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ANNUAL SURVEY REPORT: GEORGIA – 1st Wave (Spring 2016)

OPEN Neighbourhood — Communicating for a stronger partnership: connecting with citizens across the Eastern Neighbourhood

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act

*The surveys have been carried out in the six Eastern Partnership countries by ACT
LLC and their network partners*

1. Background

Between April and June 2016, annual surveys were carried out across the six Eastern Partnership countries (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine). The research was conducted within the framework of the EU-funded “OPEN Neighbourhood - Communicating for a stronger partnership: connecting with citizens across the Eastern Neighbourhood” (EU Neighbours East) project.

The OPEN Neighbourhood “EU Neighbours East” project **aims** to increase the understanding of EU support in the Eastern Partnership (EaP) countries through improved communication. The **overall objective** of the project is to contribute to the improvement of the public perception of the EU, as well as to a better understanding of European policies and their impact through the regional and bilateral EU support and cooperation programmes in Eastern Partnership countries.

The project will develop information and communication materials, carry out awareness-raising and information campaigns, and assess the perception of the EU and its support through opinion polling and media monitoring.

As part of the opinion polling strategy, the purpose of the annual surveys is to investigate the opinion and the level of information that the citizens of the EaP countries have, in general, about the EU and, in particular, about EU-funded cooperation and development programmes/projects. In order to monitor changes over time, the surveys will be carried out annually for the next 3 years.

This document represents the results of the **Annual Survey - 1st wave** conducted in **Georgia**¹ and covers the following broad topics:

- General perceptions about the EU
- Values associated with the EU
- Assessment of EU relations with Georgia
- Awareness of financial support provided by the EU and assessment of its effectiveness
- Sources of information
- Country evaluation and future expectations

The first wave of surveys places particular emphasis on collecting data about sources of information used by citizens in order to support the implementation of effective awareness-raising and information campaigns. For this purpose, the surveys address the access, usage, level of trust and influence of different sources of information in general and in relation to the EU.

¹ A similar report has been produced for each EaP country. Additionally, a macro-area report is being prepared that will compare the results across the region.

2. Research Methodology in Brief

The survey was conducted in the second half of May 2016 and data was collected through face-to-face interviews using a structured questionnaire. One thousand completed interviews were carried out and respondents were randomly selected according to the sampling strategy described below. In order to estimate the characteristics of the target population (i.e. general population aged 15 and over living in the country), the sampling weights were calculated applying a specifically designed estimation procedure.

Sampling strategy

The survey used a two-stage stratified sample design with settlements as primary sampling units (PSUs) and individuals as secondary units.

In the first stage, the sample was composed of 30 units (cities/towns) and it was stratified by unit size, expressed in terms of population and level of urbanization, and geographical area. Three groups of settlements² and three areas³ were used for a total of 9 strata. Within each stratum, 3-4 sample units were randomly selected with a proportional-to-size probability. A compromise between an equal allocation and a proportional allocation was applied in order to distribute the secondary sampling units (1,000 individuals) by strata. In each selected settlement, a minimum of 20 interviews was carried out. The excess interviews that were carried out were distributed proportionally to the PSU's size.

The second-stage sample was stratified as well. In this case, gender and age⁴ were considered for a total of 6 strata. In each selected settlement, secondary sampling units were distributed among strata using a proportional allocation.

The individuals to be interviewed were selected randomly according to the random walk⁵ principle.

Estimation phase

An estimation procedure was carried out in order to estimate the characteristics of the target population from the survey respondents. The technique used for the construction of the survey estimator (i.e. sampling weights) was based on the predictive approach to regression estimator. In particular, a calibration estimator based on the

² Groups of settlements: 1) Small settlements (less than 20,000 inhabitants); 2) Middle size settlements (20,000-150,000 inhabitants); 3) Large settlements (above 150,000 inhabitants)

³ Geographic areas: 1) West (Ajara, Guria, Racha-Lechkhumi & Kvemo Svaneti, Samegrelo-Zemo Svaneti 2) Centre (Imereti, Kvemo Kartli, Samtskhe-Javakheti, Shida Kartli 3) East (Kakheti, Mtskheta-Mtianeti, Tbilisi).

⁴ Age groups: 1) 15-34 years; 2) 35-54 years; 3) 55 or more years

⁵ This technique is based on very precise instructions for the interviewers. First, a starting point should be selected for each cluster. Second, defining a step is necessary. A step can be defined according to the size of the cluster. The third important consideration is the movement route. Each interviewer should have detailed instructions on how to follow the route in rural settlements and urban areas. Each interviewer should begin from the starting point, according to the predefined step size and route, and contact a total of predefined number of households.

general category of model-assisted estimators was built (Deville and Särndal 1992)⁶. The procedure included the computation of a sampling design weight for each sampled respondent by calculating the inclusion probability of both primary and secondary sampling units (i.e. settlements and individuals) and the calibration of the sampling design weights to known population totals. The aim of the calibration weight adjustment was to bring weighted sums of the sample data into line with the corresponding counts in the target population. More specifically, the calibration procedure allowed computing calibrated weights as close as possible, according to a given distance measure⁷, to the sampling design weights under a certain set of constraints (the calibration equations) linked to the auxiliary information. When auxiliary information is available, the calibration technique ensures high efficiency of estimates and produces an accurate representation of the phenomena of interest. The calibration variables used to produce calibrated weights were settlements size, gender, age, employment status and geographic area. The concatenation of the calibration variables and number of calibration equations are appended in Annex 1. The input data for the calibration procedure came from the official national statistics on population of each country. The known population totals used in the calibration procedure are reported in Annex 1.

⁶ DEVILLE JC, SARNDAL, C.-E. (1992). Calibration Estimators in Survey Sampling. *Journal of the American Statistical Association*, Vol. 87, No. 418, June 1992, pp. 376-382.

⁷ The logarithmic distance was applied.

3. Survey Findings

3.1 Executive Summary

General Perceptions about the EU

- The prevailing image of the EU in Georgia is “fairly positive” or “neutral”: every second Georgian (52%) feels positive about the Union (18% - very positive; 34% - fairly positive), while 31% of Georgians feel neutral. Only a small minority of Georgians had a fairly negative (4%) or very negative (4%) image of the EU. A very small share has no stance towards the EU, while 4% has not heard of the Union at all.
- About a third of those who had a positive image of the EU (31%) identified the EU’s Developed economy/Economic Prosperity as the principal reason for their **positive** evaluation, followed by economic opportunities (work places, open borders, free trade opportunities) in the EU (21%), peace and security (10%), attractive mentality (6%) and democracy/freedom (5%).
- Among the main reasons for taking a **neutral** stance towards the EU, Georgians name the lack of information regarding the EU (18%) and the lack of interest in the EU (17%).
- **Negative** evaluations are consistently lower. Nevertheless, most residents negatively assessing the EU criticise the Union for imposing its opinions, conditions and values (10%), causing tension in neighbouring countries (9%), and because its activities are too formal (8%). 13% of negatively disposed Georgians do not like anything about the EU.

Values Associated with the EU

- The most spontaneously associated value with the EU was economic development and prosperity (36%), followed by rule of law (27%), peace, security and stability (26%), democracy (23%), and freedom of speech/expression (19%).
- Negative associations were recorded only in rarest cases and were related to depravity, perversity, debauchery (same-sex marriages, prostitution, soft drugs) (less than 1%).
- While evaluating the extent to which the European Union represents certain values, Georgians attributed a very high score to 11 of the 13 values for which the EU stands. For the majority of Georgians, the European Union is a symbol of freedom of speech (81%), freedom of the media (81%), human Rights (81%), individual freedom (80%), rule of law (79%), economic prosperity (79%), and democracy (78%). Other top values were equality (77%), freedom of religion (76%), peace, security, and stability (74%) and Respect for other cultures (72%). Absence of corruption, honesty & transparency are less typical of the EU (lower level of strong association, respectively 55% and 62% of Georgians).
- Personal values that are a top priority for Georgians, namely economic prosperity, peace, security and stability and human rights, are also strongly associated with the EU.

EU relations with Georgia

- A vast majority of Georgians (75%) acknowledged that the EU's relations with Georgia are good. Only a small share (7%) considered relations to be fairly bad (9%) or very bad (4%); 3% think that Georgia has no relations with the EU, while 9% cannot evaluate the quality of relations.

Awareness and Effectiveness of EU Financial Support

- A majority of Georgians are well aware of the financial support provided by the EU to their country. Six out of ten Georgians (60%) recognise that the EU provides financial support for cooperation programmes in Georgia, while only one out of ten Georgians (9%) claimed that the EU does not provide any financial support. However, 31% of Georgians are not aware of the EU's support.
- Among Georgians who are aware of the EU's financial support, the proportion of Georgians who deem EU support to be effective (59%), outnumbers those who are more sceptical (33%).
- Awareness of particular programmes financed by the EU is quite low across all demographic and geographic segments of the population - only 15% acknowledges them. Specific programmes recalled are generally related to health and medicine (14%), education and cultural programmes (14%) and agricultural programmes/ economic support programs for farmers (11%).
- 65% of the population thinks that the EU's involvement has had a positive effect on tourism; 58% spoke of the improved quality of the healthcare system as well as the justice system. Georgians were more critical in assessing the EU's contribution to fighting corruption (76% consider the EU's support not at all or not very effective), improving agricultural production (69%), leading to economic development (74%) and greater employment opportunities (83%).
- When asked to compare the support provided by the EU with the support provided by different international donors – the Russian Federation, International Monetary Fund/World Bank (IMF/WB), United States (US), and United Nations (UN) agencies – more or less a third of the population said they did not have enough information for the comparison, 55% was confident that Russia was supporting Georgia less than the EU, and 30% believed that the US and the IMF were supporting Georgia more than the EU. The United Nations and its agencies are thought to provide more support to Georgia by 16% of population that is aware of the EU.

Trust towards Organisations

- When asked about their trust towards international organisations, the majority of Georgians said that they trusted them, even though between 14% (for the European Union) and 23% (for the Eurasian Economic Union) did not have an opinion or had not heard about it. The European Union scored the highest percentage of trust (69%), followed by the United Nations (55%), and NATO (54%). The Eurasian Economic Union is the least trusted organization, by only 18% of Georgians.

Internet & Social Media Usage

- The proportion of the population with an Internet connection is high in Georgia: overall, seven out of ten people own a computer connected to the Internet (68%). Internet connection is less prevalent in work settings: a third of the population (32%) uses a computer connected to the Internet at work.
- Georgians are most likely to have social media accounts on Facebook (53%) and Odnoklassniki (26%). A lower proportion of people use Instagram (9%) and Twitter (6%), while virtually no one has V Kontakte (3%) or LinkedIn (1%).
- Television is the most popular media channel in Georgia – 80% of the population watches it every day and 10% 2-3 times in a week. Internet and social networks are also daily used by about a third of Georgians (36% and 39%, respectively).

Sources of Information for Political News

- Asked about the most important sources of information for national news, Georgians mention private television (70%), followed by public television (34%) and the Internet (27%).
- Private TV channels (50%), the Internet (13%) and public TV channels (11%) are also found to be the most trusted sources for political news.
- Nine out of ten (92%) people believe that TV forms public opinion. Other media channels deemed influential include Internet websites (69%), printed press (67%), social media (66%) and to a lesser extent radio (47%).
- Four out of five Georgians (91%) rely primarily on local media to get news on national and international matters; 6% use foreign media in Russian and only 2% other foreign media.

Sources of Information about the EU

- Less than half the Georgian population (44%) occasionally looks for EU-related information – 7% either very frequently (1%) or frequently (6%), and 37% not very frequently.
- Nearly half of Georgians (47%) had seen or heard information about the EU in the last 3 months.
- Television was the most frequently mentioned source of information for those who had heard about the EU in the last three months (87%) followed by social networks (22%). Friends (6%), newspapers/magazines (5%) and websites (4%), Radio (2%), Info brochures (1%) and Events (1%) were found to be the least effective sources of EU-related information.
- Usage of EU websites⁸ is very low in Georgia (percentages vary between 1% and 4%).
- A majority of Georgia's population (66%) felt that the national media were presenting the European Union positively. One out of five Georgians felt that the European Union was covered objectively (21%) and one out of ten (11%) did not have an opinion. Almost none felt that the EU is presented in a negative way (2%).

⁸ EU institutions' websites; EU Delegation website; EU projects' website; EU Neighbourhood Info Centre portal; EU Twitter; EU Facebook.

- The vast majority (69%) of the population is not satisfied with the level of information provided by the government on EU-related topics.

Russian Media Channels

- Russian TV channels, newspapers and news portals are not so popular among Georgians: one out of two (55%) never follow the Russian media. On the other hand, 10% of the population stated that they always follow Russian media and another 13% said that they often do so.
- Among those who watch Russian TV, NTV (61%) tops the list of Russian channels watched in Georgia, followed by RTR (48%), ORT (44%) and Russia Today (11%).

Country Evaluation and Future Expectations

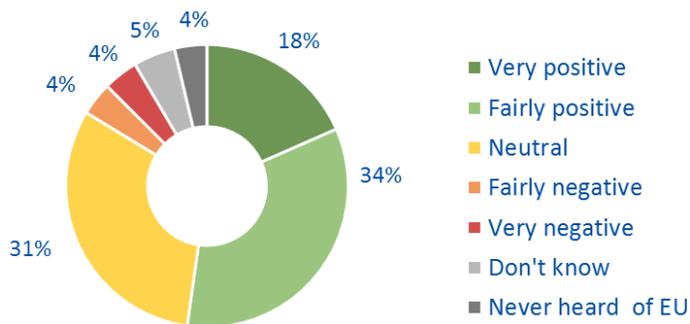
- Overall, Georgians do not share a great trust in national, regional and local institutions: 41% trust the Government, 38% the Parliament and 38% regional and local public authorities. Political parties score the lowest level of trust (32%) and the highest share of Georgians with no opinion in this regard (12% vs. 6-7% for other institutions).
- Nearly eight out of 10 citizens (76%) of Georgia are not satisfied with the existing level of democracy in the country. Only a tiny share of residents (1%) believes democracy to be at its best in their homeland.
- The most widely acknowledged elements of democracy that apply to Georgia were freedom of the media (64%), freedom of speech (62%), protection of the right of minorities (59%) and gender equality (58%). On the other hand, good governance was deemed the most problematic element - 67% of the population feel that more work is needed to bring their democracy towards it.
- Overall, Georgians are quite optimistic, and roughly 71% of them feel confident in their country's future as compared to a 27% share of pessimists. When asked about their personal future, however, Georgians feel slightly more confident, and positive beliefs (80%) strongly outweigh negative expectations (19%).

3.2. Perceptions about the European Union

3.2.1 General Perceptions about the EU

The image of the EU in Georgia is “fairly positive” or “neutral”: every second Georgian (52%) feels positive about the Union (18% - very positive; 34% - fairly positive), while 3 out of 10 Georgians (31%) express a neutral opinion. Only a small, but relevant, minority of Georgians had a fairly negative (4%) or very negative (4%) image of the EU. A very small share of Georgians does not take a stance towards the EU, while 4% has not heard of the Union at all.

Q2.1 - Do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union?



The positive perception about the EU is slightly higher among Georgians living in the eastern part of the country (61%), as well as among inhabitants of large settlements (60%). Male residents (57%) were also found to be more likely to favour the EU, compared to their female counterparts (48%). Georgian women also display considerably high neutrality (39%). The positive perception about the EU is slightly higher among the most educated Georgians (56% versus 46% of less educated) and the younger generation (56% of 15-34-years-olds as compared to 48% of the over 55 age group).

The EU’s developed economy/economic prosperity is the leading factor for a **positive** evaluation – about a third of those who had a positive image of the EU (31%) consider economic prosperity to be particularly attractive in the EU. Other key factors mentioned are also linked with economic and social characteristics, such as opportunities (work places, open borders, free trade opportunities) in the EU (21%), peace and security (10%), attractive mentality (6%) and democracy/freedom (5%).

Among the main reasons for taking a **neutral** stance towards the EU, Georgians name: lack of information regarding the EU (18%) and the lack of interest in EU (17%). Additionally, one out of five neutrally disposed Georgians (22%) do not have a specific explanation for their perception.

The research shows that **negative** evaluations are consistently lower than positive and neutral ones in all sub-groups. Nevertheless, most residents negatively assessing the EU criticize the Union for imposing its opinions, conditions and values (10%), because it causes tension in neighbouring countries (9%), and because its activities are too formal/do not bring any real results (8%); 13% of negative disposed Georgians does not like anything about the EU.

TABLE 1. Perception of the EU

| Q2.1 - Do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union? | | | | | | |
|---|--|------------|------------|-----------|---------------------|-------------|
| | | Positive | Neutral | Negative | DK / Never heard | Total |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 45% | 36% | 7% | 11% | 100% |
| | Between 20,000 - 150,000 inhabitants | 58% | 28% | 11% | 3% | 100% |
| | Equal or more than 150,000 inhabitants | 60% | 26% | 7% | 7% | 100% |
| GENDER | Male | 57% | 23% | 10% | 11% | 100% |
| | Female | 48% | 39% | 6% | 7% | 100% |
| AGE | 15 - 34 years | 56% | 27% | 3% | 14% | 100% |
| | 35 - 54 years | 52% | 35% | 10% | 3% | 100% |
| | 55 years and over | 48% | 33% | 11% | 8% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 46% | 29% | 8% | 17% | 100% |
| | High level | 56% | 33% | 8% | 4% | 100% |
| EMPLOYMENT STATUS | Employed | 53% | 32% | 9% | 7% | 100% |
| | Unemployed /non active | 52% | 31% | 7% | 10% | 100% |
| GEOGRAPHIC AREA | Centre | 47% | 34% | 7% | 12% | 100% |
| | East | 61% | 25% | 6% | 8% | 100% |
| | West | 46% | 39% | 12% | 4% | 100% |
| TOTAL | | 52% | 31% | 8% | 9% | 100% |

Note: Row percentages may not total 100 due to rounding

3.2.2 Values Associated with the EU

This section looks at the values that Georgians mostly associate with the European Union. Results refer to those who have heard about the EU (96% of target population).

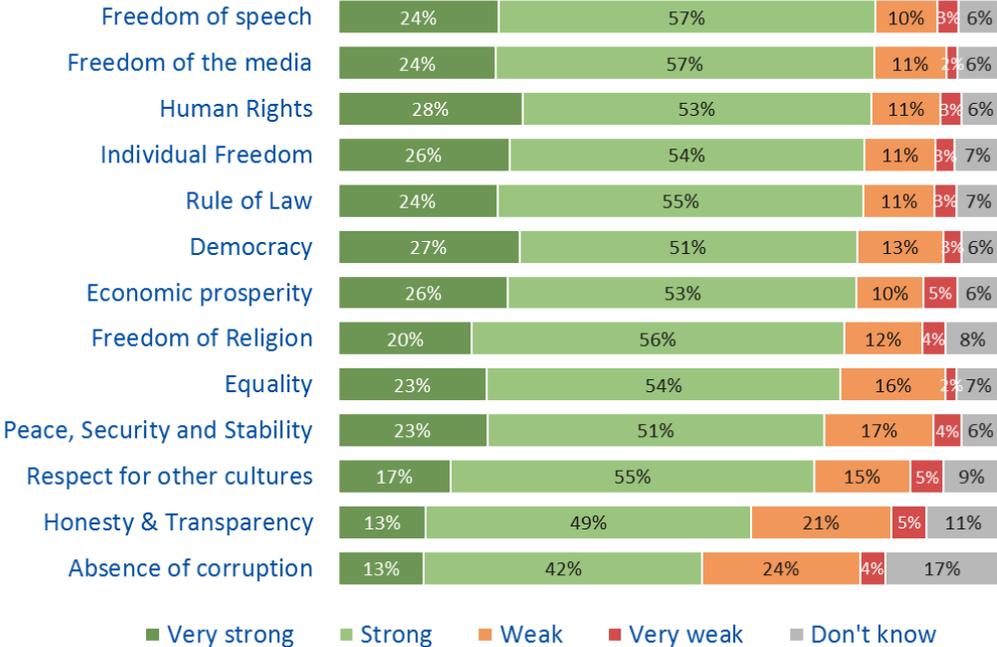
Respondents were asked to name these values spontaneously. The most frequently mentioned value was economic development and prosperity (36%), followed by rule of law (27%), peace, security and stability (26%), democracy (23%), and freedom of speech/expression (19%). In brief, the vast majority of associations is very positive and touches upon various aspects of the EU, ranging from economics to cultural norms. Negative associations were virtually not recorded (less than 1%) and related to depravity, perversity, debauchery (same-sex marriages, prostitution, soft drugs).

While evaluating the extent to which the European Union represents certain values, Georgians attributed a very high score to 11 of the 13 values that the EU stands for. The most strongly linked with the EU appeared to be: freedom of speech (81%), freedom of the media (81%), human rights (81%), individual freedom (80%), rule of law (79%), economic prosperity (79%), and democracy (78%). Other top values were equality (77%), freedom of religion (76%), peace, security, and stability (74%) and respect for other cultures (72%).

⁹ Low level: fewer than or equal to 12 years of education; High level: more than 12 years of education.

On the other hand, absence of corruption, honesty & transparency were regarded as less typical of the EU (lower level of strong association, respectively 55% and 62% of Georgians).

Q2.3 - To what extent does the European Union represent the following values for you?*



*Percentages refer to Georgians who have heard about EU

Respondents were also asked to name the three most important values in which they trusted. The top answers were economic prosperity (60%) peace, security and stability (48%) and human rights (42%). Other important values are: freedom of speech (34%), rule of law (29%), and honesty & transparency (22%). Respect for other cultures, freedom of the media and absence of corruption had no importance among Georgians.

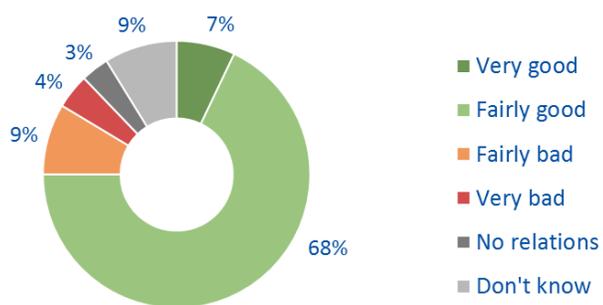
Personal values that are a top priority for Georgians, namely economic prosperity, peace, security and stability and human rights, are also strongly associated with the EU.

TABLE 2. The Most Important Values in Georgia

| Q2.4 - Which of the following values are most important to you? Indicate the 3 most important values. | | | |
|---|-------|--------|-------|
| | First | Second | Third |
| Economic prosperity | 22% | 16% | 22% |
| Freedom of speech | 16% | 9% | 9% |
| Human Rights | 14% | 15% | 13% |
| Peace, Security and Stability | 13% | 19% | 16% |
| Rule of Law | 12% | 10% | 7% |
| Honesty & Transparency | 9% | 5% | 8% |
| Freedom of Religion | 8% | 5% | 3% |
| Democracy | 3% | 8% | 8% |
| Individual Freedom | 2% | 4% | 3% |
| Equality | 1% | 7% | 4% |
| Absence of corruption | 1% | 1% | 2% |
| Freedom of the media | 0% | 1% | 3% |
| Respect for other cultures | 0% | 1% | 2% |

3.3. EU Relations with Georgia

Q2.5 - In general, how would you describe the relations that the European Union has with your country?*



*Percentages refer to Georgians who have heard about the EU

A vast majority of Georgians (75% of those who have heard about the EU) acknowledge that the EU's relations with Georgia are good. Only a small share (13%) considers relations to be fairly bad (9%) or very bad (4%). Only 3% think that Georgia has no relations with the EU, while 9% cannot evaluate the quality of the relation.

The table below shows that at least 70% of the population in all sub-groups share a positive evaluation of EU-Georgia relations. Medium sized settlements (20,000-150,000 inhabitants) were found to hold the highest share (81%) of well-disposed citizens.

TABLE 3. The EU's Relations with Georgia

| Q2.5 - In general, how would you describe the relations that the European Union has with your country? | | | | | |
|--|--|------------|------------|-------------------|-------------|
| | | Good | Bad | DK / No relations | Total |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 75% | 11% | 14% | 100% |
| | Between 20,000 - 150,000 inhabitants | 81% | 14% | 5% | 100% |
| | Equal or more than 150,000 inhabitants | 73% | 14% | 13% | 100% |
| GENDER | Male | 76% | 15% | 9% | 100% |
| | Female | 75% | 11% | 15% | 100% |
| AGE | 15 - 34 years | 77% | 11% | 13% | 100% |
| | 35 - 54 years | 76% | 17% | 8% | 100% |
| | 55 years and over | 73% | 10% | 16% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 70% | 12% | 18% | 100% |
| | High level | 78% | 13% | 9% | 100% |
| EMPLOYMENT STATUS | Employed | 77% | 12% | 11% | 100% |
| | Unemployed /non active | 73% | 14% | 14% | 100% |
| GEOGRAPHIC AREA | Centre | 76% | 14% | 11% | 100% |
| | East | 74% | 13% | 13% | 100% |
| | West | 76% | 11% | 13% | 100% |
| TOTAL | | 75% | 13% | 12% | 100% |

Note: Row percentages may not total 100 due to rounding. Percentages refer to Georgians who have heard about the EU

3.3.1. Awareness and Effectiveness of EU Financial Support

This section looks at how Georgians see the financial support of the European Union to their country. Results refer only to those who have heard about the European Union (96% of target population).

A majority of Georgians are well aware of the financial support provided by the EU to their country. Six out of ten Georgians (60%) acknowledge that the EU provides financial support for cooperation programmes in Georgia, while only one out of ten (9%) claimed that the EU does not provide any financial support. It is important to note that quite a notable share of Georgians (31%) does not know if the EU supports cooperation programmes in Georgia.

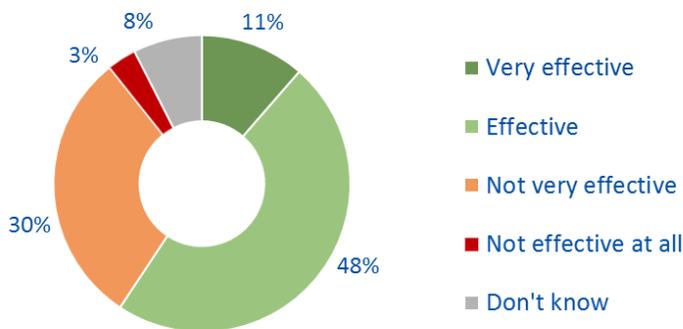
Older Georgians (55+ years old) and those with a lower level of education are most likely to have a low awareness of the EU support (50% and 49% respectively).

TABLE 4. European Union provides Georgia with financial support for cooperation programmes

| Q2.6 - As far as you know, does the European Union provide your country with financial support for cooperation programmes? | | Yes | No | Don't Know | Total |
|--|--|------------|-----------|------------|-------------|
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 56% | 9% | 35% | 100% |
| | Between 20,000 - 150,000 inhabitants | 69% | 13% | 18% | 100% |
| | Equal or more than 150,000 inhabitants | 62% | 7% | 30% | 100% |
| GENDER | Male | 59% | 13% | 29% | 100% |
| | Female | 61% | 6% | 33% | 100% |
| AGE | 15 - 34 years | 59% | 10% | 31% | 100% |
| | 35 - 54 years | 70% | 7% | 23% | 100% |
| | 55 years and over | 50% | 11% | 40% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 49% | 12% | 38% | 100% |
| | High level | 66% | 7% | 27% | 100% |
| EMPLOYMENT STATUS | Employed | 63% | 7% | 30% | 100% |
| | Unemployed /non active | 56% | 11% | 33% | 100% |
| GEOGRAPHIC AREA | Centre | 58% | 10% | 32% | 100% |
| | East | 62% | 6% | 32% | 100% |
| | West | 58% | 13% | 29% | 100% |
| TOTAL | | 60% | 9% | 31% | 100% |

Note: Row percentages may not total 100 due to rounding. Percentages refer to Georgians who have heard about the EU

Q2.6.1 - How effective do you think the support has been?*



*Percentages refer to Georgians who are aware of the EU's financial support for cooperation programmes

dissatisfaction rate, respectively).

At a geographical level, central Georgians tend on average to be more sceptical than their eastern and western counterparts (47% vs. 25-27%).

Among Georgians who are aware of the EU's financial support, the proportion that deems EU support to be effective (11% very good and 48% fairly good), outnumbers the more sceptical ones (33%), who distrust the effectiveness of EU support for cooperation programmes (30% not very effective and 3% not effective at all).

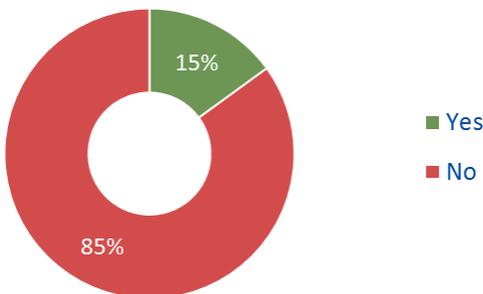
Specifically, residents of middle size settlements (20,000-150,000 inhabitants) were found to be the least satisfied – roughly every second dweller (48%) took a negative stance and considered that the EU support is not effective (while small and large settlements hold a 30% and 31%

TABLE 5. Effectiveness of EU Support

| Q2.6.1 - How effective do you think the support has been? | | | | | |
|---|--|------------|---------------|------------|-------------|
| | | Effective | Not effective | Don't Know | Total |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 64% | 30% | 6% | 100% |
| | Between 20,000 - 150,000 inhabitants | 50% | 48% | 3% | 100% |
| | Equal or more than 150,000 inhabitants | 57% | 31% | 12% | 100% |
| GENDER | Male | 63% | 31% | 7% | 100% |
| | Female | 56% | 35% | 8% | 100% |
| AGE | 15 - 34 years | 67% | 28% | 5% | 100% |
| | 35 - 54 years | 55% | 37% | 8% | 100% |
| | 55 years and over | 56% | 34% | 10% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 69% | 23% | 8% | 100% |
| | High level | 55% | 37% | 7% | 100% |
| EMPLOYMENT STATUS | Employed | 57% | 37% | 7% | 100% |
| | Unemployed /non active | 63% | 28% | 9% | 100% |
| GEOGRAPHIC AREA | Centre | 51% | 47% | 2% | 100% |
| | East | 64% | 25% | 11% | 100% |
| | West | 64% | 27% | 9% | 100% |
| TOTAL | | 59% | 33% | 8% | 100% |

Note: Row percentages may not total 100 due to rounding. Percentages refer to those who are aware of the EU's financial support for cooperation programmes

Q2.8 - Do you know of any specific programmes financed by the European Union in your country?*



*Percentages refer to Georgians who have heard about the EU

Awareness of particular programmes financed by the EU is quite low across all geographic segments of the population – only 15% of Georgians that are aware of EU knew about a specific EU programme. Perception was equally low in all demographic segments, except among youth aged 15-34 years (22%).

When asked about which specific programmes they knew, Georgians named: programmes on health and medicine (14%), education and cultural programmes (14%) and agricultural programmes/economic support programmes for farmers (11%).

According to the survey findings, only 1% of Georgians have personally been (or know someone who has been) involved in recent EU-funded projects.

Georgians were also asked to assess the current benefits for the country stemming from the EU's involvement: 65% of the population cited an increase in tourism, while about six out of ten Georgians spoke of the improved quality of the healthcare (58%) and justice systems (58%).

Georgians were more critical in assessing the EU contribution in fighting corruption (66% considers the EU's support not at all or not very effective), improving agricultural production (69%), leading to economic development (74%) and greater employment opportunities (83%).

TABLE 6. Benefits from current EU support

| Q2.9 - To what extent would you say that your country has benefitted from the current European Union support? | | | | | | |
|---|-----------|--------|----------|------------|------------|-------|
| | Very much | Fairly | Not very | Not at all | Don't know | Total |
| More tourism | 14% | 51% | 26% | 7% | 3% | 100% |
| Improved quality of health-care system | 13% | 45% | 21% | 18% | 4% | 100% |
| Improved quality of the justice system | 12% | 46% | 23% | 14% | 6% | 100% |
| Improved infrastructure (streets, sewage, water, etc.) | 6% | 38% | 33% | 20% | 3% | 100% |
| Better education | 10% | 34% | 37% | 16% | 3% | 100% |
| Access to more products and services | 7% | 34% | 38% | 16% | 4% | 100% |
| Better law enforcement | 5% | 34% | 32% | 23% | 5% | 100% |
| Improved democracy | 6% | 32% | 45% | 14% | 4% | 100% |
| Improved trade | 5% | 29% | 42% | 21% | 4% | 100% |
| Less corruption | 4% | 23% | 39% | 27% | 7% | 100% |
| Improved agricultural production | 4% | 19% | 39% | 30% | 7% | 100% |
| Greater economic development | 4% | 19% | 46% | 28% | 3% | 100% |
| Greater employment opportunities | 3% | 12% | 38% | 45% | 2% | 100% |

Note: Row percentages may not total 100 due to rounding. Percentages refer to Georgians who have heard about the EU

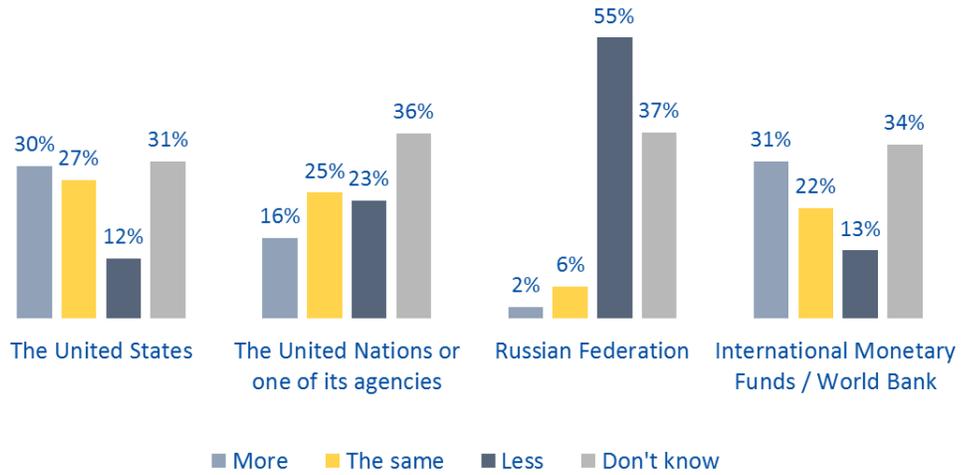
The majority of Georgians felt that the European Union should play a greater role in economic processes, business development and investment issues (43%). Creation of new work places (16%), education & science (16%), health and medicine (10%), also appeared to be of particular concern to Georgian citizens. Other sectors spontaneously mentioned were rural sector & agriculture (6%), security & military sector (6%) and tourism (6%).

Respondents were also asked to compare the support provided by the EU with the support provided by different international donors – the Russian Federation, International Monetary Fund/World Bank (IMF/WB), United States (US), and United Nations (UN) agencies.

About a third of Georgians (31%-37% for four institutions) do not have enough information to compare support provided by the EU to that provided by other international organizations.

About 3 out of 10 Georgians believe that the United States (30%) and International Monetary Fund/World Bank (31%) provide more financial support to Georgia than the EU does, while around a quarter think the support is the same (UN – 25%; IMF/WB – 22%). On the contrary, only 8% of Georgians are confident that Russian support is equal (6%) or greater (2%) than that of the EU: every second Georgian (55%) is confident that it is less. The United Nations and its agencies are thought to provide more support to Georgia by 16% of the population that is aware of the EU. A quarter of Georgian residents thinks that the support is the same for the two organisations, while 23% say the UN's support is lower.

Q2.7 - As far as you know, for each of the following international institutions would you say that it provides more, the same, or less financial support to your country than the European Union?*

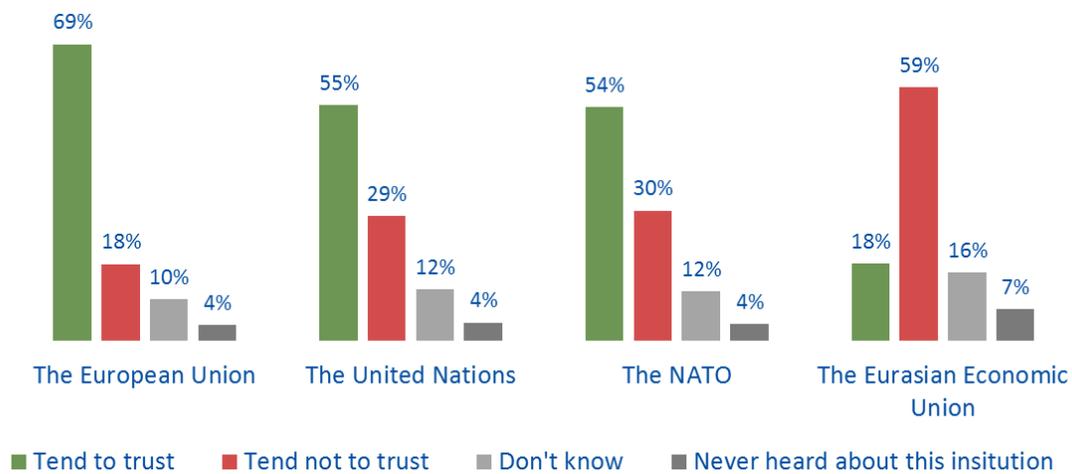


*Percentages refer to Georgians who have heard about the EU

3.3.2. Trust towards Organisations

When asked about their trust towards international organisations, the majority of Georgians said that they trusted them, even though between 14% (for the European Union) and 23% (for the Eurasian Economic Union) did not have an opinion in this regard or have not heard about it. The European Union scored the highest percentage of trust (69%), followed by the United Nations (55%), and NATO (54%). The Eurasian Economic Union is the least trusted organisation, by only 18% of Georgians.

Q2.12 - I would like to ask you a question about how much trust you have in certain institutions

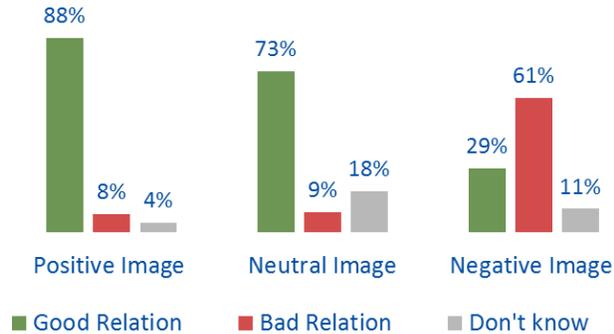


A high level of trust in the EU, the UN and the NATO – and a lower level of trust in the EEU – is observed among all socio-demographic segments of the population with no relevant differences. The only exception is about NATO: older people tend to trust this institution to a lower extent than the younger generation (46% and 60% respectively).

Attitudes towards the EU: a snapshot

Georgians' self-perceived image about the EU has a clear relation to their consistency of opinion about the EU.

Image of EU and EU's Relation with Georgia

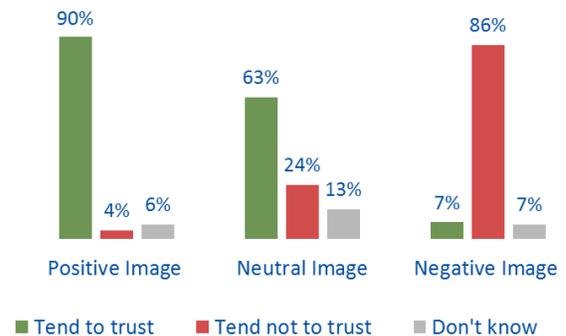


A cross-analysis of respondents' image of the EU (positive, neutral and negative) with their perception of the relations between the EU and their country, the awareness of the EU financial provision and their trust in the EU, confirms that those with the most positive image of the EU are also those most likely to have the highest level of trust in the EU (90%), to value positively the relations between the EU and Georgia (88%) and to be more informed about the support provided by the

EU (71%).

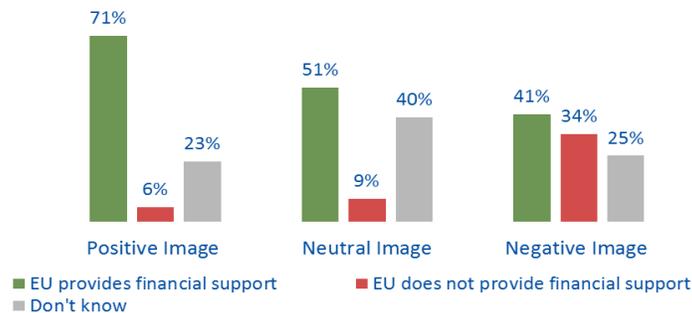
On the other hand, those who have a negative image about the EU were more likely to have a consistently bad opinion about the EU's relations with Georgia (61% rated the relationship as "bad" and 29% as "good), to believe the EU did not provide any financial support (34%) and to have, especially, the lowest levels of trust in the EU. Overall, 86% in this group tended not to trust the EU versus 4% of those who claimed they had a positive image of the EU.

Image of EU and Trust Towards EU



As for those sharing a neutral image, a vast majority of those belonging to this group deemed positively the EU's relations with Georgia (73%), 63% tended to trust the EU and about a half (51%) was aware of the financial support provided by the EU.

Image of EU and Financial Support Provision Awareness



3.4 Sources of Information

3.4.1. Internet & Social Media Usage

The proportion of the population with an Internet connection is high in Georgia: overall, seven out of ten citizens own a computer connected to the Internet (68%). Both urbanisation and age are important socio-economic factors that influence computer ownership. PC ownership is most prevalent in large cities (85%); nevertheless, three quarters of medium settlement residents (78%) also claimed to have a computer at home. Most young people have a computer (82% of citizens aged 15-34 years), but only half of people aged over 55.

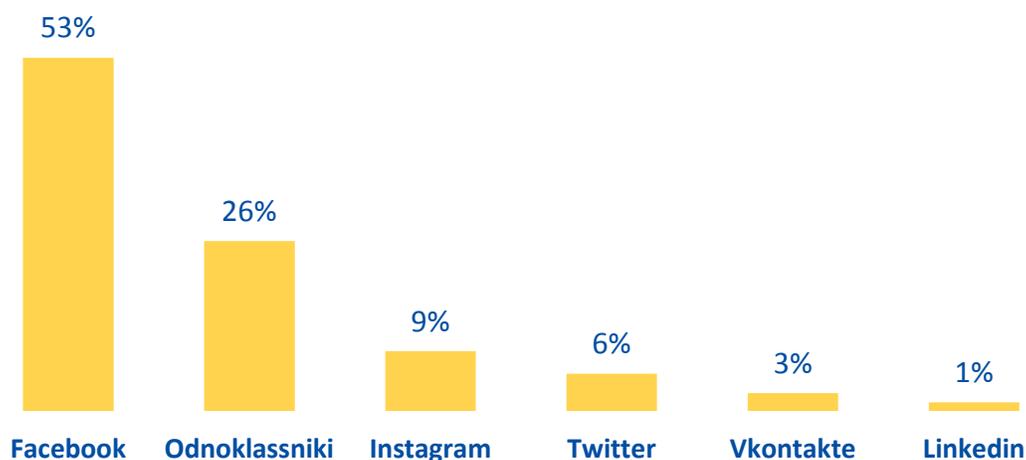
Internet connection is less prevalent in work settings: a third of the population (32%) uses a computer connected to the Internet at work.

TABLE 7. Percentage of population who have a computer with Internet at home or work

| Q3.1.1 - Do you have a computer at home connected to the Internet? | | | |
|--|--|------------------|------------------|
| Q3.1.2 - Do you have a computer at work connected to the Internet? | | | |
| | | Computer at home | Computer at work |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 55% | 28% |
| | Between 20,000 - 150,000 inhabitants | 78% | 39% |
| | Equal or more than 150,000 inhabitants | 85% | 35% |
| GENDER | Male | 69% | 32% |
| | Female | 68% | 32% |
| AGE | 15 - 34 years | 82% | 33% |
| | 35 - 54 years | 72% | 32% |
| | 55 years and over | 51% | 30% |
| EDUCATION LEVEL ⁹ | Low level | 57% | 20% |
| | High level | 75% | 39% |
| EMPLOYMENT STATUS | Employed | 73% | 55% |
| | Unemployed /non active | 62% | 0% |
| GEOGRAPHIC AREA | Centre | 61% | 35% |
| | East | 78% | 29% |
| | West | 64% | 30% |
| TOTAL | | 68% | 32% |

Georgians are most likely to have social media accounts on Facebook (53%) and Odnoklassniki (26%). A lower proportion of people use Instagram (9%) and Twitter (6%), while virtually no one has Vkontakte (3%) or LinkedIn (1%).

Q3.1.3 - Do you have accounts with any of the following?
People with a Social Media account



The categories that are most frequent users of social networks are young people (Facebook: 81%; Odnoklassniki: 40%; Instagram: 21%), while people aged 55 years and over are least likely to use them (respectively 17%, 6% and 2%). People living in large settlements and eastern Georgians are more frequent users of online social networks.

TABLE 8. People with a Social Media account

| Q3.1.3 - Do you have accounts with any of the following? | | | | | | | |
|--|--|------------|-----------|-----------|-----------|-----------|---------------|
| | | Facebook | Twitter | Instagram | LinkedIn | Vkontakte | Odnoklassniki |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 43% | 3% | 6% | 0% | 2% | 26% |
| | Between 20,000 - 150,000 inhabitants | 62% | 8% | 5% | 2% | 4% | 36% |
| | Equal or more than 150,000 inhabitants | 65% | 8% | 16% | 2% | 4% | 21% |
| GENDER | Male | 54% | 5% | 7% | 1% | 3% | 33% |
| | Female | 52% | 6% | 11% | 1% | 2% | 20% |
| AGE | 15 - 34 years | 81% | 9% | 21% | 2% | 6% | 40% |
| | 35 - 54 years | 60% | 6% | 4% | 2% | 2% | 30% |
| | 55 years and over | 17% | 1% | 2% | 0% | 0% | 6% |
| EDUCATION LEVEL ⁹ | Low level | 46% | 3% | 9% | 0% | 14% | 31% |
| | High level | 57% | 7% | 9% | 1% | 3% | 23% |
| EMPLOYMENT STATUS | Employed | 56% | 6% | 7% | 2% | 2% | 28% |
| | Unemployed /non active | 49% | 5% | 12% | 1% | 4% | 22% |
| GEOGRAPHIC AREA | Centre | 46% | 5% | 5% | 1% | 2% | 26% |
| | East | 63% | 7% | 14% | 2% | 3% | 23% |
| | West | 47% | 5% | 6% | 1% | 4% | 30% |
| TOTAL | | 53% | 6% | 9% | 1% | 3% | 26% |

Television is the most popular media channel in Georgia – 80% of the population watches it every day and 10% 2-3 times in a week. Internet and social networks are also used daily by about a third of Georgians (36% and 39%, respectively), even though around 40% of population never use them or do not have access (41% and 44% respectively). Georgians are far less likely to watch television over the Internet – only 6% watches it online every day, while 55% never watches it and 12% do not have access.

TABLE 9. Frequency of Media Usage

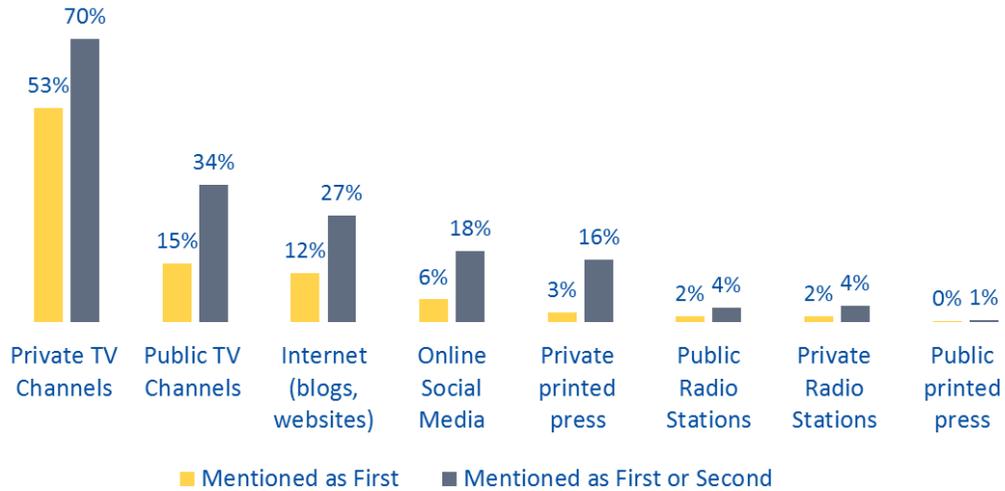
| Q3.2 - Could you tell me to what extent you...? | | | | | | | | |
|---|---------------------------------|---------------------|----------------------|----------------------|------------|-------|-----------|-------|
| | Everyday/ Almost everyday | 2-3 times a week | About once a week | 2-3 times a month | Less often | Never | No access | Total |
| Watch television on a TV set | 80% | 10% | 2% | 0% | 5% | 2% | 0% | 100% |
| Use the Internet (websites, blogs) | 36% | 9% | 4% | 1% | 10% | 29% | 12% | 100% |
| Use online social networks | 39% | 5% | 2% | 1% | 9% | 32% | 12% | 100% |
| Listen to the radio | 6% | 6% | 2% | 3% | 18% | 48% | 17% | 100% |
| Watch television via the Internet | 6% | 7% | 4% | 3% | 11% | 55% | 12% | 100% |
| Read the printed press | 6% | 8% | 10% | 10% | 26% | 35% | 4% | 100% |

Note: Row percentages may not total 100 due to rounding

3.4.2. Sources of Information for Political News

Asked about the most important sources of information for national news, Georgians mention private television (70%), followed by public television (34%) and the Internet (27%).

Q3.3 - Where do you get most of your news on national political matters? Firstly? Secondly?



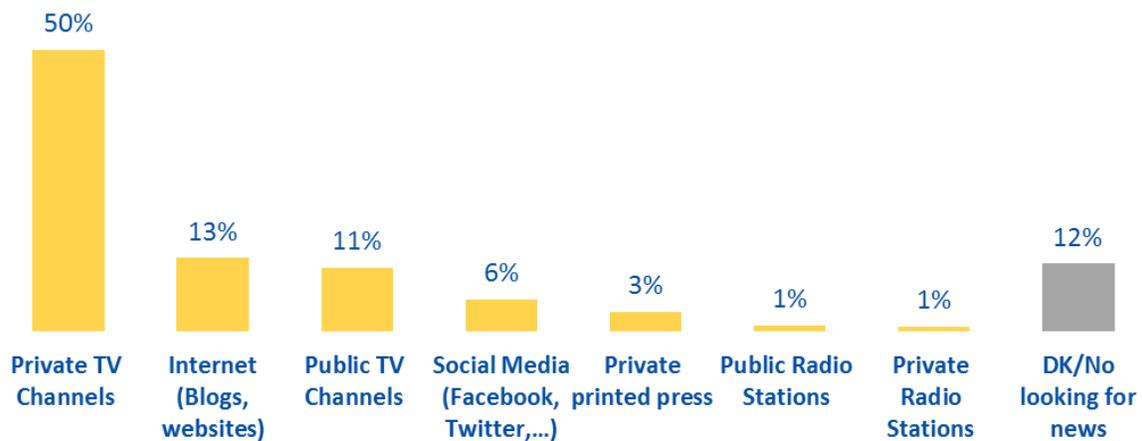
Television and private TV Channels in particular, are the most frequently used source of information for national political matters for all socio-demographic groups. Nevertheless, almost every second young Georgian also gets news on political matters from the Internet (44%). Older generations are much less comfortable using the Internet (25% of 34-55-years-olds and just 9% of 55s) and more used to getting news on national political matters from television (80% - Private channels and 51% - Public channels).

TABLE 10. Public TV channels and Internet mentioned as first Source for News on National Political Matters

| Q3.3 - Where do you get most of your news on national political matters? Firstly? Secondly? Sources of information mentioned as first or second | | | | |
|--|--|---------------------|------------|--------------------|
| | | Private TV Channels | Internet | Public TV Channels |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 71% | 23% | 41% |
| | Between 20,000 - 150,000 inhabitants | 74% | 17% | 38% |
| | Equal or more than 150,000 inhabitants | 69% | 36% | 21% |
| GENDER | Male | 70% | 29% | 33% |
| | Female | 71% | 25% | 35% |
| AGE | 15 - 34 years | 55% | 44% | 22% |
| | 35 - 54 years | 76% | 25% | 30% |
| | 55 and over | 80% | 9% | 51% |
| EDUCATION LEVEL ⁹ | Low level | 73% | 21% | 32% |
| | High level | 69% | 30% | 36% |
| EMPLOYMENT STATUS | Employed | 68% | 31% | 34% |
| | Unemployed /non active | 75% | 21% | 34% |
| GEOGRAPHIC AREA | Centre | 73% | 24% | 40% |
| | East | 72% | 31% | 22% |
| | West | 63% | 23% | 46% |
| TOTAL | | 70% | 27% | 34% |

The survey also asked which media source Georgians trust the most. Results showed that again, private TV channels (50%), the Internet (13%) and public TV channels (11%) share the leading positions.

Q3.4 - Which source of information do you trust the most when looking for news on political matters?



The most trusted sources of information follow the same trend. Specifically, private TV channels are the most trusted source for all socio-demographic groups. In particular, central Georgia (58%) trusts private TV channels more than eastern (47%) and western Georgia (42%). Younger generations are least likely to trust private TV (40% vs. 51% and 59% for 35-54 and 55+, respectively). A reverse trend emerges on the Internet: from 22% of young people who indicate the Internet as the most trusted source of information to 3% of the 55+ population.

TABLE 11. Most Reliable Sources for News on Political Matters

| Q3.4 - Which source of information do you trust the most when looking for news on political matters? | | | | | | | |
|--|--|---------------------|--------------------|------------|------------|------------------------|-------------|
| | | Private TV Channels | Public TV Channels | Internet | Other | DK/No looking for news | Total |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 49% | 16% | 12% | 10% | 13% | 100% |
| | Between 20,000 - 150,000 inhabitants | 68% | 5% | 10% | 9% | 9% | 100% |
| | Equal or more than 150,000 inhabitants | 43% | 8% | 16% | 22% | 11% | 100% |
| GENDER | Male | 50% | 8% | 13% | 15% | 14% | 100% |
| | Female | 50% | 14% | 13% | 13% | 10% | 100% |
| AGE | 15 - 34 years | 40% | 7% | 22% | 15% | 16% | 100% |
| | 35 - 54 years | 51% | 10% | 14% | 14% | 12% | 100% |
| | 55 years and over | 59% | 17% | 3% | 12% | 8% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 53% | 13% | 9% | 9% | 17% | 100% |
| | High level | 48% | 11% | 16% | 16% | 9% | 100% |
| EMPLOYMENT STATUS | Employed | 48% | 12% | 15% | 12% | 12% | 100% |
| | Unemployed /non active | 52% | 10% | 11% | 16% | 12% | 100% |
| GEOGRAPHIC AREA | Centre | 58% | 11% | 12% | 9% | 11% | 100% |
| | East | 47% | 6% | 13% | 20% | 13% | 100% |
| | West | 42% | 22% | 14% | 9% | 13% | 100% |
| TOTAL | | 50% | 11% | 13% | 14% | 12% | 100% |

Note: Row percentages may not total 100 due to rounding

As for the influence of mass media on public opinion, nine out of ten (92%) people believe that TV forms public opinion (very much - 61%, fairly - 31%). Other media channels deemed influential include Internet websites (69%), printed press (67%), social media (66%) and to a lesser extent radio (47%).

TABLE 12. Mass Media Influence on Public Opinion

| Q3.5 - In your opinion, to what extent does your country's mass media influence public opinion? | | | | | | |
|---|-----------|-------------|---------------|-----------------|-------------|-------|
| | Very Much | Fairly Much | Not Very Much | Not Much at all | Do Not Know | Total |
| Television | 61% | 31% | 5% | 1% | 3% | 100% |
| Websites | 32% | 37% | 14% | 2% | 15% | 100% |
| Printed Press | 21% | 36% | 31% | 4% | 9% | 100% |
| Radio | 14% | 33% | 32% | 11% | 10% | 100% |
| Social Media | 26% | 40% | 15% | 5% | 14% | 100% |

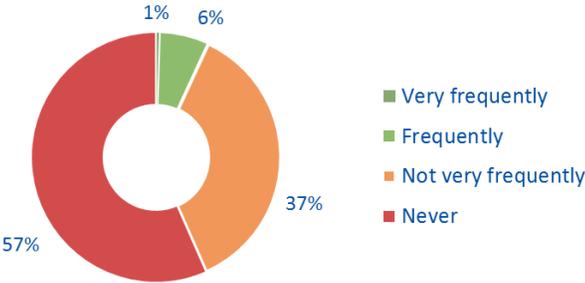
Note: Row percentages may not total 100 due to rounding

Four out of five Georgian citizens (91%) rely primarily on local media to get news on national and international matters. One out of five use foreign media in Russian (18%) and only one out of ten (10%) other foreign media.

3.4.3. Information Sources about the EU

This section looks at sources of information about the European Union. Results only refer to those Georgians who have heard about the European Union (96% of target population).

Q3.7 - How often do you look for/ access information on the EU?*



**Percentages refer to Georgians who have heard about the EU*

Less than half the Georgian population (44%) occasionally looks for EU-related information – 7% either very frequently (1%) or frequently (6%), and 37% not very frequently. Among those who do not look for information about the EU very frequently or at all, 57% said that if there were to search for information on the EU, they would use the Internet.

Despite such a limited share of the population searching for information, nearly half of Georgians (47%) in all groups (percentages varying from 39% to 55%) had seen or heard information about the EU in the last three months. Big city residents (55%) and those living in the east of the country (57%) have been more exposed to information on the EU than other socio-demographics segments.

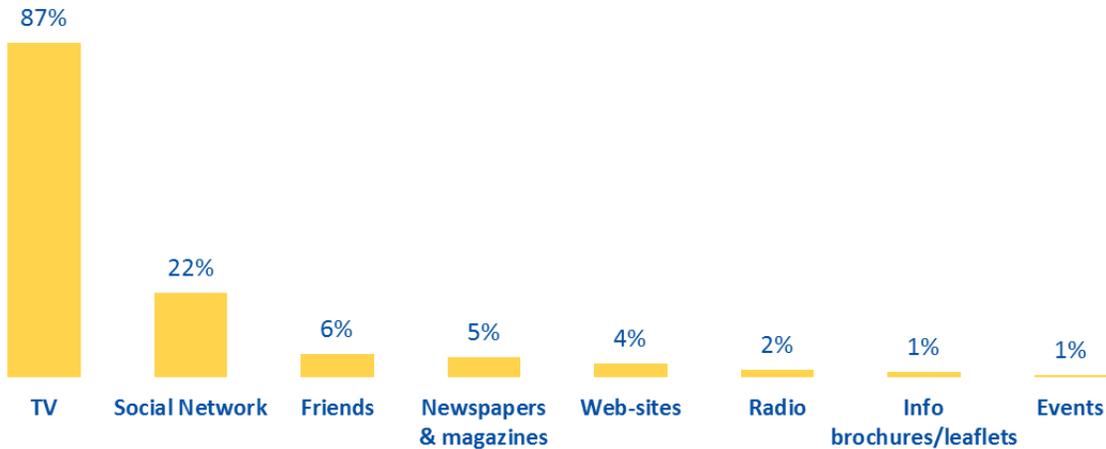
TABLE 13. Heard any Information about the EU in the Last Three Months

| Q3.10 - Have you seen or heard any information about the EU in the last three months? | | | | |
|---|--|------------|------------|-------------|
| | | Yes | No | Total |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 42% | 58% | 100% |
| | Between 20,000 - 150,000 inhabitants | 47% | 53% | 100% |
| | Equal or more than 150,000 inhabitants | 55% | 45% | 100% |
| GENDER | Male | 51% | 49% | 100% |
| | Female | 44% | 56% | 100% |
| AGE | 15 - 34 years | 50% | 50% | 100% |
| | 35 - 54 years | 49% | 52% | 100% |
| | 55 years and over | 43% | 57% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 45% | 55% | 100% |
| | High level | 48% | 52% | 100% |
| EMPLOYMENT | Employed | 45% | 55% | 100% |
| | Unemployed /non active | 50% | 50% | 100% |
| GEOGRAPHIC AREA | Centre | 39% | 61% | 100% |
| | East | 57% | 43% | 100% |
| | West | 42% | 59% | 100% |
| TOTAL | | 47% | 53% | 100% |

Note: Row percentages may not total 100 due to rounding. Percentages refer to Georgians who have heard about the EU

Television was the most frequently mentioned source of information for those who had heard about the EU in the last three months (87%) followed by social networks (22%). Friends (6%), newspapers/magazines (5%) and websites (4%), Radio (2%), Info brochures (1%) and Events (1%) were found to be least effective sources of the EU-related information.

Q3.10.1 - People who have seen or heard any information about the EU in the last three months: Where or from whom?
(Multiple answers were possible)



Usage of the EU informational websites¹⁰ is very low in Georgia. The percentage of those relying on EU websites, portals and social media as a source of information varies between 1% and 4%.

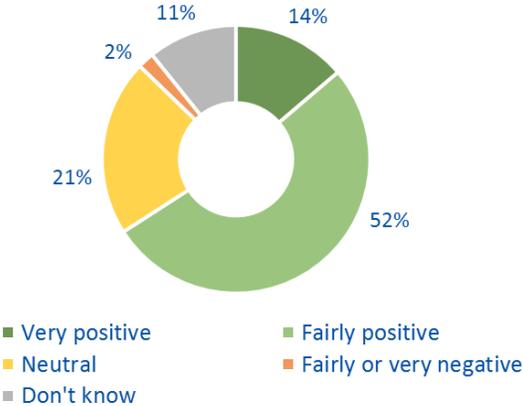
Respondents were also asked about their main topics of interest regarding the EU. “Georgia joining the Union” as well as economy topics and financial programmes/assistance from the EU were mentioned (19%, 8% and 6% respectively). It is worth noting that almost one out of four (24%) do not know what kind of information they would like to get about the EU, and more than one out of ten is not interested in getting more information.

Furthermore, respondents were asked to evaluate the image of the EU on the national media. A majority of Georgia’s population (66%) felt that the national media were presenting the European Union very positively (14%) or fairly positively (52%). One out of five Georgians felt that the European Union was covered objectively (21%) and one out of ten (11%) did not have an opinion. Almost none felt that the EU was presented in a negative way (2%).

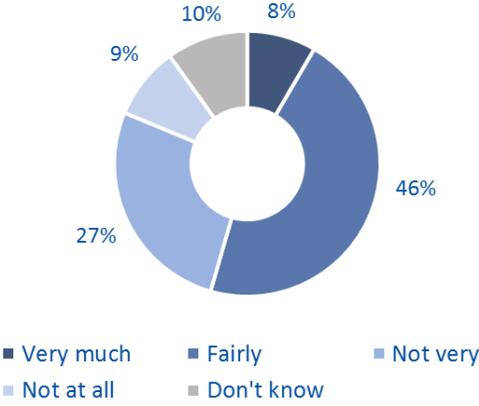
When asked about the influence on their own perception of the EU, 8% of the population felt that what they read or watched significantly influenced their perception of the EU, while 46% admitted it was ‘fairly’ influential.

According to cross analysis, the less influenced groups are those living in large settlements. The younger and middle aged population tends to be more influenced than the oldest group (63-57% vs. 44%).

Q3.8 - In general how would you say the EU was presented in the national media?*



Q3.9 - To what extent does what you read, watch or access on-line have an influence on your perception of the EU?*



*Percentages refer to Georgians who have heard about the EU

¹⁰ EU institutions’ websites; EU Delegation website; EU projects’ website; EU Neighbourhood Info Centre portal; EU Twitter; EU Facebook.

TABLE 14. Influence on perception about the EU

| Q3.9 - To what extent does what you read, watch or access on-line have an influence on your perception of the EU? | | | | | |
|---|--|------------|----------------|------------|-------------|
| | | Influenced | Not Influenced | Don't know | Total |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 58% | 29% | 13% | 100% |
| | Between 20,000 - 150,000 inhabitants | 60% | 33% | 7% | 100% |
| | Equal or more than 150,000 inhabitants | 47% | 47% | 6% | 100% |
| GENDER | Male | 51% | 38% | 11% | 100% |
| | Female | 57% | 33% | 9% | 100% |
| AGE | 15 - 34 years | 63% | 32% | 6% | 100% |
| | 35 - 54 years | 57% | 37% | 6% | 100% |
| | 55 years and over | 44% | 38% | 18% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 51% | 36% | 13% | 100% |
| | High level | 57% | 35% | 8% | 100% |
| EMPLOYMENT STATUS | Employed | 56% | 33% | 11% | 100% |
| | Unemployed /non active | 52% | 40% | 8% | 100% |
| GEOGRAPHIC AREA | Centre | 57% | 28% | 16% | 100% |
| | East | 50% | 43% | 7% | 100% |
| | West | 59% | 34% | 7% | 100% |
| TOTAL | | 54% | 36% | 10% | 100% |

Note: Row percentages may not total 100 due to rounding. Percentages refer to Georgians who have heard about the EU

Only a quarter of the population acknowledged the reliability and the truthfulness of the news about the EU from their government. The vast majority (69%) of the population is not satisfied with the level of information provided by the government on EU-related topics. Cross analysis shows that the most relevant difference was found in terms of age, as the oldest citizens (55+) are the most displeased (78%) and the younger dwellers the least (61%).

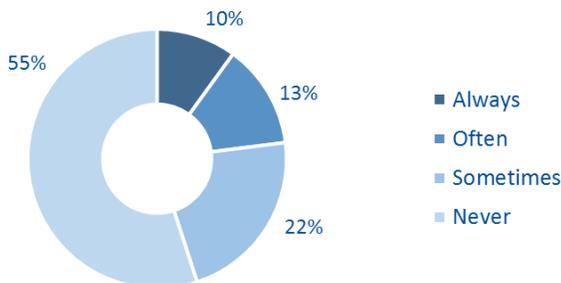
TABLE 15. Government Informing Public about Topics Related to the EU

| Q3.14 - How well does your country government inform you about topics related to the EU? | | | | | |
|--|--|------------|------------|------------|-------------|
| | | Well | Not well | Don't know | Total |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 28% | 69% | 3% | 100% |
| | Between 20,000 - 150,000 inhabitants | 33% | 65% | 2% | 100% |
| | Equal or more than 150,000 inhabitants | 26% | 71% | 4% | 100% |
| GENDER | Male | 32% | 66% | 2% | 100% |
| | Female | 25% | 72% | 4% | 100% |
| AGE | 15 - 34 years | 35% | 61% | 4% | 100% |
| | 35 - 54 years | 30% | 68% | 2% | 100% |
| | 55 + | 19% | 78% | 3% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 25% | 71% | 4% | 100% |
| | High level | 30% | 68% | 2% | 100% |
| EMPLOYMENT STATUS | Employed | 30% | 69% | 1% | 100% |
| | Unemployed /non active | 26% | 69% | 6% | 100% |
| GEOGRAPHIC AREA | Centre | 25% | 73% | 2% | 100% |
| | East | 29% | 67% | 4% | 100% |
| | West | 31% | 68% | 2% | 100% |
| TOTAL | | 28% | 69% | 3% | 100% |

Note: Row percentages may not total 100 due to rounding. Percentages refer to Georgians who have heard about the EU

3.4.4. Russian Media Channels

Q3.15 - Do you watch Russian TV channels, read Russian newspapers or visit Russian news portals online?



Russian TV channels, newspapers and news portals are not so popular among Georgians: one out of two (55%) never follow Russian media. On the other hand, 10% of the population stated that they always follow Russian media and another 13% said that they often do so.

Russian media is less widespread among younger generation (15% always or very often watch Russian channels) than in the older generation (29%). Also Georgians living in small-medium size settlements tend to watch Russian channels less than Georgians living in big cities (22-14% vs. 29%).

TABLE 16. Consuming Russian TV channels, Russian newspapers or Russian news portals online

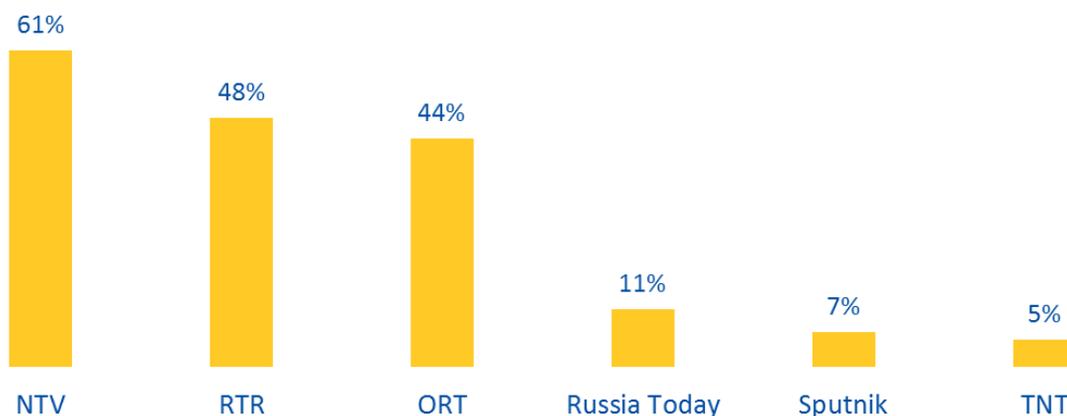
| Q3.15 - Do you watch Russian TV channels, read Russian newspapers or visit Russian news portals online? | | | | | | |
|---|--|------------|------------|------------|------------|-------------|
| | | Always | Often | Sometimes | Never | Total |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 11% | 11% | 17% | 61% | 100% |
| | Between 20,000 - 150,000 inhabitants | 4% | 10% | 26% | 60% | 100% |
| | Equal or more than 150,000 inhabitants | 11% | 18% | 28% | 43% | 100% |
| GENDER | Male | 12% | 15% | 23% | 50% | 100% |
| | Female | 8% | 12% | 21% | 59% | 100% |
| AGE | 15 - 34 years | 8% | 7% | 21% | 64% | 100% |
| | 35 - 54 years | 12% | 14% | 24% | 50% | 100% |
| | 55 years and over | 11% | 18% | 21% | 50% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 14% | 12% | 20% | 55% | 100% |
| | High level | 8% | 14% | 23% | 54% | 100% |
| EMPLOYMENT STATUS | Employed | 10% | 14% | 22% | 54% | 100% |
| | Unemployed /non active | 11% | 11% | 22% | 55% | 100% |
| GEOGRAPHIC AREA | Centre | 14% | 8% | 18% | 61% | 100% |
| | East | 10% | 15% | 25% | 51% | 100% |
| | West | 6% | 20% | 25% | 50% | 100% |
| TOTAL | | 10% | 13% | 22% | 55% | 100% |

Note: Row percentages may not total 100 due to rounding

Among those who watch Russian TV, NTV (61%) tops the list of Russian channels watched in Georgia, followed by RTR (48%), ORT (44%) and Russia Today (11%).

Q3.16 - If you watch Russian TV channels, which ones do you follow the most?

(Multiple answers were possible)



Among Georgians who watch Russian TV, the type of programmes most followed on Russian TV is Entertainment (43%), followed by Documentaries/Films (29%) and News (27%). The most relevant difference was found among

young generation - the younger dwellers tend to favour entertainment programmes (56%) over news (11%) and documentaries/firms (32%).

TABLE 17. Most Followed Russian TV Programmes

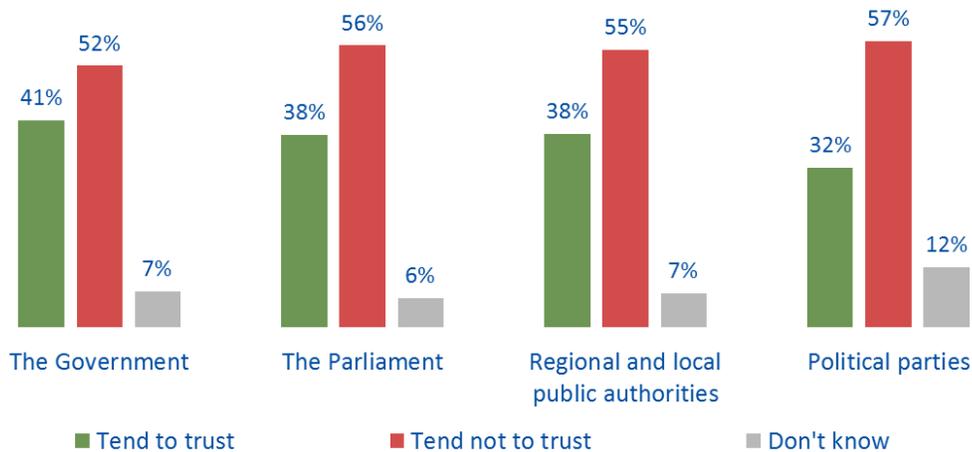
| Q3.17 - If you watch Russian TV channels, do you mostly follow? | | | | | | |
|---|--|-------------------------------------|---------------|-------------------------|-----------|-------------|
| | | News and Current Affairs Programmes | Entertainment | Documentaries and Films | No answer | Total |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 26% | 50% | 24% | 0% | 100% |
| | Between 20,000 - 150,000 inhabitants | 26% | 47% | 26% | 1% | 100% |
| | Equal or more than 150,000 inhabitants | 28% | 35% | 35% | 2% | 100% |
| GENDER | Male | 29% | 47% | 24% | 1% | 100% |
| | Female | 25% | 39% | 34% | 1% | 100% |
| AGE | 15 - 34 years | 11% | 56% | 32% | 2% | 100% |
| | 35 - 54 years | 31% | 38% | 31% | 1% | 100% |
| | 55 years and over | 35% | 40% | 25% | 0% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 23% | 51% | 26% | 1% | 100% |
| | High level | 29% | 39% | 31% | 1% | 100% |
| EMPLOYMENT STATUS | Employed | 25% | 47% | 27% | 0% | 100% |
| | Unemployed /non active | 29% | 37% | 32% | 2% | 100% |
| GEOGRAPHIC AREA | Centre | 25% | 65% | 11% | 0% | 100% |
| | East | 26% | 36% | 37% | 2% | 100% |
| | West | 32% | 29% | 38% | 1% | 100% |
| TOTAL | | 27% | 43% | 29% | 1% | 100% |

Note: Row percentages may not total 100 due to rounding. Percentages refer to those who watch Russian TV channels.

3.5. Country Evaluation and Future Expectations

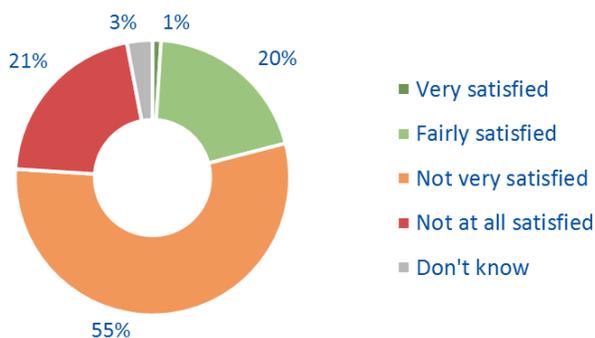
Georgians do not share a great trust in national, regional and local institutions: 41% trust the Government, 38% the Parliament and 38% regional and local public authorities. Political parties score the lowest level of trust (32%) and the highest share of Georgians with no opinion in this regard (12% vs. 6-7% for other institutions).

Q4.1 - Please tell us which is your level of trust for following institutions?



Residents of small settlements as well as those living in western Georgia, the oldest generation and less educated people were found to be less critical in assessing the above institutions. On the other hand, young Georgians had the lowest level of trust towards the above-mentioned institutions.

Q4.3 - On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in your country?



Nearly eight out of 10 Georgians (76%) are not satisfied with the existing level of democracy in their country. Only a tiny share of residents (1%) believes democracy to be at its best in their homeland.

Cross analysis does not show important differences among socio-demographic segments with the exception of dwellers of medium settlements who had a much less positive perception (9% were very or fairly satisfied).

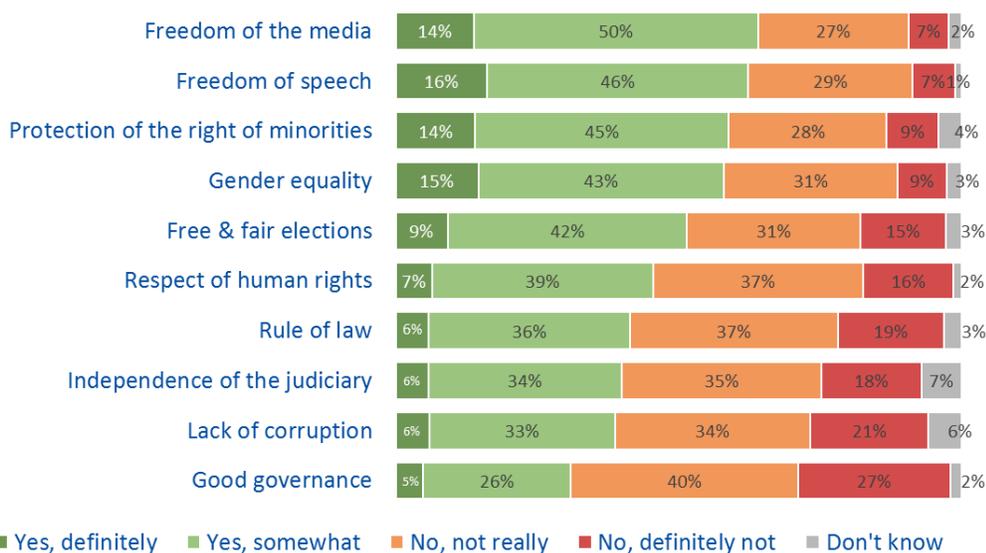
TABLE 18. Satisfaction with democracy

| Q4.3 - On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in your country? | | | | | |
|---|--|------------|---------------|------------|-------------|
| | | Satisfied | Not satisfied | Don't know | Total |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 26% | 72% | 2% | 100% |
| | Between 20,000 - 150,000 inhabitants | 9% | 88% | 3% | 100% |
| | Equal or more than 150,000 inhabitants | 20% | 77% | 3% | 100% |
| GENDER | Male | 21% | 77% | 2% | 100% |
| | Female | 22% | 76% | 3% | 100% |
| AGE | 15 - 34 years | 21% | 77% | 2% | 100% |
| | 35 - 54 years | 20% | 78% | 2% | 100% |
| | 55 years and over | 24% | 73% | 3% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 24% | 73% | 3% | 100% |
| | High level | 20% | 78% | 2% | 100% |
| EMPLOYMENT STATUS | Employed | 21% | 78% | 2% | 100% |
| | Unemployed /non active | 23% | 73% | 4% | 100% |
| GEOGRAPHIC AREA | Centre | 21% | 79% | 1% | 100% |
| | East | 19% | 77% | 4% | 100% |
| | West | 28% | 69% | 3% | 100% |
| TOTAL | | 22% | 76% | 3% | 100% |

Note: Row percentages may not total 100 due to rounding.

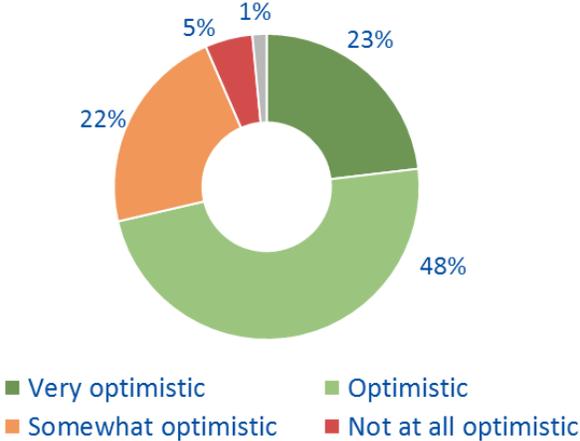
The most widely acknowledged elements of democracy that apply to Georgia were Freedom of the media (64%), Freedom of Speech (62%), Protection of the right of minorities (59%) and Gender equality (58%). On the other hand, good governance was deemed the most problematic element - 67% of the population feel that more work is needed to bring their democracy towards it.

Q4.4 - To what extent do you think that the following elements apply in your country?

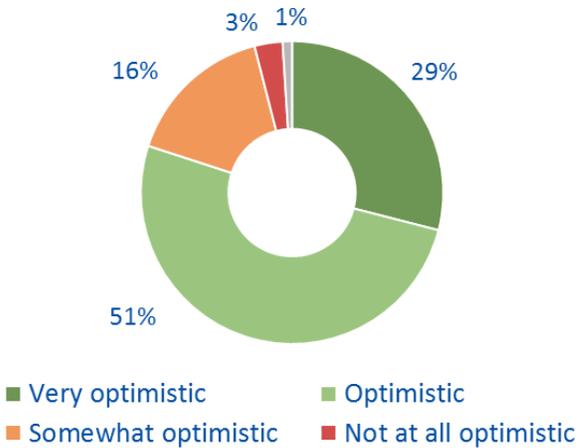


Overall, Georgian citizens are quite optimistic and roughly 71% of them feel confident in their country’s future as compared to a 27% share of pessimists. When asked about their personal future, however, Georgians feel slightly more confident, and positive beliefs (80%) strongly outweigh negative expectations (19%).

Q4.5 - How optimistic are you about the future of your country?



Q4.6 - How optimistic are you about your personal future?



Levels of optimism vary greatly among different geographical areas. Optimism is greatest in western areas (80%) as well as in small settlements (80%).

As already outlined, people are more likely to be optimistic than pessimistic about their personal expectations for the future: 80% versus 19%. There is a clear generational split on the question: those aged 15 to 34 are more optimistic than those 55 and over (86% versus 74%). Western inhabitants as well as dwellers of small settlements are again the more optimistic groups in Georgia.

Asked about the most pressing problems facing Georgia, the vast majority of Georgians spontaneously mentioned the lack of employment opportunities (78%), economy (31%), low standards of living (29%), education (11%) and territorial integrity (10%).

TABLE 19. Optimism Regarding Georgia' Future

| Q4.5 - How optimistic are you about the future of your country? | | | | | |
|---|--|------------|-------------|------------|-------------|
| | | Optimistic | Pessimistic | Don't know | Total |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 80% | 18% | 1% | 100% |
| | Between 20,000 - 150,000 inhabitants | 56% | 44% | 0% | 100% |
| | Equal or more than 150,000 inhabitants | 65% | 33% | 2% | 100% |
| GENDER | Male | 76% | 23% | 1% | 100% |
| | Female | 68% | 30% | 2% | 100% |
| AGE | 15 - 34 years | 73% | 27% | 0% | 100% |
| | 35 - 54 years | 71% | 27% | 1% | 100% |
| | 55 years and over | 71% | 26% | 3% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 71% | 27% | 2% | 100% |
| | High level | 72% | 27% | 1% | 100% |
| EMPLOYMENT STATUS | Employed | 77% | 23% | 0% | 100% |
| | Unemployed /non active | 65% | 32% | 3% | 100% |
| GEOGRAPHIC AREA | Centre | 75% | 25% | 0% | 100% |
| | East | 65% | 32% | 3% | 100% |
| | West | 80% | 20% | 1% | 100% |
| TOTAL | | 72% | 27% | 1% | 100% |

Note: Row percentages may not total 100 due to rounding.

TABLE 20. Optimism Regarding Personal Future

| Q4.6 - How optimistic are you about your personal future? | | | | | |
|---|--|------------|-------------|------------|-------------|
| | | Optimistic | Pessimistic | Don't know | Total |
| SETTLEMENT SIZE | Less than 20,000 inhabitants | 85% | 14% | 1% | 100% |
| | Between 20,000 - 150,000 inhabitants | 65% | 34% | 0% | 100% |
| | Equal or more than 150,000 inhabitants | 78% | 20% | 2% | 100% |
| GENDER | Male | 84% | 15% | 1% | 100% |
| | Female | 76% | 22% | 1% | 100% |
| AGE | 15 - 34 years | 86% | 13% | 1% | 100% |
| | 35 - 54 years | 79% | 19% | 1% | 100% |
| | 55 years and over | 74% | 24% | 2% | 100% |
| EDUCATION LEVEL ⁹ | Low level | 80% | 19% | 2% | 100% |
| | High level | 80% | 19% | 1% | 100% |
| EMPLOYMENT STATUS | Employed | 84% | 16% | 1% | 100% |
| | Unemployed /non active | 75% | 24% | 2% | 100% |
| GEOGRAPHIC AREA | Centre | 83% | 17% | 0% | 100% |
| | East | 73% | 24% | 3% | 100% |
| | West | 88% | 12% | 0% | 100% |
| TOTAL | | 80% | 19% | 1% | 100% |

Note: Row percentages may not total 100 due to rounding.

Annex 1

Table 21: Auxiliary information

| Calibration Variables | |
|-----------------------|--|
| SETTLEMENT SIZE | Less than 20,000 inhabitants |
| | Between 20,000 - 150,000 inhabitants |
| | Equal or more than 150,000 inhabitants |
| GENDER | Male |
| | Female |
| AGE | 15 - 34 years |
| | 35 - 54 years |
| | 55 years and over |
| EMPLOYMENT STATUS | Employed |
| | Unemployed /non active |
| GEOGRAPHIC AREA | Centre |
| | East |
| | West |

Table 22: Concatenation of the calibration variables

| Variable 1 | Variable 2 | Variable 3 | No. constraints |
|-------------------|-------------------|------------|-----------------|
| Geographical area | Gender | Age group | 18 |
| Geographical area | City size | | 9 |
| Geographical area | Employment status | | 9 |

Table 23: Distribution of target population by geographic area and settlement size. Year 2014

| Geographic Area | Settlement size | Population |
|-------------------------|--|------------------|
| Centre | Less than 20,000 inhabitants | 784,602 |
| | Between 20,000 - 150,000 inhabitants | 334,422 |
| | Equal or more than 150,000 inhabitants | 0 |
| East | Less than 20,000 inhabitants | 335,861 |
| | Between 20,000 - 150,000 inhabitants | 0 |
| | Equal or more than 150,000 inhabitants | 901,295 |
| West | Less than 20,000 inhabitants | 453,369 |
| | Between 20,000 - 150,000 inhabitants | 87,226 |
| | Equal or more than 150,000 inhabitants | 125,700 |
| Total | Less than 20,000 inhabitants | 1,573,832 |
| | Between 20,000 - 150,000 inhabitants | 421,648 |
| | Equal or more than 150,000 inhabitants | 1,026,995 |
| Total Population | | 3,022,475 |

Source: National Statistics Office of Georgia

Table 24: Distribution of target population by geographic area, age and gender. Year 2014

| Geographic Area | Age | Gender | Population |
|-------------------------|-------------------|--------|------------------|
| Centre | 15 - 34 years | Male | 194,283 |
| | | Female | 180,372 |
| | 35 - 54 years | Male | 180,790 |
| | | Female | 186,507 |
| | 55 years and over | Male | 159,412 |
| | | Female | 217,660 |
| East | 15 - 34 years | Male | 218,951 |
| | | Female | 227,202 |
| | 35 - 54 years | Male | 188,726 |
| | | Female | 219,693 |
| | 55 years and over | Male | 150,554 |
| | | Female | 232,030 |
| West | 15 - 34 years | Male | 110,814 |
| | | Female | 101,247 |
| | 35 - 54 years | Male | 111,491 |
| | | Female | 115,416 |
| | 55 years and over | Male | 94,417 |
| | | Female | 132,910 |
| Total | 15 - 34 years | Male | 524,048 |
| | | Female | 508,821 |
| | 35 - 54 years | Male | 481,007 |
| | | Female | 521,616 |
| | 55 years and over | Male | 404,383 |
| | | Female | 582,600 |
| Total Population | | | 3,022,475 |

Source: National Statistics Office of Georgia

Table 25: Distribution of target population by geographic area and employment status. Year 2014

| Geographic Area | Employment status | Population |
|---------------------------|---------------------|------------------|
| Centre | Employed | 236,360 |
| | Unemployed/Inactive | 489,475 |
| East | Employed | 393,189 |
| | Unemployed/Inactive | 404,932 |
| West | Employed | 217,003 |
| | Unemployed/Inactive | 615,221 |
| Total | Employed | 157,604 |
| | Unemployed/Inactive | 246,198 |
| Total Population - | | 3,022,475 |

Source: National Statistics Office of Georgia



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