



ANNUAL SURVEY REPORT: **GEORGIA**

2nd Wave (Spring 2017)

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

June 2017

**#
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act

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

1. Background

Between March and May 2017, a second wave of annual surveys was carried out across the six Eastern Partner 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 ‘**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 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 is developing information and communication materials, carry out awareness-raising and information campaigns, and assesses 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 citizens of the EaP countries have about the EU in general and, in particular, about EU-funded cooperation and development programmes/projects. In order to monitor changes over time, the surveys are being carried out annually from 2016 until 2019.

This document presents the results of the **Annual Survey – 2nd wave** (Spring 2017) 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

Alongside an analysis of the results of the 2nd wave of the survey, this document provides a comparison between the findings of the 2016 and 2017 surveys where relevant.

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 April 2017, following the same methodology adopted in the previous round of data collection (Spring 2016). 1,000 face-to-face 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 and living in the country), the sampling weights were calculated by applying a specifically designed estimation procedure.

Sampling strategy

The survey used a two-stage 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 urbanisation, and geographical area. Three groups of settlements² and three areas³ were used for a total of nine strata. Within each stratum, three or four sample units were randomly selected, with the probability of their selection proportional to their size. 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 were carried out. The additional interviews that were carried out were distributed proportionally to the PSU's size.

The second-stage sample was also stratified. In this case, gender and age⁴ were considered for a total of six strata. In each selected settlement, secondary sampling units were distributed proportionally among strata.

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 was built based on the general category of model-assisted estimators (Deville and Särndal 1992). 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. Three new calibration variables (education level, religious faith and mother tongue) were added to those used in the previous wave (settlement size, gender, age, employment status and geographical area) to produce calibrated weights, and therefore to improve the quality of survey findings, as they allowed for a better correction of any selection bias. Nevertheless, it is worth mentioning that the introduction of additional auxiliary variables in the estimation procedure could occasionally explain part of the difference between the estimates of the two years.

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

³ Geographical areas: 1) West (Ajara, Guria, Racha-Lechkhumi & Kvemo Svaneti, Samegrelo-Zemo Svaneti); 2) Centre (Imereti, Kvemo Kartli, SamtskheJavakheti, 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, it is necessary to define a step. 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 predefined number of households.

3. Survey findings

3.1. Executive summary

General perceptions about the EU

- As in 2016, the image of the European Union among Georgian citizens is generally positive or at least neutral (fig. 1) – 59% have a very or fairly positive image of the EU, while 34% feel neutral about it. The positive attitude towards the EU seems to have increased compared to last year due to the deepening of EU-Georgia relationship.
- Georgians who have heard about/know the EU strongly believe that the EU represents such values as freedom of speech (81%), economic prosperity, human rights, democracy, and rule of law (each 79%). Very weak associations with the surveyed values were virtually not recorded, while it is interesting to note that the values that are strongly associated with the EU are also the most important personal values for Georgians.
- The European Union is the most trusted foreign institution in Georgia: two thirds of the population tend to trust the EU (66%), while just over half tend to trust the UN (56%) and NATO (54%) and only a quarter trust the Eurasian Economic Union (25%).

EU relations with Georgia and awareness of EU financial support

- Over 80% of Georgians describe the relationship of their country with the European Union as ‘fairly or very good’, compared to 75% in 2016. Currently only 4% of Georgians describe the relationship as ‘fairly or very bad’, a significant decrease from 2016, when the same could be said about 13% of the population.
- Similarly to ‘in 2016’, nearly 60% of Georgians know that the EU provides financial support to Georgia and most of them believe that the financial support is effective (74%, compared to 59% in 2016). However, more than a third of Georgians (36%) have no knowledge about the EU’s financial support.
- Less than half (42%) of those who are aware of the EU’s financial support know about specific EU-funded programmes in Georgia, such as educational programmes (48%), health and medicine (33%) and infrastructural development projects (28%).
- Every fifth Georgian does not consider the EU as the biggest foreign donor when compared with the International Monetary Fund/World Bank, the United States of America and the United Nations and its agencies. On the other hand, almost half of citizens think that the EU provides more support than the Russian Federation. Nearly one in four Georgians stated that they did not have enough information to compare the support provided by the EU to that provided by other institutions.
- The majority of Georgians believe that Georgia has benefitted ‘fairly’, and to a lesser extent ‘very much’, from EU support through increased tourism in the country (70%) and improved quality of the justice system (59%) and healthcare system (53%). Half of people also noted improved education, access to more products and services and improved infrastructure as benefits.
- As for the desired fields for EU involvement, people think the EU should play a greater role in promoting economic development (45%), greater employment opportunities (37%) and better education (34%).

Attitudes towards the EU: a snapshot

- Unsurprisingly, and similarly to in 2016, individuals that have a positive image of the EU are also more likely to trust the Union, rate positively the relationship between the EU and their country, be aware of and acknowledge the effectiveness of the EU's financial support, compared to those with a neutral attitude towards the EU. Individuals that have a positive image of the EU are also much more likely to have an opinion on such matters as opposed to individuals with a neutral stance.
- Individuals that have a positive image of the EU are more likely to strongly link all important values with the EU in comparison to the neutral population. While positively oriented Georgians tend to associate the European Union with freedom of speech, human rights and rule of law, neutrally oriented citizens mostly associate the EU with human rights, democracy and economic prosperity.
- Similarly, those with positive attitudes towards the EU see more benefits for Georgia stemming from the EU than neutrally oriented individuals. Increased tourism and improved quality of the justice system were assessed as top benefits by those with both positive and neutral attitudes.

Media usage as sources of information

- Television is the most popular media channel in Georgia – 38% of Georgians always watch television, 24% often and 19% sometimes. Word of mouth was the second-most preferred source of information (64% of the population), although with different frequency.
- Nearly all Georgians (60% always, 19% often and 12% sometimes) rely on media in national language. The usage of foreign media, or media in different languages, is very rare – between 80% and 90% of population never use national or foreign media in Russian or other languages.

Sources of information about the EU

- 65% of Georgians claimed to have heard about the European Union in the last three months, as compared to 47% in 2016. Most of the information they had been exposed to came from television (91%), followed by internet (20%), word of mouth (19%) and social media (17%).
- The majority of the population (68%) felt that the national media represented the European Union very positively (13%) or fairly positively (55%), with no substantial changes compared to last year.
- Information on the European Union is accessed frequently or very frequently by 24% of the population. This figure has significantly increased compared to 2016 (7%), probably due to the recent progress in EU-Georgia relations.
- The majority of people who search for information about the EU access information in their national language (86%), while 7% use Russian and 6% English. The most commonly searched information about the European Union concerns general information about the EU (55%) and the EU's relations with their home country (26%).
- While passive exposure to information about the EU mostly stems from television (91%) and to an extent from the internet (21%) and social media (17%), a greater proportion of those actively searching/accessing information rely on the internet (38%) and social media (24%), while television channels (75%) are again the most common source of information.
- Most people that search for information about the EU rate the information as being accessible (very – 18%; fairly – 61%). They also think of the information as user-friendly (67%), comprehensive (66%), reliable (59%) and trustworthy (57%).
- According to 58% of the population, the information they read, watch or access online helps them to have a better understanding of the European Union. 30% of people disagree with this notion and think that the information does not help to better understand the EU.

Source of information and attitude towards the EU

- Frequent social media and internet users are on average the most positive and satisfied with the EU's role: three quarters have a positive image of the EU and trust it, and are aware of and satisfied with the EU's financial support. In addition, nearly all consider the relationship between their country and the EU to be good. Traditional media users, and to a greater extent people that do not use any media, are less likely to share their point of view, although most people are still positive about and satisfied with the EU's role.
- The majority of people (percentages varying between 58% and 76%), regardless of whether they frequently access media in Russian or not, tend to have a positive perception of the European Union, to trust it and, in particular, to consider its support effective. The only noticeable difference can be found in the perception of the relationship between Georgia and the EU and in the awareness of its support. In fact, Russian media users tend to be more critical – or uninformed.

View of Georgia's current situation

- Just as in 2016, Georgians do not show a great deal of trust in national, regional and local institutions, although the proportion of individuals that tend to trust the institutions seems to have increased compared to last year. Political parties still score the lowest levels of trust (27%). Religious authority appears to be the most trusted institution in Georgia (73%).
- Only a quarter of the population seem to be satisfied with current democracy in Georgia (26%), although this number was even lower in 2016 (21%). Total dissatisfaction, however, has decreased from 21% to 13% since last year, while the share of those 'fairly dissatisfied' has overall remained stable. Again, only a tiny share of residents (2%) are 'very satisfied' with how democracy is working in their homeland.
- More than half of the population believe that freedom of speech (58%), freedom of media (54%), protection of the right of minorities (53%) and gender equality (57%) exist in Georgia. Although positive, these indicators have lowered compared to the first wave in 2016.

Future expectations

- More than half of people rated their attitudes towards the future of their country as optimistic (66%), which was a bit lower than in the previous year (71%). The optimism of Georgians towards their own future was a bit higher than towards that of their country (74%), but was lower than that of the previous year (80%).
- The most pressing problem facing Georgia was unemployment, with 81% of people indicating this in their responses. This was followed by low standard of living and poverty (37%), economic crisis (36%), low salaries/pensions (35%) and high prices and taxes (32%).

Views of the country and attitude towards the EU

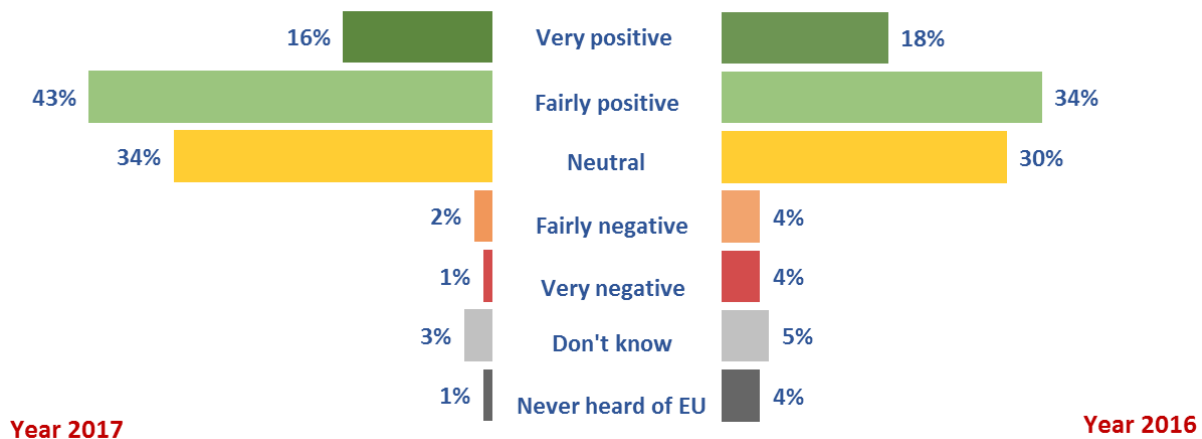
- Unsurprisingly, individuals that have a positive image of the EU are also more likely to be more positively oriented for all the assessed indicators (trust in the institutions, satisfaction with the way democracy works, optimism about the country's and the individual's personal future) when compared to the neutral population.
- The gap between the two populations tends to shrink when it comes to trust in the parliament, regional and local authorities and political parties (between 4 and 6 per cent) and is greatest when it comes to satisfaction with the functioning of democracy and optimism about their country's future (17 per cent for each).
- Almost everyone, regardless of their attitude towards the European Union, indicates the same pressing problems Georgia is facing, with unemployment being the most important issue (81-85%). On the other hand, those with positive perceptions of the EU find freedom of speech more important than those with a negative view (25% versus 10%). The same is true for democracy (positive – 19%; negative – 10%).

3.2. Perceptions about the European Union

3.2.1. General perceptions about the EU

As in 2016, the image of the European Union among Georgian citizens is generally positive or at least neutral (fig. 1) – 59% have a very or fairly positive image of the EU, while 34% feel neutral about it. In addition, the positive attitude towards the EU seems to have increased compared to last year: in particular, the share of citizens who feel fairly positive about the EU has recorded an increase of 7 per cent. Conversely, the share of negatively oriented citizens has decreased from 8% to only 3% in 2017, as well as the share of those who have no awareness of or opinion about the EU (9% in 2016 versus 4% in 2017). This increase in positive attitudes is in line with the deepening of EU-Georgia integration through the entry into force of the Association Agreement in July 2016, the strengthening of trade relations through the introduction of the Deep and Comprehensive Free Trade Area (DCFTA) and the introduction of the visa liberalisation regime in March 2017.

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



The attitude of Georgians towards the EU appears to be directly related to the level of education: more than two thirds of highly educated people have a positive image of the EU compared to 58% and 42% respectively for those with medium and low levels of education (tab. 1).

On average, residents of smaller cities, older generations (aged over 55 years) and unemployed or temporarily inactive individuals feel less positive towards the European Union than other groups (nearly 40% of citizens in the above-mentioned groups have a neutral or negative image of the EU). People with a low level of education and residents of cities with less than 20,000 inhabitants are less likely to know/have heard of the EU (10% and 7% respectively).

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	Don't know / Never heard	Total
Settlement size	Equal to or more than 150,000 inhabitants	65%	32%	2%	1%	100%
	Between 20,000 and 150,000 inhabitants	64%	34%	1%	1%	100%
	Less than 20,000 inhabitants	54%	36%	3%	7%	100%
Gender	Male	61%	33%	3%	3%	100%
	Female	58%	36%	2%	4%	100%
Age group	15-34 years	62%	32%	1%	5%	100%
	35-54 years	61%	36%	2%	1%	100%
	55 years & above	55%	36%	4%	5%	100%
Education Level	Low level	42%	45%	3%	10%	100%
	Medium level	58%	36%	2%	4%	100%
	High level	71%	26%	3%	0%	100%
Employment status	Employed	62%	33%	3%	2%	100%
	Self-employed	62%	33%	1%	4%	100%
	Unemployed or temporarily not working / inactive	56%	36%	3%	5%	100%
Geographical Area	Centre	55%	37%	2%	6%	100%
	East	66%	31%	2%	1%	100%
	West	55%	36%	4%	5%	100%
Total		59%	34%	3%	4%	100%

Georgians who have heard about/know the EU strongly believe that the EU represents such values as freedom of speech (overall 81% of people share this belief), economic prosperity, human rights, democracy and rule of law (each 79%) (tab. 2). Freedom of media is also quite strongly associated with the EU (77%), as well as equality and social justice (76%), individual freedom (73%), freedom of religion (72%) and peace, security and stability (72%). Less people – but still more than half of the population – are convinced that the EU represents such values as respect for other cultures (67%), honesty and transparency (60%) and absence of corruption (52%). Very weak associations with the surveyed values were virtually not recorded, although high proportions of citizens (varying between 12% and 30% for each chosen value) did not know how to answer. The findings are consistent with last year's survey, as Georgians shared similar beliefs in 2016.

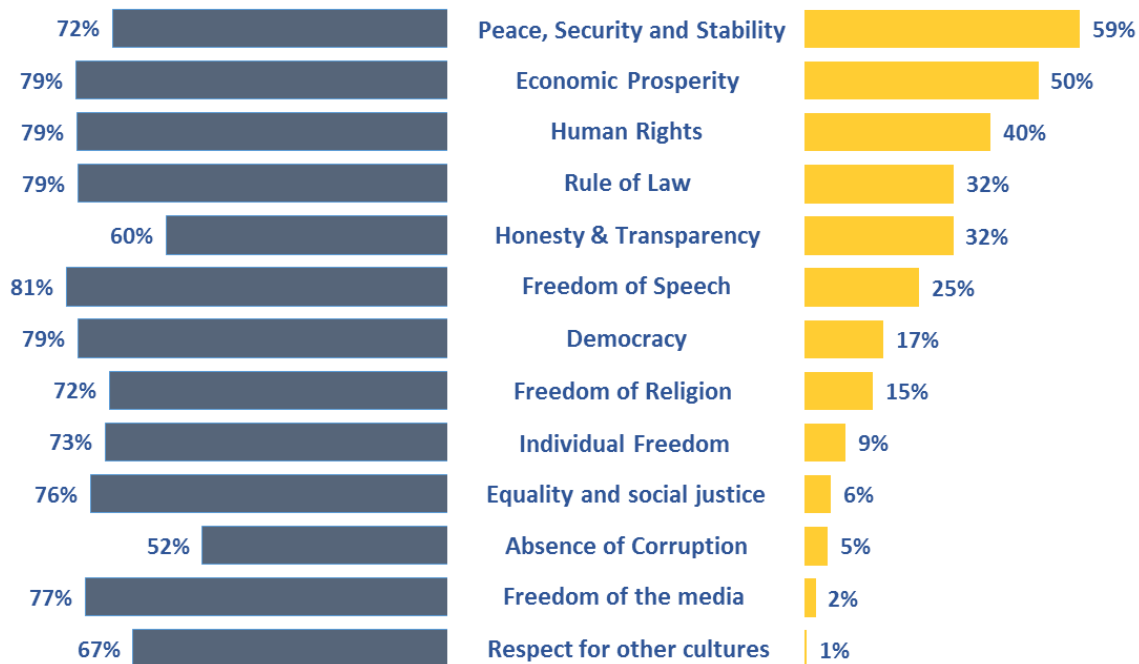
TABLE 2 – Values associated with the EU

Q2.3. To what extent does the European Union represent the following values for you?						
	Very strong	Strong	Weak	Very weak	Don't know	Total
Freedom of Speech	22%	59%	6%	1%	12%	100%
Economic Prosperity	26%	53%	6%	1%	14%	100%
Human Rights	23%	56%	7%	1%	13%	100%
Democracy	22%	57%	8%	0%	13%	100%
Rule of Law	23%	56%	7%	1%	13%	100%
Freedom of the media	24%	53%	6%	1%	16%	100%
Equality and social justice	19%	57%	8%	1%	15%	100%
Individual Freedom	20%	53%	9%	1%	17%	100%
Freedom of Religion	20%	52%	9%	1%	18%	100%
Peace, Security and Stability	21%	51%	15%	1%	12%	100%
Respect for other cultures	14%	53%	12%	1%	20%	100%
Honesty & Transparency	14%	46%	14%	2%	24%	100%
Absence of Corruption	11%	41%	15%	2%	31%	100%

Percentages refer to Georgians who have heard about the EU

Figure 2 compares the values that are strongly associated with the EU with the most important personal values for Georgians⁶. The most important personal values for Georgians, such as peace, security and stability, economic prosperity, human rights and rule of law are also strongly associated with the EU (over one in three Georgians strongly believe that the EU represents the above-mentioned values). The only exception is the value of honesty and transparency, which shows a lower level of association with the EU. One value that displayed a weaker association with the EU was absence of corruption (52%), which was also of little importance on a personal level (5%). Respect for other cultures, freedom of the media, equality and social justice and individual freedom were all rated as important values by less than 10% of Georgians.

FIGURE 2 – Values strongly or very strongly associated with the EU (Q2.3) & Three most important personal values (Q4.7)



Values strongly associated with EU

Most important personal values

Percentages refer to Georgians who have heard about the EU

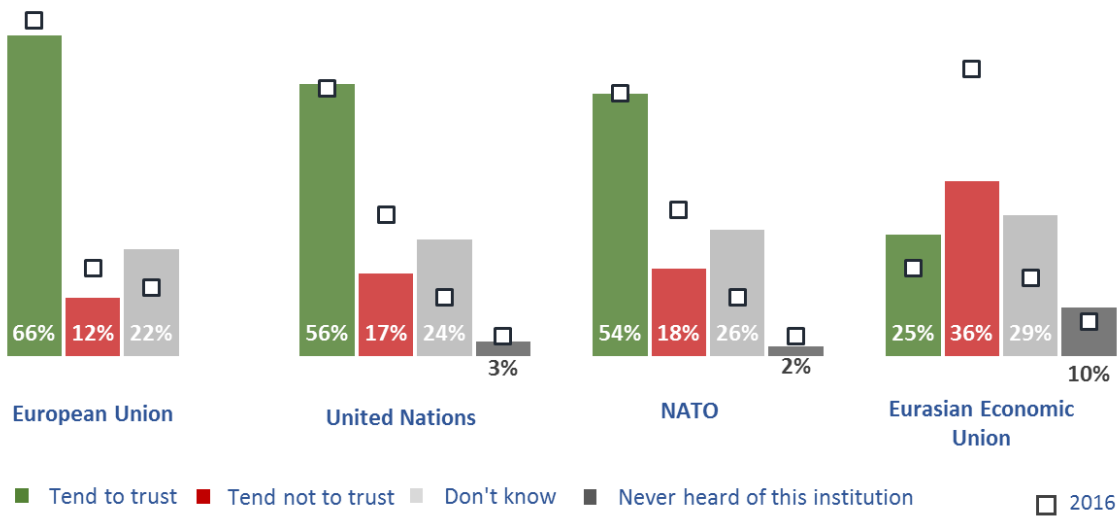
Perceptions of the EU were also assessed through an open-ended question where respondents were asked to name the first issues that came to their mind when thinking of the EU. As expected, positive associations mostly revolved around economic prosperity and development (13% and 8% respectively). One in ten Georgians also mentioned visa liberalisation, which is not surprising considering the recent introduction of the EU’s visa liberalisation regime with Georgia. Another 9% mentioned the EU’s support to Georgia, while 8% cited travel and tourism. Negative perceptions towards the EU, on the other hand, mostly focus around the ‘moral decline’ that one in ten Georgians associate with the European Union; this includes attitudes towards gay marriage and homosexuality. Finally, it should be noted that nearly 30% of citizens did not answer the question, either because it was too hard to answer or they had nothing to say.

⁶ Respondents were asked to choose and rank the three most important personal values from a list of 13 items.

The European Union is the most trusted foreign institution in Georgia: as mentioned above in the section on general perceptions of the EU, two thirds of the population tend to trust the EU (66%), while just over half tend to trust the UN (56%) and NATO (54%) and only a quarter trust the Eurasian Economic Union (25%) (fig. 3). Although the share of those who trust the Eurasian Economic Union has recorded the highest increase (from 18% in 2016 to 25% in 2017), the Eurasian Economic Union remains the least trusted institution among the four for the second year in a row.

Compared to 2016, it appears there has been an overall shift from distrust (which has decreased) to having no opinion (which has increased) in terms of trust in all four institutions. Distrust in the EU has decreased by 6%, distrust in the UN from 29% to 17%, distrust in NATO from 30% to 18%, and distrust in the Eurasian Economic Union from 59% to 36%. It appears that some of those who tended not to trust the four institutions in 2016 had no opinion in 2017.

FIGURE 3 – Trust towards different institutions (Q2.11)



Percentages refer to Georgians who have heard about the EU

The level of trust in the European Union increases with the level of education: 77% of highly-educated individuals tend to trust the EU, compared to 63% and 58% of Georgians with medium and low levels of education (tab 3).

The European Union is also particularly trusted by employed people (73%), those in the working age bracket (74%) and residents of medium-sized cities (76%), particularly in the western part of the country (71%).

TABLE 3 – Trust towards the European Union

Q2.11. I would like to ask you a question about how much trust you have in the EU		Tend to trust	Tend not to trust	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	69%	13%	18%	100%
	Between 20,000 -and150,000 inhabitants	76%	10%	14%	100%
	Less than 20,000 inhabitants	62%	12%	26%	100%
Gender	Male	65%	14%	21%	100%
	Female	67%	11%	22%	100%
Age group	15-34 years	65%	11%	24%	100%
	35-54 years	74%	9%	17%	100%
	55 years & above	61%	17%	22%	100%
Education level	Low level	58%	15%	27%	100%
	Medium level	63%	13%	24%	100%
	High level	77%	9%	14%	100%
Employment status	Employed	73%	11%	16%	100%
	Self-employed	64%	11%	25%	100%
	Unemployed or temporarily not working / inactive	64%	14%	22%	100%
Geographical area	Centre	61%	13%	26%	100%
	East	69%	11%	20%	100%
	West	71%	13%	16%	100%
Total		66%	12%	22%	0%

Percentages refer to Georgians who have heard about the EU

3.2.2. EU relations with Georgia and awareness of EU financial support

Just as the positive attitude towards the EU seems to have increased compared to last year, 83% of Georgians (compared to 75% in 2016) describe their country’s relationship with the European Union as fairly or very good (fig. 4). Conversely only 4% of Georgians described it as fairly or very bad compared to 13% in 2016.

FIGURE 4 – In general, how would you describe the relations that the European Union has with your country? (Q2.4)



Percentages refer to Georgians who have heard about the EU

The opinion on the relations between Georgia and the EU tends to improve with the level of education: the share of those who deem the relations with the EU to be ‘good’ is highest among the most educated individuals (87% versus 81% and 79% of those with a medium and low level of education respectively). Individuals in the working bracket (15-54 years), employed and unemployed, tend to have a more positive opinion than older and self-employed people, who are on average more undecided (a quarter of people in both categories answered ‘don’t know’).

TABLE 4 – Relations between the EU and Georgia

Q2.4. In general, how would you describe the relations that the European Union has with Georgia?					
		Good	Bad	Don't know/No relations	Total
Settlement size	Equal to or more than 150,000 inhabitants	83%	5%	12%	100%
	Between 20,000 and 150,000 inhabitants	89%	1%	10%	100%
	Less than 20,000 inhabitants	80%	5%	15%	100%
Gender	Male	80%	5%	15%	100%
	Female	85%	3%	12%	100%
Age group	15-34 years	84%	5%	11%	100%
	35-54 years	89%	4%	7%	100%
	55 years & above	74%	4%	22%	100%
Education level	Low level	79%	8%	13%	100%
	Medium level	81%	4%	15%	100%
	High level	87%	3%	10%	100%
Employment status	Employed	86%	4%	10%	100%
	Self-employed	78%	2%	20%	100%
	Unemployed or temporarily not working / inactive	83%	6%	11%	100%
Geographical area	Centre	81%	4%	15%	100%
	East	84%	4%	12%	100%
	West	83%	5%	12%	100%
Total		83%	4%	13%	100%

Percentages refer to Georgians who have heard about the EU

Similarly to in 2016, nearly 60% of citizens know that the EU provides financial support to Georgia (tab. 5). The number of people who are aware of the EU’s financial support to Georgia is lower among older people (48%) and less educated individuals (54%), thus mirroring the groups that are generally more EU-sceptical.

It should also be highlighted that the share of Georgians who do not know if the EU supports their country remains notable: one third more. Again, older people (46%) and to a lesser extent individuals with medium levels of education (39%), are more likely to have no knowledge about the EU’s financial support.

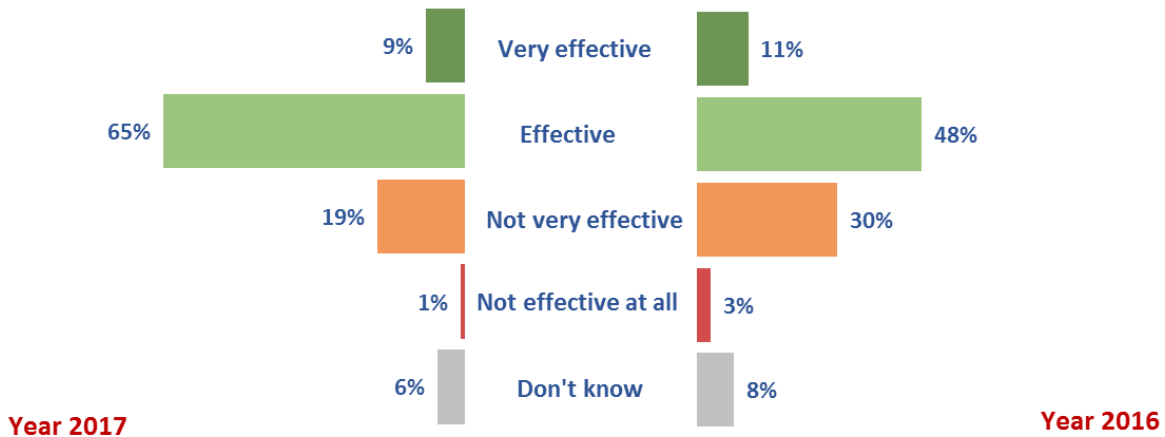
TABLE 5 – Provision of financial support by the EU

Q2.5. As far as you know, does the European Union provide Georgia with financial support?		Yes	No	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	54%	9%	37%	100%
	Between 20,000 and 150,000 inhabitants	58%	4%	38%	100%
	Less than 20,000 inhabitants	60%	5%	35%	100%
Gender	Male	59%	5%	36%	100%
	Female	57%	7%	36%	100%
Age group	15-34 years	60%	6%	34%	100%
	35-54 years	66%	7%	27%	100%
	55 years & above	48%	6%	46%	100%
Education level	Low level	54%	10%	36%	100%
	Medium level	56%	5%	39%	100%
	High level	63%	7%	30%	100%
Employment status	Employed	58%	7%	35%	100%
	Self-employed	59%	5%	36%	100%
	Unemployed or temporarily not working / inactive	57%	7%	36%	100%
Geographical area	Centre	58%	3%	39%	100%
	East	56%	8%	36%	100%
	West	61%	7%	32%	100%
Total		58%	6%	36%	100%

Percentages refer to Georgians who have heard about the EU

As shown in the figure below (fig. 5), the share of people believing financial support to be effective has also significantly increased from 59% to 74% compared to 2016. Equally, only one in five individuals who are aware of the EU’s financial support deem the support not to be effective – it was one in three in 2016.

FIGURE 5 – How effective do you think the support has been? (Q2.5.1)



Percentages refer to Georgians who were aware of the EU's financial support

Notably, the highest percentages of people who believe the financial support provided by the EU has been effective have low levels of education (82%), live in the western part of the country (82%), reside in medium sized settlements that have 20,000-150,000 inhabitants (80%) and belong to the youngest age group (79%) (tab. 6). Thus, these are not necessarily the same socio-demographic groups that tend to have the highest levels of trust in the EU. The groups most sceptical about the effectiveness of EU support are self-employed people (24%), individuals aged 35-54 (25%), those with higher levels of education (26%) and residents of the central part of the country (24%).

TABLE 6 – Effectiveness of the support

Q2.5.1. How effective do you think the support has been?					
		Effective	Not effective	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	71%	21%	8%	100%
	Between 20,000 and 150,000 inhabitants	80 %	10%	10%	100%
	Less than 20,000 inhabitants	74%	22%	4%	100%
Gender	Male	73%	21%	6%	100%
	Female	75%	19%	6%	100%
Age group	15-34 years	79%	13%	8%	100%
	35-54 years	71%	25%	4%	100%
	55 years & above	72%	21%	7%	100%
Education level	Low level	82%	13%	5%	100%
	Medium level	75%	18%	7%	100%
	High level	69%	26%	5%	100%
Employment status	Employed	76%	19%	5%	100%
	Self-employed	70%	24%	6%	100%
	Unemployed or temporarily not working / inactive	76%	17%	7%	100%
Geographical area	Centre	69%	24%	7%	100%
	East	74%	19%	7%	100%
	West	82%	14%	4%	100%
Total		74%	20%	6%	100%

Percentages refer to Georgians who were aware of the EU's financial support

Less than half (42%) of those who are aware of the EU's financial support know about specific EU-funded programmes in Georgia (tab. 7). Gender and age seem to be closely linked to this kind of information. Females (35%) and older people (35%) appear to be the least informed about specific programmes in comparison to males and younger age groups. Quite large differences can also be seen depending on the settlement size: 56% of people living in settlements with 20,000-150,000 inhabitants have awareness of the programmes, while only 38% of people living in smaller settlements have the same level of knowledge.

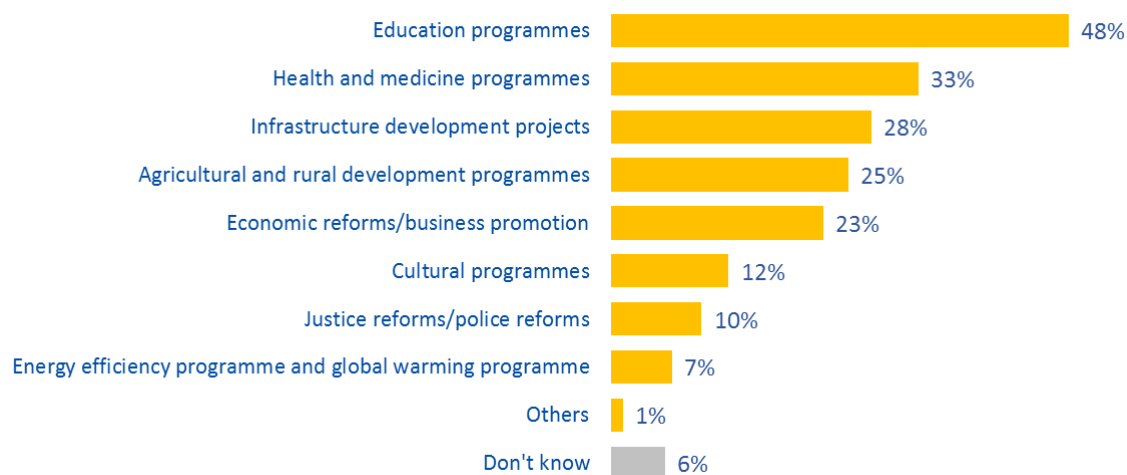
TABLE 7 – Programmes financed by the EU

Q2.6. Do you know of any specific programmes financed by the European Union in Georgia?		Yes	No	Total
Settlement size	Equal to or more than 150,000 inhabitants	42%	58%	100%
	Between 20,000 and 150,000 inhabitants	56%	44%	100%
	Less than 20,000 inhabitants	38%	62%	100%
Gender	Male	49%	51%	100%
	Female	35%	65%	100%
Age group	15-34 years	46%	54%	100%
	35-54 years	42%	58%	100%
	55 years & above	35%	65%	100%
Education level	Low level	40%	60%	100%
	Medium level	40%	60%	100%
	High level	45%	55%	100%
Employment status	Employed	44%	56%	100%
	Self-employed	40%	60%	100%
	Unemployed or temporarily not working / inactive	41%	59%	100%
Geographical area	Centre	42%	58%	100%
	East	45%	55%	100%
	West	37%	63%	100%
Total		42%	58%	100%

Percentages refer to Georgians who were aware of the EU's financial support

The most well known EU-financed programmes in Georgia are educational programmes (48%), followed by health and medicine (33%), as well as infrastructural development projects (28%) (fig. 6). A quarter of people are aware of agricultural and rural development programmes (25%) and economic reforms/business promotions (23%). Programmes in the fields of culture, justice and policy, energy efficiency and on domestic violence prevention are the least frequently recognised. Less than 2% of Georgians have personally been (or know someone who has been) involved in recent EU-funded projects.

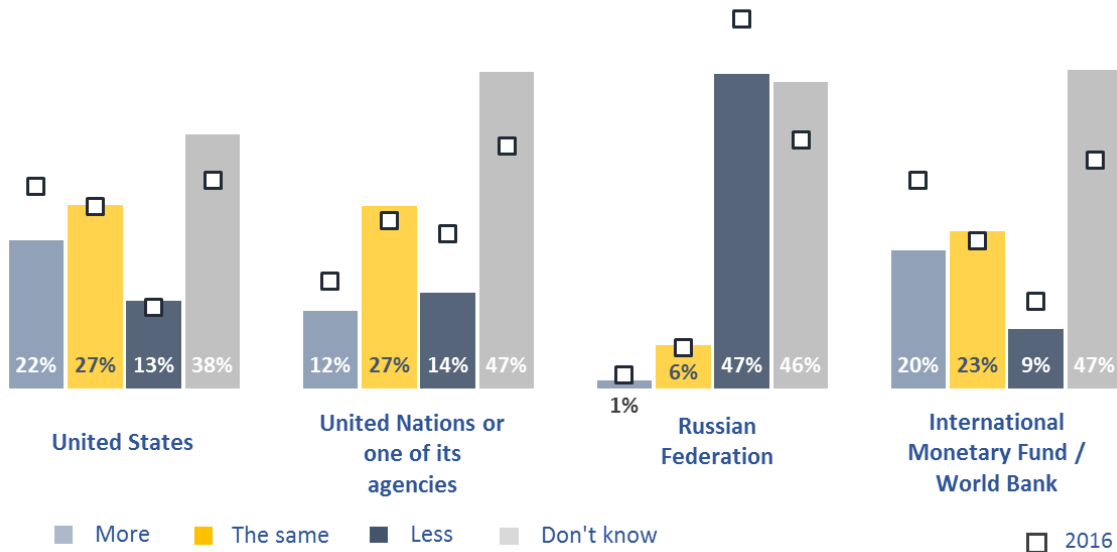
FIGURE 6 – Which specific programme(s) do you know? (Q2.6.1, multiple answers possible)



Percentages refer to Georgians who were aware of the EU's financial support

As expected, considering that nearly one in four Georgians are not aware of the EU’s financial support, a similar share of the population did not have enough information to compare the support provided by the EU to that provided by other institutions, such as the International Monetary Fund (IMF)/World Bank (WB), the United States of America, the United Nations and its agencies, and the Russian Federation. Around one fifth of citizens do not consider the EU as the biggest foreign donor to Georgia as compared to the first three institutions (fig. 7). On the other hand, almost half of citizens think that the EU provides more support than the Russian Federation (47%). Figures are consistent with last year’s findings, although the share of those who had no definite opinion has increased since 2016.

FIGURE 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? (Q2.7)



Percentages refer to Georgians who have heard about the EU

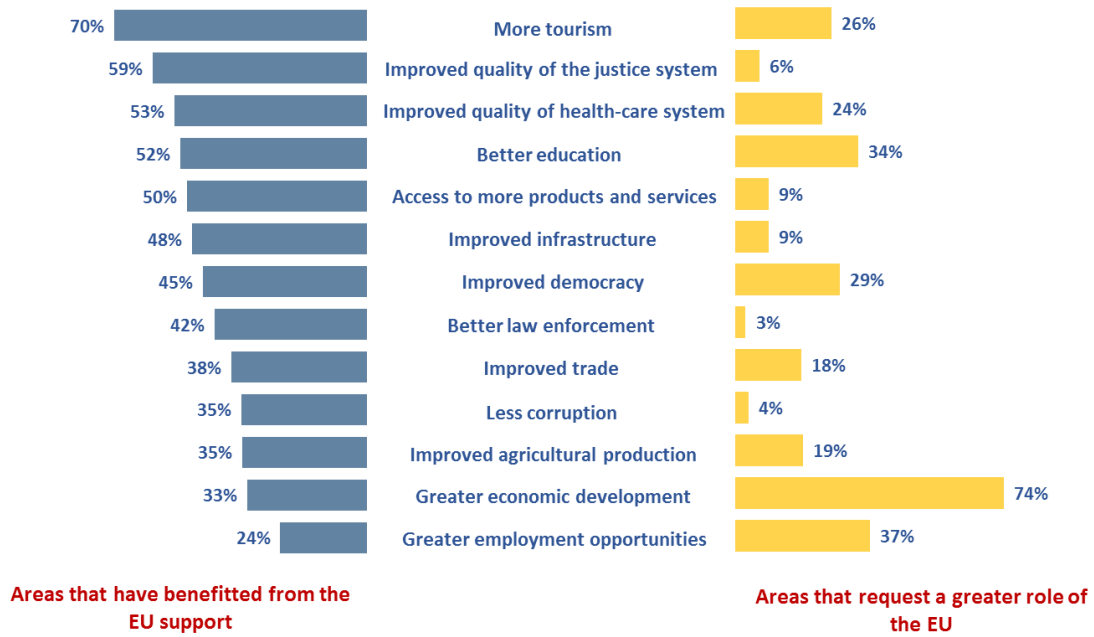
However, the majority of Georgians still believe that their country has fairly, and to a lesser extent very much, benefitted from the EU’s support (fig. 8).⁷ The main benefits cited include the increase in tourism (70%), improved quality of the justice system (59%) and healthcare system (53%), better education (52%) and access to more products and services as benefits (50%). The list continues with improved infrastructure (48%), improved democracy (45%) and better law enforcement (42%). Employment and economic development are the least supported areas – only 33% and 24% of people respectively acknowledged some kind of benefit from the EU’s support. Georgians shared similar beliefs last year.

According to Georgians, the least supported areas are also those where the EU should play a greater role, as shown in the figure below (fig. 8). Almost half of the population (45%) believe economic development to be the number-one priority and the vast majority (74%) see it as one of the three most important areas.⁸ 37% of people in Georgia also believe that the EU should help create more employment opportunities. In addition, around one third of citizens think the EU should promote better education (34%), play a stronger role in improving democracy (29%) and increasing tourism (26%), while 24% believe that the EU should focus more on improving the quality of the healthcare system.

⁷ More details are provided in Annex, Table A1.

⁸ Respondents were asked to name and rank the three most important areas in which the EU should play a greater role. See Appendix Table A2 for more details.

FIGURE 8 – Areas that have benefitted very much or fairly from EU support (Q2.8) & three most important areas that request a greater role of the EU (Q2.9)



Percentages refer to Georgians who have heard about the EU

3.2.3. Attitudes towards the EU: a snapshot

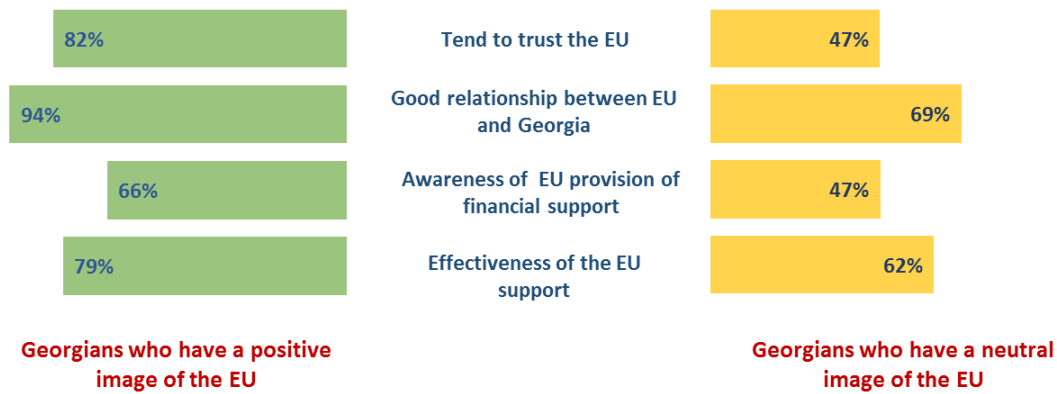
In this section the attitude of Georgians towards the EU has been analysed according to two main profiles: individuals that have a positive attitude towards the EU and those who are mostly neutral.⁹ Four indicators were considered: level of trust, relationship between Georgia and the EU, awareness of EU financial support, and effectiveness of EU support.

The first thing that should be noted is that, unsurprisingly, individuals that have a positive image of the EU are also more likely to be more positively oriented for all four indicators compared to the neutral population (fig. 9).¹⁰ In particular, more than 80% of those who have a positive attitude also tend to trust the EU, compared to less than half of those who are mostly neutral (47%). A difference of around 20 per cent between positively and neutrally oriented people was recorded for the other three indicators. Aside from the evaluation of the effectiveness of EU support, individuals that have a positive image of the EU are also much more likely to have an opinion on such matters as opposed to those with a neutral stance – 45% were not aware of the EU’s financial support, 30% on trust and 25% on the relationships between Georgia and the EU.

⁹ Individuals that were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

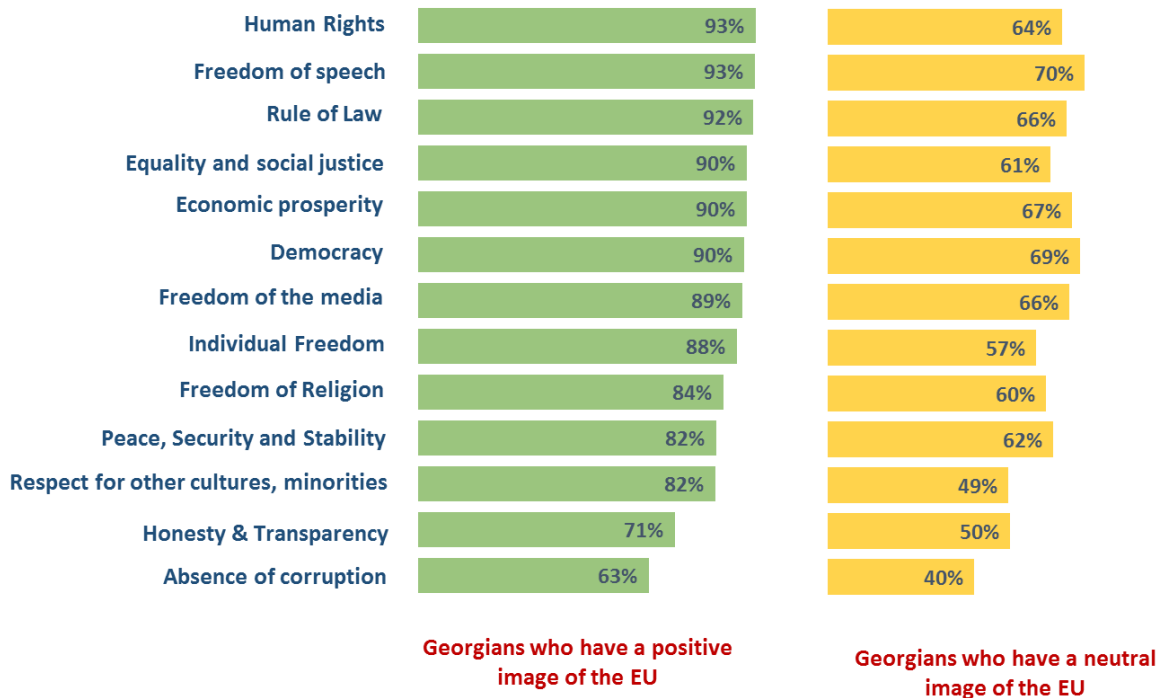
¹⁰ More details are provided in Annex, Table A3.

FIGURE 9 – Attitudes towards the EU: positive versus neutral



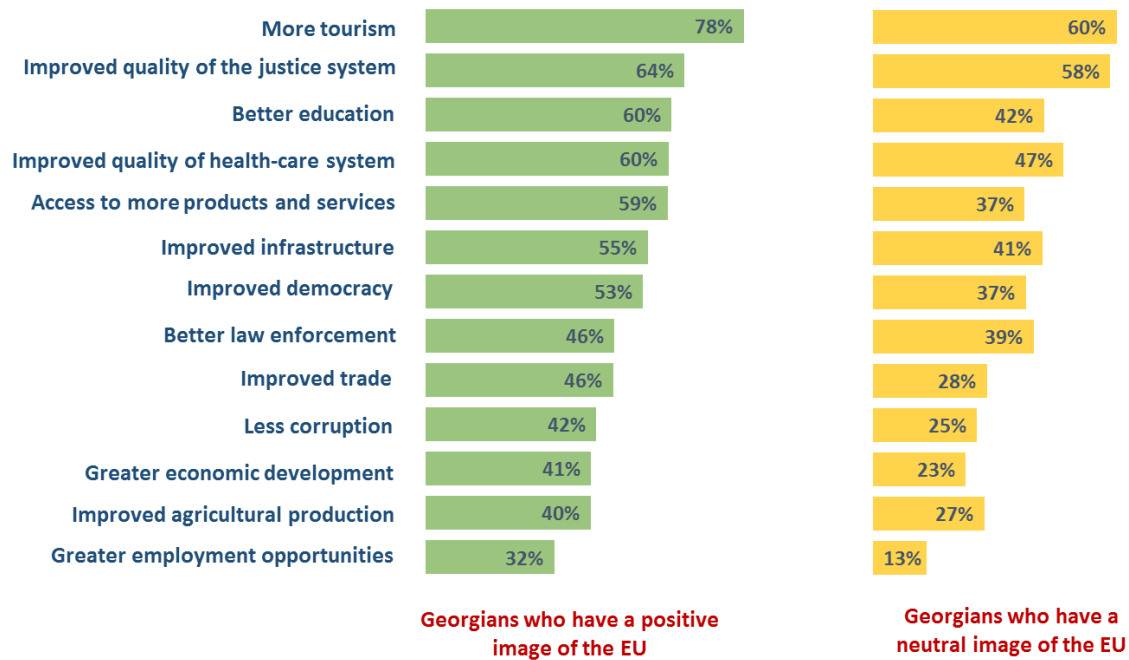
The top three values which Georgians who have a positive image of the EU tend to strongly and very strongly link with the Union are freedom of speech, human rights and rule of law (fig. 10). Neutrally oriented citizens, on the other hand, mostly associate the EU with freedom of speech, democracy and economic prosperity. The least associated values – such as absence of corruption, honesty and transparency and respect for other cultures – are the same for both populations. Again, individuals that have a positive image of the EU are also more likely to strongly link all values with the EU in comparison to the neutral population.

FIGURE 10 – Values strongly associated with the EU – positive versus neutral



Similarly, those with positive attitudes towards the EU see more benefits for Georgia from the EU than neutrally oriented individuals. As shown in figure 11, both positively and neutrally oriented individuals believe that the European Union has very much and fairly encouraged tourism and the quality of the justice system. 60% of those who have a positive image of the EU also cited better education (60%), while 47% of those with a neutral image referred also to healthcare. Economic development, agricultural production and employment were the least mentioned benefits by both populations: still, between a third and a quarter of positively oriented citizens mentioned these benefits. Neutrally oriented individuals were more critical in these areas: 27% mentioned agricultural production, 23% economic development and only 13% employment opportunities.

FIGURE 11 – Areas that have very much or fairly benefited from EU support: positive versus neutral

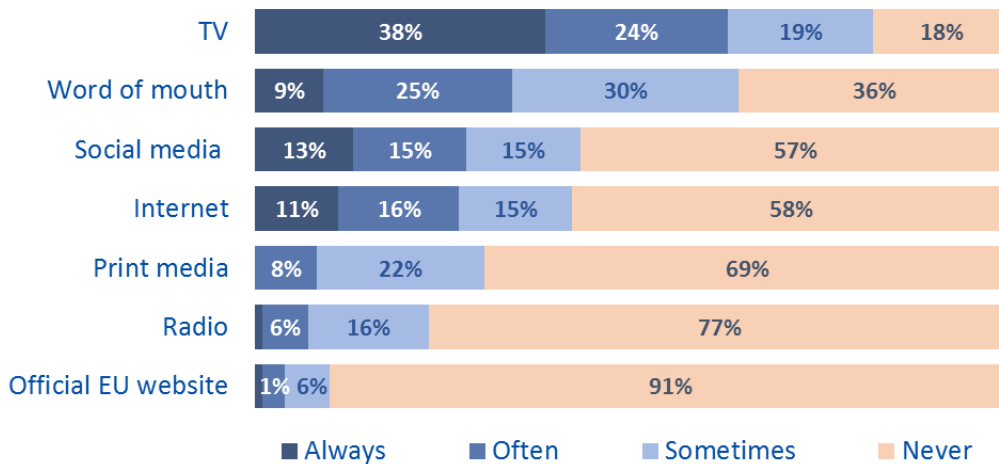


3.3. Sources of information on the EU

3.3.1. Media usage as sources of information

Television is the most popular media channel in Georgia – 38% of Georgians always watch television, 24% often and 19% sometimes (fig. 12). The next most commonly used source of information is word of mouth (from neighbours, friends, colleagues, etc.) – as stated by 64% of the population, although with different frequency. This is a new variable introduced in the 2017 wave. Social media (used by 43% in total) and the internet (42%) appear to be less popular among the population. The official EU website is almost never used (91%) and neither are print media (69%) and radio (77%).

FIGURE 12 – Type of media used as a source of information (Q3.7)



Overall, individuals that do not frequently use any of the above-mentioned media account for 29% of the population; while 4 out of 10 Georgians frequently use only traditional media and 1 in 3 are regularly active on social media and the internet¹¹ (tab. 8).

People that do not use any media tend to be self-employed, live in smaller cities and possibly in the centre of the country, and have a low or medium level of education. Traditional media users, on the other hand, are more likely to be females, living in medium sized cities, aged 35 years or older, with a medium level of education. On average, traditional media users tend to live in the centre of the country and are either unemployed/temporarily inactive or employed.

On average, frequent social media and internet users are aged less than 35 years, live in cities with over 150,000 inhabitants, have a high level of education and are generally employed. They are also more likely to live in the eastern part of the country. Also, the use of word of mouth as a source of information tends to be more widespread in the East, and individuals that most frequently rely on it are on average residents of larger cities.

¹¹ The first group includes all individuals who do not “always or often” use any of the surveyed media; the second group includes all individuals who “always or often” use only traditional media (such as television, radio and print media); while the last group includes all individuals who always or often use either internet (including the official EU web site) or the social media.

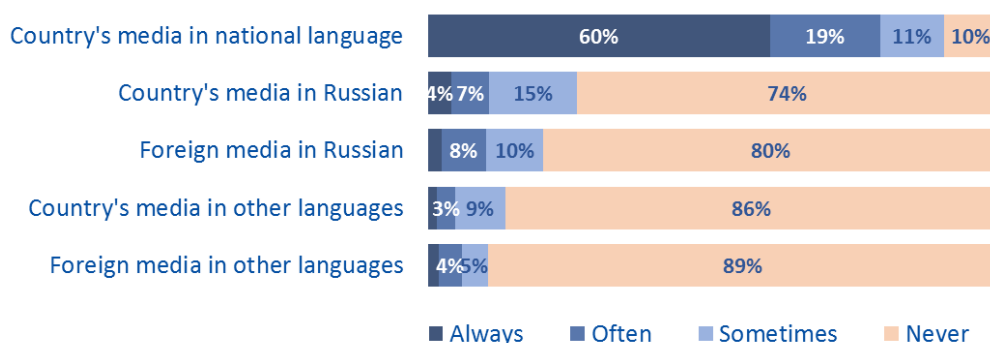
TABLE 8 – Type of media frequently used as source of information

		Type of media frequently used as source of information (Q3.8)				Word of mouth used as source of information (Q3.8)
		No media	Only traditional media	Social media or internet	Total	
Settlement size	Equal to or more than 150,000 inhabitants	21%	34%	45%	100%	46%
	Between 20,000 and 150,000 inhabitants	21%	51%	28%	100%	35%
	Less than 20,000 inhabitants	37%	38%	25%	100%	26%
Gender	Male	30%	36%	34%	100%	33%
	Female	28%	40%	32%	100%	34%
Age group	15-34 years	31%	17%	52%	100%	32%
	35-54 years	29%	42%	29%	100%	34%
	55 years & above	27%	57%	16%	100%	36%
Education level	Low level	32%	36%	32%	100%	37%
	Medium level	34%	41%	25%	100%	31%
	High level	18%	34%	48%	100%	38%
Employment status	Employed	18%	41%	41%	100%	36%
	Self-employed	39%	34%	27%	100%	25%
	Unemployed or temporarily not working / inactive	30%	40%	30%	100%	39%
Geographical area	Centre	30%	45%	25%	100%	29%
	East	23%	35%	42%	100%	43%
	West	39%	35%	26%	100%	25%
Total		29%	38%	33%	100%	34%

Nearly all Georgians (60% always, 19% often and 11% sometimes) rely on media in national language (fig. 13).

The usage of foreign media, or media in different languages, is very rare – 89% of citizens never use foreign media in other languages, 80% never use foreign media in Russian and 86% never use Georgian media in other languages. The Georgian media in Russian is rarely used: 74% never use such media sources, while 11% either often or always refer to Russian language media as a source of information.

FIGURE 13 – Usage of media in national language, Russian and other languages (Q3.7)



In the below table, socio-demographic characteristics of the population have been analysed according to three main profiles – individuals that frequently use media in the national language (79%), individuals that mostly rely on media in Russian (16%) and those who rely on media in foreign languages (9%).¹²

¹² The first group includes all individuals who “always or often” use media in national language; the second group includes all individuals who “always or often” use the country’s or foreign media in Russian; while the last group includes all individuals who “always or often” use the country’s or foreign media in other languages. The frequent use of media in one language is not exclusive, in the sense that individuals might also access media in other languages.

Males, people aged 55 years and over, people with a high level of education and the employed tend to rely on media in their national language more than other groups. In addition, residents who live in larger cities and in the eastern part of the country tend to use these media. Media in Russian, on the other hand, are more frequently accessed by females, people belonging to older age groups, people living in cities with more than 150,000 inhabitants and those with a high level of education and who are self-employed. On average, consumers of media in other foreign languages tend to live in medium sized cities, have a low level of education and be either unemployed or temporarily inactive.

TABLE 9 – Frequent usage of media in national language, Russian and other languages

		Individuals that always or often use media (Q3.8)		
		In national language	In Russian	In other foreign language
Settlement size	Equal to or more than 150,000 inhabitants	82%	20%	11%
	Between 20,000 and 150,000 inhabitants	71%	10%	20%
	Less than 20,000 inhabitants	79%	15%	5%
Gender	Male	83%	12%	8%
	Female	75%	19%	10%
Age group	15-34 years	74%	12%	11%
	35-54 years	79%	16%	8%
	55 years & above	84%	20%	8%
Education level	Low level	62%	6%	18%
	Medium level	80%	13%	7%
	High level	85%	26%	8%
Employment status	Employed	82%	16%	8%
	Self-employed	77%	22%	6%
	Unemployed or temporarily not working / inactive	78%	12%	11%
Geographical area	Centre	69%	17%	12%
	East	82%	16%	9%
	West	88%	15%	3%
Total		79%	16%	9%

Trust levels towards different media sources are similar to the usage patterns of media: the majority of people trust the country's media in Georgian (76%), while they are undecided about other media sources. Television and word of mouth are the most trusted sources of information in Georgia (67% and 44% respectively). 72% of people do not know how much to trust the official EU website, which could be caused by their lack of use and awareness of such a source of information¹³.

¹³ More details are provided in Annex, Table A4.

3.3.2. Sources of information about the EU

65% of Georgians claimed to have heard about the European Union in the last three months as compared to 47% in 2016. As last year, residents of larger cities were more likely to have been exposed to information about the EU recently (72%).

Nearly three quarters of people living in the central part of Georgia have also seen or heard information about the EU in the last three months (tab. 10).

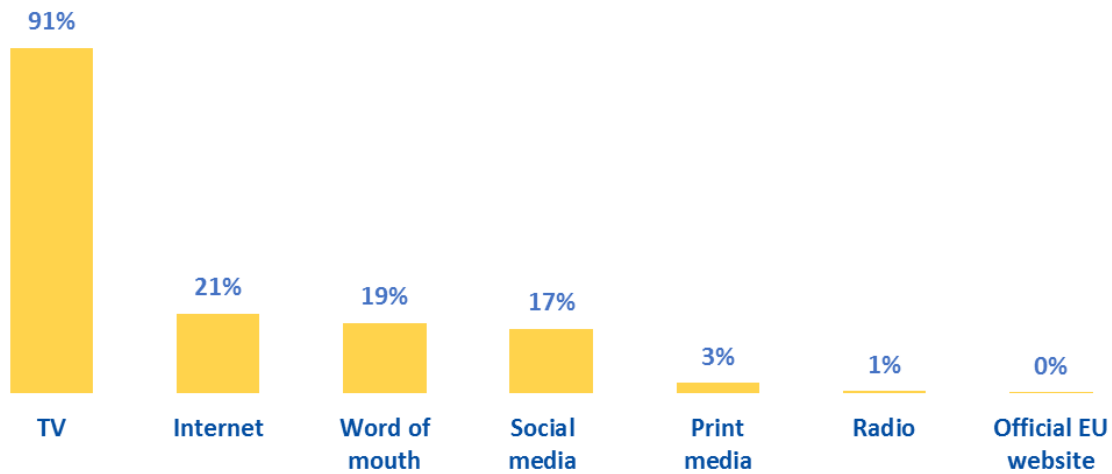
TABLE 10 – Exposure to information about the EU

Q3.2. Have you seen or heard any information about the EU in the last three months?				
		Yes	No	Total
Settlement size	Equal to or more than 150,000 inhabitants	72%	28%	100%
	Between 20,000 and 150,000 inhabitants	71%	29%	100%
	Less than 20,000 inhabitants	59%	41%	100%
Gender	Male	69%	31%	100%
	Female	61%	39%	100%
Age group	15-34 years	65%	35%	100%
	35-54 years	61%	39%	100%
	55 years & above	69%	31%	100%
Education level	Low level	59%	41%	100%
	Medium level	66%	34%	100%
	High level	66%	34%	100%
Employment status	Employed	67%	33%	100%
	Self-employed	64%	36%	100%
	Unemployed or temporarily not working / inactive	64%	36%	100%
Geographical area	Centre	74%	26%	100%
	East	65%	35%	100%
	West	49%	51%	100%
Total		65%	35%	100%

Percentages refer to Georgians who have heard about the EU

Most of the information recently obtained by people came from television (91%). Over 20% of Georgians heard or saw information about the EU through the internet, 19% through word of mouth and 17% from social media. Printed press, radio and the official EU website accounted for less than 5% of the overall population.

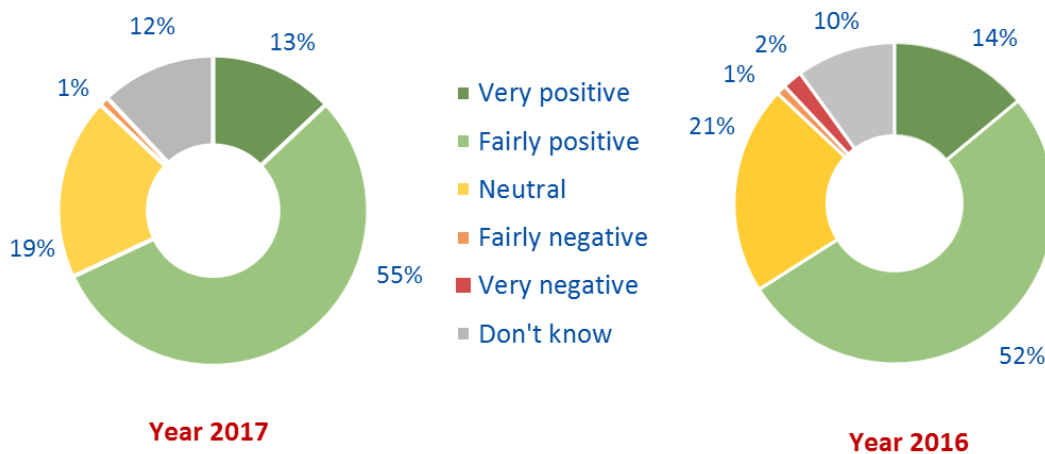
FIGURE 14 – Where or from whom you have you seen or heard information about the EU in the last three months? (Q3.2.1, multiple answers possible)



Percentages refer to Georgians who have heard any information about the EU in the last three months

When asked to evaluate the image of the EU in the national media, the majority of the population (68%) felt that the national media represented the European Union very positively (13%) or fairly positively (55%), with no substantial changes compared to last year. Again, one in five Georgians believed the representation to be neutral and one in ten did not have an opinion (fig. 15).

FIGURE 15 – In general, how would you say the EU was presented in the national media? (Q3.3)



Percentages refer to Georgians who have heard about the EU

Those who believe that the EU is positively represented in the national media usually come from medium-sized cities (83%) and are young (72%), employed (71%) and highly educated (78%) (tab. 11).

TABLE 11 – Representation of the EU in the national media

Q3.3. In general how would you say the EU was presented in the national media?		Positive	Neutral	Negative	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	70%	19%	1%	10%	100%
	Between 20,000 and 150,000 inhabitants	83%	5%	1%	11%	100%
	Less than 20,000 inhabitants	63%	23%	1%	13%	100%
Gender	Male	68%	20%	1%	11%	100%
	Female	68%	18%	0%	14%	100%
Age group	15-34 years	72%	16%	0%	12%	100%
	35-54 years	69%	19%	1%	11%	100%
	55 years & above	64%	22%	0%	14%	100%
Education level	Low level	65%	12%	1%	22%	100%
	Medium level	64%	23%	0%	13%	100%
	High level	78%	13%	1%	8%	100%
Employment status	Employed	71%	18%	1%	10%	100%
	Self-employed	64%	23%	1%	12%	100%
	Unemployed or temporarily not working / inactive	69%	17%	1%	13%	100%
Geographical area	Centre	65%	20%	0%	15%	100%
	East	71%	17%	1%	11%	100%
	West	69%	20%	1%	10%	100%
Total		68%	19%	1%	12%	100%

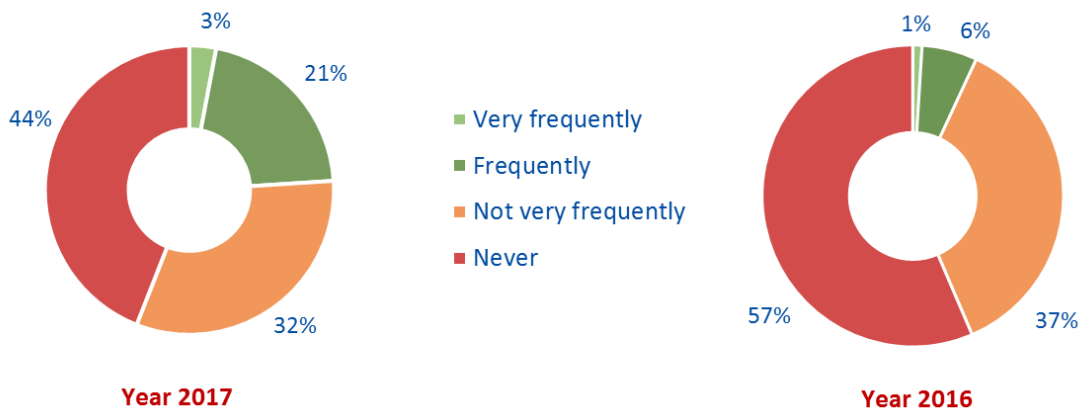
Percentages refer to Georgians who have heard about the EU

According to 58% of the population, the information they read, watch or access online helps them to have a better understanding of the European Union. 30% of people disagree with this notion and think that the information does not help to better understand the EU.

The following section looks specifically at sources of information about the EU, therefore it only refers to Georgians who actively look for/access information on the EU.

Information on the European Union is accessed frequently or very frequently by 24% of the population (fig. 16). This figure has significantly increased compared to 2016, when only 7% of Georgians had frequently or very frequently looked up for such information, while more than half (57%) never had. The recent increase in interest is understandable in light of recent progress in EU-Georgia relations.

FIGURE 16 – How often do you look for/access information on the EU? (Q3.1)



Percentages refer to Georgians who have heard about the EU

The highest share of people who never look for information on the EU can be found in average sized settlements (20,000-150,000 inhabitants) (64%), while self-employed people (31%) and residents of smaller settlements (30%) tend to access information on the EU more frequently (tab. 12).

TABLE 12 – Accessing information about the EU

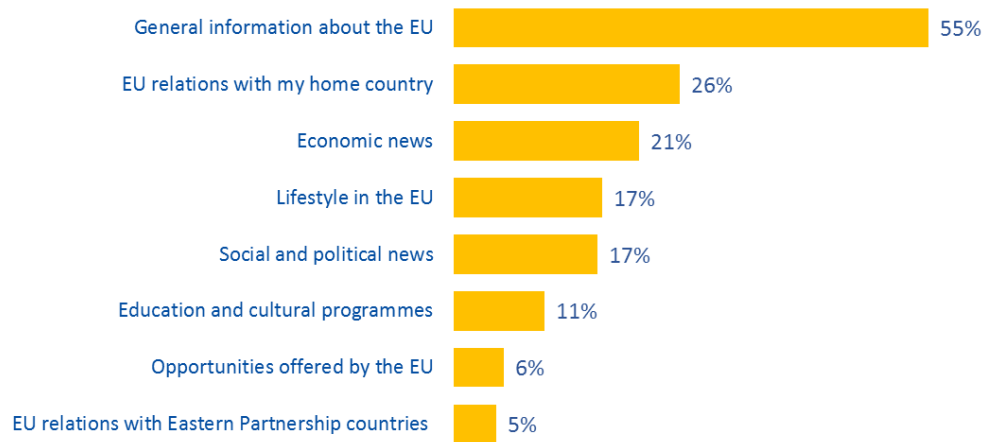
Q3.1. How often do you look for/access information on the EU?		Frequently	Not very frequently	Never	Total
Settlement size	Equal to or more than 150,000 inhabitants	21%	27%	52%	100%
	Between 20,000 and 150,000 inhabitants	5%	31%	64%	100%
	Less than 20,000 inhabitants	30%	36%	34%	100%
Gender	Male	26%	35%	39%	100%
	Female	22%	30%	48%	100%
Age group	15-34 years	24%	36%	40%	100%
	35-54 years	24%	31%	45%	100%
	55 years & above	23%	30%	47%	100%
Education level	Low level	17%	32%	51%	100%
	Medium level	24%	35%	41%	100%
	High level	26%	27%	47%	100%
Employment status	Employed	22%	31%	47%	100%
	Self-employed	31%	34%	35%	100%
	Unemployed or temporarily not working / inactive	18%	32%	50%	100%
Geographical area	Centre	28%	31%	41%	100%
	East	21%	29%	50%	100%
	West	21%	40%	39%	100%
Total		24%	32%	44%	100%

Percentages refer to Georgians who have heard about the EU

The majority of people who search for information about the EU access information in their national language (86%), while 7% use Russian and 6% English. The most commonly searched information about the European Union concerns general information (55%), while 26% search for information about the EU's relations with their home country (fig. 17). 21% search for economic news and 17% want to know more about the lifestyle in EU Member States, as well as social and political news.

Every tenth Georgian searching for information about the EU is looking for education and cultural programmes, while 6% look for opportunities offered by the EU and 5% for information concerning EU relations with Eastern Partnership countries.

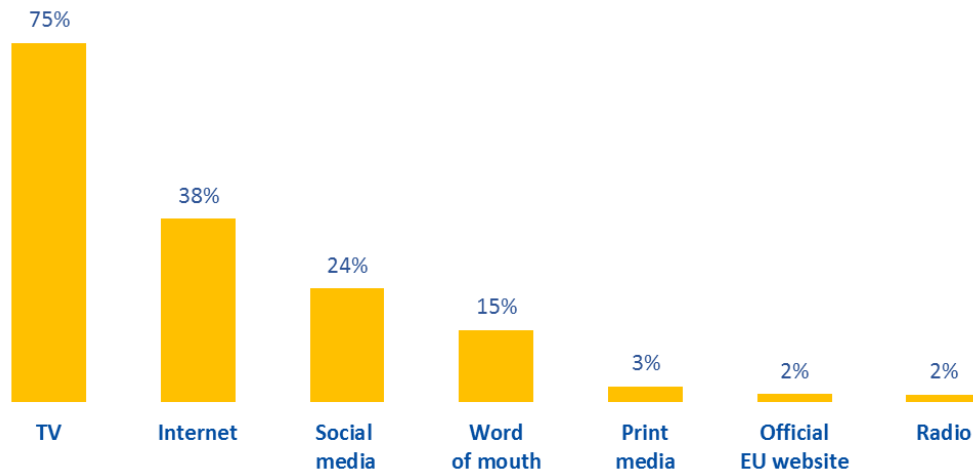
FIGURE 17 – What type of information do you normally look for? (Q3.1.2, multiple answers possible)



Percentages refer to Georgians who have looked for/accessed information on the EU

While passive exposure to information about the EU mostly stems from television (91%) and to an extent from the internet (21%) and social media (17%), those actively searching/accessing information still rely on television channels (75%), but more on the internet (38%) and social media (24%) (fig. 18). 15% of Georgians find the information they need through word of mouth; only 2% visit the official EU website or listen to the radio and 3% read print media.

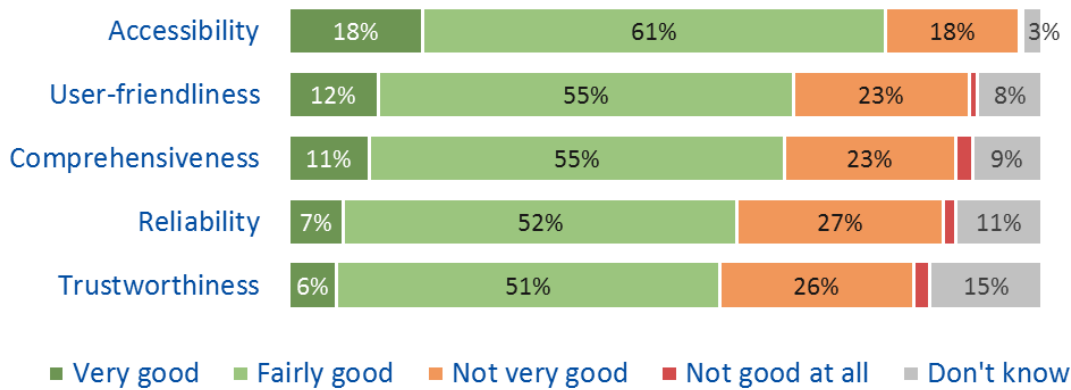
FIGURE 18 – Where do you go to find information about the EU? (Q3.1.4, multiple answers possible)



Percentages refer to Georgians who have looked for/accessed information on the EU

Most people that search information about the EU rate the information as being accessible (very – 18%; fairly – 61%) (fig. 19). They also think of the information as user-friendly (67%), comprehensive (66%) and reliable (59%). 57% of Georgians find the information trustworthy, while 26% do not.

FIGURE 19 – How would you rate the information in terms of...? (Q3.1.5)



Percentages refer to Georgians who have looked for/accessed information on the EU

Finally, 15% of Georgians have used EU informational websites¹⁴ at least once. The Facebook profile of the European Union is the most visited EU website (9% of the population). EU institutions’ websites and EU Projects’ websites are each visited by 5% of Georgians. The rest of the EU pages are only seen by 2%-3% of the target audience.

3.3.3. Sources of information and attitude towards the EU

As in section 3.3.1, attitudes of Georgians towards the EU have been analysed according to three main profiles – individuals that do not frequently use any media, individuals that frequently rely on traditional media and those who are regularly active on social media and the internet. Individuals using word of mouth as a source of information have been assessed separately and figures for them are presented in Annex - Table A5.

Half of the people that do not use any media tend to have a positive perception of the EU, to trust it and to be aware of the financial support provided by it (fig. 20).¹⁵ Nearly all acknowledge the relationship between their country and the EU and 80% rate the EU’s support as effective. Traditional media users, on the other hand, are more likely to have a positive image of the EU (59%), be aware of its financial support (57%) and, in particular, to trust it (71%). Although nearly all consider the relationship between their country and the EU to be good, 22% of individuals are not satisfied with the financial support provided by the EU (a higher share than people that do not use any media).

Frequent social media and internet users are on average most positive about and satisfied with the EU’s role: three quarters have a positive image of the EU and trust it and are aware of and satisfied with the EU’s financial support. In addition, nearly all consider the relationship between their country and the EU to be good.

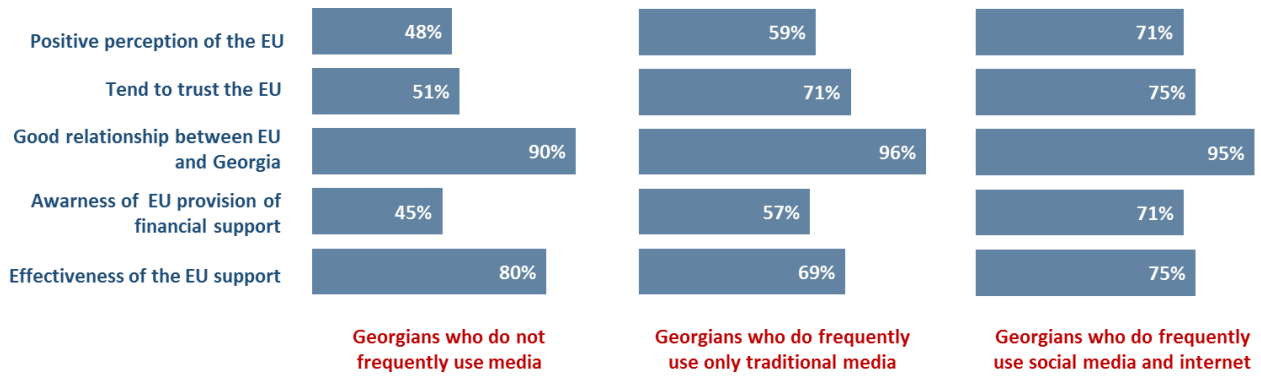
Overall, trust towards the EU and awareness of its financial support were the most controversial issues, and high proportions of the population did not have a definite opinion on these matters. Most uninformed citizens were those not accessing media.

The profile of Georgians who are frequent users of word of mouth as a source of information tends to be positioned between those who rely on traditional media and social media and internet users.

¹⁴ EU institutions’ websites; EU Delegation website; EU projects’ website; EU Neighbourhood Info Centre portal; EU Twitter; EU Facebook.

¹⁵ More details are provided in Annex, Table A5.

FIGURE 20 – Type of media frequently used as a source of information and attitude towards the EU

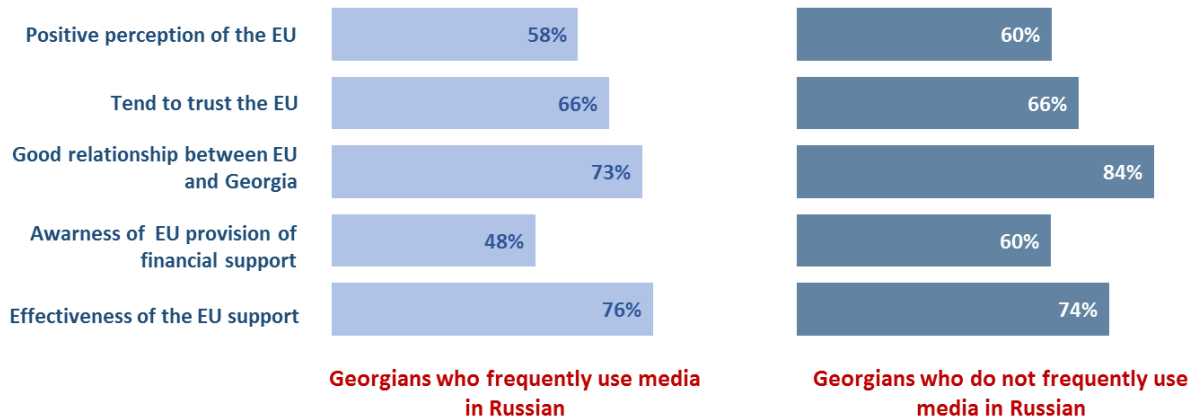


Percentages refer to Georgians who have heard about the EU

Attitudes towards the EU have also been assessed by comparing the people that frequently use media in Russian against those who do not (fig. 21).¹⁶ The majority of people (percentages varying between 58% and 76%), regardless of whether they frequently access media in Russian or not, tend to have a positive perception of the European Union, to trust it and, in particular, to consider its support effective. The only noticeable difference can be found in the perception of the relationship between Georgia and the EU and in the awareness of its support. In fact, Russian media users tend to be more critical – or uninformed. One in four citizens did not have an opinion on the quality of the relationship between the EU and their country and 7% rated this as bad (the respective figures for non-users of media in Russian were 12% and 4%).

As regards awareness of the financial support provided by the EU, 43% of Russian media users were uninformed and 9% thought that the EU was not supporting their country at all (compared to 34% and 6% respectively among non-Russian media users).

FIGURE 21 – Frequent usage of media in Russian and attitude towards the EU



Percentages refer to Georgians who have heard about the EU

¹⁶ More details are provided in Annex, Table A6.

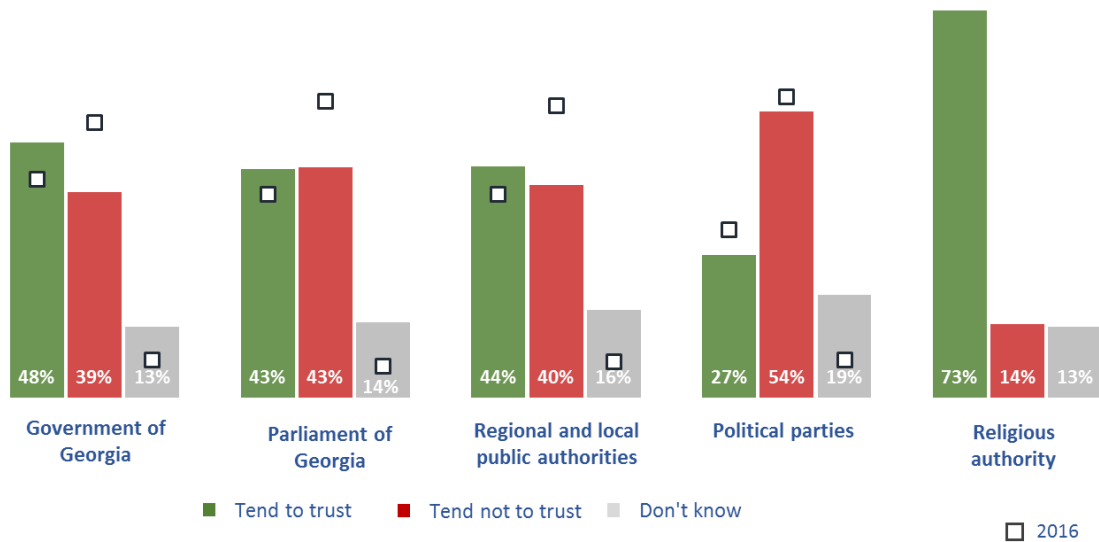
3.4. View of Georgia’s current situation and future expectations

3.4.1. View of Georgia’s current situation

Just like in 2016, Georgians do not share a great deal of trust in national, regional and local institutions, although the share of individuals that tend to trust the institutions seems to have increased compared to last year: 48% of individuals currently trust the Government compared to 41% in 2016; 43% trust the Parliament compared to 38% in 2016 and 44% trust regional and local public authorities, up from 38% in 2016 (fig. 22).

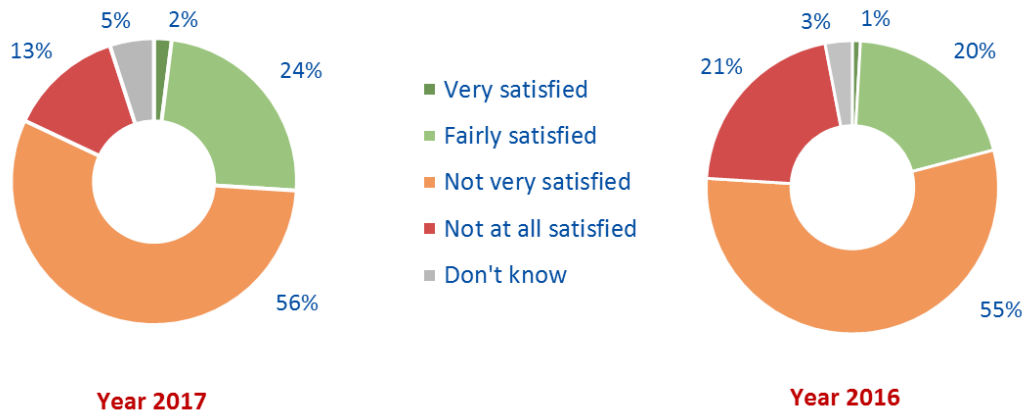
In addition, there seems to have been a slight shift from distrust to no opinion. Political parties, on the other hand, still score the lowest levels of trust (27%) – a net decrease in trust of 5% since last year. In this case, Georgians have apparently shifted from trusting political parties to having no opinion. Another interesting finding relates to the new variable that was included in 2017: Religious authority. In fact, this appears to be the most trusted institution in Georgia (73%).

FIGURE 22 – Please tell us your level of trust for the following institutions (Q4.1)



When it comes to the current situation in terms of democracy, although there has been a slight increase in the share of those who showed appreciation (+5%) since 2016, nearly 70% of Georgians remain dissatisfied with the way democracy works in their country (fig. 23). Total dissatisfaction, however, has decreased from 21% to 13% since last year, while the share of those fairly dissatisfied has overall remained stable. Again, only a tiny share of residents (2%) believe democracy to be at its best in their homeland.

FIGURE 23 – On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Georgia? (Q4.3)



The data does not show significant differences among socio-demographic groups, with the exception of residents of medium sized cities, who tend to show greater levels of satisfaction and lower levels of dissatisfaction (34% and 65% respectively). Individuals aged 35-54 (73%), eastern residents (72%) and people with a medium level of education (72%) tend to show slightly higher levels of dissatisfaction with democracy in Georgia than other groups (tab. 13).

TABLE 13 – Satisfaction with democracy in Georgia

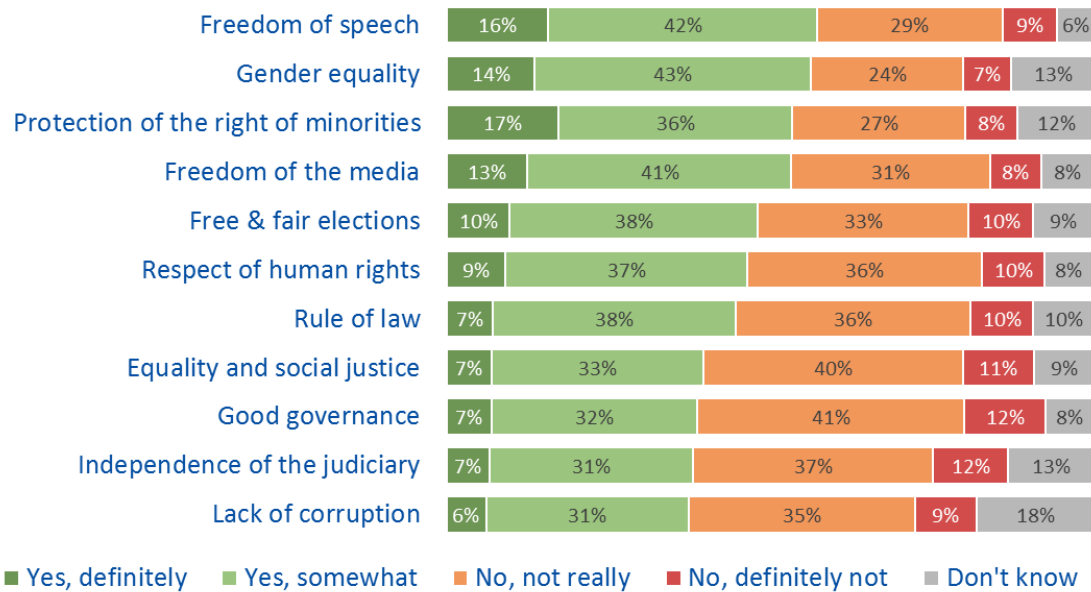
Q4.3. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Georgia?

		Satisfied	Not satisfied	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	26%	70%	4%	100%
	Between 20,000 and 150,000 inhabitants	34%	65%	1%	100%
	Less than 20,000 inhabitants	24%	69%	7%	100%
Gender	Male	28%	68%	4%	100%
	Female	25%	69%	6%	100%
Age group	15-34 years	29%	65%	6%	100%
	35-54 years	23%	73%	4%	100%
	55 years & above	26%	69%	5%	100%
Education level	Low level	27%	68%	5%	100%
	Medium level	23%	72%	5%	100%
	High level	32%	64%	4%	100%
Employment status	Employed	28%	71%	1%	100%
	Self-employed	23%	68%	9%	100%
	Unemployed or temporarily not working / inactive	27%	68%	5%	100%
Geographical area	Centre	27%	66%	7%	100%
	East	24%	72%	4%	100%
	West	30%	69%	1%	100%
Total		26%	69%	5%	100%

More than half of the population believe that freedom of speech (58%), freedom of media (54%) and gender equality (57%) exist in Georgia (fig. 24). Although positive, these indicators have lowered compared to 2016 (freedom of the media: 64%; freedom of speech: 60%; gender equality: 58%). Good governance, equality and social justice, independence of the judiciary system and lack of corruption, on the other hand, were assessed as problematic by half of the population.

These indicators also seem to have lowered compared to 2016, thus highlighting a shift from a definite opinion (either positive or negative) to a more indefinite position.

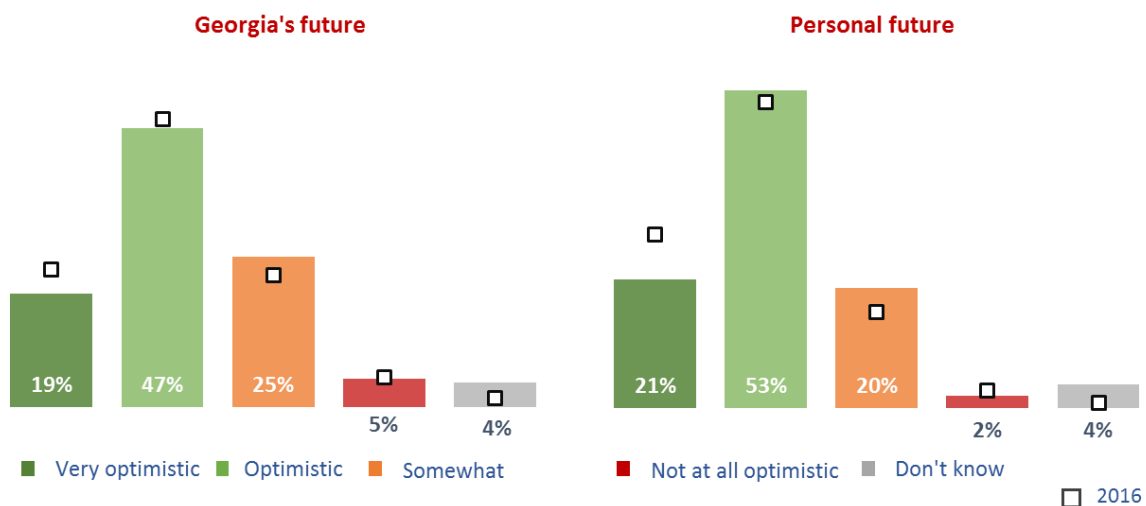
FIGURE 24 – To what extent do you think that the following elements apply in Georgia? (Q4.4)



3.4.2. Future expectations

Georgians are generally more optimistic towards their own future (74%) than the future of their country (66%). In both cases, the degree of optimism expressed by Georgians has lowered compared to last year (80% and 71% respectively) (fig. 25).

FIGURE 25 – How optimistic are you about the future of your country? (Q4.5) & How optimistic are you about your personal future? (Q4.6)



There were no major differences regarding the degree of optimism towards Georgia's future among different groups of people. The highest level of optimism, however, was found among the younger generation (70%), compared to the older generation (55 and above) (59%) and among women compared to men (70% versus 61%) (tab. 14).

TABLE 14 – Optimism regarding Georgia’s future

Q4.5. How optimistic are you about the future of your country?					
		Optimistic	Pessimistic	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	67%	29%	4%	100%
	Between 20,000 and 150,000 inhabitants	61%	38%	1%	100%
	Less than 20,000 inhabitants	66%	29%	5%	100%
Gender	Male	61%	34%	5%	100%
	Female	70%	27%	3%	100%
Age group	15-34 years	70%	24%	6%	100%
	35-54 years	67%	31%	2%	100%
	55 years & above	59%	37%	4%	100%
Education level	Low level	71%	23%	6%	100%
	Medium level	62%	34%	4%	100%
	High level	70%	27%	3%	100%
Employment status	Employed	69%	30%	1%	100%
	Self-employed	60%	33%	7%	100%
	Unemployed or temporarily not working / inactive	67%	29%	4%	100%
Geographical area	Centre	64%	30%	6%	100%
	East	66%	31%	3%	100%
	West	68%	30%	2%	100%
Total		66%	30%	4%	100%

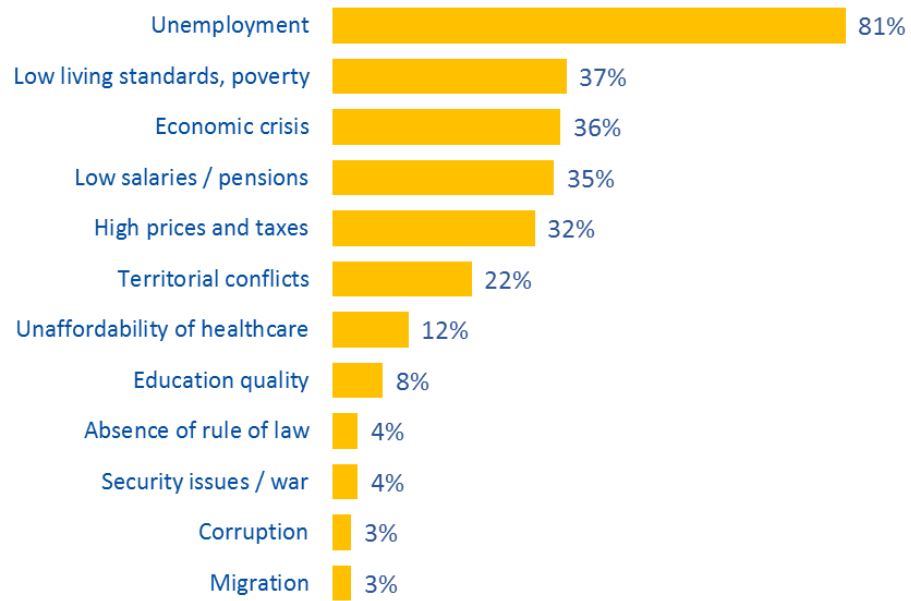
Also for personal future, the highest percentages of optimism were found among younger people (82%) and employed people (81%). People with a low level of education appeared equally optimistic as those with a high level of education (80%) (tab. 15).

TABLE 15 – Optimism regarding personal future

Q4.6. How optimistic are you about your personal future?					
		Optimistic	Pessimistic	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	77%	21%	2%	100%
	Between 20,000 and 150,000 inhabitants	64%	33%	3%	100%
	Less than 20,000 inhabitants	75%	19%	6%	100%
Gender	Male	74%	21%	5%	100%
	Female	74%	22%	4%	100%
Age group	15-34 years	82%	13%	5%	100%
	35-54 years	76%	22%	2%	100%
	55 years & above	65%	30%	5%	100%
Education level	Low level	80%	15%	5%	100%
	Medium level	70%	25%	5%	100%
	High level	80%	18%	2%	100%
Employment status	Employed	81%	19%	0%	100%
	Self-employed	74%	19%	7%	100%
	Unemployed or temporarily not working / inactive	71%	25%	4%	100%
Geographical area	Centre	71%	21%	8%	100%
	East	77%	21%	2%	100%
	West	76%	24%	4%	100%
Total		74%	22%	4%	100%

The most pressing problem in Georgia was unemployment (81%). This was followed by low standards of living and poverty (37%), economic crisis (36%), low salaries/pensions (35%) and high prices and taxes (32%) (fig. 26). As previously noted, employment and economic development are, according to Georgians, the least supported areas by the EU and also those where the EU should play a greater role.

FIGURE 26 – What do you consider to be the most pressing problems facing your country? (Q4.2, multiple answers possible)

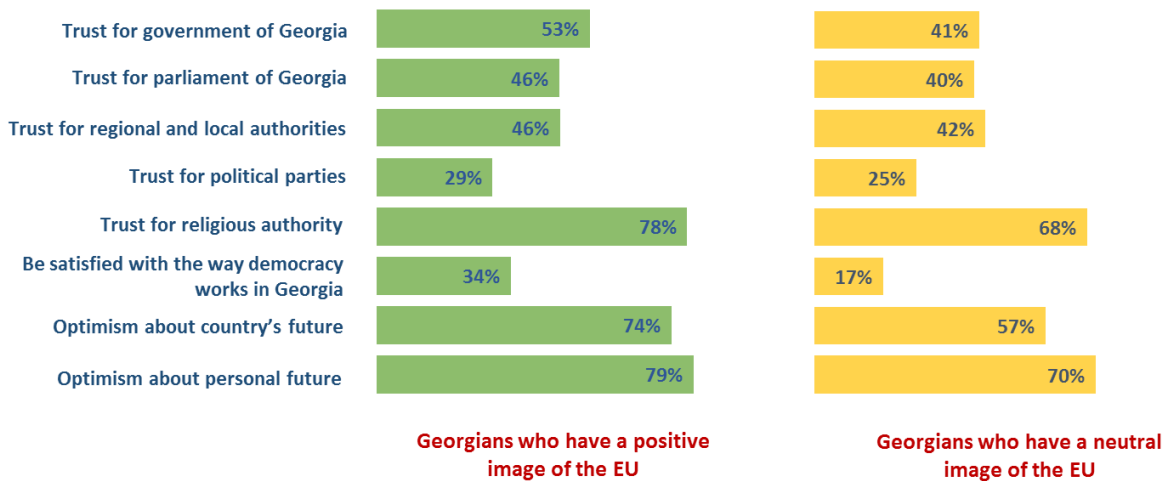


3.4.3. Views of the country and attitude towards the EU: snapshot

As in section 3.2.2, views of the country and attitude towards the EU have been analysed according to two main profiles: individuals that have a positive attitude towards the EU and those who are mostly neutral.¹⁷ Eight indicators were considered: trust in the government, trust in the parliament, trust in regional and local authorities, trust in political parties, trust in religious authority, satisfaction with the functioning of democracy, optimism about country's future, and optimism about personal future.

The first thing that should be noted is that, unsurprisingly, individuals that have a positive image of the EU are also more likely to be more positively oriented for all the assessed indicators in comparison to the neutral population (fig. 27).¹⁸ The gap between the two populations tends to shrink when it comes to trust in the parliament, regional and local authorities and political parties (between 4 and 6 per cent) and reaches its maximum when it comes to satisfaction with the functioning of democracy and optimism about their country's future (17 per cent). No significant difference between positively and neutrally oriented individuals was recorded in terms of people that had no opinion on the above issues.

FIGURE 27 – Views of the country and attitude towards the EU: positive versus neutral



Almost everyone, regardless of their attitude towards the European Union, indicated the same pressing problems in Georgia, with unemployment being one of the most important issues (81-85%).¹⁹

¹⁷ Individuals that were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

¹⁸ More details on main findings are provided in Annex, Table A7.

¹⁹ More details on main findings are provided in Annex, Table A8.

4. Annex

TABLE A1 – Benefits from current EU support

Q2.8. To what extent would you say that Georgia has benefitted from the current European Union support in the following areas?						
	Very much	Fairly	Not very much	Not at all	Don't know	Total
More tourism	23%	47%	13%	4%	13%	100%
Improved quality of justice system	12%	47%	15%	5%	21%	100%
Improved quality of healthcare system	6%	47%	26%	6%	15%	100%
Better education	6%	45%	27%	6%	16%	100%
Access to more products and services	6%	44%	21%	4%	25%	100%
Improved infrastructure	7%	41%	27%	7%	18%	100%
Improved democracy	3%	42%	28%	6%	20%	100%
Better law enforcement	5%	37%	23%	9%	26%	100%
Improved trade	4%	33%	34%	8%	21%	100%
Less corruption	2%	33%	30%	10%	25%	100%
Improved agricultural production	2%	32%	35%	12%	19%	100%
Greater economic development	4%	29%	39%	11%	17%	100%
Greater employment opportunities	3%	21%	35%	25%	16%	100%

Percentages refer to Georgians who have heard about the EU

TABLE A2 – Areas in which the EU should play a greater role

Q2.9. Please tell us in which sectors you think the European Union should play a greater role		
	The specific item was selected as the first most important area	The specific item was selected as the first or second or third most important area
Promote economic development	45%	74%
Create greater employment opportunities	11%	37%
Promote a better education	7%	34%
Improve democracy	15%	29%
Increase tourism	6%	27%
Improve quality of healthcare system	4%	24%
Improve agricultural production	4%	19%
Improve trade	3%	18%
Improve infrastructure	1%	9%
Promote access to more products and services	1%	9%
Improve quality of justice system	1%	7%
Reduce corruption	1%	4%
Promote better law enforcement	0%	3%
Restore territorial integrity	0%	1%

Percentages refer to Georgians who have heard about the EU

TABLE A3 – Attitudes towards the EU: positive versus neutral

		Image of the EU	
		Positive	Neutral
Trust towards the EU	Tend to trust	82%	47%
	Tend not to trust	4%	23%
	Do not know	14%	30%
	<i>Total</i>	<i>100%</i>	<i>100%</i>
Relations between the EU and Georgia	Good	94%	69%
	Bad	2%	6%
	Don't know/No relations	4%	25%
	<i>Total</i>	<i>100%</i>	<i>100%</i>
Awareness of financial support by the EU	Yes	66%	47%
	No	4%	8%
	Don't know	30%	45%
	<i>Total</i>	<i>100%</i>	<i>100%</i>
Effectiveness of the EU's support	Effective	79%	62%
	Not effective	15%	32%
	Don't know	6%	6%
	<i>Total</i>	<i>100%</i>	<i>100%</i>

TABLE A4 – Trust towards different type of media

Q3.9. & Q3.10. Which is your level of trust for following media as a source of information?				
	Tend to trust	Tend not to trust	Don't know	Total
Official EU website	23%	5%	72%	100%
Television	67%	12%	21%	100%
Radio	23%	9%	69%	100%
Print media	28%	12%	60%	100%
Social media	32%	10%	58%	100%
Internet	39%	5%	56%	100%
Word of mouth	44%	11%	45%	100%
Country's media in national language				
Country's media in national language	76%	14%	10%	100%
Country's media in Russian				
Country's media in Russian	23%	18%	59%	100%
Country's media in other languages				
Country's media in other languages	18%	14%	68%	100%
Foreign media in Russian				
Foreign media in Russian	16%	15%	69%	100%
Foreign media in other languages				
Foreign media in other languages	13%	13%	74%	100%

TABLE A5 – Type of media frequently used as a source of information and attitude towards the EU

		Type of media frequently used as source of information (Q3.8)			Word of mouth frequently used as source of information (Q3.8)	
		No media	Only traditional media	Social media or internet	Yes	No
Perception of the EU	Positive	48%	59%	71%	69%	55%
	Neutral	41%	37%	26%	29%	37%
	Negative	5%	1%	2%	1%	3%
	Don't know	6%	3%	2%	1%	5%
	Total	100%	100%	100%	100%	100%
Trust towards the EU	Tend to trust	51%	71%	75%	68%	65%
	Tend not to trust	20%	8%	10%	8%	14%
	Do not know	30%	21%	15%	24%	20%
	Total	100%	100%	100%	100%	100%
Relations between the EU and Georgia	Good	90%	96%	95%	94%	94%
	Bad	8%	3%	5%	5%	5%
	Don't know/No relations	1%	1%	0%	1%	1%
	Total	100%	100%	100%	100%	100%
Awareness of financial support by the EU	Yes	45%	57%	71%	55%	59%
	No	7%	6%	5%	5%	7%
	Don't know	48%	37%	24%	40%	34%
	Total	100%	100%	100%	100%	100%
Effectiveness of the EU's support	Effective	80%	69%	75%	73%	74%
	Not effective	17%	22%	19%	23%	19%
	Don't know	2%	9%	6%	4%	7%
	Total	100%	100%	100%	100%	100%

Percentages refer to Georgians who have heard about the EU

TABLE A6 – Frequent usage of media in Russian and attitude towards the EU

		Frequently used media in Russian	
		Yes	No
Perception of the EU	Positive	58%	60%
	Neutral	36%	34%
	Negative	5%	2%
	Don't know	2%	4%
	Total	100%	100%
Trust towards EU	Tend to trust	66%	66%
	Tend not to trust	9%	13%
	Do not know	25%	21%
	Total	100%	100%
Relations between the EU and Georgia	Good	73%	84%
	Bad	7%	4%
	Don't know/No relations	20%	12%
	Total	100%	100%
Awareness of financial support by the EU	Yes	48%	60%
	No	9%	6%
	Don't know	43%	34%
	Total	100%	100%
Effectiveness of the EU support	Effective	76%	74%
	Not effective	23%	20%
	Don't know	2%	7%
	Total	100%	100%

Percentages refer to Georgians who have heard about the EU

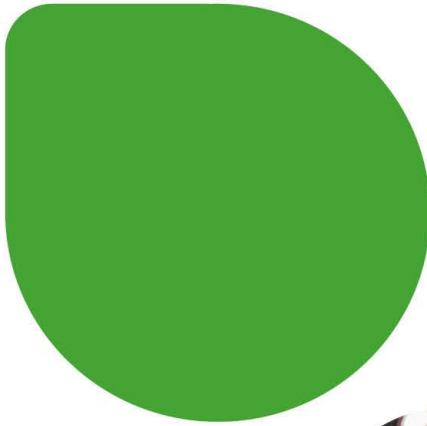
TABLE A7 – Views of the country and attitude towards the EU: positive versus neutral

		Attitude towards the EU	
		Positive	Neutral
Trust for government of Georgia	Tend to trust	53%	41%
	Tend not to trust	35%	45%
	Don't know	12%	14%
	Total	100%	100%
Trust for parliament of Georgia	Tend to trust	46%	40%
	Tend not to trust	40%	47%
	Don't know	14%	13%
	Total	100%	100%
Trust for regional and local authorities	Tend to trust	46%	42%
	Tend not to trust	38%	43%
	Don't know	16%	15%
	Total	100%	100%
Trust for political parties	Tend to trust	29%	25%
	Tend not to trust	51%	57%
	Don't know	20%	18%
	Total	100%	100%
Trust for religious authority	Tend to trust	78%	68%
	Tend not to trust	10%	19%
	Don't know	12%	13%
	Total	100%	100%
Satisfaction with the way democracy works in Georgia	Yes	34%	17%
	No	63%	80%
	Don't know	3%	3%
	Total	100%	100%
Optimism about country's future	Optimistic	74%	57%
	Pessimistic	23%	41%
	Don't know	3%	2%
	Total	100%	100%
Optimism about personal future	Optimistic	79%	70%
	Pessimistic	18%	27%
	Don't know	3%	3%
	Total	100%	100%

Percentages refer to Georgians who have heard about the EU

TABLE A8 – Most pressing problems in Georgia**Q4.2. What do you consider to be the most pressing problems facing your country? (multiple answers possible)**

	Attitude towards the EU	
	Positive	Neutral
Unemployment	81%	85%
Economic crisis	37%	38%
Low living standard, poverty	37%	33%
Low salaries / pensions	32%	37%
High prices and taxes	31%	33%
Territorial conflicts	22%	18%
Unaffordability of healthcare	11%	14%
Education quality	7%	8%
Absence of rule of law	6%	4%
Security issues / war	5%	4%
Migration	4%	3%
Corruption	3%	3%



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