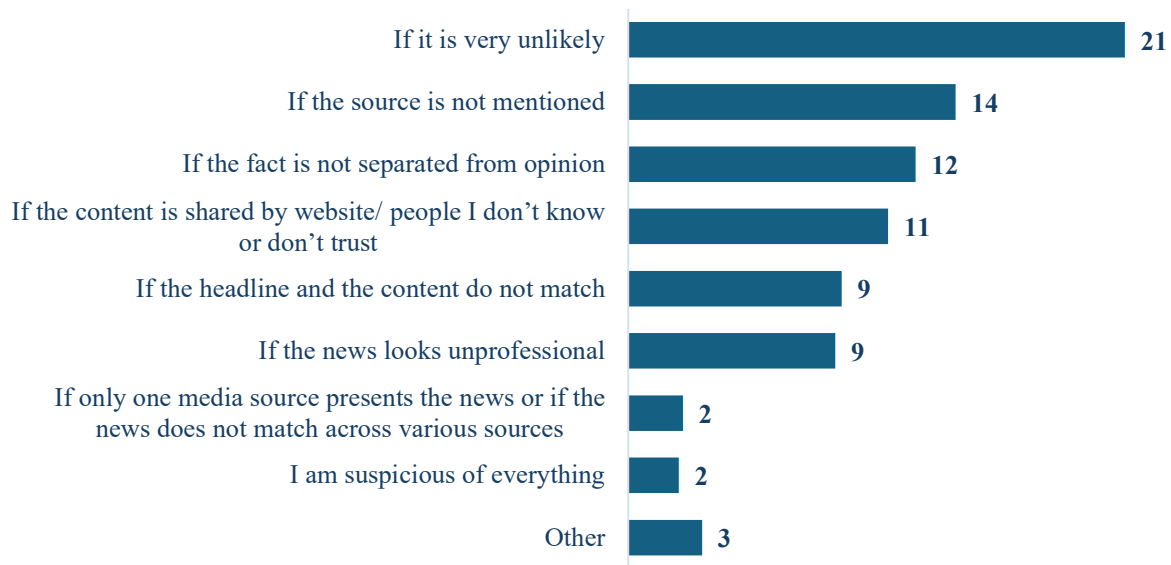
Further analysis revealed significant demographic differences. Specifically, a higher percentage of male respondents, younger adults (aged 18-35), individuals with higher levels of education, and those reporting average or higher economic status expressed greater confidence in their ability to discern true from fake news compared to other groups of respondents (see Annex 2, Table 26).

Figure 35. To what extent do you feel confident at judging whether a news you read/watch/listen to is true or fake? %



Respondents most commonly cite the unlikelihood of the information (21 percent) as a reason for finding it suspicious or unreliable. They also consider the absence of a source (14 percent), the failure to separate fact from opinion (12 percent), and a lack of trust in the website or individuals involved (11 percent) as factors contributing to their skepticism (Figure 36).

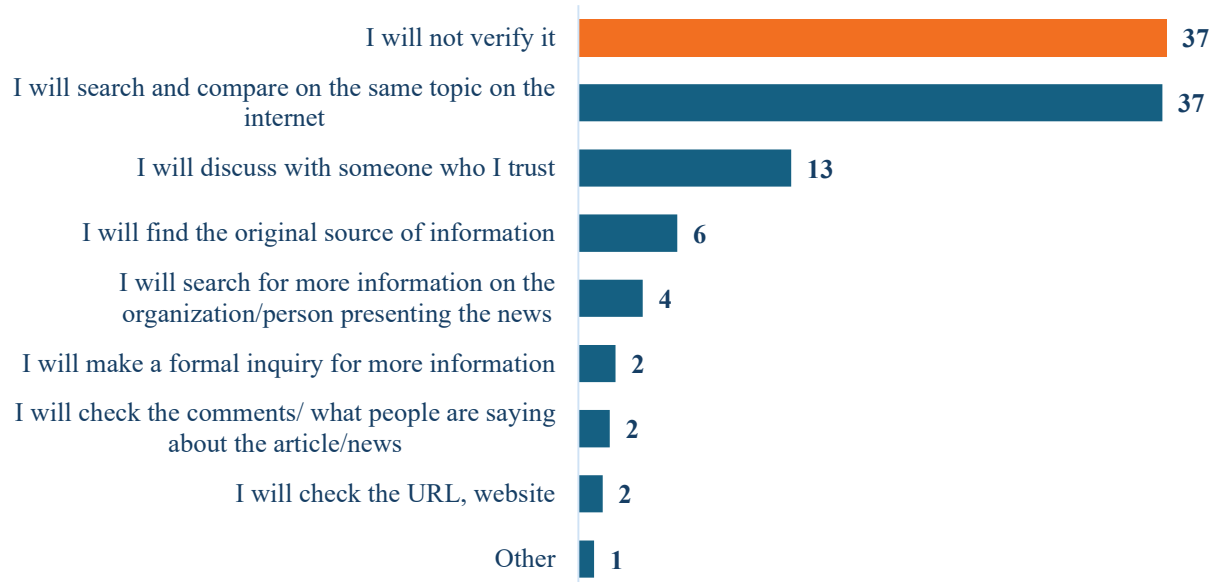
Figure 36. Circumstances in which information is considered suspicious/unreliable,³¹ (open-ended question, n=1,106), %



Furthermore, the figure below reveals how respondents would verify and check the accuracy of suspicious information. The primary method, mentioned by 37 percent of respondents, involves searching for and comparing the same topic on the internet. Other methods include discussing the information with a trusted individual (13 percent) and finding the original source of the information (6 percent). Notably, 37 percent of respondents indicated that they would not verify or check the accuracy of suspicious information.

³¹ Multiple response question, 1,312 total responses received, one respondent provided 1.2 answers on average. 34 percent of respondents had difficulty answering this question.

Figure 37. Methods to verify information,³² (open-ended question, n=1,106), %



3. Ability to create media content

The assessment of the ability of media content creation focused on examining respondents' actual practices. According to the results, **15 percent** of participants have experience producing media content, a figure unchanged since 2023 (Figure 38).³³

When it comes to self-assessment, 20 percent of respondents feel confident in their ability to create media content, while 78 percent lack confidence (Figure 39). A higher percentage of younger respondents (aged 18-35) and those with higher education level reported significantly greater confidence in their ability to create media content compared to other groups (see Annex 2, Table 27)

³² Multiple response question, 1,222 responses received. One respondent provided 1.1 answers on average. 7 percent of respondents had difficulty answering this question.

³³ To assess the ability to create media content, respondents were directly asked if they had ever created any media content.

Figure 38. Percentage of respondents who have the ability to create media content, %

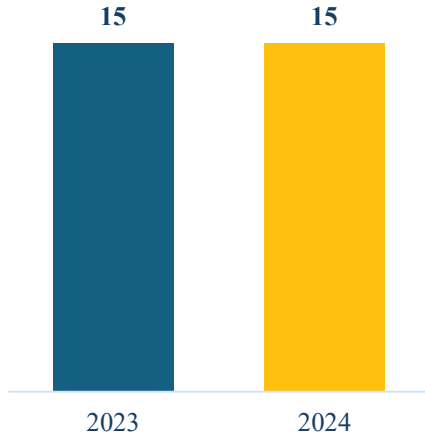
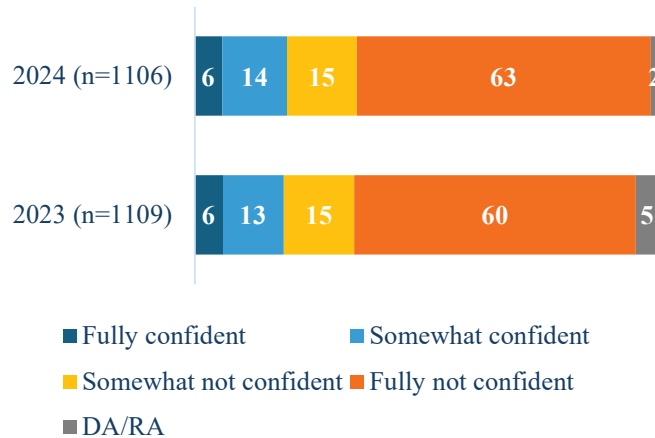


Figure 39. To what extent do you feel confident in your ability to create media content? %



The analysis of confounding factors revealed statistically significant differences based on respondents’ education, age group, and economic status. Specifically, a higher percentage of respondents with higher education levels, younger respondents (aged 18-35), and those with average or higher economic status are more likely to have the ability to create media content compared to other groups (see Annex 2, Table 4).

The primary motivation behind content creation is to inform the audience (47 percent). Other reasons include building an audience (21 percent), protecting their own or others’ rights (18 percent), and making money (17 percent) (Figure 40). When it comes to the type of content, 44 percent of respondents create occasional texts, comments, or images, while 37 percent focus on video clips and reels, and 23 percent produce memes, sayings, or other visuals. Additionally, 18 percent report creating podcasts (Figure 41).

Most content creators primarily use Facebook (74 percent) to share what they have created. Instagram is the next most popular platform, used by 33 percent of creators, followed by YouTube and Telegram, each at 10 percent, and TikTok at 9 percent.

Figure 40. What was/is the purpose of content creation?³⁴ (open-ended question, n=167), %

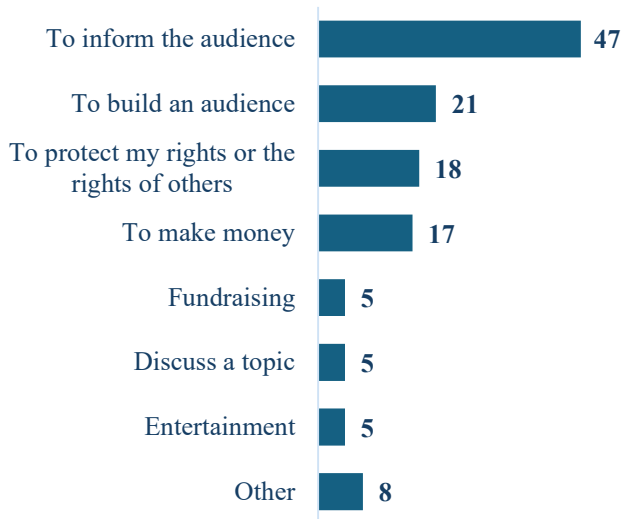
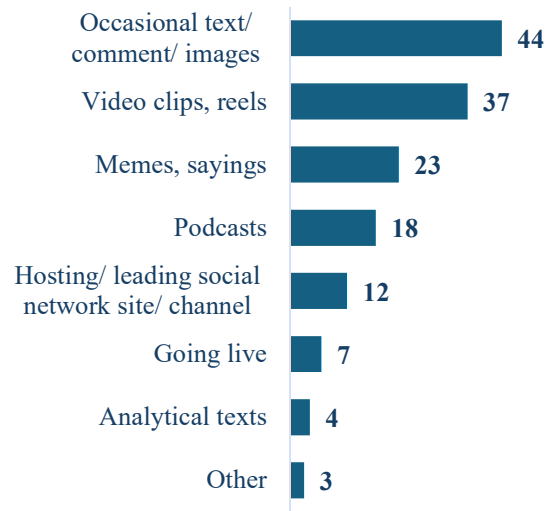


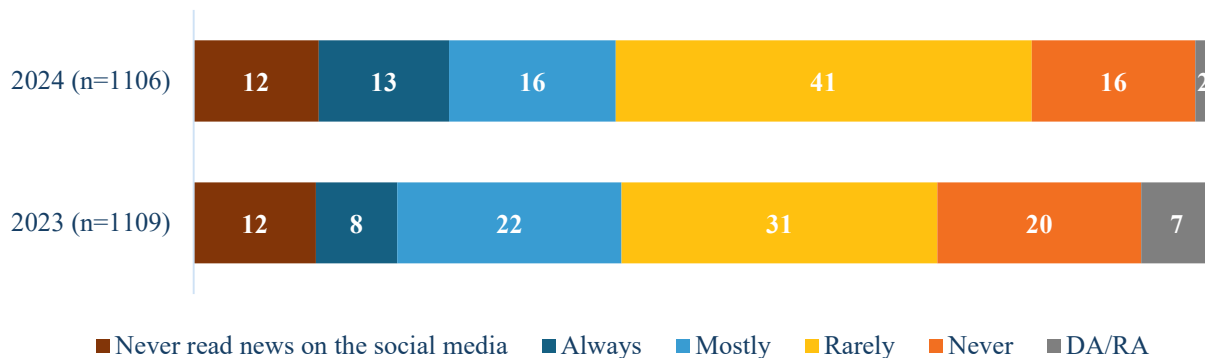
Figure 41. What content do you create?³⁵ (open-ended question, n=167), %



Question 2: What are the prevalent response practices in case of false, misleading or unethical information?

The results show that 29 percent of respondents always or mostly click on news links they encounter via social networks, while 57 percent rarely or never do so. The percentage of respondents who avoid clicking on these links has significantly increased, by 6 percentage points since 2023 (51 percent) (Chi-square test, p<0.001) (Figure 42).

Figure 42. How often do you click on a news link that you read via social networks? %



When encountering false, misleading, or unethical information, nearly half of respondents (48 percent) admit they would do nothing. The main reasons for inaction include skepticism about whether their efforts would make a difference (32 percent) and a lack of knowledge or information on how to respond (29 percent). Some respondents also express indifference, citing a lack of time or motivation to address such

³⁴ Multiple response question, 210 responses received. One respondent provided 1.3 answers on average. 1 percent of respondents had difficulty answering this question.

³⁵ Multiple response question, 249 responses received. One respondent provided 1.5 answers on average. 1 percent of respondents had difficulty answering this question.

issues. Of those who would take action, 34 percent would boycott by unfollowing, not watching, or not reading the source (Figures 43 and 44).

Figure 43. What is your response to false, misleading, or unethical information?³⁶ (open-ended question, n=1,106), %

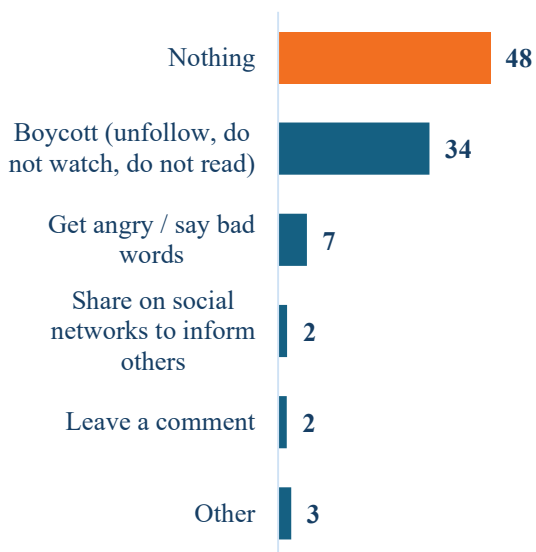
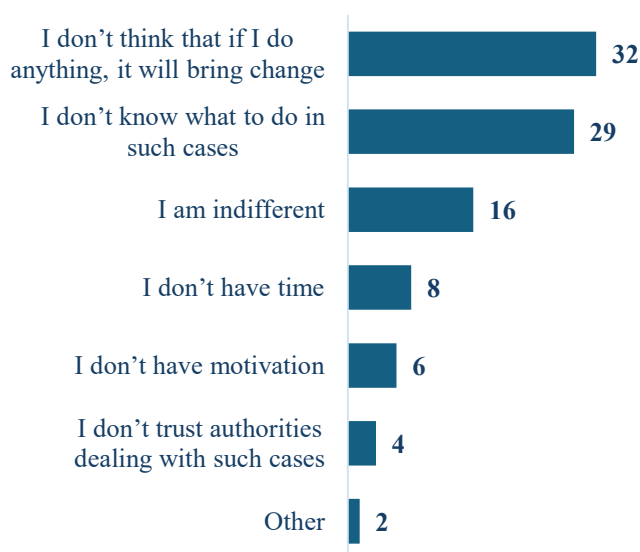


Figure 44. If nothing, why?³⁷ (open-ended question, n=530), %



The qualitative data indicate that participants assess their media literacy to varying degrees. Some have attended media literacy training courses or read about the topic, while others feel they lack these skills. However, as both qualitative and quantitative data suggest, some individuals might overestimate or underestimate their media literacy abilities.

Overall, the majority of participants agree that fostering critical thinking is essential for developing media literacy. It is particularly noted that young children and seniors often lack these crucial skills. According to most informants, it is vital to organize training sessions and engage in discussions about media literacy with schoolchildren, university students, and seniors. Additionally, it is important to continually update information and strategies, as those who spread misinformation are increasingly using diverse methods to manipulate and distort information.

"I consider myself media literate, unless there is a very serious scam, I can identify the case." FGD, Yerevan, male

"To some extent, I consider myself media literate and I am very careful in this field." FGD, females

"I don't regard myself as media literate because I haven't attended relevant courses, and I don't work in that sphere. While university discussions touch on media literacy topics, I still find it challenging to understand these concepts." FGD, Yerevan, female

"In particular, seniors lack media literacy skills and are unable to verify the accuracy of information." FGD, males

³⁶ Multiple response question, 1,137 responses received. One respondent provided 1 answer on average. 5 percent of respondents had difficulty answering this question.

³⁷ Multiple response question, 561 responses received. One respondent provided 1.1 answer on average. 9 percent of respondents had difficulty answering this question.

Most informants share various “lifehacks” for verifying information, focusing on the following methods:

1. **Grammar and Quality:** They use the grammar and overall quality of the information as an initial indicator of credibility.
2. **Source Verification:** They verify information by checking its source, particularly by comparing it with official channels, especially for topics related to border incidents and military affairs. Informants are also aware of certain channels known for spreading false information and do not consider these sources reliable.
3. **Cross-checking:** A commonly used strategy is to consult multiple sources to ensure the accuracy and reliability of the information.

These methods reflect a thoughtful approach to assessing information credibility.

“I have a blacklist of media that I know what their goal is, I don't follow them.” FGD, marz, male

“To assess the accuracy of the material, I begin by seeking the same information across various news outlets. Simultaneously, I cross-reference this information with additional sources to ensure its accuracy.” FGD, Yerevan, female

Conclusions

- The data on media literacy reveals a complex picture of public abilities and attitudes toward handling media content. There is a notable gap between perceived and actual media literacy skills. Many people feel confident in their ability to distinguish between facts and opinions, recognize manipulative media strategies, and fact-check suspicious information. However, fewer individuals actually possess these skills in practice.
- Over a third of respondents do not verify the suspicious information they encounter. This highlights the need for media literacy programs that focus on practical, evidence-based strategies for fact-checking and identifying manipulation. Such programs should aim to translate the public’s skepticism into effective verification practices.
- The increase in respondents avoiding news links on social networks, along with a significant portion who would take no action against false information, reflects a broader issue of media fatigue and disengagement.
- Qualitative insights reveal a recognition of the importance of critical thinking and media literacy, particularly for groups such as children and seniors. The strategies employed by individuals, such as checking grammar and verifying sources, suggest a thoughtful approach but also highlight the need for formalized training programs.

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 Observatory?

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

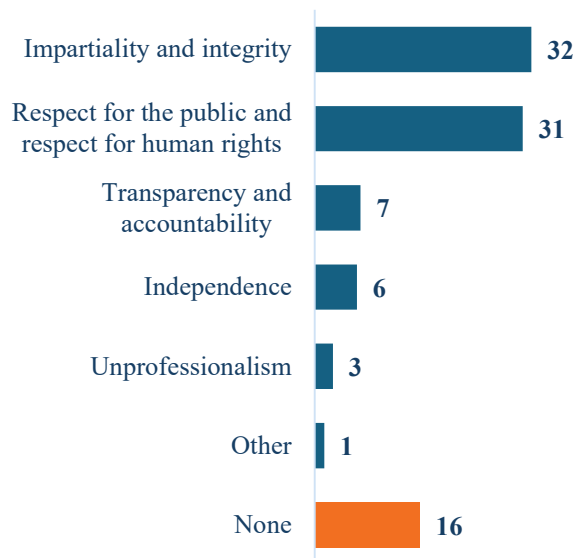
Important ethical standards: Respondents identified key ethical standards that journalists should follow, as well as those most frequently violated in Armenian media. The most valued ethical standard among respondents is respect for the public and human rights (45 percent), followed by impartiality and integrity

(37 percent) (Figure 45). Notably, these are also the standards that respondents believe are most often violated in Armenian media (Figure 46).

Figure 45. What kind of ethical standards should journalists follow?³⁸ (open-ended question, n=1,106), %



Figure 46. What kind of journalistic ethical standards are most often violated in Armenian media?³⁹ (open-ended question, n=1,106), %



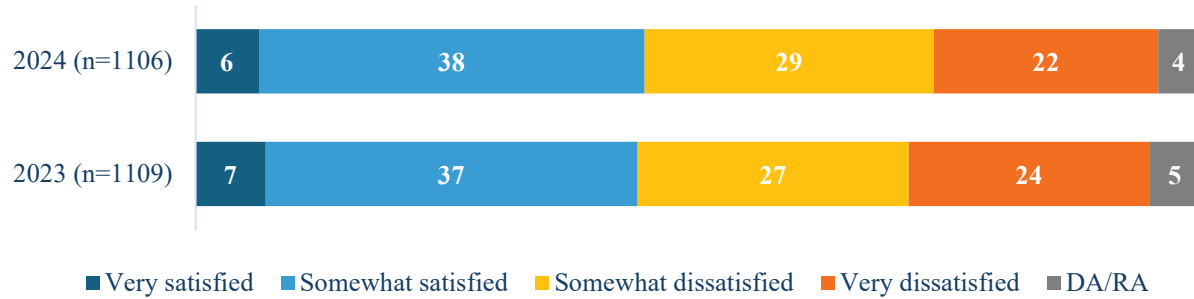
Users’ level of satisfaction with the ethics and professionalism: Regarding satisfaction with the ethics and professionalism of Armenian journalists, 44 percent of respondents are either very satisfied or somewhat satisfied. In contrast, over half (51 percent) are dissatisfied. This pattern has remained consistent since 2023 (Figure 47).

The analysis of confounding factors reveals statistically significant differences only based on respondents’ settlement type. Specifically, respondents living in Yerevan and other urban areas are less likely to be satisfied with the ethics and professionalism of Armenian journalists compared to those in other regions (see Annex 2, Table 5).

³⁸ Multiple response question, 1,457 total responses received. One respondent provided 1.3 answers on average. 20 percent of respondents had difficulty answering this question.

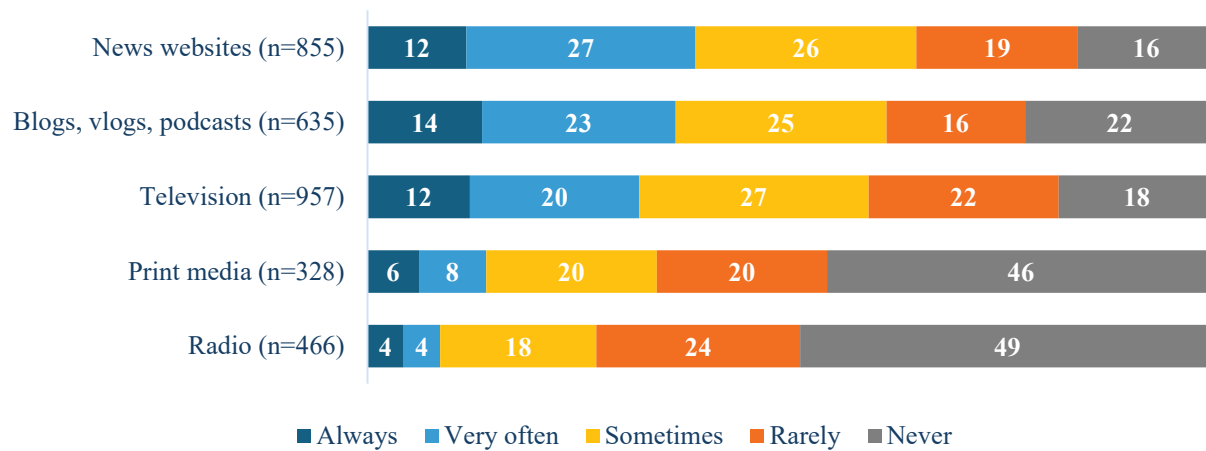
³⁹ Multiple response question, 1,296 total responses received. One respondent provided 1.2 answers on average. 22 percent of respondents had difficulty answering this question.

Figure 47. How satisfied are you with the ethics and professionalism of Armenian journalists in general? %



The figure below shows that respondents frequently or always observe ethical violations in news websites (39 percent), followed by blogs, vlogs, and podcasts (36 percent), and television (32 percent). In contrast, they report the fewest ethical violations in print media (14 percent) and radio (8 percent).

Figure 48. How often do you see ethical violations in the following types of media? %



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

The table below reveals a significant increase in awareness of the Media Ethics Observatory (MEO) over the years. In 2024, 15 percent of respondents report being aware of this body, up from 9 percent in 2023 and 4 percent in 2021 (Table 8). Despite this growing awareness, the percentage of respondents willing to contact the body if needed has remained relatively stable.⁴⁰

FGD participants also discussed the Media Ethics Observatory, but none were aware of its existence or functions. Some participants speculated that the body might oversee media outlets to ensure adherence to media ethics. However, after the role of the Observatory was explained, nearly all participants expressed skepticism about the impact it could have on media outlets, citing a lack of knowledge of any cases where media outlets had been 'punished' for violating ethical standards.

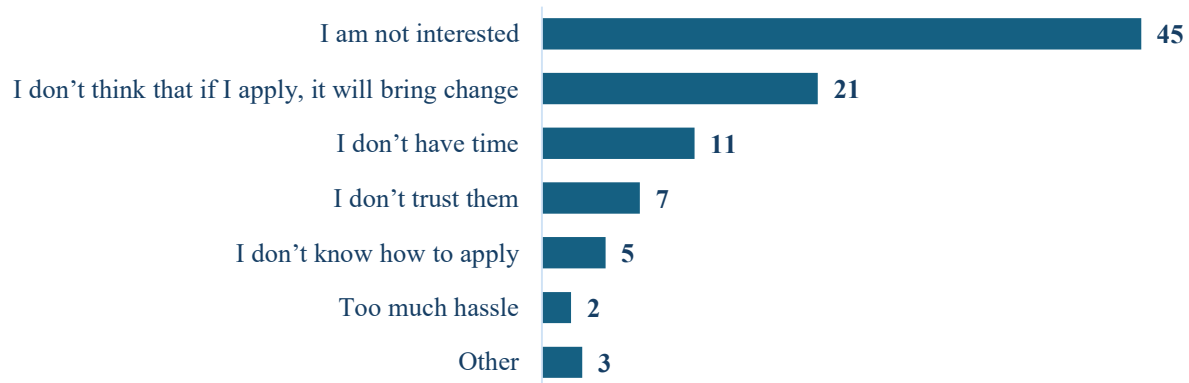
⁴⁰ The figures for these questions are presented in Annex 3, Figures 17 and 18.

Table 8. Awareness on Media Ethics Observatory and willingness to apply⁴¹

Indicator 1	2021 (n=1,204)	2023 (n=1,098)	2024 (n=1,097)	Difference
The proportion of people who are aware of the Media Ethics Observatory	4%	9%	15%	Chi-square test p<0.001
Indicator 2	2021 (1,164)	2023 (1,071)	2024 (n=1,070)	Difference
The proportion of people who are willing to apply to the Media Ethics Observatory if required	29%	27%	31%	Chi-square test p>0.01

The figure below illustrates that 45 percent of respondents are not interested in applying to the Media Ethics Observatory if needed. Additionally, 21 percent express skepticism about whether it would lead to meaningful change. Some respondents also cite a lack of time, while others do not trust the body (Figure 49).

Figure 49. Reasons people are not willing to send a complaint/appeal to the MEO if necessary,⁴² (open-ended question, n=741), %



Conclusions

- The level of satisfaction with the ethics and professionalism of Armenian journalists has not changed since 2023 and is still around 44 percent. The ongoing dissatisfaction with the ethics and professionalism of Armenian journalists, is particularly pronounced in urban areas like Yerevan.
- The higher frequency of observed violations in digital and visual media compared to print and radio suggests that the rapid and often unregulated nature of online media may be contributing to ethical failures.
- There is an increased level of awareness of the Media Ethics Observatory. However, this increase didn't lead to a greater number of people willing to apply to the MEO if needed. This situation suggests that while the MEO is becoming more visible, it needs to enhance its credibility and demonstrate tangible impacts to foster greater public engagement and confidence.

⁴¹ To conduct meaningful comparison across two survey data, only valid responses were calculated excluding difficult to answer and refuse to answer options, percent data is calculated among respondents who consume online news media.

⁴² Multiple response question, 785 total responses received. One respondent provided 1.1 answer on average. 13 percent of respondents had difficulty answering this question.

PERCEPTIONS OF FREEDOM OF EXPRESSION (FoE)

Research Questions

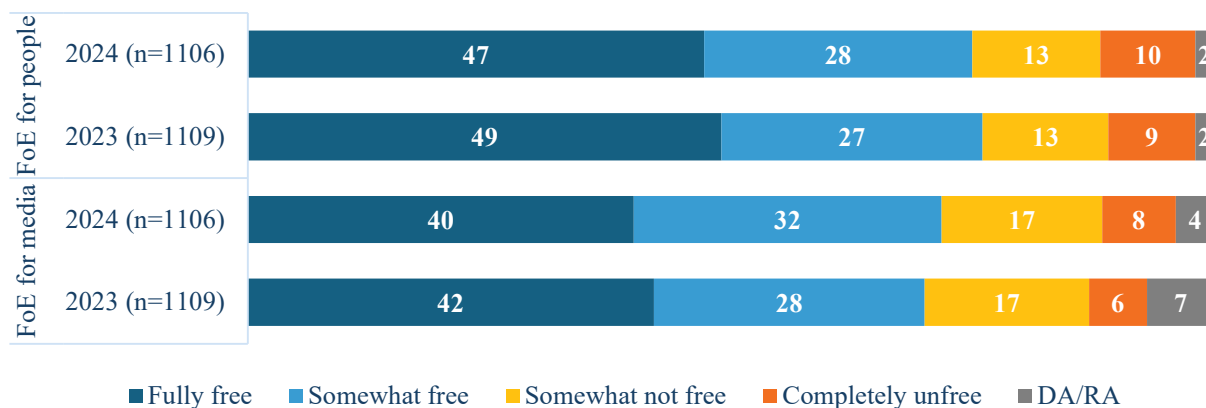
Question 1: What is the perceived level of freedom of expression (FoE) in Armenia for people and for media?

Question 2: What does FoE look like in online and public spaces?

Question 1: What is the perception of FoE in Armenia for citizens and for media?

As in 2023, this research again demonstrates that the majority of the respondents believe that there is a high level of freedom of expression in Armenia both for people and the media. The figure below shows that 75 percent of respondents view freedom of expression for people as fully or somewhat free, while 72 percent believe freedom of expression for media is fully or somewhat free. At the same time, every 5th respondent finds that people and media in Armenia are somewhat or completely not free to express their views and opinions (Figure 50).

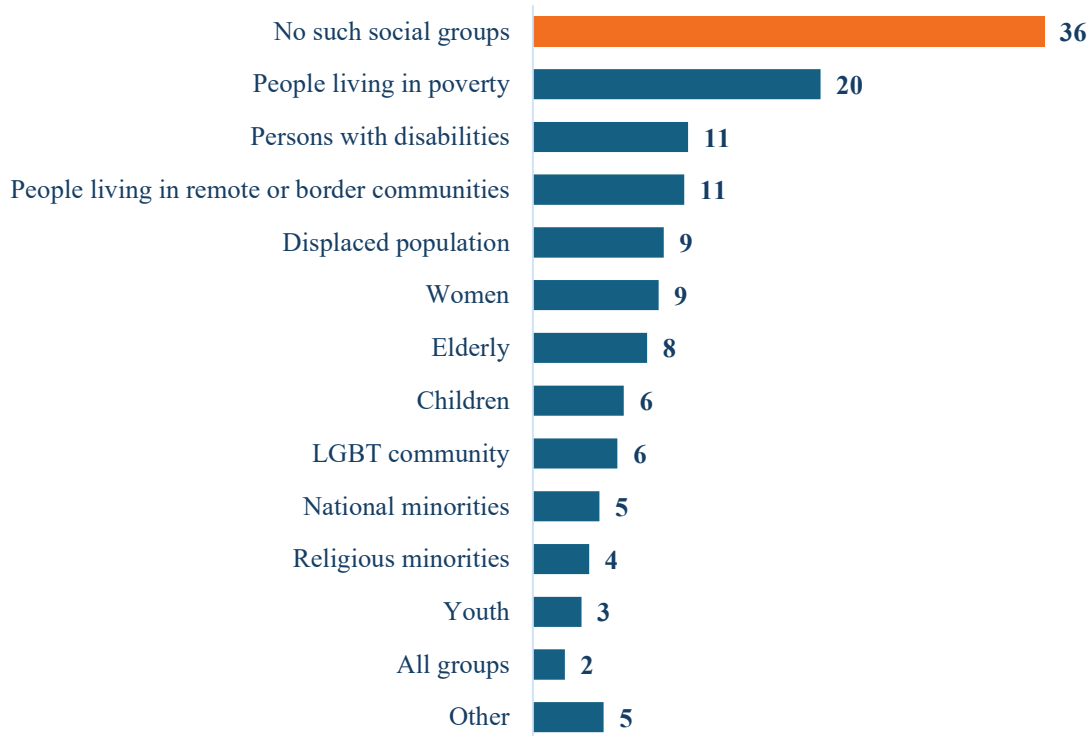
Figure 50. How would you rate the level of freedom of expression for people in Armenia and freedom of expression for Armenian mass media?



The analysis of confounding factors revealed statistically significant differences based on settlement type and perceptions of freedom of expression for people. Specifically, fewer respondents from Yerevan rated FoE for people and media in Armenia as fully free compared to those from other urban and rural areas. Additionally, respondents with higher education levels were less likely to perceive FoE for media as fully free compared to those with lower levels of education (see Annex 2, Tables 6 and 7).

FoE for different social groups: When asked about social groups with comparatively less freedom of expression, 36 percent of respondents indicate that no such groups exist. However, 20 percent believe that people living in poverty experience less freedom of expression, while 11 percent identify persons with disabilities and those living in remote or border communities as having less freedom (Figure 51).

Figure 51. Which groups have comparably less freedom of expression?⁴³ (open-ended question, n=1,106), %



According to qualitative data, there are certain topics on which individuals are less inclined to speak freely or share their opinions publicly. These topics include sensitive matters such as politics, LGBTQI+ topics, domestic and sexual violence, sexual education, religion, and issues related to political prisoners. Some informants believe that the reluctance to discuss these subjects is influenced by the type of settlement (for example, that people in the capital are generally more open compared to those in the regions). Cultural norms also play a role, with men often able to criticize and discuss a wider range of topics more openly than women.

"In Yerevan, many topics are discussed more openly and freely. Additionally, gender influences the extent to which individuals can engage in discussions; men are generally able to address a broader range of topics and express criticism more openly than women." FGD, youth, female

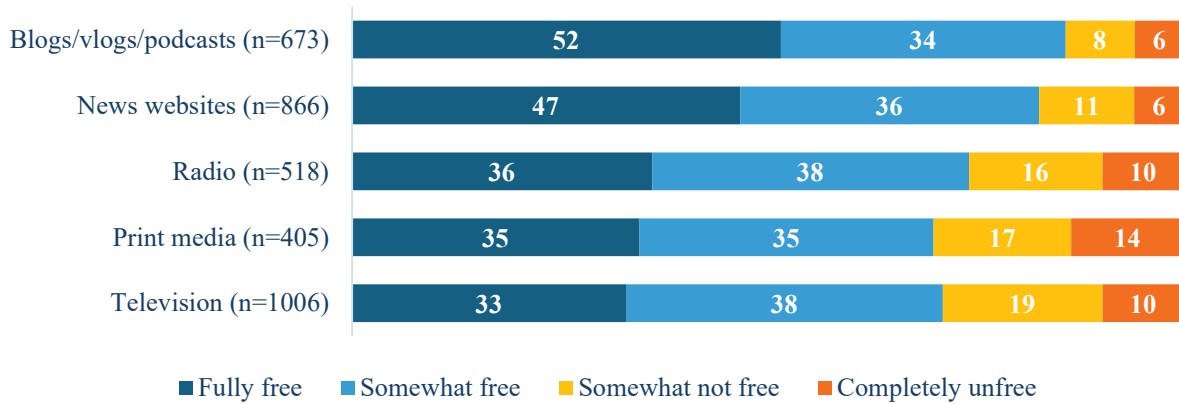
"I have dealt with this situation, that I belong to a political force, I share the values, and I believe, I express my freedom of speech, and that is why I have been even fired because of that, now I try to be silent." FGD, females

"Men can freely talk about any topic, even drug addiction and weapons." FGD, youth, male

FoE in various types of Armenian media: Respondents perceive blogs, vlogs, and podcasts, as well as news websites, as having the highest levels of freedom of expression among Armenian media types, with 86 percent and 83 percent rating them as either “fully free” or “somewhat free,” respectively. In contrast, print media and television are seen as having the lowest levels of freedom, with 70 percent and 71 percent of respondents rating them similarly (Figure 52).

⁴³ Multiple response question, 1,609 responses received. One respondent provided 1.5 answers on average. 9 percent of respondents had difficulty answering this question.

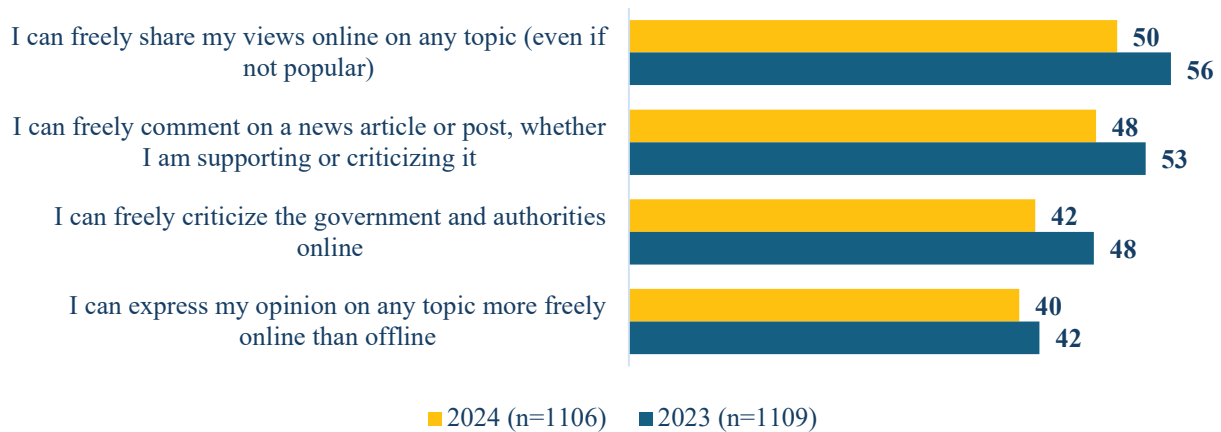
Figure 52. How would you rate the level of freedom of expression in the following types of Armenian media? (n=1,106), %



Question 2: What does the FoE look like in online and public spaces?

Freedom of expression in online spaces: Compared to 2023, the data shows a significant decrease in the percentage of respondents who feel they can freely express their views online, comment on news articles, criticize the government and authorities, or express themselves more freely online than offline (Chi-square test, $p < 0.001$ for all statements). Overall, in 2024, more respondents believe that their freedom of expression is constrained compared to 2023 (Figure 53).⁴⁴

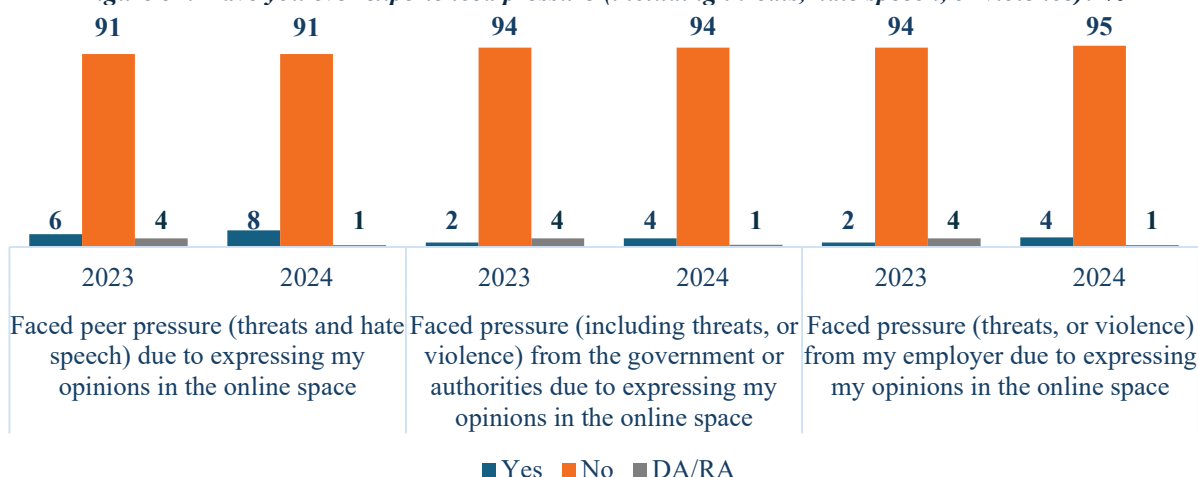
Figure 53. Percentage of respondents that agree (“Fully agree” and “Somewhat agree” options combined) with the following statements, %



Regarding experiencing pressure, threats, hate speech, or violence from various actors for expressing opinions online, the vast majority of respondents reported not facing such situations in either 2024 or 2023. The figure below indicates that respondents were more likely to encounter peer pressure for their online opinions (8 percent), compared to pressure from the government or authorities (4 percent), or their employers (4 percent). No significant differences emerge between 2023 and 2024.

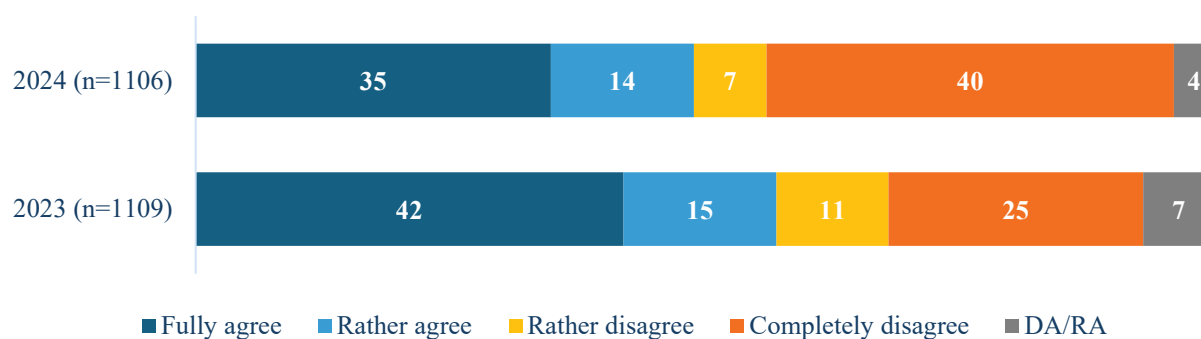
⁴⁴ The data for 2024 with all answer options is presented in Annex 3, Figure 19.

Figure 54. Have you ever experienced pressure (including threats, hate speech, or violence)? %



Freedom of expression in public spaces: The results reveal that 49 percent of respondents believe they can freely attend peaceful protests or other organized events, either fully or somewhat agreeing with this statement. In contrast, 47 percent disagree. Since 2023, perceptions have shifted significantly: in 2024, 40 percent of respondents completely disagree with that they can freely attending such events, compared to 25 percent in 2023 (Chi-square test, $p < 0.001$) (Figure 55). This change may reflect the recent events in Armenia, including protests against the government and clashes with police since.

Figure 55. I can freely attend a peaceful protest, or organized political or other type of event, %

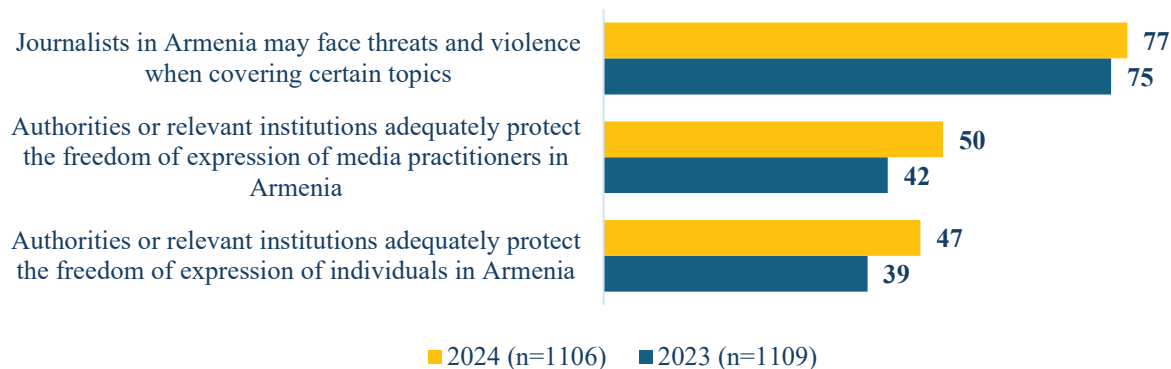


The analysis of confounding factors revealed statistically significant differences based on respondents' gender, education, age group, and economic status. Specifically, more female respondents, those with less education levels, older respondents (aged 36 and older), and individuals with lower economic status are more likely to disagree that they can freely attend a peaceful protest or organized political event compared to other groups (see Annex 2, Table 8).

Protection of FoE: Regarding the protection of freedom of expression, nearly half of the respondents believe that authorities or relevant institutions adequately protect the freedom of expression for both media practitioners (50 percent, 8 percent increase since 2023) and individuals (47 percent, 8 percent increase since 2023) in Armenia. At the same time, the majority (77 percent, 2 percent increase since 2023) also believe that journalists may face threats and violence when covering certain topics.

It is noteworthy that the changes in the proportions of people agreeing with these three statements are statistically significant (Chi-square test, $p < 0.001$) (Figure 56).⁴⁵

Figure 56. Percentage of respondents that agree (“Fully agree” and “Somewhat agree” options combined) with the following statements, %



The analysis of confounding factors revealed statistically significant differences based on respondents’ economic status and settlement type regarding the protection of freedom of expression. Specifically, respondents with average or higher economic status are more likely to agree that authorities or relevant institutions adequately protect the freedom of expression of media practitioners in Armenia compared to those with lower economic status (see Annex 2, Table 10).

Additionally, there are significant differences based on settlement type and economic status concerning the protection of individual freedom of expression. Respondents from rural settlements and those with average or higher economic status are more likely to agree that authorities or relevant institutions adequately protect the freedom of expression of individuals in Armenia (see Annex 2, Table 11).

The majority of focus group participants define freedom of expression as the ability to voice one's opinions without fear of repercussions.

Some participants believe that in Armenia, individuals and journalists can freely express their views on both the government and the opposition without facing consequences, unlike in some other countries. However, despite this perception of freedom, many participants express concerns about its implications. They note that journalists may publish misleading stories to attract likes and ratings, which can negatively impact society. This manipulative behavior is viewed negatively, especially since such journalists often face no penalties for their actions. Some informants even suggest implementing censorship to regulate journalists’ work and control the content being shared. Additionally, concerns are raised about the misuse of freedom of speech to justify offensive language and a lack of civility.

"Freedom of speech encompasses the idea that individuals can express themselves openly and share their thoughts freely. It implies that people can voice their opinions and engage in critical thinking without restriction." FGD, females

"Freedom of speech is when you can say or write what you want on the internet without thinking that you will be punished for it." FGD, Yerevan, female

"In general, both individuals and mass media have freedom of expression. The presence of numerous periodicals and news channels indicate a level of freedom of speech." FGD, males

⁴⁵ The data for 2024 with all answer options is presented in Annex 3, Figure 20.

"There was a time when we could say there was no freedom of speech, but the situation has since changed." FGD, youth, female

"Freedom is not perceived correctly in our country. Anyone can write whatever they want without thinking about the consequences because they will never be punished for it." FGD, youth, female

"Freedom of speech does not bring anything good. Knowing that this question can upset a person, the journalist will give it to get his clicks and likes, and he/she is not interested in the rest." FGD, marz, female

Conversely, other participants argue that freedom of expression is limited in Armenia. They highlight that even within close environments, such as among friends and acquaintances, individuals may face restrictions when their views are disagreed with. Media outlets are also seen as limiting the scope of discussion, often focusing on topics related to the government and opposition or those requested by sponsors.

Some FGD participants also shared personal experiences or the experiences of those close to them who faced pressure or threats for expressing their opinions.

"The people who participated in the recent demonstrations were quite cautious about expressing their opinions. Journalists are highly vulnerable when reporting on political news." FGD, females

"While journalists may have the freedom to express themselves, they often end up conveying not their views, but rather what society expects to hear, the opinions of others, or the interests of their sponsors." FGD, youth, female

"In some cases, the freedom of the media is hindered by the society, the opposition, and government representatives." FGD, youth, male

"I can speak from my own experience. Back in 2018, when I was working in the state apparatus and the issue of Amulsar was being discussed, and when I posted the Amulsar logo on Facebook, it became a big discussion at my place of work, they even held a meeting to decide what to do." FGD, Yerevan, female

Overall, nearly all participants emphasize the crucial role of freedom of expression, highlighting its importance as a fundamental right and its prioritization within the country. They believe that upholding freedom of expression is essential not only for national development but also for shaping the country's image on both a domestic and international scale.

"In the absence of freedom of speech, a climate of fear would prevail in the country, with people reluctant to express themselves openly. This would undermine the societal health and well-being of the country." FGD, Yerevan, male

"Freedom of speech is crucial because, without it, progress is stunted, and society remains stagnant due to exposure to only one-sided, uniform information." FGD, Yerevan, female

Hate speech: According to the data, 80 percent of respondents agree that hate speech is a significant problem in Armenia, an opinion that has remained consistent since 2023 (Figure 57). Additionally, 66 percent of respondents report frequently encountering hate speech in the online space, while 45 percent say they witness it in civic spaces (Figure 58).⁴⁶

⁴⁶ In 2023, the question combined witnessing hate speech in both digital and civic spaces. However, in 2024, the project team decided to separate these categories; thus, it is not possible to compare changes between the two years.

Figure 57. To what extent do you agree or disagree with the following statement: “Hate speech is a significant problem in Armenia”? %

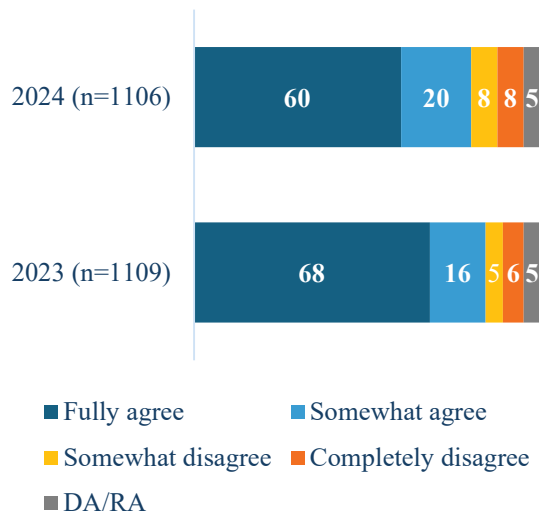
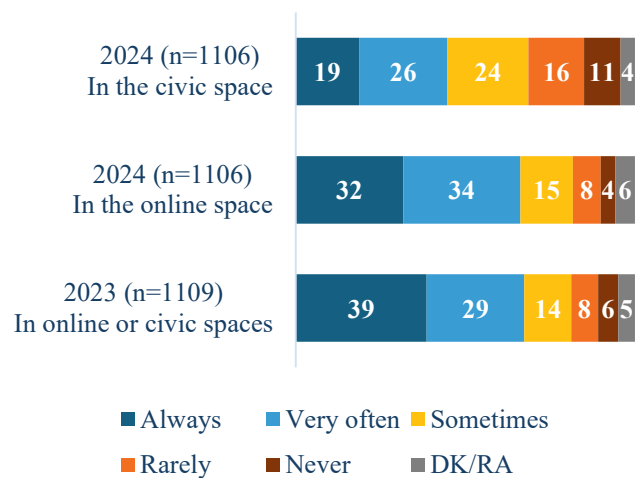


Figure 58. How often do you witness hate speech in online or civic spaces? %



The analysis of confounding factors reveals statistically significant differences based on respondents’ education and settlement type. Specifically, respondents with higher education levels and those living in Yerevan are more likely to agree that “Hate speech is a significant problem in Armenia” compared to other groups (see Annex 2, Table 13).

Regarding the observation of hate speech in online spaces, respondents with higher education levels, younger individuals (18-35 years old), and those with average or higher economic status report witnessing hate speech more frequently (see Annex 2, Table 14).

The qualitative findings suggest a new perspective which should be considered while interpreting the quantitative data. Specifically, the discussions show that the concept of hate speech is not uniformly understood among the FGD participants. About half of the participants perceive hate speech as involving rude language, insults, or any negative statements. The other half, however, differentiates hate speech from general rudeness or negative language, emphasizing its deliberate and systematic nature with specific targets and often severe consequences. They describe hate speech as content that is discriminatory, aimed at inciting or reinforcing hatred and provoking negative actions or even violence. Additionally, some participants highlight that hate speech is a violation of human rights, particularly when it targets individuals based on characteristics such as race, ethnicity, political views, and other identity markers.

“When an opinion crosses into an insult, it can be categorized as hate speech in my view.” FGD, Yerevan, male

“It constitutes a personal insult or unjustified negative statement directed towards an individual.” FGD, marz, male

“As far as I know, hate speech is discrimination against particular races or some specific group members. And those insults or something, they are not considered hate speech. It often involves explicit threats directed at particular groups.” FGD, Yerevan, male

“Hate speech is not only a complex phenomenon, but also tends to garner widespread support and encompasses specific propaganda, distinguishing it from mere insults. When individuals disseminate hate speech, they often attract numerous supporters, evidenced by high engagement, views, and subsequent adoption by others.” FGD, youth, female

“I believe hate speech not only fosters animosity and negativity but also defames individuals and segments of society. It constitutes a violation of human rights by maliciously defaming individuals rather than mere insults or verbal abuse, thereby perpetrating defamation against individuals in general.” FGD, marz, male

In line with the quantitative data, the majority of FGD participants also report that they most frequently encounter hate speech on social networks. This prevalence is attributed to the greater freedom and ease with which individuals can express their opinions online. Some participants also believe that hate speech occasionally permeates official news feeds.

Additionally, some participants feel that hate speech from individuals, both online and offline, is more common than in media outlets, as the latter tend to be more cautious in order to protect their reputations. They suggest that media outlets are more likely to face serious consequences than individuals, which motivates them to avoid disseminating hate speech.

“I have noticed more hate speech on social networks because people express themselves much more freely online, and it is even easier to express an opinion.” FGD, Yerevan, female

“Hate speech is generated because of the statuses of some Facebook users.” FGD marz, male

“There is also hate speech in the official news feed.” FGD, marz, female

“The prevalence of hate speech primarily stems from individuals, as organizations broadcasting on TV or radio must uphold their reputations. Individuals find it easier to disseminate misinformation or disinformation, which, if later corrected, can be remedied through apologies and explanations to affected parties. Conversely, media organizations such as TV or radio face more significant repercussions.” FGD, Yerevan, male

All participants recognize that the distinction between hate speech and freedom of expression is intricately nuanced, making it challenging to clearly define. While the majority struggle to envision ways to balance the protection of free expression with the need to reduce hate speech, a minority propose potential strategies. These include promoting critical media consumption among the public and guiding media content to reduce hate speech. They also advocate for investing in education, particularly by teaching values such as tolerance, respect for human rights, and an appreciation of diverse opinions, especially to children. Additionally, increasing public awareness and fostering critical thinking are seen as viable approaches to minimizing the influence of those who propagate hate speech.

The participants also discussed the role of the government in this context. Some argue that the state should not be overly active in controlling public communication, as it could potentially violate the freedom of speech. However, they also emphasize the government's significant responsibility in ensuring the quality of education to enhance public awareness, critical thinking, and instill values. Additionally, some participants pointed out instances where governmental entities themselves have been identified as sources of hate speech, highlighting the complexity of the issue.

“The regulation of hate speech is influenced by societal responses to such expressions. The responsibility to address hate speech often falls to the government, yet paradoxically, government officials may sometimes propagate hatred themselves. Effective management of this issue requires a shift in media consumption. By critically analyzing media content and promoting positive discourse, society can foster a more respectful environment.” FGD, youth, female

“This is a complex issue. For instance, consider the case in France where, following a terrorist attack resulting in significant loss of life, a prominent satirical newspaper published a caricature related to the victims. If such content is accepted and resonates with the public, it may be deemed within the bounds of freedom of expression. Conversely, if it is widely rejected and deemed offensive, it may be considered a breach of acceptable limits.” FGD, Yerevan, male

“Education is the key to solution. It is imperative to instill values of tolerance and patience in children from an early age, potentially fostering a generational shift wherein children, equipped with these values, may positively influence their parents.” FGD, Yerevan, female

“In my opinion, the state has little to do here, because the problem of limiting freedom comes up. The key strategy lies in ensuring that individuals who spread such messages do not garner a significant audience capable of effecting change. Ultimately, reducing the size of their audience diminishes the potency of those who disseminate hateful rhetoric.” FGD, youth, male

Overall, the discussions highlight the complexity of addressing hate speech, emphasizing the need for education and open dialogue. There is a call for a careful and balanced approach by the state, ensuring that any measures taken to reduce hate speech do not inadvertently infringe upon freedom of expression. This nuanced approach is seen as essential for creating a society where free expression is protected, while hate speech is effectively addressed.

Conclusions

- The perceived level of freedom of expression for people in Armenia and freedom of expression of Armenian mass media is still high in 2024, with no significant changes compared to 2023.
- There is a decline in the perceived freedom of expression in online spaces since 2023. Furthermore, 40 percent of respondents in 2024, compared to 25 percent in 2023, completely disagree with the statement that they can freely attend a peaceful protest or organized political or other type of event. The shift in perceptions highlights growing concerns about public freedoms amidst recent political events.
- Compared to 2023, there is an 8 percent increase in the number of who now believe that authorities and relevant institutions in Armenia adequately protect freedom of expression for both media practitioners and individuals. However, 2 percent more respondents also believe that journalists may face threats and violence when covering certain topics. Overall, despite the statistically significant increase in perceived institutional protections, concerns about the challenges journalists may face persist.
- The complex views on hate speech reveal a spectrum of understanding and concern among respondents. While there is broad recognition of hate speech as a problem, the varying definitions and perceptions of its nature and impact highlight the need for clearer guidelines and educational initiatives. Addressing hate speech requires not only legal and regulatory measures but also a cultural shift towards tolerance and respect. Education, public awareness, and critical media consumption are essential in mitigating the influence of hate speech and fostering a more informed and respectful discourse.

RECOMMENDATIONS

MEDIA CONSUMPTION AND HABITS OF CONSUMERS

- **Enhance Digital Engagement Strategies:** Given the rise of social networks as the primary sources for news consumption, media organizations should invest in more actively creating and distributing content specifically tailored for platforms such as Instagram and other emerging networks. This includes leveraging video content, stories, and interactive posts to engage a wider audience.
- **Diversify Content Delivery Channels:** To maintain relevance in an evolving media landscape, traditional media outlets (TV, radio, and news websites) should consider integrating social media strategies more effectively. This could involve partnerships with trustworthy influencers, live-

streaming events, and offering content previews on social platforms to drive traffic back to their main sites.

- **Monitor and Adapt to Platform Trends:** As the use of Facebook for news sharing declines and Instagram gains popularity, it's crucial for media outlets to continuously monitor these trends and adapt their content and engagement strategies accordingly. This may include training journalists in platform-specific content creation and staying updated on platform algorithms and user behaviors.

TRUST IN MEDIA

- **Encourage Diverse and Balanced Media Consumption:** To mitigate the impact of confirmation bias, media outlets and educators should encourage the public to consume a diverse range of media sources. Campaigns that promote the value of engaging with multiple perspectives can help audiences recognize and challenge their own biases, leading to a more informed and balanced media environment.
- **Leverage the Growing Willingness to Pay for Credible Information:** With a slight increase in the number of respondents willing to pay for credible information, media organizations should explore subscription models, crowdfunding, or membership programs that offer exclusive, high-quality content. This approach can help sustain independent journalism and reinforce the value of trustworthy information.
- **Reassess and Innovate Trust Measurement Methods:** Traditional methods of measuring trust in media may no longer be sufficient. Researchers and media analysts should develop more nuanced tools that consider both subjective perceptions and objective media qualities. These tools should account for the complex interplay between personal biases, media consumption behaviors, and trust.

CONSUMER NEEDS AND DEMANDS

- **Diversify and Deepen Coverage of Key Topics:** Media outlets should focus on expanding and enhancing their content in areas such as education, health, well-being, and security, as people highly value these topics.
- **Shift Focus from Sensationalism to Substance:** To address the growing disinterest in political content and the preference for positive, uplifting news, media organizations should prioritize producing human interest stories, community successes, and educational programs that offer practical advice and insights. An emphasis on analytical and research-based programming, especially in science, culture, and Armenia-specific topics, can cater to the audience's demand for more meaningful content.
- **Expand Digital and Multiformat Content Delivery:** Recognizing the preference for concise content, media outlets should invest in developing content that is easily accessible across various platforms. This includes offering quick-read articles, podcasts, and short video segments tailored to different audience needs and time constraints.
- **Implement Audience-Centric Content Strategies:** Media outlets should use audience feedback and data analytics to continuously monitor and adapt to public interests and consumption habits.

MEDIA LITERACY

- **Implement Practical Media Literacy Training Initiatives and Training:** Develop and offer targeted media literacy initiatives that focus on hands-on, practical skills. These programs should teach individuals critical thinking, how to effectively fact-check information, recognize manipulative strategies, distinguish between fact and opinion, avoid confirmation bias when consuming media content, and better understand quality content and ethics. Emphasizing real-world application will help bridge the gap between perceived and actual media literacy skills.

- **Promote Media Literacy Among Vulnerable Groups:** Given the recognition of the importance of critical thinking for children and seniors, create tailored media literacy initiatives for these groups. These programs should be designed to be accessible and relevant, addressing the specific challenges and needs of these demographics and ensuring they are equipped to critically engage with media content.
- **Encourage Active Engagement with Media Content:** To combat media fatigue and disengagement, encourage the public to actively verify information and engage with media content critically. Campaigns that raise awareness about the dangers of information manipulation and the importance of fact-checking could motivate individuals to act rather than passively avoid news links or ignore false information.

ETHICAL STANDARDS

- **Strengthen Ethical Guidelines:** Emphasize the importance of ethical standards such as respect for human rights, impartiality, and integrity in media training programs. Address the frequent violations of these standards by promoting adherence to ethical practices through industry-wide initiatives and professional development.
- **Engage the Public:** Raise awareness about media ethics among the public to foster a better understanding of ethical journalism practices. This could involve public campaigns, informational resources, and community discussions about the role of media ethics.
- **Enhance Awareness of MEO:** Continue to raise public awareness and engagement with the Media Ethics Observatory to strengthen oversight and accountability in media practices. Highlight specific examples of MEO activities and cases it has addressed, showcasing how these actions have effectively addressed issues within the media. This transparency can foster greater trust in and bolster the perceived reliability of the MEO.

FREEDOM OF EXPRESSION

- **Facilitate Dialogue Between Government, Media, and Civil Society:** Establish forums or regular dialogues that bring together government officials, media practitioners, and civil society organizations to discuss and address concerns related to freedom of expression and press and the freedom of assembly in peaceful demonstrations, and journalist safety. These discussions can help create mutual understanding, identify key challenges, and develop collaborative solutions to protect these fundamental rights.
- **Promote Education and Public Awareness on Hate Speech:** To address the complex views on hate speech, it is essential to develop clearer guidelines and educational initiatives that define and contextualize hate speech. Public awareness campaigns should be launched to promote tolerance and respect, and media literacy programs should include components on recognizing and countering hate speech. Legal measures should be complemented by efforts to foster a culture of respectful discourse.

ANNEXES

Annex 1. Inception Report



FoE and MC
Research_Inception R

Annex 2. Tables by Confounding Factors



Disaggregation by
Confounding Factors.

Annex 3. Supplementary Figures



Supplementary
Figures.docx