EU NEIGHBOURS east

ANNUAL SURVEY REPORT: GEORGIA

5thd Wave (Spring 2020)

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

MARCH 2020

STRONGER TOGETHER

ECORYS

This project is implemented by an Ecorys-led Consortium

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

1. Background

In February 2020, a fifth wave of annual surveys was carried out across the six Eastern partner countries (Armenia, Azerbaijan, Belarus, Georgia, the Republic of 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 partner countries (EaP) 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 the EaP countries.

The project develops information and communication materials, carries out public diplomacy, awareness-raising and information campaigns, and assesses the perception of the EU and its support through opinion polling and media monitoring.

The purpose of the annual surveys is to investigate the opinion and the level of information that citizens of the EaP countries have on the EU in general and, in particular, on EU-funded cooperation and development programmes/projects. In order to monitor changes over time, the surveys are being carried out annually from 2016 until 2020.

This document presents the results of the **5th wave of annual surveys** (Spring 2020 – **before COVID-19 crisis**) conducted in **GEORGIA**[1] and is organised around four main sections:

- **General perceptions of the EU**
  This section looks at how citizens perceive the EU's image, the relationship between their country and the EU, their awareness of the EU's financial support and their opinion of its benefits, as well as their level of trust towards the EU, also compared with the role of other foreign institutions. During the third wave, a new set of questions that touched upon perceived myths about the EU, was also added, in order to gather greater insights on how the EU is perceived by citizens.
- **Sources of information**
  This section looks at the main sources of information in the country, both in the national language and other foreign languages. Specific focus is placed on EU-related information, programmes financed by the EU and its institutional communication instruments.
- **Country evaluation and future expectations**
  This section provides an assessment of how citizens view their country's and their personal future. Specific focus is placed on the current functioning of democracy and most pressing concerns.
- **Profiling attitudes towards the EU**
  This section is dedicated to profiling citizens with a positive and a neutral stance towards the EU. Attitudes are profiled against a comprehensive set of indicators, such as the main socio-demographic characteristics, passive and active exposure to EU-related information, awareness and effectiveness of EU's financial support, level of trust towards the EU and other foreign institutions, perceptions of the country's and personal future and main concerns, and common beliefs about the EU.

All sections, together with an analysis of the results of the 5th wave of the survey, also provide comparisons between the findings of the 2019, 2018, 2017 and 2016 surveys, where relevant.

[1] A similar report has been produced for each Eastern partner country. In addition, a macro-area/regional overview report that compares the results across the region is available.

2. Research methodology in brief

The survey (field work) took place between February and March 2020 (before COVID-19 crisis), following the same methodology adopted in the previous rounds of data collection (Spring 2019, 2018, 2017 and 2016): 1,000 face-to-face interviews were carried out and respondents were randomly selected according to the sampling strategy described below. 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 stratified by unit size, expressed in terms of population, level of urbanisation and geographical area. Three groups of settlements[2] and three areas[3] 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 age[4] 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 walk[5] 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. The calibration variables were the same as those used in the previous wave (settlement size, gender, age, employment status, geographical area, education level, religious faith and mother tongue).

[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) / Capital.
[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 of the EU

- **Georgian citizens display both a high awareness and a stable attitude towards the European Union (EU).** Nearly all have heard of the EU (96%) and almost all feel either positive (49%) or neutral (40%) about it, with no significant change when compared to the previous survey results.
- **'Peace, security and stability' appears to be the most important value at a personal level in 2020** (61%, up 6 percentage points since the last wave), possibly due to the escalation of tension in the breakaway region of South Ossetia during Summer 2019. 'Economic prosperity', on the other hand, despite being the second most important value, has seen a decrease of 9 percentage points (55%) compared to 2019, in line with the stable economic growth recorded in the country.
- Positive associations with the EU appear consistent with the 2019 findings. **All values – including the three most important values at a personal level, namely 'peace, security and stability', 'economic prosperity' and 'human rights'– were 'strongly' or 'very strongly' associated with the EU** by over three quarters of Georgians, apart from 'rule of law' (72%), 'honesty and transparency' (65%) and 'absence of corruption' (50%), which remains the value least associated with the EU for the fifth year in a row.
- **Around 70% of the population trust the European Union, followed closely by NATO (59%) and the United Nations (57%).** On the other hand, the Eurasian Economic Union (EAEU) continues to have the lowest level of both trust and awareness: three quarters of Georgians did not trust the EAEU (37%) or did not know how to rate their level of trust (25%) or had never heard of it (11%).

EU relations with Georgia and awareness of EU financial support

- **The appreciation of the relations between Georgia and the EU is high (77%) and common to all socio-demographic groups**. Around 70% of citizens know that the EU provides financial support to Georgia – it was 74% in 2019 – around 70% of them recognise its effectiveness (up 7%).
- **In 2019, 60%** of Georgians aware of the EU's financial support **knew about specific EU-funded programmes – with a huge increase from 2017 (up 19%). This figure has remained stable in 2020 (61%),** confirming the widespread knowledge on assistance allocated by the EU among the population. **The most well-known EU-financed programmes relate to the fields of 'education', 'agriculture and rural development', 'infrastructure development' and 'economic reforms and business promotion'**.
- The growth of tourism and its importance continues to be well perceived by Georgians although slightly less than in 2019: 76% of the population (versus 85% last year) cited it among the areas that have benefited 'very much' or 'fairly' from EU support. Between 55% and 65% of citizens also mentioned the positive effects of the EU's engagement with regard to the state of infrastructure, judiciary system and greater access to more products and services.

Media usage as sources of information

- **Television continues to be the most popular source of information in Georgia** – only 9% of the population never watches it. **However, new media**, **such as the Internet (60%) and, particularly, social networks (63%) continue to grow in importance and outdistance traditional media**, such as print press (28%) and radio (18%).
- Nearly all Georgians – 61% 'always', 17% 'often' and 13% 'sometimes' – use national media in Georgian. The usage of media in different languages is less prevalent, although slightly more than reported in 2019, especially if the ownership of the media is foreign – 28% of citizens access foreign media in Russian (versus 20% last year) and 22% in other languages (versus 16% last year).

- The Georgian media landscape remains polarised[6] and trust levels towards different media sources reflect the situation: **national media in Georgian (66%), TV (63%) and Internet (51%) are the only three sources trusted by the majority of the population**.

Sources of information about the EU

- **39% of Georgians say they have seen or heard information about the EU in the last three months**. The trend of this indicator has kept relatively low over the whole 2016-2020 period except for the 2017 wave (65%) when it benefitted from the effects of the Association Agreement and visa-free regime. The polarisation of national media may affect the exposure of foreign news in comparison to national issues, such as the revision of the electoral system and future elections.
- In line with 2019, television remains the main source of passive exposure to EU-related information (77%); over one third of citizens who have seen or heard information about the EU were also reached through the Internet (35%, up 9 percentage points); around 15% by social media and word of mouth.
- Among those who had heard about the EU, 59% felt that national media presented the European Union positively (12% 'very positively', 47% 'fairly positively') with no change when compared to 2018 and 2019. **According to half of the individuals (52%), the information which they read, watch or access online helps them to have a better understanding of the EU**.
- Compared to 2019, 'frequent' or 'very frequent' access to information on the EU has recorded an increase (18% versus 13% in 2019). **Less 'active' citizens have accessed/searched for information about the EU in Georgian (74%, down 8% since 2019)**, while interest towards media sources in Russian (12%, up 3%) and, particularly, English 14%, up 6%) has witnessed an increase.
- Searches for EU-related information have been more focused rather than generalised – 23% (versus 32% in 2019) have looked up for 'general information about the EU'– and mostly concentrated on 'educational and cultural programmes' (37%), the 'relations between Georgia and the EU' (30%), and 'economic' (27%) and 'socio-political news' (25%).
- **Nearly 80% of Georgians** who searched for information about the EU **find them to be 'very' or 'quite' accessible (78%).** Its quality – in terms of its user-friendliness, comprehensiveness, reliability and trustworthiness – was rated 'very' or 'quite' positively by slightly less individuals (around 70% each). Opinions are more positive than in 2019, with a difference of around 5% for each characteristic.

View of Georgia's current situation

- **Although there is less than a year before elections, trust in Georgia's institutions and leaders is not increasing**. Of the main public institutions, only the religious authority receives a positive assessment from the majority of the population (68%) with no change compared to previous waves. The survey also shows consistently negative assessments towards the political parties (60%) and the parliament (50%), reflecting the stall in the revision of the electoral process and the parliamentary tensions of June 2019.
- **Accordingly, 75% of Georgians are dissatisfied with the way democracy works in their country with 29% 'absolutely dissatisfied'**. Between around 40% and around 60% of the population also feel that all assessed democratic indicators do not apply to their country – and their opinion is more negative than it was in 2019. 'Corruption', 'rule of law' and 'independence of the judiciary' seem to be particularly problematic areas.
- Around 60% of Georgians are optimistic towards their country's future (62%) – although only few of them are 'very optimistic' (15%). Personal future prospects are more positive (72%), but again only 22% are 'very optimistic optimistic'.
- **Compared to 2019, Georgians are equally concerned about the 'economic crisis' (39%) but less about 'unemployment' (65%, down 13%) possibly due to the stable economic growth recorded**

[6]The media landscape remains polarised in the country and political groupings maintain a tight hold on the country's broadcast scene. In the 2019 World Press Freedom Index, Georgia moved up one place and now ranks 60th out of 180 countries. Its Freedom House rating remained stable, with an aggregate 'freedom score' of 63/1005. Association Implementation Report in Georgia, European Commission, February 2020.

in the country. In fact, it is rather the rising costs of living – inflation gradually accelerated, to 7% in November 2019 – that triggers concerns about the low level of salaries and pensions (32%, up 5%) and, particularly, the unaffordability of the healthcare (24%, up 8%).

Profiling attitudes towards the EU: positive versus neutral

- **EU-supporters are strongly characterised by their level of education and their geographical residence**: 41% (versus 36% in 2019) of those who have a positive image of the EU are highly educated (versus 29% in the general population) – and nearly half (49% versus 45% in 2019) live in eastern Georgia, which includes Tbilisi, the capital city (41% for the general population). Accordingly, EU supporters are more easily found in larger cities (39%).
- The effect of education is fully caught if positive perceptions are considered with regard to the level of exposure to EU-related information and, in general, the usage (and preference) of media sources: **44% of EU supporters had seen or heard information about the EU in the three months preceding the survey** (versus 39% in the general population); **and 59% have looked for/accessed information on the EU** (versus 48%).
- **EU supporters tend to rely on new media more often** – 60% of them use them frequently versus 52% of the general population – **as well as on media in Georgian** (84% versus 78%) **and media in foreign languages other than Russian** (17% versus 15%), which primarily means media in English. In fact, 21% of active searchers indicated English as the main language of EU-related information.
- **Their interests are varied with a particular focus on 'education and cultural programmes'** (39%), 'EU relations with Georgia' (37%), 'economic news' (29%). Around one in ten EU supporters is also interested in 'the opportunities offered by the EU' (11%) and/or 'EU's relations with Eastern partner countries' (9%).
- **Higher exposure to EU-related information mirrors greater levels of confidence towards it.** Nearly all positively oriented individuals hold a good image of the relations between Georgia and the EU (90%, up 2%), acknowledge the EU's financial support (86%, up 1%) and, particularly, rate it as 'effective' (83%, up 13%). Trust in NATO (80%) is also widespread, endorsing the support towards NATO membership. Conversely, only 24% of EU supporters trust the EAEU.
- When it comes to the assessment of common beliefs, **EU supporters tend to share a much stronger and positive vision of the EU than the general population**, with between 31% and 46% of them 'strongly' agreeing with all the proposed statements. EU supporters **are also much more confident** in sharing their beliefs as attested by the lower share of 'don't know' responses.
- **EU supporters tend to see Georgia's future more positively** than the general population (69% versus 62%) – **although not necessarily their own future** (74% versus 72%). Although 'unemployment' (64%) and 'the economic crisis' (41%) are their most pressing concerns, they tend to be less worried about the economic sphere than the general population and tend to mention more often 'territorial conflicts' (24%) and 'war' (9%), as well as 'education' (13%), 'migration' (13%) and 'corruption' (9%).
- N**eutrally oriented Georgians**, **are also strongly characterised by their level of education:** 82% of neutrally oriented citizens have a low to medium level of education and only 18% are highly educated. **Neutral attitudes seem also more sensitive to age, gender and, particularly, employment status** and are marginally more easily observed among middle-aged individuals (36%), females (58%) and unemployed or inactive citizens (48%). They tend to live in the West of the country (27%) and display a slightly greater preference towards smaller – possibly rural – settings (53%).
- **Levels of passive and active exposure among neutrally oriented citizens have increased** compared to 2019, still 69% of them have not heard any information about the EU in the three months preceding the survey and 63% have never looked for any information on the EU.

- **Neutrality also stems from occasional usage of media**: **one in five citizens does not frequently rely on any media (22% versus 7% among EU-supporters).** Social media have a lower penetration (40%) and even national media (74%) record figures below those among Georgians positively oriented towards the EU (60% and 84% respectively). Frequent usage of media in Russian is slightly higher (20% versus 16%) and neutrally oriented individuals engaged in active searches about the EU do report a greater recourse to sources in Russian (19% versus 9%).

- The EU is the only institution trusted by the majority of neutrally oriented citizens (59%, up three percentage points since 2019). In general, **neutral citizens report lower levels of trust in all foreign institutions than EU supporters, although these do not necessarily match higher levels of distrust but rather higher levels of indecision** – mirroring lower levels of passive exposure.

- Levels of acknowledgement of the EU's financial support are much lower (55%), however the opinion of neutral citizens reflects the lower levels of exposure to EU-related information because over one third of them (35%) provided a 'don't know' response (22% and 11% respectively for the general population and the EU supporters).

- **Individuals holding a neutral image of the EU are less likely to express their opinion on common beliefs, as well as to share a strong and positive vision of the EU**. The highest share of strong approval was recorded for the statements 'the EU is an independent actor in foreign relations' (20%) and 'it is committed to fighting corruption'.

- **Neutral individuals are quite optimistic regarding their personal future (70%), but very much less so regarding the future of Georgia**. Around 70% are concerned about 'unemployment' and 40% about the 'economic crisis' and they seem also more worried about 'the low living standards and poverty' (28%) and 'the unaffordability of healthcare' (24%) compared to the general population. One in four individuals has mentioned 'territorial conflicts' (17%), one in ten issues related to 'migration', and 5% 'war'.

3.2. Perceptions of the European Union

Georgian citizens display both a high awareness and a stable attitude towards the European Union (EU). ***Nearly all have heard of the EU (96%) and nearly all feel either positive (49%) or neutral (40%) about it with no significant change compared to the last two waves.*** *The* ***EU continues to record the highest levels of trust (69%)*** *compared to other international institutions, with 77% of Georgians positively assessing the relations between their country and the Union.* ***The acknowledgement of the EU's financial support is also very high (71%)****, especially with regard to EU-funded programmes in the field of education and agricultural and rural development. Citizens continue to recognise strong support from the EU in the areas they perceive as priorities, such as economic development, employment opportunities, quality of the health care system and education.*

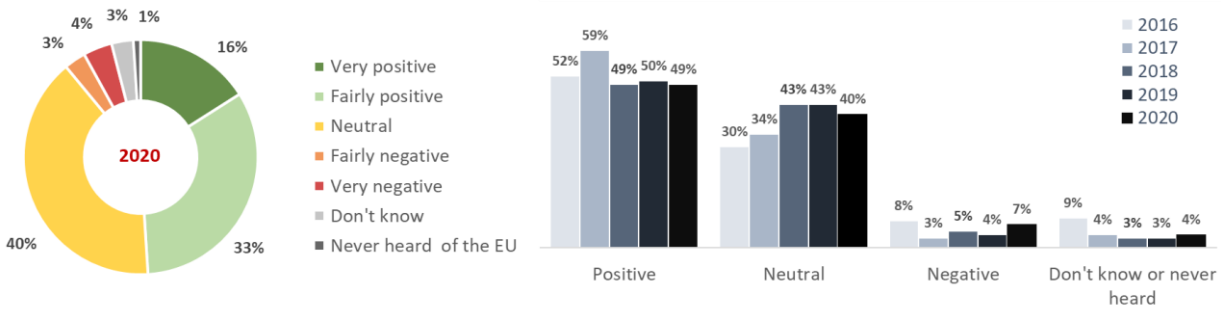
This section looks at how Georgian citizens perceive the EU's image and their opinion of the benefits of the EU's financial support, also compared with the role of other external organisations.

3.2.1. General perceptions of the EU

Georgian citizens display both a **high awareness** and a **stable attitude** towards the European Union (EU). Nearly all have heard of the EU (96%) and nearly all feel either positive (49%) or neutral (40%) about it with no significant change compared to the last two waves. In fact, the only peak in positive attitudes between 2016 and 2020 occurred in Spring 2017 – when the visa-free short-term travel to the Schengen countries was granted – outlining the strong support of Georgians towards integration with the EU.

Likewise in previous waves, the level of education – which, in turn, impacts on the level of exposure to new media and EU-related information – is the most important 'marker' of attitudes: **72% of highly educated individuals have a positive image of the EU**, compared to 40% of those with medium and low levels of education. Residents of larger cities (56%) and the East of the country (58%) – including Tbilisi, the capital city – are also more positively inclined towards the EU. Positive attitudes do not seem to be particularly sensitive to either gender, age or employment status, although males, young people and employed/self-employed citizens tend to be on average slighltly more negative rather than neutral compared to females, midde-aged and older individuals and those who are currently unemployed or inactive[7].

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



'Peace, security and stability' appears to be the most important value at a personal level[8] in 2020 (61%, up 6 percentage points since the last wave), possibly due to the escalation of tension in the breakaway region of South Ossetia during summer 2019. 'Economic prosperity', on the other hand, despite being

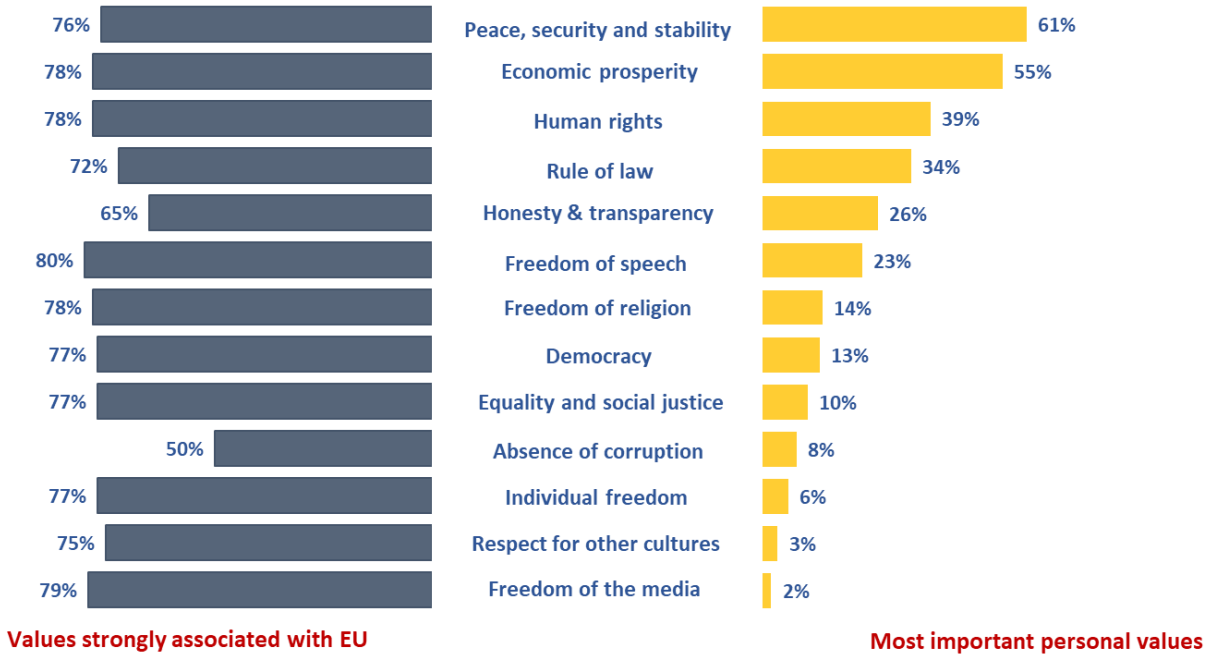
[7] More details on the distribution according to main socio-demographic characteristics are provided in Annex – Table 1.
[8] Respondents were asked to choose and rank the three most important personal values from a list of 13 items.

the second most important value, has seen a decrease of 9 percentage points (55%) compared to 2019, in line with the stable economic growth recorded in the country[9]. 'Human rights' and 'rule of law' were mentioned respectively by 39% and 34% of citizens, followed by 'honesty and transparency' (26%) and 'freedom of speech' (23%). All other elements ranked very low at a personal level (below 15%)[10].

Positive associations with the EU appear consistent with the 2019 findings. All values – including the three most important values at a personal level – were 'strongly' or 'very strongly' associated with the EU by over three quarters of Georgians, apart from 'rule of law' (72%), 'honesty and transparency' (65%) and 'absence of corruption' (50%), which remains the value least associated with the EU for the fifth year in a row. However, it is worth noting that less than one in ten citizens (8%) would rank it as a key personal value. Between 8% and 23% of citizens could not provide a definite opinion on the issue.

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

(Percentages refer to Georgians who have heard of the EU)



Compared to 2019, more Georgians are confident that 'the EU fosters the preservation of traditional values in their society' (54%, up 8%)[11]. More specifically over half of Georgians 'strongly' (20%) or 'somewhat' (34%) agree with the above statement versus less than one third who are 'not really' (19%) or 'not at all' (11%) convinced by it. This shift towards more positive views – which is only partly linked to the decrease in the share of those who found it difficult to answer this question (16%, down 3%) – may be associated with slightly higher levels of both passive and active exposure to EU-related information[12].

[9] The macroeconomic outlook in the country remains stable and the economy continued to grow by more than 5% year-on-year in the first ten months of 2019. Association Implementation Report in Georgia, European Commission, February 2020.

[10] More details are provided in the Annex – Table 2.

[11] The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European Union is perceived by the citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale ('strongly', 'somewhat', 'not really', 'not at all', or 'don't know'): 'the EU fosters the preservation of traditional values in our society', 'the EU provides tangible benefits to citizens in their everyday lives', 'the EU is committed to fighting corruption', 'the EU is an independent actor in foreign relations' and 'integration with the EU increases the country's security and stability'.

[12] In fact, people who believe that the EU threatens Georgian traditions report, on average, lower levels of passive and active exposure to EU-related information. They also tend to to support a Russian "orientation" for the foreign policy of Georgia, including Georgia's membership in the Eurasian Economic Union (EAEU). See section 3.3, Sources of information on the EU and section 3.5.2. Neutral attitudes.

FIGURE 3 – 'The EU fosters the preservation of traditional values in our society'.
To what extent do you agree with this statement about the EU?
(Percentages refer to Georgians who have heard about the EU)

Perceptions of the EU were also assessed through an open-ended question, whereby respondents were asked to name the first issues that came to their mind when thinking of the EU. Associations were generally positive and touched upon many different areas, with 14% of citizens mentioning economic prosperity/high standards of living, development and progress (7%), peace and stability (7%), democracy (5%), freedom (4%), rule of law/human rights (4%) and education (2%). Visa liberalisation and especially European integration, were rarely mentioned (5% and 2% respectively), reflecting the fading effect of the entry into force of the visa liberalisation regime. Among negative aspects, 3% of Georgians mentioned moral decline and 1% felt 'they could not trust the EU'. Around one third of Georgians did not answer the question, either because it was too hard to answer (32%), or they had nothing to say (2%).

Almost 70% of the population trust the European Union, followed closely by NATO (59%) and the United Nations (57%). On the other hand the EAEU continues to have the lowest level of both trust and awareness: three quarters of Georgians did not trust the EAEU (37%) or did not know how to rate their level of trust (25%) or had never heard of it (11%). These findings are consistent with the previous waves.

Education seems again the most important factor in shaping perceptions and awareness: nearly all highly-educated individuals trust the EU (84%) and only 7% could not answer the question. Some kind of regional patterns are also detectable, with Eastern residents more keen to trust the EU (74%), Western residents largely unaware (21%) and Centre residents more keen to distrust it (20%).[13] It is also worth noting that although females and males show similar levels of unawareness (around 15%), males appear to be more critical, with 19% of them who openly distrust the European Union (versus 12% of females)[14].

[13] Regional patterns can be also partly explained by the role of ethnic minorities, especially the two largest communities of Azerbaijanis and Armenians which account for over 10% of the Georgian population. According to a recent poll conducted by NDI/CRRC, Azerbaijanis and Armenians tend to be less supportive of pro-Western foreign policy stance than ethnic Georgians, however while Armenians hold strong, opposite views to that of the general population, Azerbaijanis seem largely unaware. In addition to Tbilisi, which hosts sizeable communities of both minorities, Armenian communities are settled in the region of SamtskheJavakheti, whereas Azerbaijanis mostly live in the regions of Kvemo Kartli and Kakheti and the city of Rustavi (*Source:* https://www.ndi.org/publications/ndi-poll-eu-and-nato-support-remains-strong-threatened-russia-and-perception-harm).

[14] More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 3.

FIGURE 4 – Trust towards different institutions (Q2.11)
(Percentages refer to Georgians who have heard of the EU)

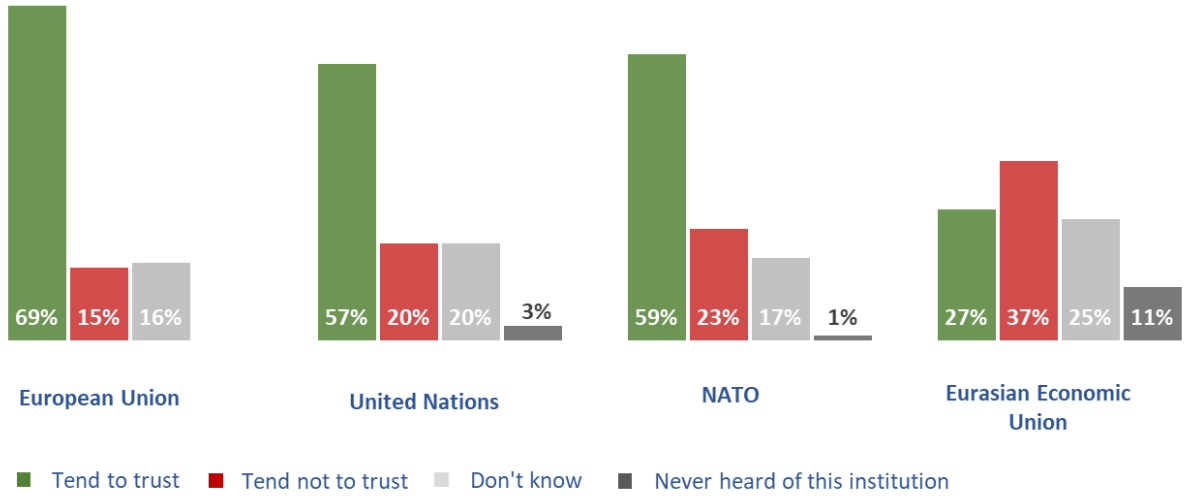
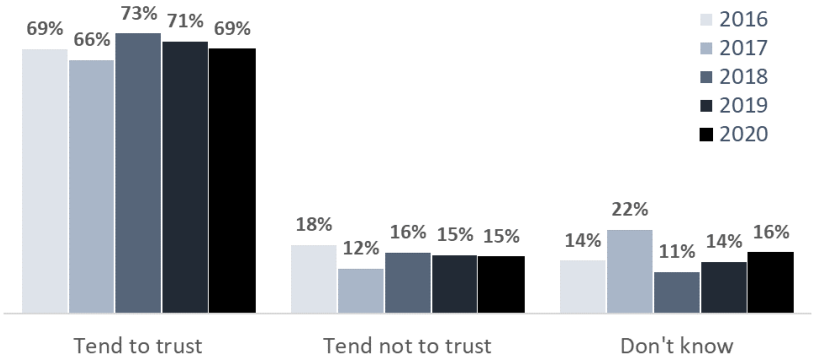


FIGURE 5 – Trust towards the EU (Q2.11)
(Percentages refer to Georgians who have heard of the EU)



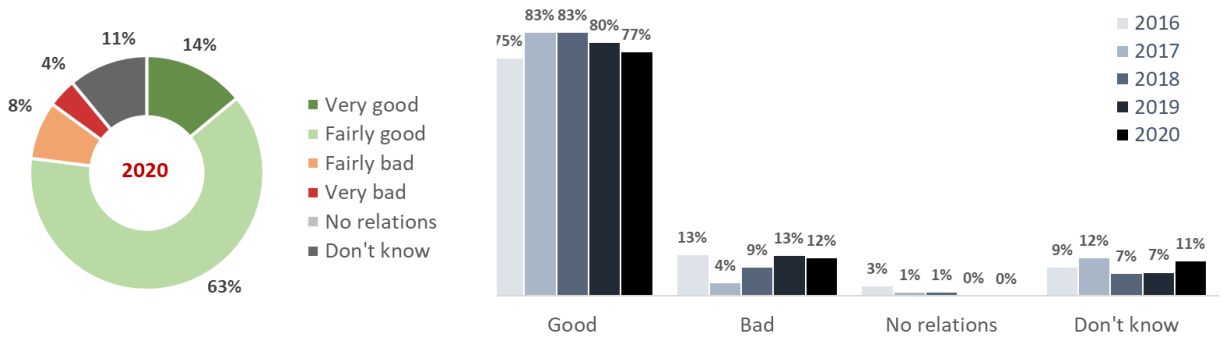
3.2.2. EU relations with Georgia and awareness of EU financial support

The appreciation of the relations between Georgia and the EU is high (77%) and common to all socio-demographic groups, although a very slight declining trend can been observed since 2018, when 83% of the population rated the relations between their country and the EU as 'fairly' or 'very good'. Highly-educated individuals are among the most positive (83%), together with females (84%), older individuals (84%) and unemployed or temporarily inactive citizens (85%). In fact, the only group that displays very different figures are males: only 69% consider the EU relations with Georgia as 'good' and 17% rate them as 'bad' (versus 8% of females) – it is worth remembering that males are on average also more likely to distrust the EU[15].

[15] More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 4.

FIGURE 6 – 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 of the EU)



The EU is perceived as 'an independent actor in foreign relations' by most Georgians (60%), with no significant change compared to 2019, and only 15% of the population – 'not really' (10%) or 'not at all' (5%) – agree with the statement. Around one in four citizens could not provide a definite answer (25%), a figure slightly higher than that for the other statements on common beliefs[16].

FIGURE 7 – 'The EU is an independent actor in foreign relations'. To what extent do you agree with this statement about the EU?

(Percentages refer to Georgians who have heard of the EU)

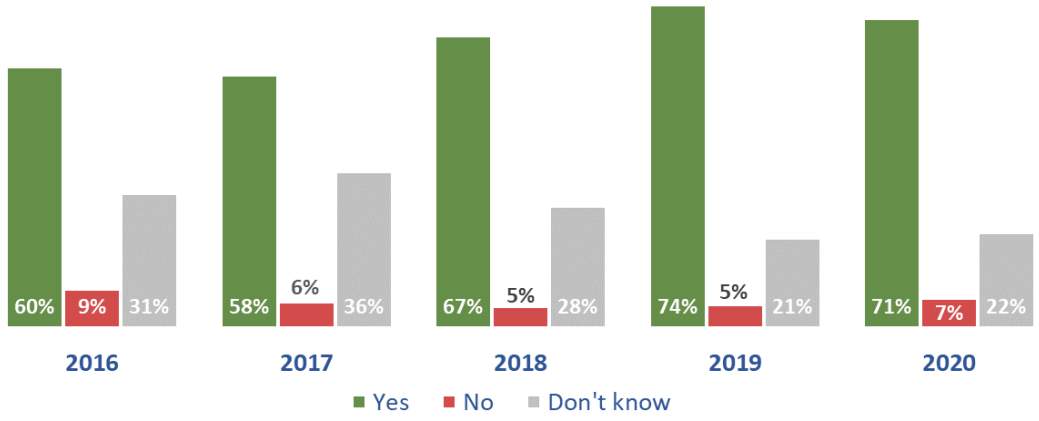
Around 70% of citizens know that the EU provides financial support to Georgia – it was 74% in 2019. The knowledge of EU's financial support follows closely the rating of trust: 81% of highly-educated individuals are aware of EU's role and only 15% could not answer the question. Eastern residents tend to be well-informed (73%), **Western residents more unaware (27%)** and Centre residents more keen to deny EU's support (10%). In addition, **middle-aged (35-54 years) and unemployed individuals display similar high levels of unawareness** (25% both) and low levels of recognition (66% both)[17].

[16] The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European Union is perceived by the citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale ('strongly', 'somewhat', 'not really', 'not at all', or 'don't know'): 'the EU fosters the preservation of traditional values in our society', 'the EU provides tangible benefits to citizens in their everyday lives', 'the EU is committed to fighting corruption', 'the EU is an independent actor in foreign relations' and 'integration with the EU increases the country's security and stability'.

[17] More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 5.

FIGURE 8 – As far as you know, does the European Union provide Georgia with financial support? (Q2.5)

(Percentages refer to Georgians who have heard of the EU)

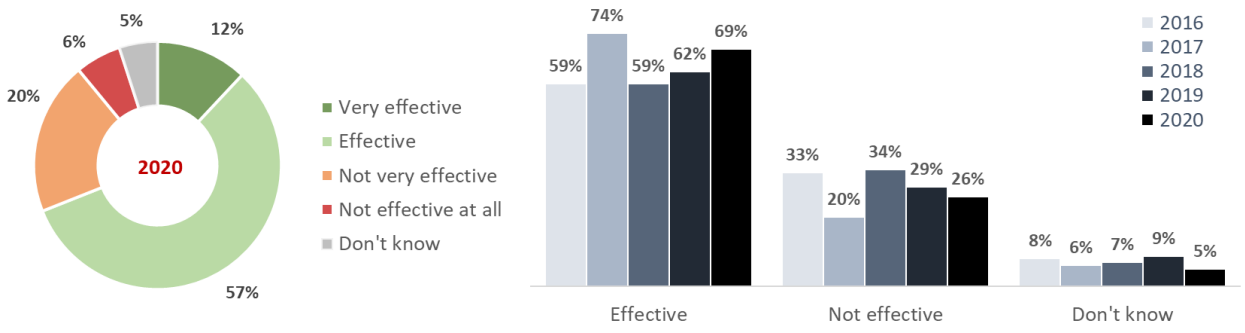


As shown in Figure 9, the share of people aware of the EU's financial support who consider it to be effective reached its peak in 2017 (74%) reflecting the effects of the full entry into force of the Association Agreement (AA) in Summer 2016. However, the share of those who recognise its effectiveness has increased by 7 percentage points compared to last year (and 10 percentage points compared to 2018) reaching nearly 70% overall – and 81% among the most-educated citizens. One in four individuals who are aware of the EU's financial support deem it not to be effective (26%) – again lower than figures from the previous year.

Among those citizens who are aware of the EU's financial support, the **most sceptical groups regarding its effectiveness are the residents of the Centre of the country** (33%, versus a non-appreciation rate of 25% for residents of eastern residents and 17% for western residents). Males (34%) and employed/self-employed citizens (29%) are also more likely to view the EU's financial support as not effective than the females and unemployed individuals (19% and 21% respectively), mirroring a trend that generally sees these groups much less positively disposed towards the European Union[18].

FIGURE 9 – 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)

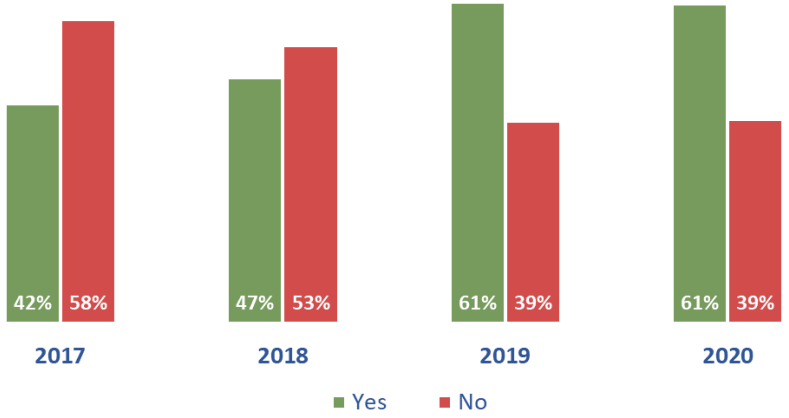


Last year the percentage of Gerorgians aware of the EU's financial support who knew about specific EU-funded programmes was 61% – representing a substantial increase from 2017 (42%, up 19%). This figure has remained stable in 2020 (61%), confirming the widespread knowledge on assistance allocated by the EU among the population. The figures are above 56% for all socio-demographic groups. Males (66%), highly educated (66%) and middle-aged individuals (68%) are, on average, the most informed – which may well reflect their interest on the issue[19].

[18] More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 6.
[19] More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 7.

FIGURE 10 – Do you know of any specific programmes financed by the European Union in Georgia? (Q2.6)

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

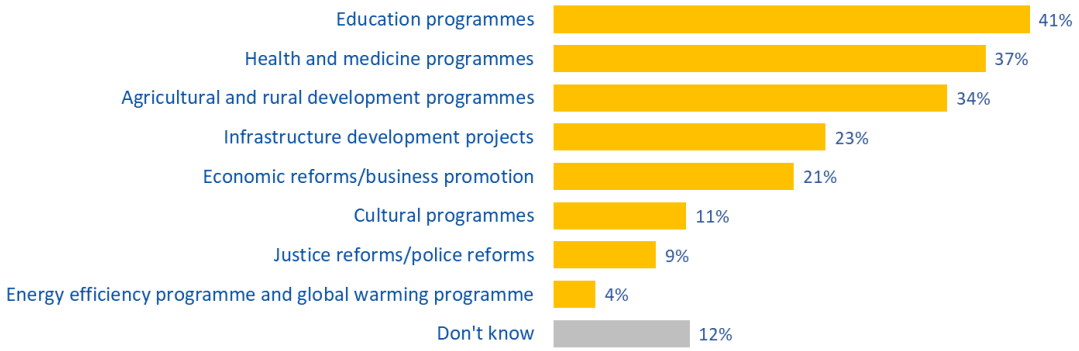


The most well-known EU-financed programmes relate to the field of 'education' (41%), endorsing the effect of Georgia's successful participation in Erasmus+ in the areas of higher education. Around one third of the population aware of specific EU-funded programmes is also currently aware of 'agricultural and rural development programmes' (34%, up 9 percentage points since 2019), and around one fifth identified 'infrastructure development programmes' (23%) and 'economic reforms/business promotion programmes (21%). The high percentage of individuals who mentioned 'health and medicine programmes' (37%) may well reflect the growing concerns of Georgians over healthcare: not only, its unaffordability was cited among the most pressing concerns much more frequenly than last year, but people are also increasingly mentioning it among the areas that would benefit more from the EU's support[20]. Georgians aware of specific EU-funded programmes are least familiar with the EU's financial support to the sectors of 'culture' (11%), 'justice and policy reforms' (9%) and 'energy efficiency' (4%) – although sligtly less than last year (up 2 percentage points each).

Although small, the percentage of Georgians who have personally been (or know someone who has been) involved in recent EU-funded projects continues to rise (6% versus less than 2% in 2017).

FIGURE 11 – Which specific programme(s) do you know? (Q2.6.1, multiple answers possible)

(Percentages refer to Georgians who were aware of specific programmes financed by the EU)



Slightly less citizens than in 2019 perceive the European Union as an equal or stronger financial supporter than the United Nations and its agencies (37%), the United States of America (40%) and the International

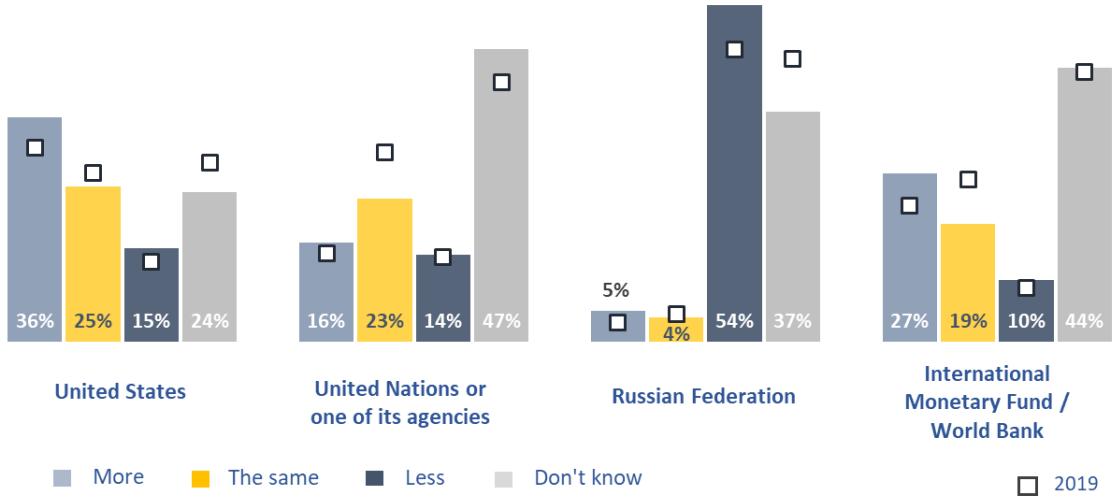
[20] According to a recent survey, while the majority of Georgians report satisfaction with the accessibility and quality of healthcare, they are concerned by the high costs of both care and medicine. Over the past year, half of the population reported that they postponed a medical treatment (54%) and were unable to buy medicine (50%) because they couldn't afford it (*Source:*https://www.ndi.org/sites/default/files/NDI%20Georgia%20poll%20press%20release_%20July%202019_ISSUES_ENG.pdf)

Monetary Fund/World (29%) – the respective figures in 2019 were 44%, 40% and 35%. However, more citizens do perceive it as a greater provider than the Russian Federation (54% versus 47% in 2019).

As in previous waves it is worth stressing out that there is a very high level of unawareness with regard to this issue: between 24% and 44% of individuals found it difficult to provide a definite answer – and especially when it comes to the comparison of the EU with the United Nations (47%) and the Russian Federation (44%).

FIGURE 12 – 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 of the EU)



The majority of the Georgian population associates the EU with the provision of tangible benefits for society (65%, up 10 percentage points since 2019)[21]. This shift towards more positive views was equally observed with regards to other common beliefs and, rather than stemming from an increase in awareness, tends to be associated with a decrease in negative and very negative opinions which may be associated with the slightly higher levels of both passive and active exposure to EU-related information recorded in the country since the last wave in 2019.

FIGURE 13 – 'The EU provides tangible benefits to citizens in their everyday lives'. To what extent do you agree with this statement about the EU?

(Percentages refer to Georgians who have heard of the EU)

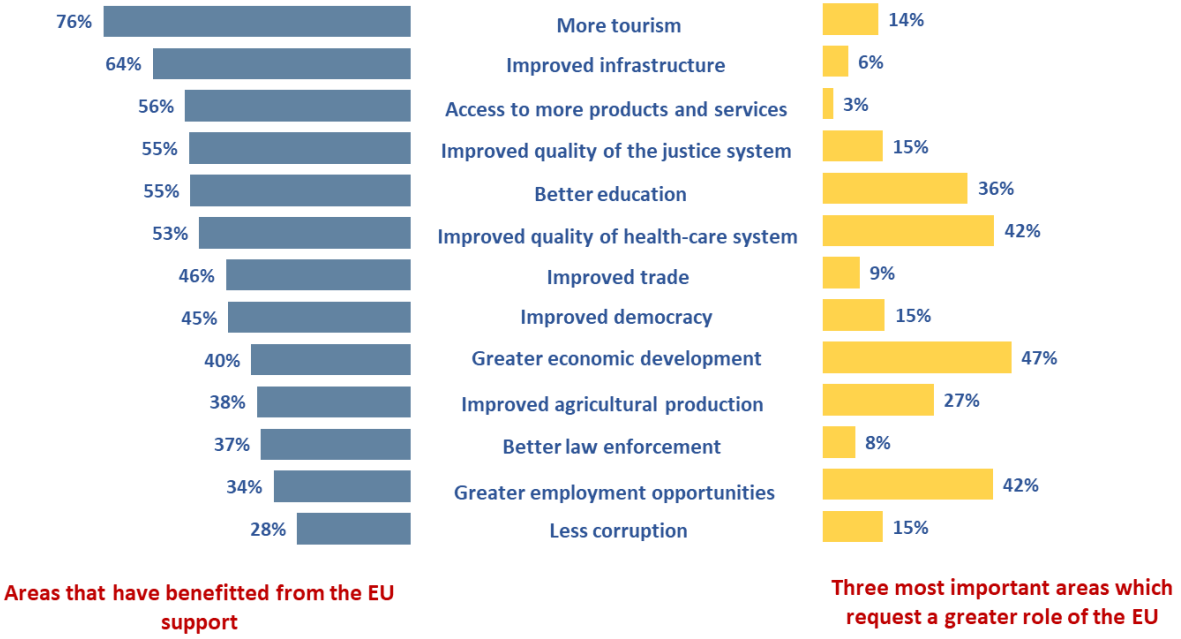
[21] The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European Union is perceived by the citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale ('strongly', 'somewhat', 'not really', 'not at all', or 'don't know'): 'the EU fosters the preservation of traditional values in our society', 'the EU provides tangible benefits to citizens in their everyday lives', 'the EU is committed to fighting corruption', 'the EU is an independent actor in foreign relations' and 'integration with the EU increases the country's security and stability'.

The growth of tourism and its importance continues to be well perceived by Georgians although slightly less than in 2019: 76% of the population (versus 85% last year) cited it among the areas that have benefited 'very much' or 'fairly' from EU support. Between 55% and 65% of citizens also mentioned the positive effects of the EU's engagement with regard to the state of infrastructure, judiciary system and free market ('acess to more products and services'). It is also worth noting that the areas which the population thinks Georgia needs EU support differ from those in which support is believed to be provided and citizens continue to request more support from the EU in many of the fields they perceive as priorities, such as 'economic development' (47%), 'employment opportunities' (42%), 'quality of the health care system' (42%) and 'education'[22]. In fact, 'education' is one of the only areas where strong support was received (55%) and more support is advocated (36%).

As with previous waves, 'fight against corruption' is among the areas that have benefitted less from EU support (28%), although only 15% of citizens would request a greater involvement of the European Union to tackle the issue. Again, this low figure seems more linked to the fact that 'fight against corruption' is not one of Georgians' priorities – hence when asked about the perceived benefits stemming from integration with the EU, other concerns come to their mind first[23].

FIGURE 14 – Areas that have benefited 'very much' or 'fairly' from EU support (Q2.8) & three most important areas in which Georgians request a greater role of the EU (Q2.9)

(Percentages refer to Georgians who have heard of the EU)



When directly asked if the EU is committed to fighting corruption[24], 66% of Georgians 'strongly' (28%) or 'fairly' (38%) agree, with an increase of 4 percentage points compared to 2019. Only 14% did not support the statement and 20% did not have a definite opinion on the issue.

[22] Respondents were asked to name and rank the three most important areas in which the EU should play a greater role.

[23] More details are provided in Annex – Tables 8 and 9.

[24] The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European Union is perceived by the citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale ('strongly', 'somewhat', 'not really', 'not at all', or 'don't know'): 'the EU fosters the preservation of traditional values in our society', 'the EU provides tangible benefits to citizens in their everyday lives', 'the EU is committed to fighting corruption', 'the EU is an independent actor in foreign relations' and 'integration with the EU increases the country's security and stability'.

FIGURE 15 – 'The EU is committed to fighting corruption'.
To what extent do you agree with this statement about the EU?
(Percentages refer to Georgians who have heard of the EU)

Integration with the EU is seen by a large segment of the population as a mean of overcoming many problems in Georgia. Considering that 'security 'is the first and most important personal value of citizens, it does not come as a surprise that **nearly 70% of Georgians are convinced that integration with the EU will increase the country's security and stability**, just as in 2019[25].

FIGURE 16 – 'Integration with the EU increases country's security and stability'.
To what extent do you agree with the former statement about the EU?
(Percentages refer to Georgians who have heard of the EU)

[25] The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European Union is perceived by the citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale ('strongly', 'somewhat', 'not really', 'not at all', or 'don't know'): 'the EU fosters the preservation of traditional values in our society', 'the EU provides tangible benefits to citizens in their everyday lives', 'the EU is committed to fighting corruption', 'the EU is an independent actor in foreign relations' and 'integration with the EU increases the country's security and stability'.

3.3. Sources of information on the EU

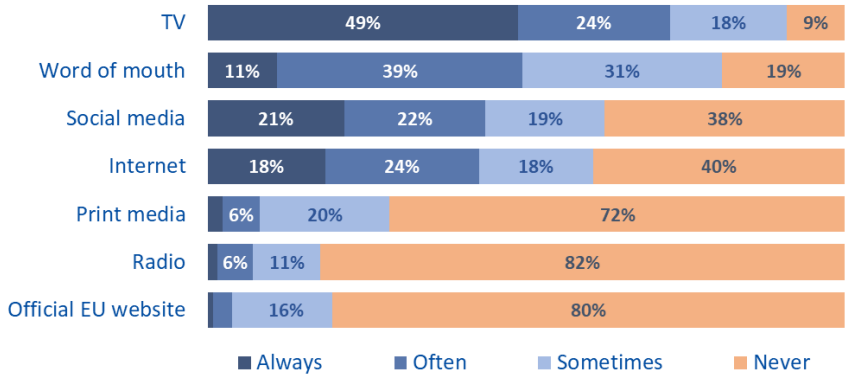
***TV continues to be the most popular medium (only 9% of the population never watch it)**. Yet, in terms of exclusive and frequent usage, social media and the Internet (52%) have surpassed traditional media, including TV (35%) and the gap is increasing every year. Passive exposure to EU-related information stands at 39%, a finding that may reflect the limited coverage of foreign news in comparison to domestic issues. Active exposure stands at 48% and most active searchers rated positively the information they access, in terms of both usefulness and positive representation of the EU. Educational and cultural programmes (37%), the relations between Georgia and the EU (30%) and economic news (27%) are most searched. Only one in ten individuals is interested in knowing more about EU's relations with other EaP countries (7%).*

This section looks at the main sources of information in Georgia, with a focus on specific information about the EU, its programmes and its institutional communication instruments.

3.3.1. Media usage as sources of information

The pervasiveness of sources of information is similar to that in previous years and **television is still the most popular source of information in Georgia** – only 9% of the population never watches it. However, **new media**, such as the Internet (60% of Georgians use it) and, particularly, social networks (62%) **continue to grow in importance and overtakes traditional media**, such as print press (28%) and radio (18%). **Four out of five Georgians continue to rely on the 'word of mouth'** – 'always' (11%), 'often' (39%) or 'sometimes' (31%). **The official EU website**, though rarely accessed, **has seen an increase of 7 percentage points since 2019 (20%)**.

FIGURE 17 – Type of media used as a source of information (Q3.7)

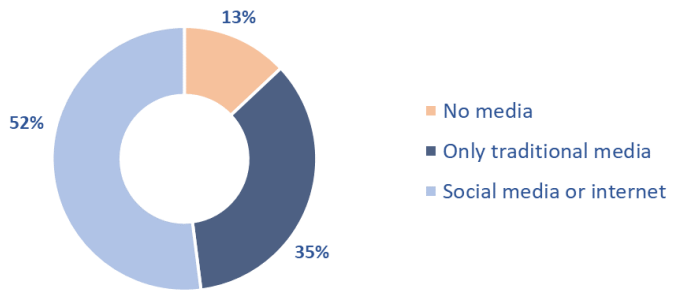


The breakdown of frequent users of traditional media only, new media and no media is shown in Figure 18[26]. As noted above, frequent usage of social media or the Internet (52%) continues to overtakes frequent and exclusive usage of traditional media only (35%), despite the fact that the latter includes TV, the most popular source of information. As expected frequent usage of new media appears to be very sensitive to age, education and settlement size: 81% of individuals aged 15-34, 73% of highly educated citizens and 64% of residents of larger cities rely on these very often – versus 19% of older generations, 43% of lowly-educated and 45% of inhabitants of smaller settlements. Conversely, these groups – and particularly individuals over 55 (66%) – are very likely to use traditional media only. Overall around one in ten individuals do not frequently rely on any media (13%), with no significant change when compared

[26] The first includes all individuals who 'always' or 'often' use only traditional media (such as television, radio and print media); the second group includes all individuals who 'always' or 'often' use either the Internet (including the official EU websites) or social media; while the last group includes all individuals who do not 'always' or 'often' use any of the surveyed media.

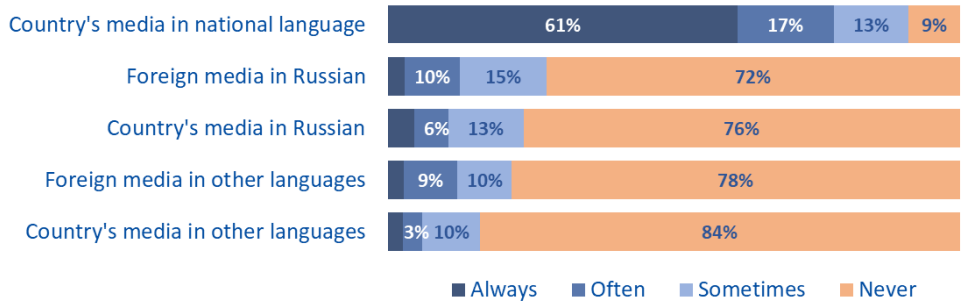
to 2019. Individuals living in the Centre of the country are twice more likely not to use any media compared to citizens living in the West of the country (18% versus 9%)[27].

FIGURE 18 – Type of media frequently used as source of information



Nearly all Georgians – 61% 'always', 17% 'often' and 13% 'sometimes' – use national media in Georgian. The usage of media in different languages is less prevalent, although slightly more reported than in 2019, especially if the ownership of the media is foreign – for instance, 28% of citizens access foreign media in Russian (versus 20% last year) and 22% in other languages (versus 16% last year).

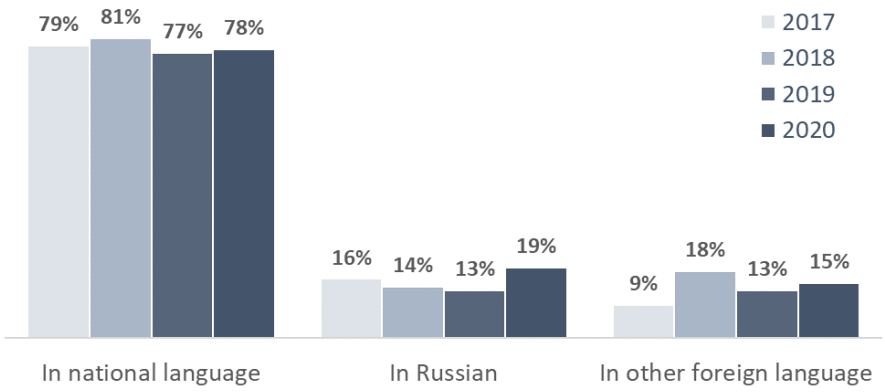
FIGURE 19 – Usage of media in Georgian, Russian and other languages (Q3.7)



If frequent usage of media in Georgian, Russian and other foreign languages is compared, irrespective of the ownership of the media[28], it appears that Russian media recorded the greatest increase since 2019 (19%, up 6 percentage points), whereas both media in Georgian and other foregin languages have remained largely stable (78%, up 1 percentage point and 15%, up 2 percentage points since last year). A high preference in the usage of media in other foreign languages was recorded both among the youth and the highly-educated segments of the population – which may indicate their greater usage of media in English; whereas the distribution of ethnic minorities may be responsible for regional differences especially with regard to the usage of media in Russian – over 20% of residents of the Centre and the East versus 10% of those in the West of the country frequently rely on media in Russian[29].

[27] More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 10.
[28] Frequent users of media in Georgian are defined as all individuals who 'always' or 'often' use media in the national language; those who 'always' or 'often' use the country's or foreign media in Russian are seen as frequent users of media in Russian. Finally, frequent users of media in foreign languages are those 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.
[29] More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 11. See also footnote 14.

FIGURE 20 – Frequent usage of media in Georgian, Russian and other languages



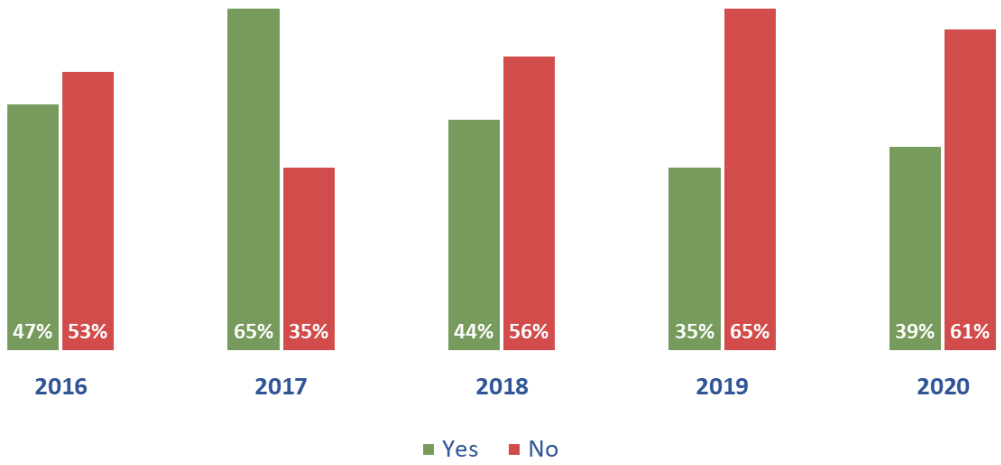
The Georgian media landscape remains polarised and trust levels towards different media sources reflect the situation[30]: national media in Georgian (66%), TV (63%) and Internet (51%) are the only three sources trusted by the majority of the population. In fact, most citizens do not have a definite opinion – with an impressive 53% of individuals who cannot rate their trust in print media and 69% in the radio. Compared to 2019, trust in the official EU website has increased by 7 percentage points (28%), mirroring the upward trend observed with regard to active exposure to EU-related information through the Internet [31].

3.3.2. Sources of information about the EU

39% of Georgians say they have seen or heard information about the EU in the last three months. The trend of this indicator has kept remained low over the whole 2016-2020 period except for the 2017 wave (65%) when it benefitted of the full effects of the Association Agreement and later visa-free regime. The 'polarisation' of national media may affect the exposure of foreign news in comparison to national issues, such as the coverage of the presidential campaign and elections in autumn 2018, as well as the process to change the electoral system be be used during the Parliamentary elections scheduled for October 2020. Western residents report the lower levels of exposure of all socio-demographic groups: only 33% of individuals have seen or heard information on the EU in the three months preceding the survey[32].

FIGURE 21 – Have you seen or heard any information about the EU in the last three months? (Q3.2)

(Percentages refer to Georgians who have heard of the EU)



[30]The media landscape remains polarised in the country and political groupings maintain a tight hold on the country's broadcast scene. In the 2019 World Press Freedom Index, Georgia moved up one place and now ranks 60th out of 180 countries. Its Freedom House rating remained stable, with an aggregate 'freedom score' of 63/1005. Association Implementation Report in Georgia, European Commission, February 2020.

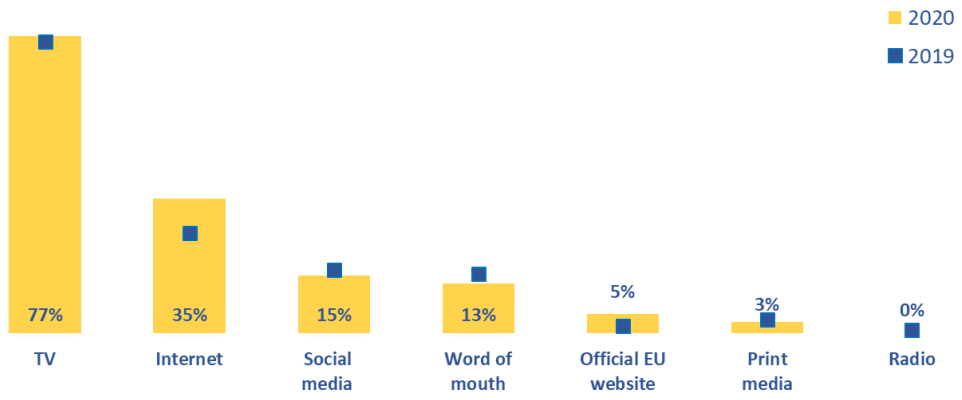
[31] More details are provided in Annex – Table 12.

[32] More details on exposure to information about the EU and socio-demographic characteristics are provided in Annex – Table 13.

In line with 2019, television remains the main source of passive exposure to EU-related information (77%); over one third of citizens who have seen or heard information about the EU were also reached though the Internet (35%, up 9 percentage points). Social media and 'word of mouth' were cited each by around 15% of the population exposed to EU-related information.

FIGURE 22 – 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)

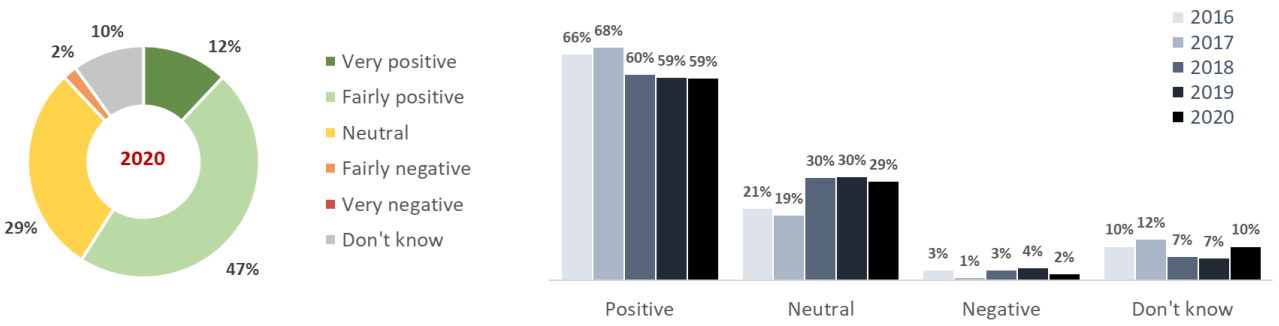
(Percentages refer to Georgians who have heard any information about the EU in the last three months)



Among those who had heard about the EU, 59% felt that national media presented the European Union positively (12% 'very positively', 47% 'fairly positively') with no change compared to the last two waves, aligning with the fairly positive and neutral attitudes towards the EU prevailing in the country (*see Figure 1*). Overall residents of medium-sized settlements (47%) tend to share a more neutral view[33].

FIGURE 23 – 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)



According to half of the individuals who have heard of the EU (52%), the information which they read, watch or access online helps them to have a better understanding of the European Union, either 'fairly' (42%) or 'very much' (10%). Only 13% find the information 'not at all useful'.

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

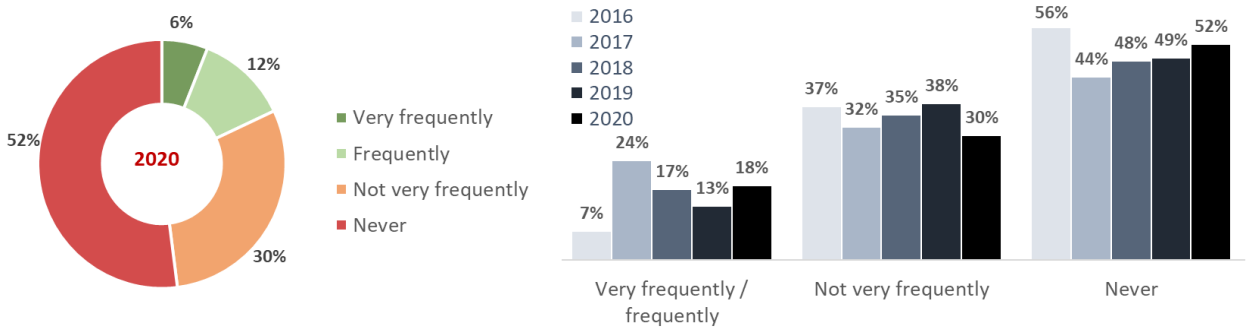
Compared to last year, 'frequent' or 'very frequent' access to information on the EU has recorded an increase (18% versus 13% in 2019) confirming the slightly upward trend observed also for passive exposure. Highly educated people are the most likely to search for EU-related information (69%, out of which around 26% access it frequently). Conversely, between 60% and 65% of older individuals, lower-educated citizens and Western residents never access any information on the EU[34].

[33] For the distribution according to main socio-demographic characteristics, see Table 14 in Annex.

[34] More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 15.

FIGURE 24 – How often do you look for/access information on the EU? (Q3.1)

(Percentages refer to Georgians who have heard of the EU)



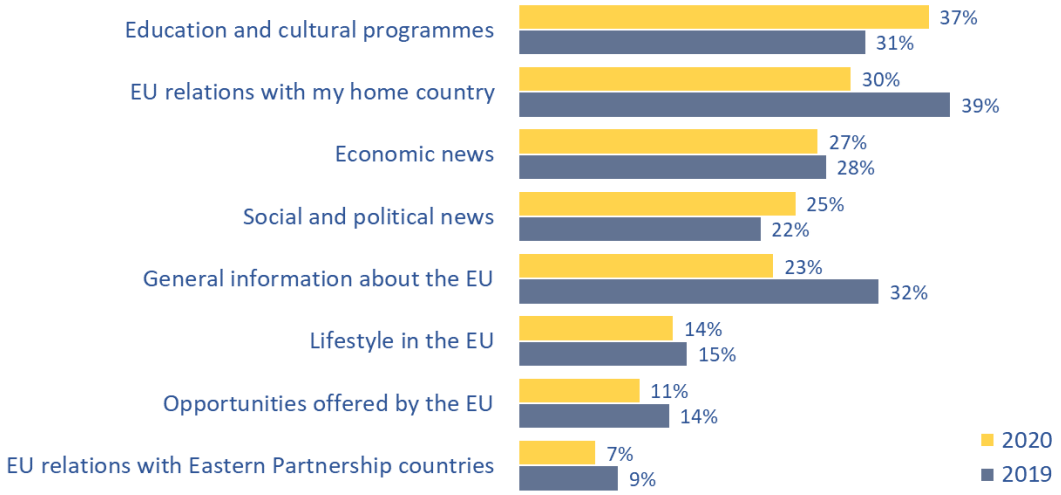
Compared to last year, less active searchers/citizens have accessed/searched for information about the EU in Georgian (74%, down 8% since 2019), while interest towards media sources in Russian (12%, up 3%) and, particularly, English (14%, up 6%) has witnessed an increase.

In addition, the search for EU-related information has also been more focused rather than generalised – 23% have looked up for 'general information about the EU' versus 32% in 2019 – with most people focusing on searching 'educational and cultural programmes' (37%), the 'relations between Georgia and the EU' (30%), and 'economic' (27%) and 'socio-political news' (25%). It is worth noting that 'educational and cultural programmes' stir the greatest interest of Georgians and have increased by 13% since 2018.

Only 7% of individuals actively searching for information about the EU are interested in knowing more about its relations with Eastern partner countries, in line with 2019.

FIGURE 25 – What type of information do you normally look for? (Q3.1.2, multiple answers possible)

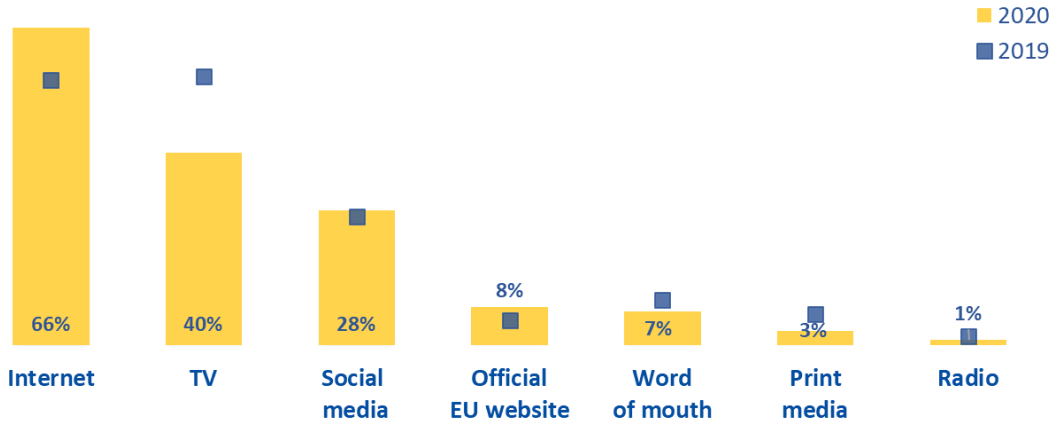
(Percentages refer to Georgians who have looked for/accessed information on the EU)



For the first year (between 2061-2020), the Internet is the main providers of information about the EU (66% of Georgians who searched for information about the EU went to the Internet, up 10 percentage points compared to 2019) and has definitely surpassed television (40%, down 15%). Social media remains stable at 28%; whereas only a marginal segment of those who actively look for information on th EU relies on 'word of mouth' (7%), print media (3%) or the radio (1%). Although slowly, the official EU website as a provider of EU-related information continues to rise and is now accessed by around one in ten active citizens (8%).

FIGURE 26 – Where do you go to find information about the EU? (Q3.1.4, multiple answers possible)

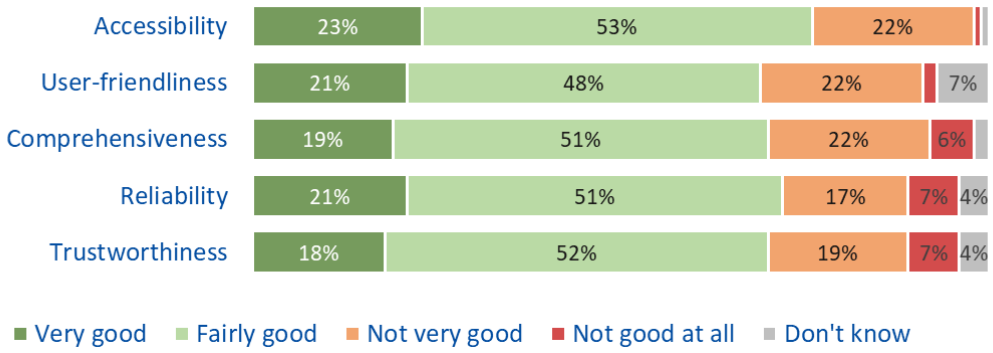
(Percentages refer to Georgians who have looked for/accessed information on the EU)



Nearly 80% of Georgians who search for information on EU, finds it to be 'very' or 'quite' accessible (78%). Its quality – in terms of its **user-friendliness, comprehensiveness, reliability and trustworthiness** – was rated 'very' or 'quite' positively by slightly less individuals (around 70% each). These assessments were also slightly more positive than in 2019, with a difference of around 5 percentage points for each characteristics.

FIGURE 27 – 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)



The share of Georgians having used EU websites[35] at least once continues to increase: overall 25% of citizens have done so in 2020 versus 18% in 2019 and 10% in 2018. The Facebook profile of the European Union is the most accessed (21%, up 8 percentage points since last year), followed by websites of EU projects (10%, up 2%) and the EU institutions website (10%, up 3%). The 'EU NEIGHBOURS east', the EU's Twitter pages and the EU Delegation website continue to be accessed seldomly, although slightly more – around 5% each versus around 3% in 2019.

[35] This refers to EU HQ institutions' websites; the EU Delegation website; EU projects' websites; the 'EU NEIGHBOURS'; EU Twitter and EU Facebook pages.

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

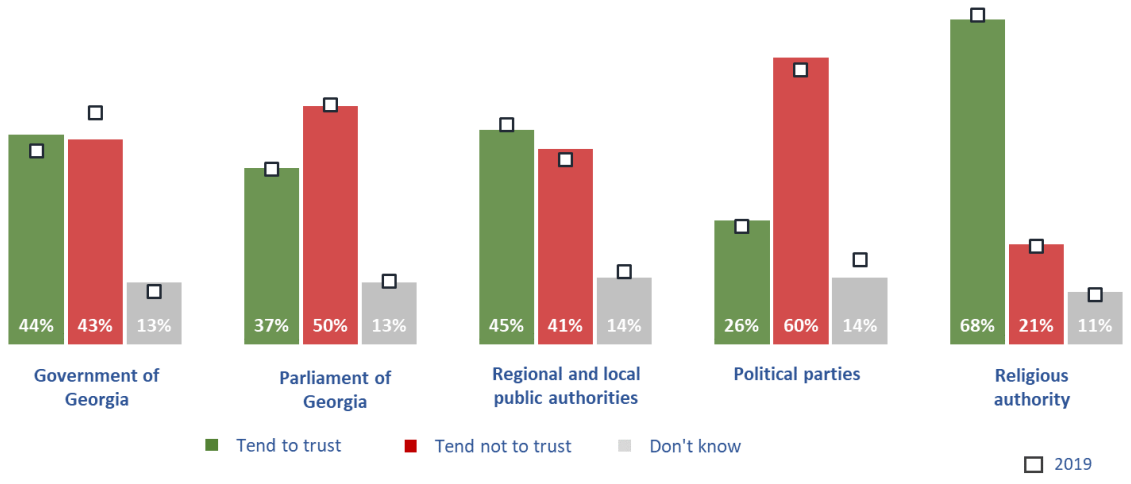
Although there is less than a year before elections, trust in Georgia's institutions and leaders is not increasing. *From the main public institutions, only the religious authority receives a positive assessment from the majority of the population (68%), while the political parties (60%) and the parliament (50%) record consistently negative assessments, possibly reflecting the stall in the revision of the electoral process and the parliamentary tensions of June 2019. Between around 40% and around 60% of the population feel that all assessed democratic indicators do not apply to their country – and their opinion is more negative than it was in 2019. The most problematic areas are the 'independence of the judiciary', 'lack of corruption', and 'rule of law'. These negative views are reflected in the high share of citizens holding pessimistic views of the country's future (35%). Nearly 65% of citizens are worried about unemployment and 19% about territorial conflicts.*

This section presents an assessment of Georgia's current situation regarding the functioning of democracy and the most pressing problems.

3.4.1. View of Georgia's current situation

Although there is less than a year to elections, trust in Georgia's institutions and leaders is not increasing. From the main public institutions, only the religious authority receives a positive assessment from the majority of the population (68%) with no change compared to previous years. The survey also shows consistently negative assessments towards the political parties (60%) and the parliament (50%) reflecting the stall in the revision of the electoral process and the parliamentary tensions of June 2019 [36]. Georgians seem more divided with regard to regional and local public authorities and the government, with around 45% of the citizens expressing either trust or distrust.

FIGURE 28 – Please tell us your level of trust in the following institutions (Q4.1)

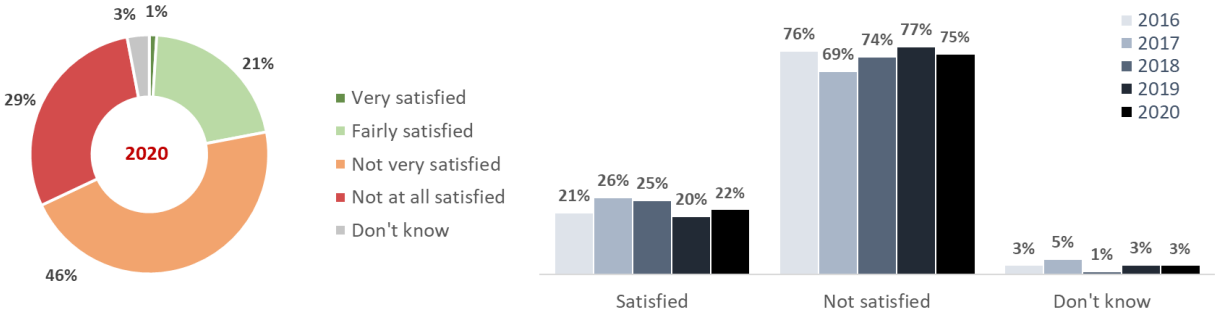


Accordingly, 75% of Georgians are dissatisfied with the way democracy works in their country with 29% 'absolutely dissatisfied' with no significant change compared to 2019. Residents of smaller settlements (80%), older individuals (80%), lower-educated citizens (78%) and inhabitants of the Centre of the country are on average the most dissatisfied of all socio-demographic sub-groups[37].

[36] According to a recent survey conducted by the National Democratic Institute (NDI) and CRRC-Georgia, most Georgians (59%) believe that the ruling party 'Georgian Dream' failed to ensure the legitimacy of the upcoming electoral process, switching to a fully proportional system. Around half of the population (45%) also holds the government responsible for the protests and violence that took place in June 2019 (*Source:* https://www.ndi.org/publications/ndi-poll-declining-trust-country-s-democratic-institutions-georgians-negatively-assess).

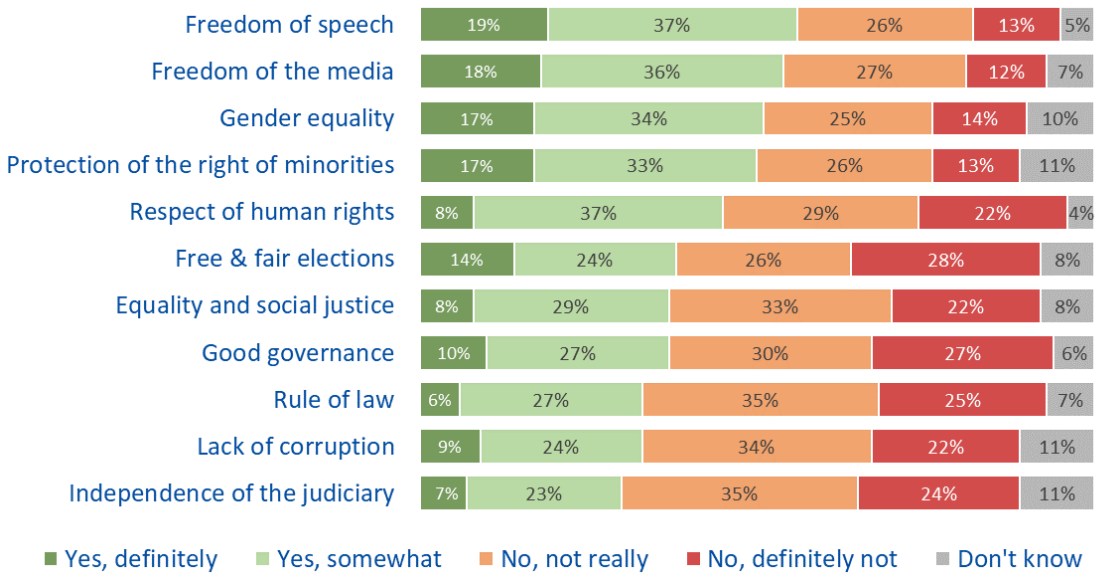
[37] More details on satisfaction with democracy and socio-demographic characteristics are provided in Annex – Table 16.

FIGURE 29 – 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)



Civil Society observers in Georgia claim that democratic development has stalled since 2017 [38]. This year's wave records that between 40% and 60% of the population feel that none of the assessed democratic indicators apply to their country – and their opinion is more negative than it was in 2019[39]. In fact, all elements – including those which received the more positive assessments – recorded a downward trend, such as 'freedom of speech' (56%, down 8%), 'freedom of the media' (54% down 8%), 'gender equality' (51%, down 5%) and 'protection of the rights of minorities' (50% down 9%). All other indicators are below the 50% threshold. The most problematic areas are the 'independence of the judiciary', 'lack of corruption', and 'rule of law' – less than one third of citizens are convinced that these apply to Georgia. Nearly 55% of the population think that 'free and fair elections' are 'not really' (26%) or 'definitely not' (28%) present in Georgia, and this low figure may well reflect the failure to implement the switch to a fully proportional electoral system for the forthcoming elections.

FIGURE 30 – To what extent do you think that the following elements apply in Georgia? (Q4.4)



[38] This has been underway for a number of years, for instance vis-à-vis the judiciary, decentralisation, and freedom of the media. During 2017, civil society actors and international organisations as well as the US State Department, raised concerns regarding the speed and direction of reforms. ***See*** Eastern Partnership Index 2017, Charting Progress in European Integration, Democratic Reforms, and Sustainable Development Eastern Partnership Civil Society Forum, 2018, https://eap-csf.eu/eastern-partnership-index/

[39] A recent survey conducted by the National Democratic Institute (NDI) and CRRC-Georgia accord with these findings. According to the survey, 59% of Georgians did not consider their country a democracy, with a significant increase from 46% in December 2018 (*Source:* https://www.ndi.org/publications/ndi-poll-declining-trust-country-s-democratic-institutions-georgians-negatively-assess).

3.4.2. Future expectations

Future expectations align with figures recorded during the previous period and around 60% of Georgians are optimistic towards their country's future (62%) – although only few of them are 'very optimistic' (15%). Personal future prospects are more positive (72%), but again only 22% are 'very optimistic optimistic'. Views on personal future reflect the education and age of the respondents, with 86% of younger citizens and 81% of highly-educated citizens positive about future outcomes – versus 55% of older citizens and 68% of lower-educated individuals. Western residents (53%), inhabitants of smaller settlements (54%), citizens with a low level of education (58%) and unemployed individuals (56%) tend to be, on average, less optimistic about Georgia's future than other socio-demographic sub-groups[40].

FIGURE 31 – How optimistic are you about the future of your country? (Q4.5)

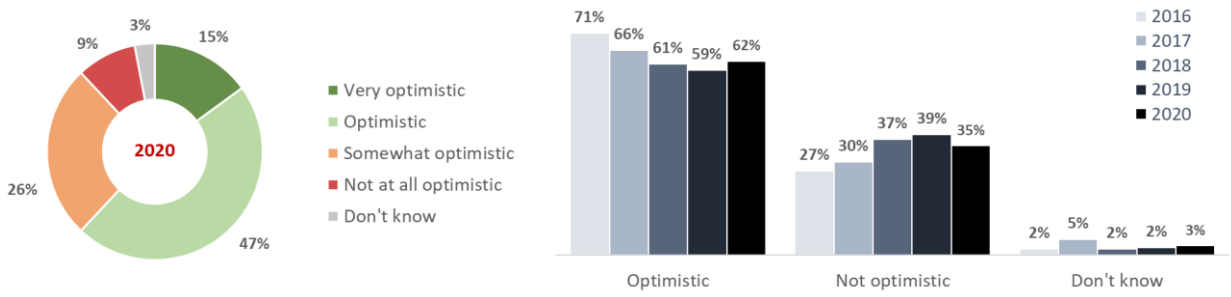
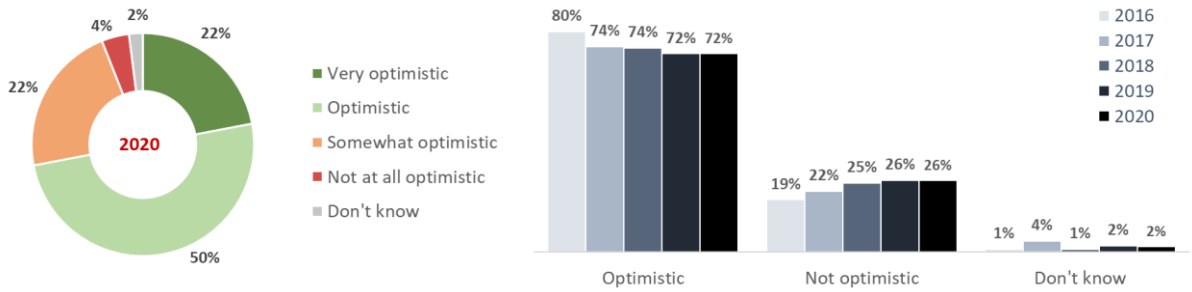


FIGURE 32 – How optimistic are you about your personal future? (Q4.6)



Compared to 2019, Georgians are equally concerned about the 'economic crisis' (39%) but less about 'unemployment' (65%, down 14%) possibly due to the stable economic growth recorded in the country[41]. It is perhaps the rising cost of living – inflation gradually accelerated to 7% in November 2019[42] – that has triggered concerns about the low level of salaries and pensions (32%, up 5%) and, particularly, the unaffordability of healthcare (24%, up 8%). Concerns over 'territorial conflicts' (19%) and 'war' (7%) are also persisting, despite 'peace, security and stability' being the most important value at a personal level in 2020, and the escalation of tension in the breakaway region of South Ossetia during summer 2019.

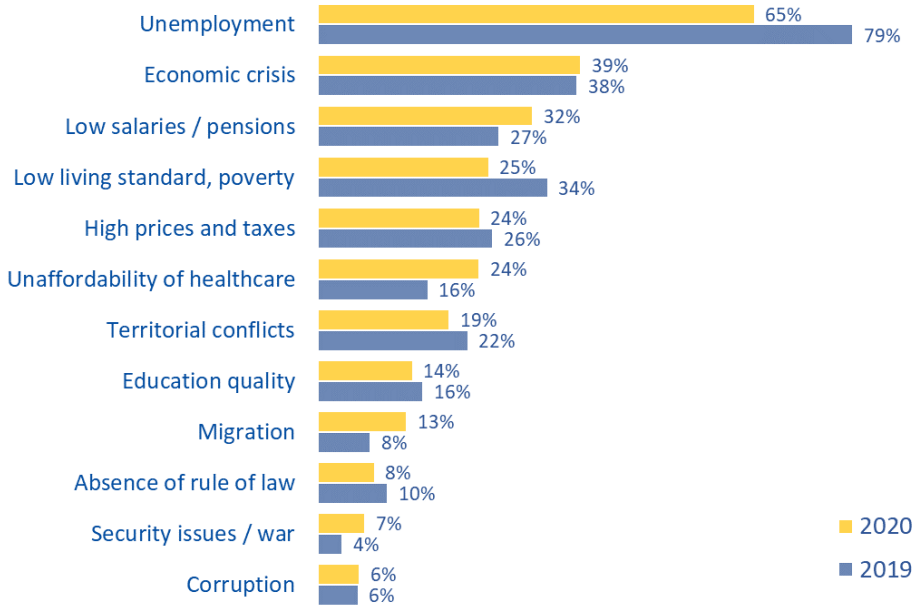
[40] More details on optimism regarding citizens' personal future and the country's future and socio-demographic characteristics are provided in Annex – Tables 17 and 18.

[41] The macroeconomic outlook in the country remains stable and the economy has continued to grow by more than 5 % year-on-year in the first ten months of 2019 (*Source:* Association Implementation Report in Georgia, European Commission, February 2020).

[42] The macroeconomic outlook in the country remains stable and the economy has continued to grow by more than 5 % year-on-year in the first ten months of 2019 (*Source:* Association Implementation Report in Georgia, European Commission, February 2020.)

Slightly more Georgians mentioned 'migration' (13%, up 5%) among the most pressing problems facing their country, although their number is still low.

FIGURE 33– What do you consider to be the most pressing problems facing your country? (Q4.2, multiple answers possible)



3.5. Profiling attitudes towards the EU: positive versus neutral

Education, passive and active exposure to EU-related information and preferred media sources seem to be the most important factors when it comes to the attitudes of Georgians towards the EU*. In fact, while 41% of those who have a positive image of the EU are highly educated, 82% of neutrally oriented citizens have a low to medium level of education. EU supporters are also much more exposed to information about the EU (44% versus 31% among neutral citizens) and keener to actively search for information (59% versus 37%). They are more frequent users of new media (60% versus 40%), national media (84% versus 74%) and even media in foreign languages other than Russian (17% versus 15%). Overall, they tend to display higher levels of trust in the EU (90% versus 59%), although views of neutral citizens reflect both indecision and distrust. EU supporters are more optimistic regarding the future of Georgia (69% versus 55%) although they tend to mention more frequently territorial conflicts and war, as well as education, migration and corruption among sources of concern.*

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In this section, the attitude of Georgians towards the EU has been analysed according to two main profiles: individuals who have a positive image of the EU and those who are neutral towards it[43].

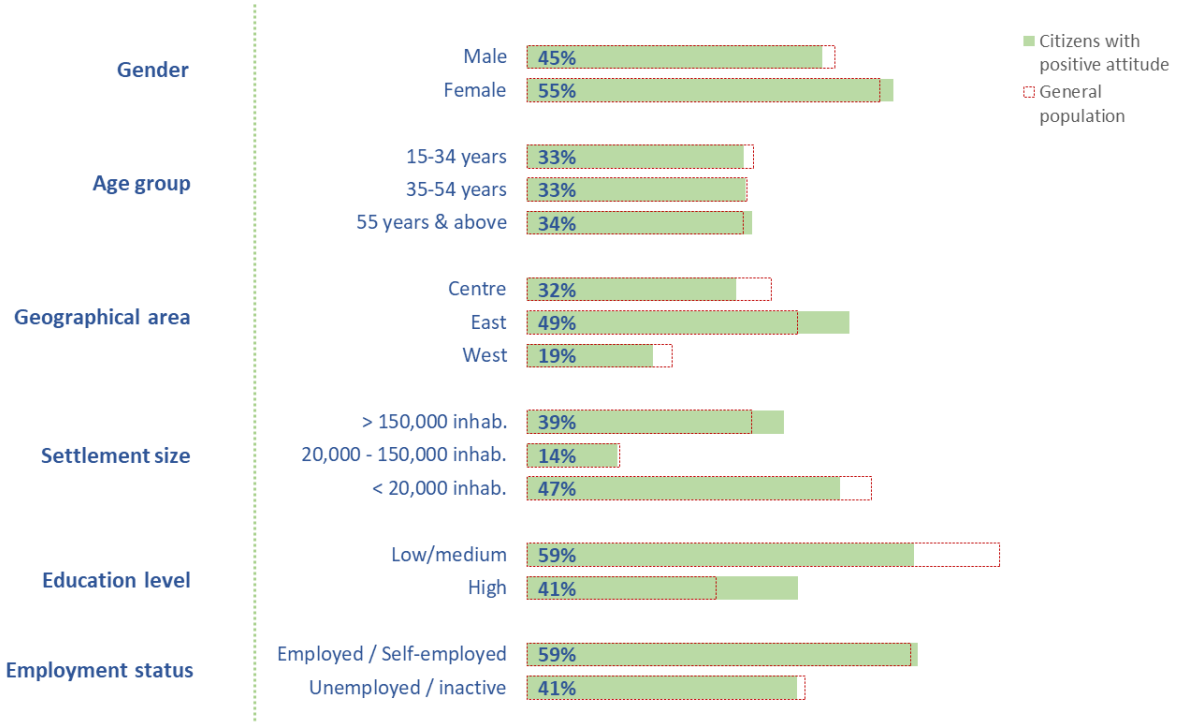
Attitudes were profiled against a comprehensive set of indicators, starting with the main socio-demographic characteristics, followed by passive and active exposure to EU-related information (including main language used and subjects of interest), assessment of the relationship between Georgia and the EU, awareness and effectiveness of its financial support and level of trust towards the EU and other foreign institutions, and finally the perception of the country's and respondents' personal future and main concerns.

[43] Individuals who were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

3.5.1. Positive attitudes

Holders of a positive view of the EU – who represent half of Georgians (49%) – are strongly characterised by their level of education and their geographical residence and more so when compared to last year: 41% (versus 36% in 2019) of those who have a positive image of the EU are highly educated – the related figure for the general population is 29% – and nearly half (49% versus 45% in 2019) live in eastern Georgia, which includes Tbilisi, the capital city (41% for the general population). Accordingly, EU supporters are more easily found in larger cities (39% versus 34% for the general population). Attitudes towards the EU are less sensitive to age, gender and employment status.

FIGURE 34 – Socio-demographic characteristics and geographical location of the Georgians with a positive image of the EU

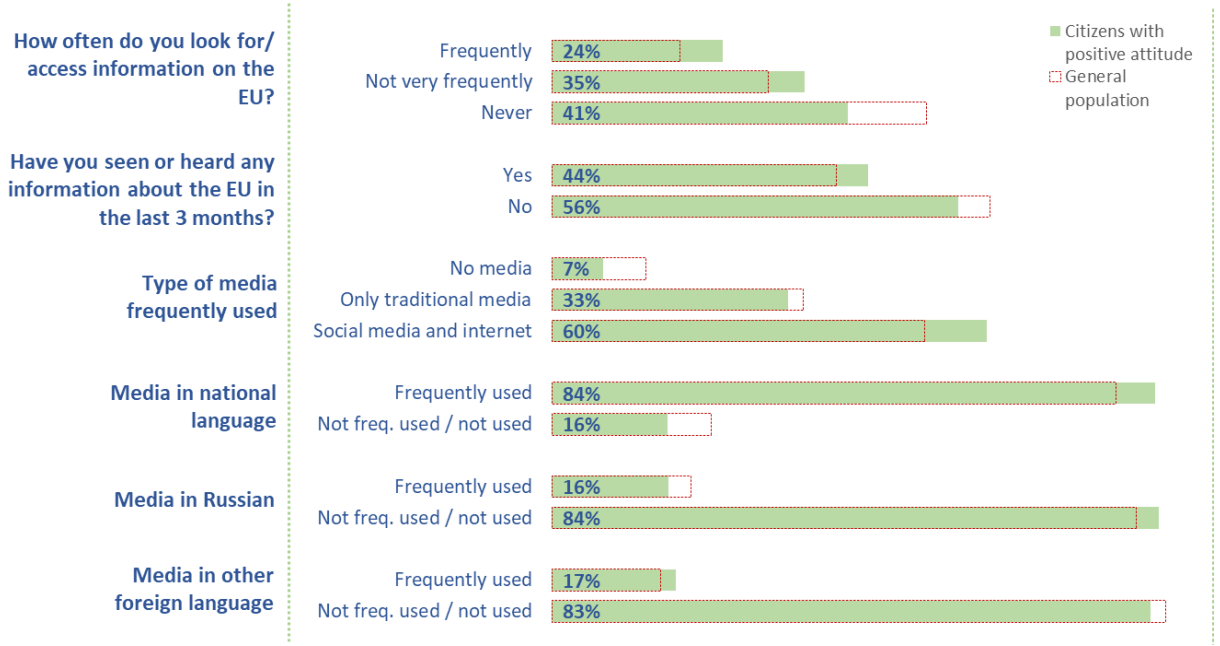


EU supporters are more likely to be actively and passively exposed to information about the EU, with 44% of them who had seen or heard information about the EU in the three months preceding the survey (versus 39% for the general population) and 59% who have looked for/accessed information on the EU – versus 48% for the general population – over 40% of which accessing it 'frequently'.

Those with positive perceptions of the EU tend to rely on new media more often – 60% use them frequently versus 52% of the general population – as well as media in Georgian (84% versus 78%) and media in foreign languages other than Russian (17% versus 15%), which primarily means media in English. In fact, 21% of active searchers indicated English as the main language through which they access EU-related information.

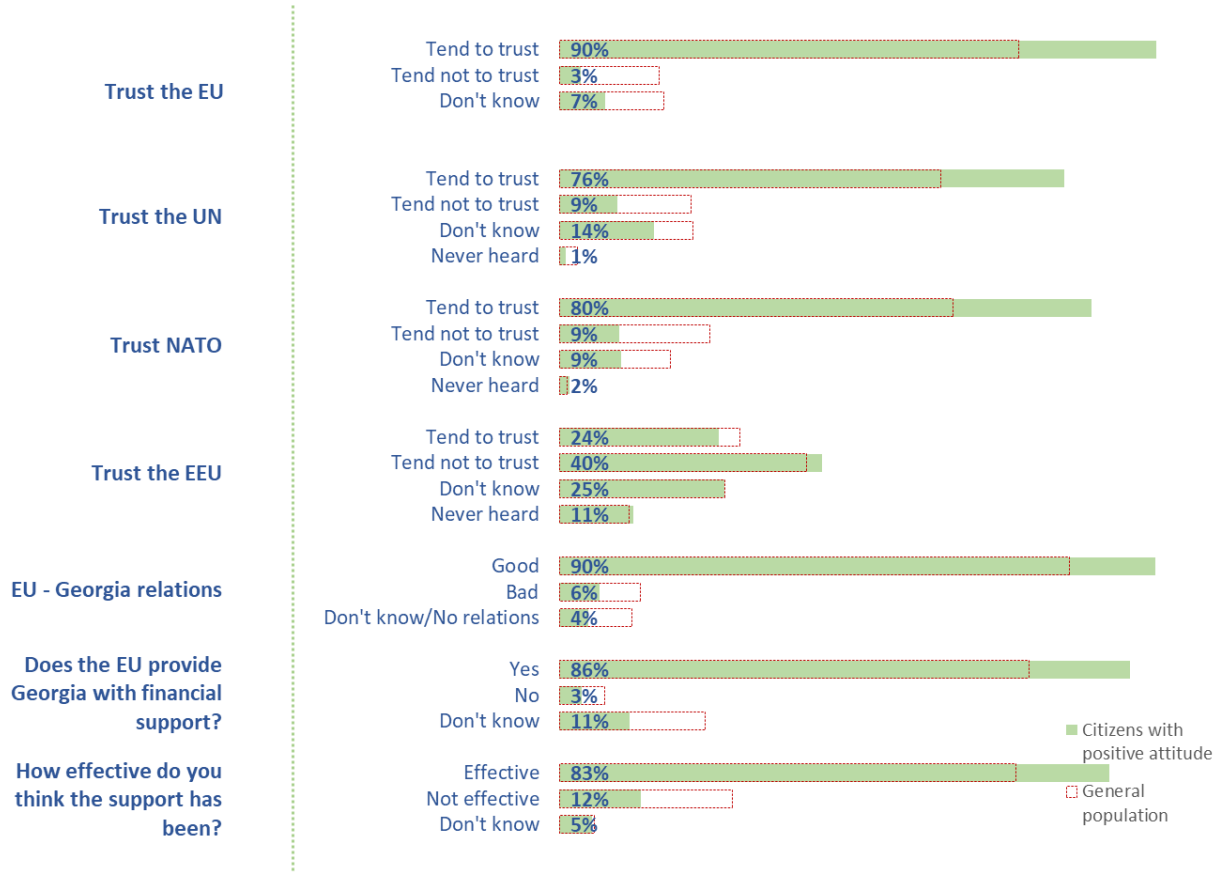
Their interests are varied with a particular focus on 'education and cultural programmes' (39%), 'EU relations with Georgia' (37%), 'economic news' (29%). Around one in ten EU supporters is also interested in 'the opportunities offered by the EU' (11%) and/or 'EU's relations with Eastern partner countries' (9%).

FIGURE 35 – Exposure to information about the EU and media usage among Georgians with a positive image of the EU



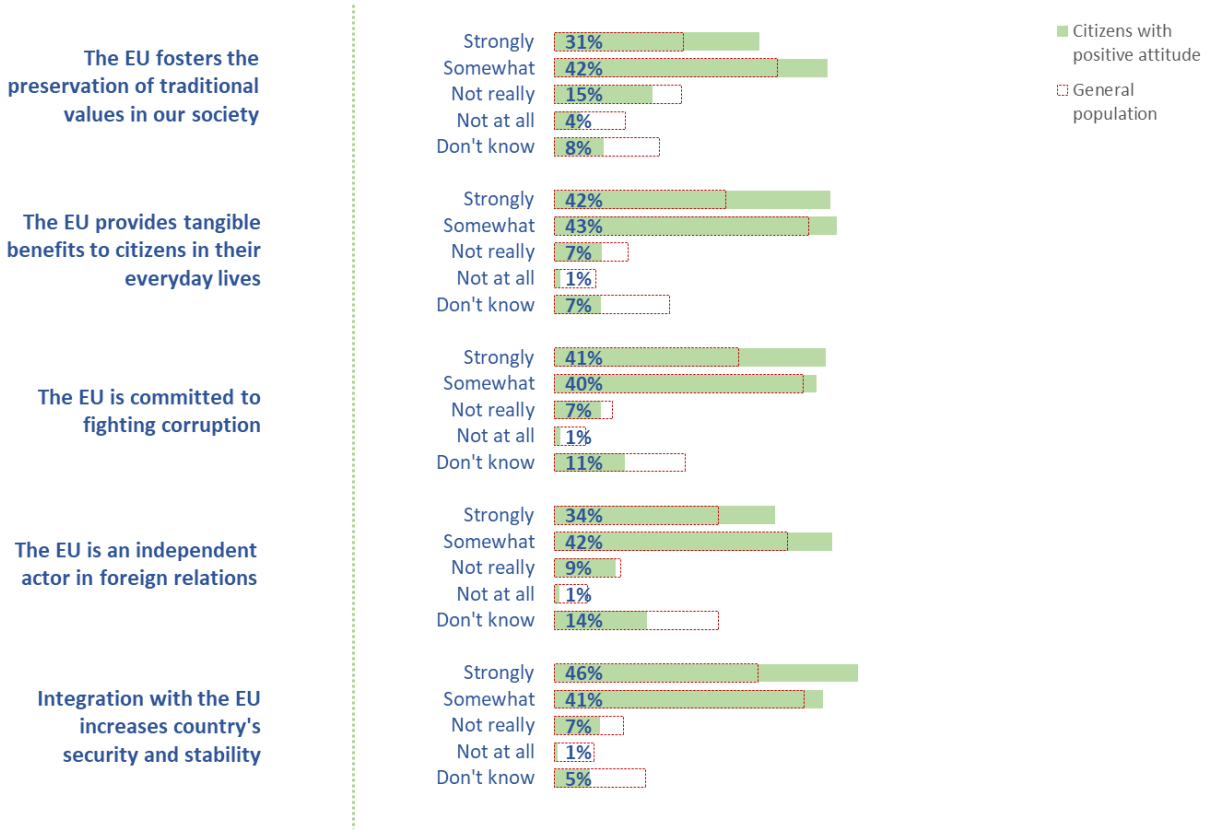
Higher exposure to EU-related information mirrors greater levels of confidence in the Eueopan Union. Nearly all positively oriented individuals have a good image of the relations between Georgia and the EU (90%, up 2%), acknowledge the EU's financial support (86%, up 1%) and, particularly, rate it as 'effective' (83%, up 13%). Trust in NATO (80%) – as well as the UN (76%) – is also widespread, endorsing the population's support of NATO membership. Conversely, only 24% of those who view the EU positively trust the EAEU.

FIGURE 36 – Attitudes towards the EU among Georgians with a positive image of the EU



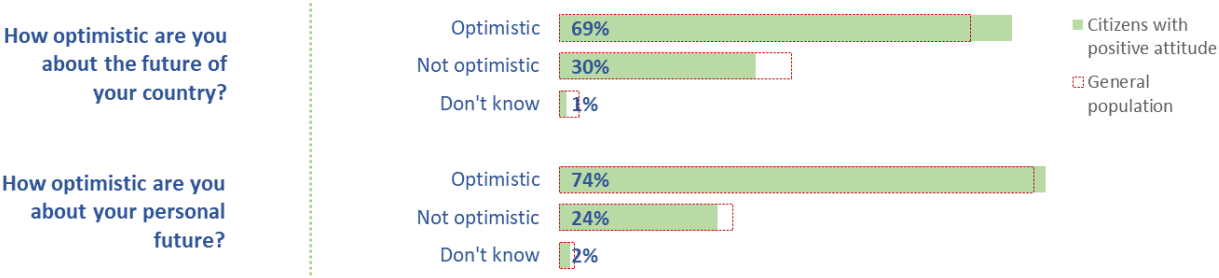
Similarly to previous waves, the 2020 survey also studied the population's views on common beliefs. The overwhelming majority of EU supporters 'strongly' or 'somewhat' agrees with all the statements: that 'integration with the EU increases the country's security and stability' (87% versus 69% for the general population); that 'it provides tangible benefits to citizens in their everyday lives' (85% versus 65%); that 'it is committed to fighting corruption' (81% versus 66%); that 'it fosters the preservation of traditional values in our society' (73% versus 53%); and that 'it is an independent actor in foreign relations' (76% versus 60%). The limited number of 'don't know' responses recorded among EU supporters compared to the general populations (less than 50%) also shows that they are much more confident in sharing their beliefs.

FIGURE 37 – Common beliefs by Georgians with a positive image of the EU



EU supporters tend to see Georgia's future more positively than the general population (69% versus 62%) – although not necessarily their own future (74% versus 72%). 'Unemployment' (64%) and 'the economic crisis' (41%) are their most pressing concerns, but they tend to be less worried about the economic sphere than the general population and tend to mention more often 'territorial conflicts' (24%) and 'war' (9%), as well as 'education' (13%), 'migration' (13%) and 'corruption' (9%) among sources of concern.

FIGURE 38 – View of the future among Georgians with a positive image of the EU

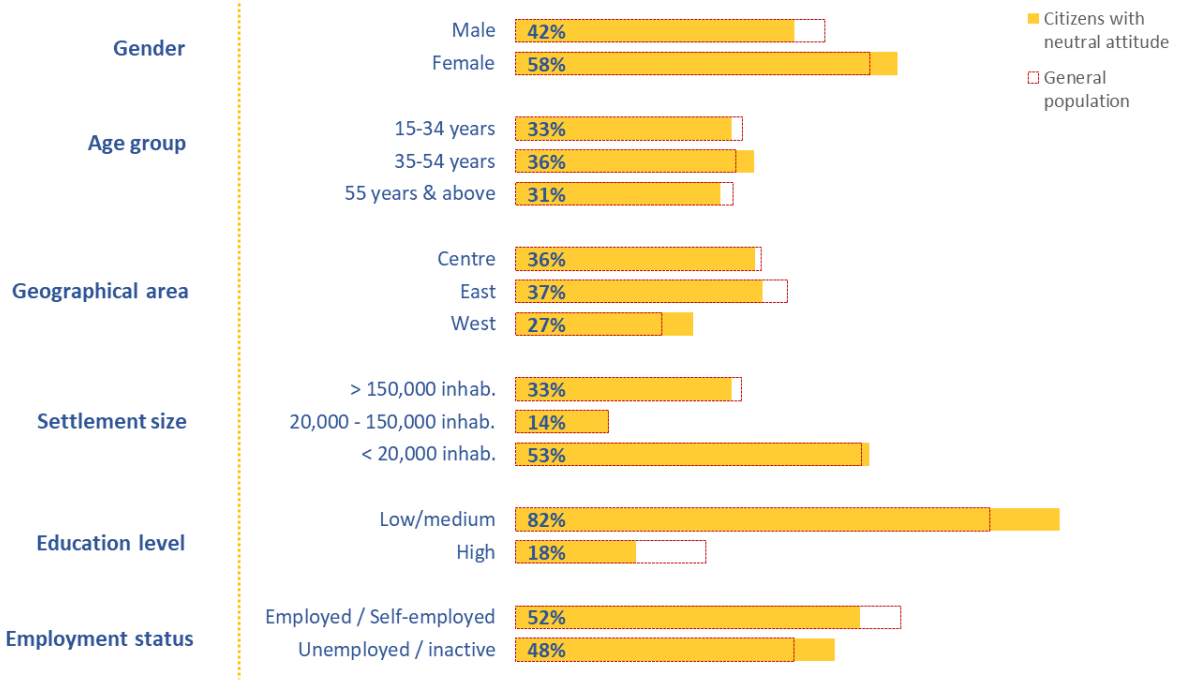


3.5.2. Neutral attitudes

Georgians with a neutral view of the EU account for 40% of the population. **Like the EU supporters, they are strongly characterised by their level of education:** 82% of neutrally oriented citizens have a low to medium level of education and only 18% are highly educated. Neutral attitudes seem also more sensitive to age, gender and, particularly, employment status and are slightly more easily observed among middle-aged individuals (36%), females (58%) and unemployed or inactive citizens (48%).

As for geographical residence, they tend to favour the West of the country (27% versus 22% for the general population) and disregard the eastern part (37% versus 41%) – including Tbilisi, the capital city – and display a slightly greater preference towards smaller – possibly rural – settings (53%).

FIGURE 39 – Socio-demographic characteristics and geographical location of Georgians with a neutral image of the EU

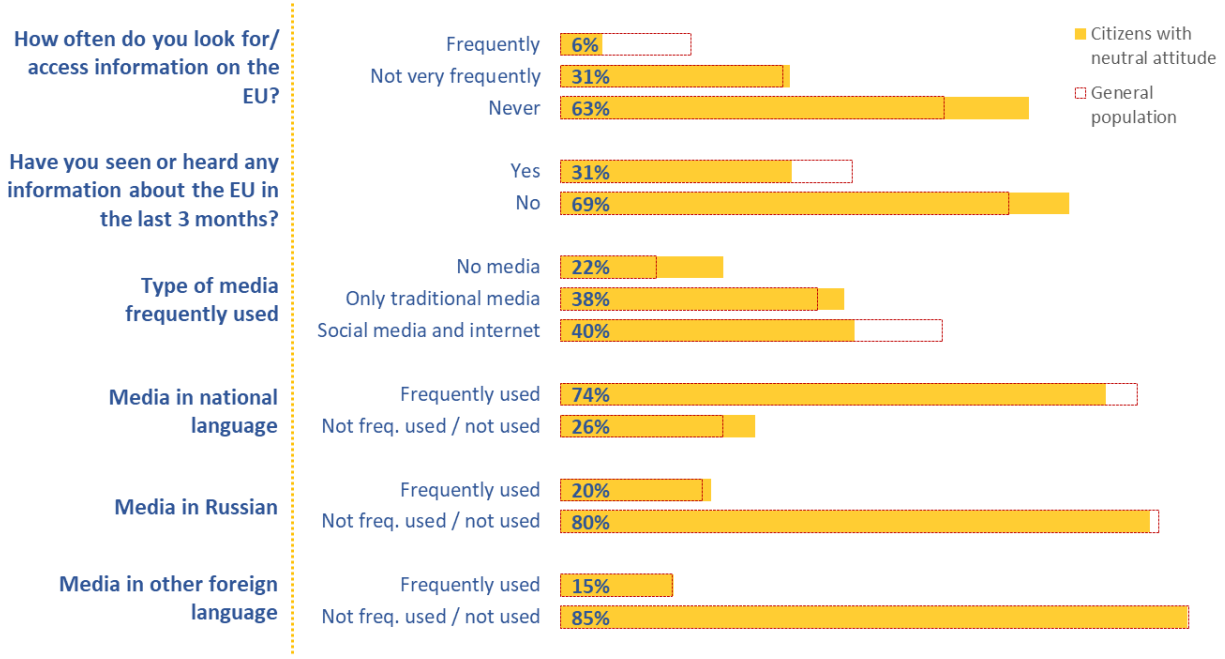


Although levels of both passive and active exposure among neutrally oriented citizens have increased compared to last year, 69% of them have still not heard any information about the EU in the three months preceding the survey and 63% have never looked for/accessed any information on the EU.

Neutrality also stems from occasional usage of media: one in five citizens does not frequently rely on any media (22% versus 7% among EU supporters). Social media has a low penetration (40%) and even media in national language (74%) record figures below those among Georgians positively oriented towards the EU (60% and 84% respectively). Frequent usage of media in Russian is slightly higher (20% versus 16%) and neutrally oriented individuals engaged in active searches of information about the EU do report a greater recourse to sources in Russian (19% versus 9%).

In general, neutrally oriented citizens seem less interested in Georgia's relations with the EU (27%) – and particularly with EaP countries (only 4%) – and prefer to target 'education and cultural programmes' financed by the EU (43%, the most searched), engage in 'socio-political and economic' searches (22-23%) or explore the 'opportunities that the European Union may offer to Georgian citizens' (13%).

FIGURE 40 – Exposure to information about the EU and media usage among Georgians with a neutral image of the EU

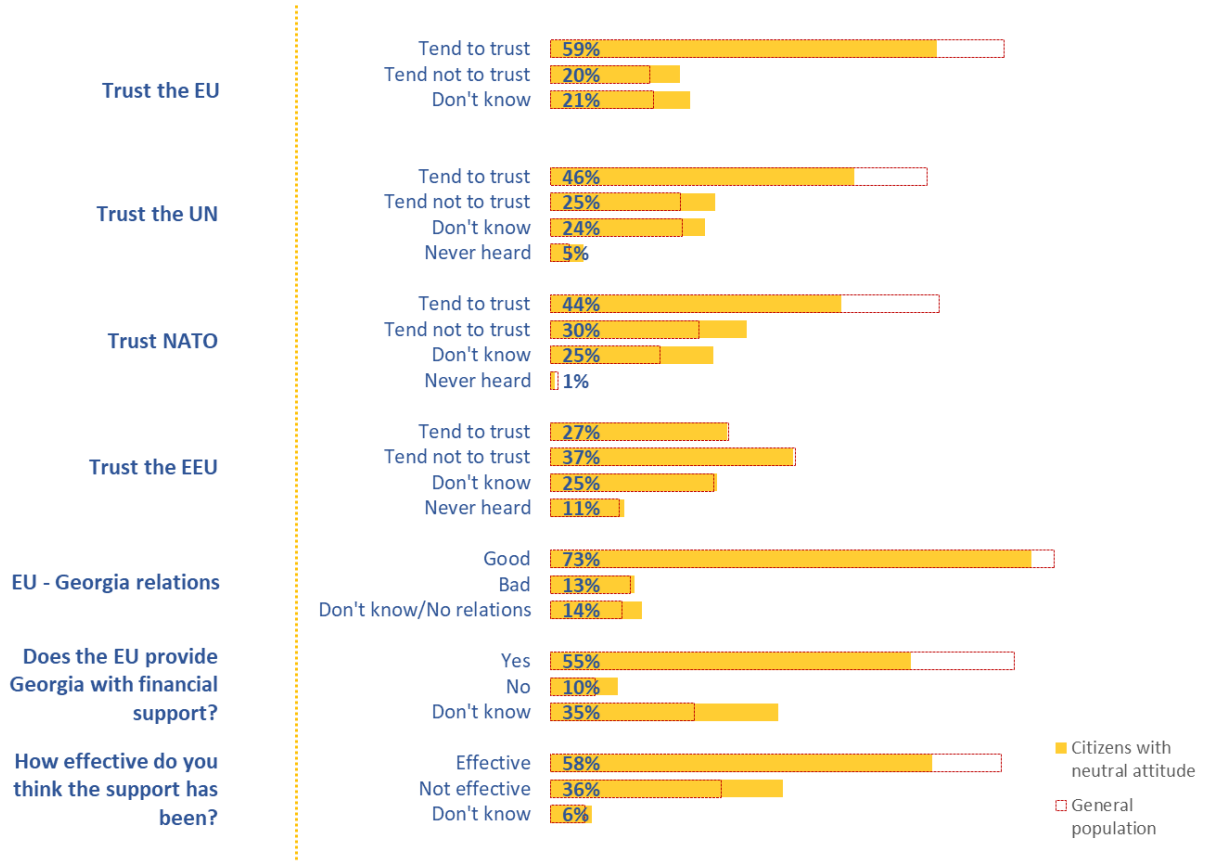


The EU is the only institution trusted by the majority of neutrally oriented citizens (59%, up three percentage points since 2019). Three quarters of neutral citizens would also describe the relations between Georgia and the EU as 'good' – 73%, a figure close to that of the general population (77%).

Levels of acknowledgement of the EU's financial support are much lower (55%). The opinion of neutral citizens reflects the lower levels of exposure to EU-related information, because over one third of them (35%) provided a 'don't know' response (22% and 11% respectively for the general population and the EU supporters). Neutrally oriented citizens are also more critical with regard to the effectiveness of EU support – and 36% rated it as 'not effective' in line with 2019 findings.

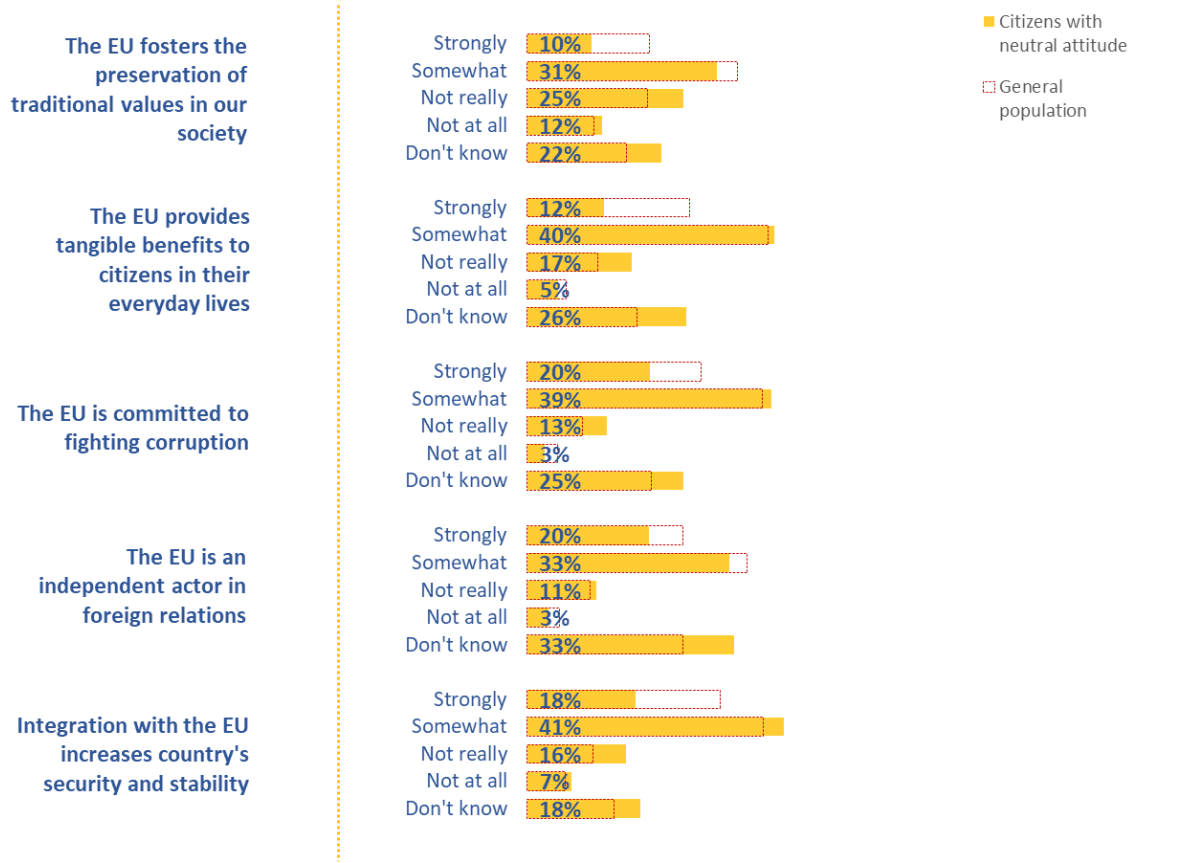
NATO and the United Nations were trusted by around 45% of neutrally oriented citizens – and the Eurasian Economic Union around 25%. In this case too, lower levels of trust were paralleled by greater levels of indecision – the share of 'don't know' responses is around 25% for all three institutions. It is worth noting that an additional 11% of neutrally oriented citizens had never heard of the EAEU.

FIGURE 41 – Attitudes towards the EU among Georgians with a neutral image of the EU



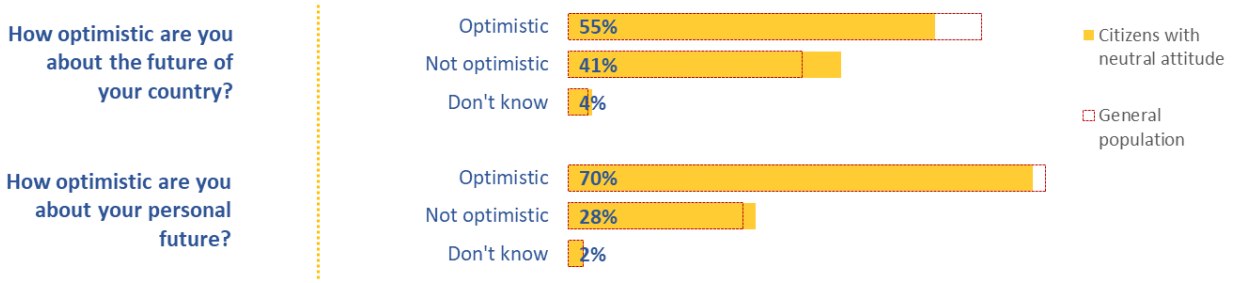
Individuals holding a neutral image of the EU are less likely to express their opinion on common beliefs, as well as to share a strong and positive vision of the EU. The highest share of strong approval was recorded for the statements 'the EU is an independent actor in foreign relations' (20%) and 'it is committed to fighting corruption'; whereas only around 10% of neutrally oriented citizens 'strongly' agree with the fact that 'the EU fosters the preservation of traditional values in our society' and it 'provides tangible benefits to citizens in everyday life'. Between 18% and 33% of neutrally oriented citizens was unable to provide a definite opinion on the five proposed statements.

FIGURE 42 – Common beliefs by Georgians with a neutral image of the EU



Neutral individuals are quite optimistic regarding their personal future (70%), but very much less so regarding the future of Georgia (55%). Around 70% are concerned about 'unemployment' and 40% about the 'economic crisis' and they also seem more worried about 'the low living standards and poverty' (28%) and 'the unaffordability of healthcare' (24%) compared to the general population. One in four individuals mentioned 'territorial conflicts' (17%), one in ten mentioned issues related to 'migration', and 5% to 'war'.

FIGURE 43 – View of the future among Georgians with a neutral image of the EU



4. Annex

TABLE 1 – Perceptions 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 of the EU	Total
Settlement size	Equal to or more than 150,000 inhabitants	56%	38%	3%	3%	**100%**
	Between 20,000 and 150,000 inhabitants	48%	40%	1%	11%	**100%**
	Less than 20,000 inhabitants	45%	41%	11%	3%	**100%**
Gender	Male	47%	36%	11%	6%	**100%**
	Female	51%	43%	4%	2%	**100%**
Age group	15-34 years	47%	38%	9%	6%	**100%**
	35-54 years	49%	44%	3%	4%	**100%**
	55 years & above	51%	38%	9%	2%	**100%**
Education level	Low/medium level	40%	45%	9%	6%	**100%**
	High level	72%	25%	3%	0%	**100%**
Employment status	Employed / Self-employed	50%	36%	9%	5%	**100%**
	Unemployed or temporarily not working / inactive	48%	45%	4%	3%	**100%**
Geographical area	Centre	42%	39%	12%	7%	**100%**
	East	58%	36%	3%	3%	**100%**
	West	44%	48%	6%	2%	**100%**
Total		**49%**	**40%**	**7%**	**4%**	**100%**

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	28%	52%	9%	3%	8%	**100%**
Freedom of the media	22%	57%	8%	4%	9%	**100%**
Human Rights	26%	52%	9%	5%	8%	**100%**
Economic prosperity	28%	50%	12%	2%	8%	**100%**
Freedom of Religion	22%	56%	7%	3%	12%	**100%**
Individual Freedom	22%	55%	9%	3%	11%	**100%**
Democracy	27%	50%	10%	4%	9%	**100%**
Equality and social justice	24%	53%	13%	1%	9%	**100%**
Peace, Security and Stability	25%	51%	11%	4%	9%	**100%**
Respect for other cultures, minorities	22%	53%	10%	4%	11%	**100%**
Rule of Law	24%	48%	11%	4%	13%	**100%**
Honesty & Transparency	19%	46%	16%	5%	14%	**100%**
Absence of corruption	15%	35%	23%	4%	23%	**100%**

Percentages refer to Georgians who have heard of the EU

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. Please tell me if you tend to trust it or tend not to trust it

		Tend to trust	Tend not to trust	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	73%	15%	12%	**100%**
	Between 20,000 and 150,000 inhabitants	74%	9%	17%	**100%**
	Less than 20,000 inhabitants	65%	17%	18%	**100%**
Gender	Male	64%	19%	17%	**100%**
	Female	73%	12%	15%	**100%**
Age group	15-34 years	71%	17%	12%	**100%**
	35-54 years	69%	9%	22%	**100%**
	55 years & above	67%	19%	14%	**100%**
Education level	Low/medium level	63%	17%	20%	**100%**
	High level	84%	9%	7%	**100%**
Employment status	Employed / Self-employed	67%	16%	17%	**100%**
	Unemployed or temporarily not working / inactive	72%	14%	14%	**100%**
Geographical area	Centre	64%	20%	16%	**100%**
	East	74%	14%	12%	**100%**
	West	69%	10%	21%	**100%**
Total		**69%**	**15%**	**16%**	**100%**

Percentages refer to Georgians who have heard of the EU

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	79%	11%	10%	**100%**
	Between 20,000 and 150,000 inhabitants	70%	10%	20%	**100%**
	Less than 20,000 inhabitants	77%	14%	9%	**100%**
Gender	Male	69%	17%	14%	**100%**
	Female	84%	8%	8%	**100%**
Age group	15-34 years	77%	15%	8%	**100%**
	35-54 years	70%	13%	17%	**100%**
	55 years & above	84%	8%	8%	**100%**
Education level	Low/medium level	74%	13%	13%	**100%**
	High level	83%	11%	6%	**100%**
Employment status	Employed / Self-employed	71%	15%	14%	**100%**
	Unemployed or temporarily not working / inactive	85%	8%	7%	**100%**
Geographical area	Centre	72%	14%	14%	**100%**
	East	79%	11%	10%	**100%**
	West	80%	11%	9%	**100%**
Total		**77%**	**12%**	**11%**	**100%**

Percentages refer to Georgians who have heard of the EU

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	72%	6%	22%	**100%**
	Between 20,000 and 150,000 inhabitants	55%	21%	24%	**100%**
	Less than 20,000 inhabitants	74%	4%	22%	**100%**
Gender	Male	70%	5%	25%	**100%**
	Female	72%	8%	20%	**100%**
Age group	15-34 years	76%	5%	19%	**100%**
	35-54 years	66%	7%	27%	**100%**
	55 years & above	70%	8%	22%	**100%**
Education level	Low/medium level	67%	8%	25%	**100%**
	High level	81%	4%	15%	**100%**
Employment status	Employed / Self-employed	74%	5%	21%	**100%**
	Unemployed or temporarily not working / inactive	66%	9%	25%	**100%**
Geographical area	Centre	69%	10%	21%	**100%**
	East	73%	5%	22%	**100%**
	West	68%	5%	27%	**100%**
Total		**71%**	**7%**	**22%**	**100%**

Percentages refer to Georgians who have heard of the EU

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	70%	25%	5%	**100%**
	Between 20,000 and 150,000 inhabitants	68%	29%	3%	**100%**
	Less than 20,000 inhabitants	68%	26%	6%	**100%**
Gender	Male	61%	34%	5%	**100%**
	Female	75%	19%	6%	**100%**
Age group	15-34 years	68%	25%	7%	**100%**
	35-54 years	69%	28%	3%	**100%**
	55 years & above	69%	26%	5%	**100%**
Education level	Low/medium level	63%	30%	7%	**100%**
	High level	81%	17%	2%	**100%**
Employment status	Employed / Self-employed	68%	29%	3%	**100%**
	Unemployed or temporarily not working / inactive	71%	21%	8%	**100%**
Geographical area	Centre	62%	33%	5%	**100%**
	East	72%	25%	3%	**100%**
	West	75%	17%	8%	**100%**
Total		**69%**	**26%**	**5%**	**100%**

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

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	61%	39%	**100%**
	Between 20,000 and 150,000 inhabitants	69%	31%	**100%**
	Less than 20,000 inhabitants	59%	41%	**100%**
Gender	Male	66%	34%	**100%**
	Female	56%	44%	**100%**
Age group	15-34 years	56%	44%	**100%**
	35-54 years	68%	32%	**100%**
	55 years & above	60%	40%	**100%**
Education level	Low/medium level	59%	41%	**100%**
	High level	66%	34%	**100%**
Employment status	Employed / Self-employed	62%	38%	**100%**
	Unemployed or temporarily not working / inactive	60%	40%	**100%**
Geographical area	Centre	64%	36%	**100%**
	East	59%	41%	**100%**
	West	59%	41%	**100%**
Total		**61%**	**39%**	**100%**

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

TABLE 8 – 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	27%	49%	12%	5%	7%	**100%**
Improved infrastructure	13%	51%	17%	9%	10%	**100%**
Access to more products and services	13%	43%	21%	7%	16%	**100%**
Better education	13%	42%	26%	9%	10%	**100%**
Improved quality of the justice system	11%	44%	21%	8%	16%	**100%**
Improved quality of health-care system	11%	42%	23%	11%	13%	**100%**
Improved trade	9%	37%	28%	11%	15%	**100%**
Improved democracy	7%	38%	30%	12%	13%	**100%**
Greater economic development	7%	33%	34%	17%	9%	**100%**
Improved agricultural production	7%	31%	26%	19%	17%	**100%**
Better law enforcement	7%	30%	32%	15%	16%	**100%**
Greater employment opportunities	6%	28%	30%	27%	9%	**100%**
Less corruption	5%	23%	36%	16%	20%	**100%**

Percentages refer to Georgians who have heard of the EU

TABLE 9 – 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
Create greater employment opportunities	18%	42%
Improve quality of health-care system	16%	42%
Promote a better education	14%	36%
Promote economic development	13%	47%
Improve democracy	7%	15%
Improve agricultural production	7%	27%
Improve quality of the justice system	5%	15%
Reduce corruption	4%	15%
Increase tourism	4%	14%
Improve trade	4%	9%
Improve infrastructure (streets, sewage, water, etc.)	2%	6%
Promote better law enforcement	2%	8%
Promote access to more products and services	0%	3%

Percentages refer to Georgians who have heard of the EU

TABLE 10 – 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 the Internet	Total	
Settlement size	Equal to or more than 150,000 inhabitants	9%	27%	64%	100%	41%
	Between 20,000 and 150,000 inhabitants	14%	39%	47%	100%	56%
	Less than 20,000 inhabitants	16%	39%	45%	100%	53%
Gender	Male	10%	35%	55%	100%	51%
	Female	16%	35%	49%	100%	48%
Age group	15-34 years	13%	6%	81%	100%	49%
	35-54 years	13%	34%	53%	100%	47%
	55 years & above	15%	66%	19%	100%	52%
Education level	Low/medium level	16%	41%	43%	100%	50%
	High level	7%	20%	73%	100%	49%
Employment status	Employed/ Self-employed	11%	31%	58%	100%	53%
	Unemployed or temporarily not working / inactive	18%	40%	42%	100%	44%
Geographical area	Centre	18%	38%	44%	100%	61%
	East	12%	26%	62%	100%	42%
	West	9%	46%	45%	100%	45%
Total		13%	35%	52%	100%	49%

TABLE 11 – Frequent usage of media in Georgian, Russian and other languages

		Individuals that 'always' or 'often' use media		
		In national language	In Russian	In other foreign language
Settlement size	Equal to or more than 150,000 inhabitants	78%	21%	20%
	Between 20,000 and 150,000 inhabitants	81%	23%	29%
	Less than 20,000 inhabitants	77%	17%	8%
Gender	Male	74%	19%	15%
	Female	81%	20%	15%
Age group	15-34 years	74%	13%	19%
	35-54 years	81%	24%	16%
	55 years & above	79%	20%	10%
Education level	Low/medium level	76%	19%	14%
	High level	83%	21%	19%
Employment status	Employed / Self-employed	78%	21%	15%
	Unemployed or temporarily not working / inactive	78%	16%	15%
Geographical area	Centre	73%	23%	12%
	East	79%	21%	20%
	West	85%	10%	10%
Total		**78%**	**19%**	**15%**

TABLE 12 – 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	28%	11%	61%	**100%**
tv	63%	24%	13%	**100%**
radio	16%	16%	69%	**100%**
print media	25%	23%	53%	**100%**
social media	42%	21%	37%	**100%**
internet	51%	14%	36%	**100%**
word of mouth	46%	38%	16%	**100%**
our country's media in national language	66%	22%	12%	**100%**
our country's media in Russian	18%	33%	50%	**100%**
our country's media in other language	17%	26%	57%	**100%**
foreign media in Russian	14%	32%	54%	**100%**
foreign media in other languages	18%	23%	59%	**100%**

TABLE 13 – 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	42%	58%	**100%**
	Between 20,000 and 150,000 inhabitants	48%	52%	**100%**
	Less than 20,000 inhabitants	36%	64%	**100%**
Gender	Male	42%	58%	**100%**
	Female	37%	63%	**100%**
Age group	15-34 years	45%	55%	**100%**
	35-54 years	34%	66%	**100%**
	55 years & above	40%	60%	**100%**
Education level	Low/medium level	37%	63%	**100%**
	High level	46%	54%	**100%**
Employment status	Employed / Self-employed	41%	59%	**100%**
	Unemployed or temporarily not working / inactive	37%	63%	**100%**
Geographical area	Centre	41%	59%	**100%**
	East	41%	59%	**100%**
	West	33%	67%	**100%**
Total		**39%**	**61%**	**100%**

Percentages refer to Georgians who have heard of the EU

TABLE 14 – 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	59%	29%	4%	8%	**100%**
	Between 20,000 and 150,000 inhabitants	43%	47%	3%	7%	**100%**
	Less than 20,000 inhabitants	63%	24%	1%	12%	**100%**
Gender	Male	63%	24%	2%	11%	**100%**
	Female	56%	33%	3%	8%	**100%**
Age group	15-34 years	64%	26%	1%	9%	**100%**
	35-54 years	55%	31%	3%	11%	**100%**
	55 years & above	57%	30%	4%	9%	**100%**
Education level	Low/medium level	57%	28%	3%	12%	**100%**
	High level	65%	30%	2%	3%	**100%**
Employment status	Employed / Self-employed	61%	29%	2%	8%	**100%**
	Unemployed or temporarily not working / inactive	57%	28%	4%	11%	**100%**
Geographical area	Centre	62%	24%	2%	12%	**100%**
	East	58%	31%	4%	7%	**100%**
	West	57%	31%	1%	11%	**100%**
Total		**59%**	**29%**	**2%**	**10%**	**100%**

Percentages refer to Georgians who have heard of the EU

TABLE 15 – 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	22%	32%	46%	**100%**
	Between 20,000 and 150,000 inhabitants	11%	44%	45%	**100%**
	Less than 20,000 inhabitants	17%	26%	57%	**100%**
Gender	Male	26%	24%	50%	**100%**
	Female	11%	36%	53%	**100%**
Age group	15-34 years	21%	39%	40%	**100%**
	35-54 years	15%	34%	51%	**100%**
	55 years & above	17%	18%	65%	**100%**
Education level	Low/medium level	14%	26%	60%	**100%**
	High level	26%	43%	31%	**100%**
Employment status	Employed / Self-employed	19%	33%	48%	**100%**
	Unemployed or temporarily not working / inactive	16%	27%	57%	**100%**
Geographical area	Centre	18%	30%	52%	**100%**
	East	22%	32%	46%	**100%**
	West	11%	28%	61%	**100%**
Total		**18%**	**30%**	**52%**	**100%**

Percentages refer to Georgians who have heard of the EU

TABLE 16 – 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	29%	68%	3%	**100%**
	Between 20,000 and 150,000 inhabitants	23%	74%	3%	**100%**
	Less than 20,000 inhabitants	18%	80%	2%	**100%**
Gender	Male	24%	75%	1%	**100%**
	Female	21%	75%	4%	**100%**
Age group	15-34 years	28%	69%	3%	**100%**
	35-54 years	22%	77%	1%	**100%**
	55 years & above	17%	79%	4%	**100%**
Education level	Low/medium level	19%	78%	3%	**100%**
	High level	32%	68%	0%	**100%**
Employment status	Employed / Self-employed	22%	77%	1%	**100%**
	Unemployed or temporarily not working / inactive	24%	71%	5%	**100%**
Geographical area	Centre	19%	79%	2%	**100%**
	East	26%	73%	1%	**100%**
	West	23%	71%	6%	**100%**
Total		**22%**	**75%**	**3%**	**100%**

TABLE 17 – 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	70%	29%	1%	**100%**
	Between 20,000 and 150,000 inhabitants	76%	22%	2%	**100%**
	Less than 20,000 inhabitants	54%	42%	4%	**100%**
Gender	Male	67%	31%	2%	**100%**
	Female	59%	39%	2%	**100%**
Age group	15-34 years	65%	34%	1%	**100%**
	35-54 years	67%	32%	1%	**100%**
	55 years & above	54%	40%	6%	**100%**
Education level	Low/medium level	58%	39%	3%	**100%**
	High level	73%	27%	0%	**100%**
Employment status	Employed / Self-employed	67%	31%	2%	**100%**
	Unemployed or temporarily not working / inactive	56%	41%	3%	**100%**
Geographical area	Centre	64%	33%	3%	**100%**
	East	66%	33%	1%	**100%**
	West	53%	42%	5%	**100%**
Total		**62%**	**35%**	**3%**	**100%**

TABLE 18 – 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%	22%	1%	**100%**
	Between 20,000 and 150,000 inhabitants	81%	18%	1%	**100%**
	Less than 20,000 inhabitants	65%	32%	3%	**100%**
Gender	Male	74%	23%	3%	**100%**
	Female	69%	29%	2%	**100%**
Age group	15-34 years	86%	12%	2%	**100%**
	35-54 years	72%	27%	1%	**100%**
	55 years & above	55%	40%	5%	**100%**
Education level	Low/medium level	68%	30%	2%	**100%**
	High level	80%	18%	2%	**100%**
Employment status	Employed / Self-employed	74%	24%	2%	**100%**
	Unemployed or temporarily not working / inactive	68%	29%	3%	**100%**
Geographical area	Centre	69%	28%	3%	**100%**
	East	75%	24%	1%	**100%**
	West	68%	29%	3%	**100%**
Total		**72%**	**26%**	**2%**	**100%**

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