



September 2022

Taking Georgians' pulse

Findings from August 2022 face to face survey

Carried out for NDI by CRRC Georgia

Research is funded by the United Kingdom of Great Britain and Northern Ireland through the foreign, commonwealth and development office's good governance fund.

AUGUST POLL

- ❖ Fieldwork dates: 14 July – 15 August 2022
- ❖ 2,104 completed interviews (28% response rate)
- ❖ The average margin of error is +/- 2%
- ❖ Note: the margin of error is different for every response
- ❖ Shift from face-to-face to telephone method might affect a change on historical slides.

SAMPLE

- ❖ A nationally representative sample (excluding occupied territories) including oversampled areas of the Capital, large Urban, Small Urban, Rural and Minority Settlements;
- ❖ Large Urban stratum consists of cities with a population 40K or more: Batumi, Zugdidi, Rustavi, Poti, Gori, and Kutaisi;
- ❖ Small Urban stratum consists of the rest of the cities/dabas holding urban status;
- ❖ Minority stratum consists of settlements, where ethnic minorities (mostly Armenians & Azerbaijani) compose at least 40% of the voters in given settlement. Settlements within this stratum are dispersed throughout Kvemo Kartli, Samtskhe-Javakheti & Kakheti regions.

Methodology

We use random sampling at all stages. We use a complex survey design:

- ❖ Stratification – dividing population in relatively homogenous sub-groups; and
- ❖ Clustering – randomly selecting small geographic areas for each sub-group (stratum).
- ❖ Households are selected via random route sampling;
- ❖ Respondents are selected using a Kish table;
- ❖ Randomly selected households and individuals are not substituted;
- ❖ All interviews were conducted face-to-face with 18+ population, using tablets, in Georgian, Armenian, and Azerbaijani languages.

Quality control

- ❖ All interviewers receive special training;
- ❖ CRRC central office coordinators conduct quality control interviews.

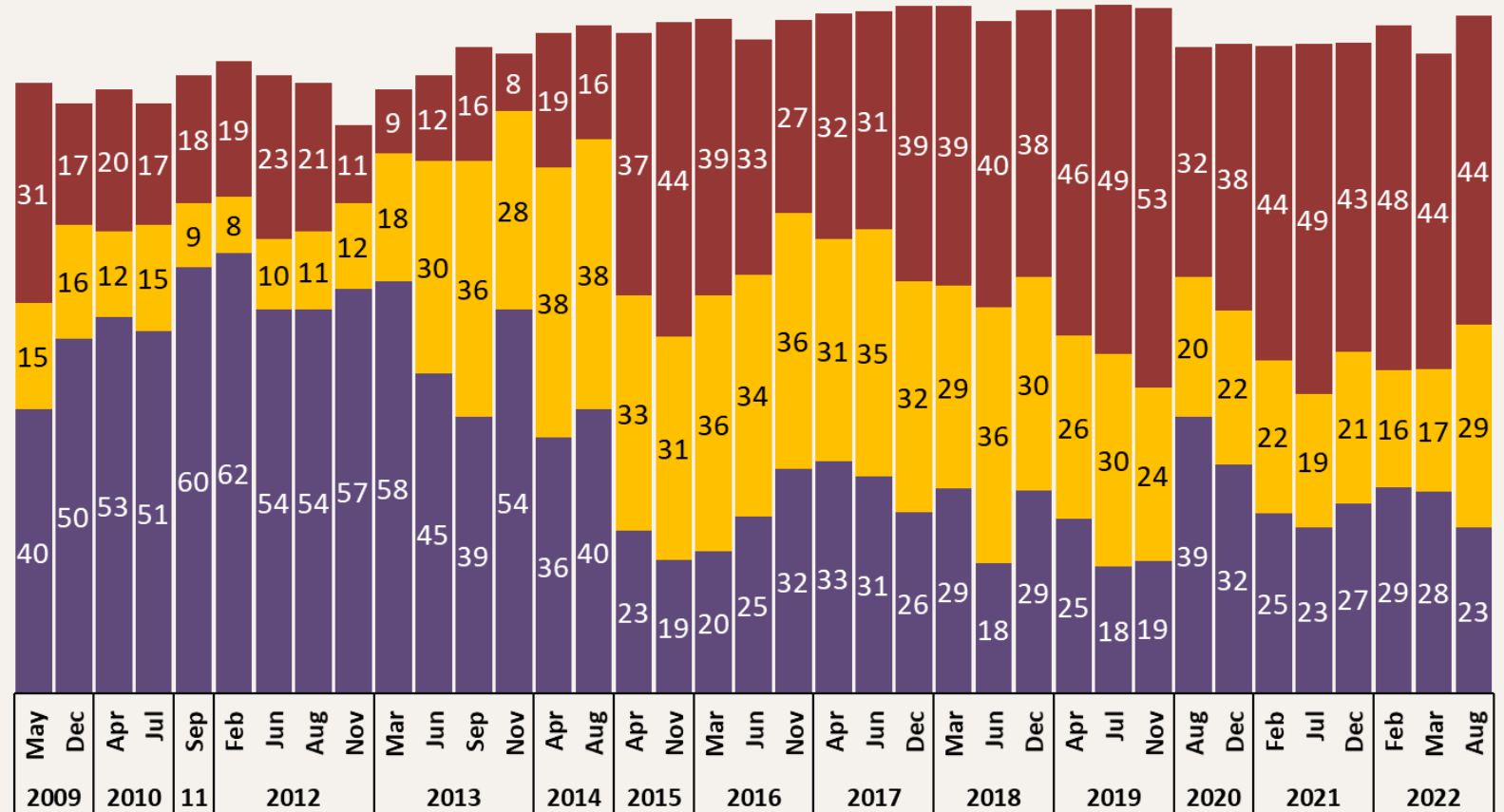
General mood, state of
democracy

Plurality say Georgia going in the wrong direction

Tbilisi residents and
opposition supporters are
the most dissatisfied with
the country direction.

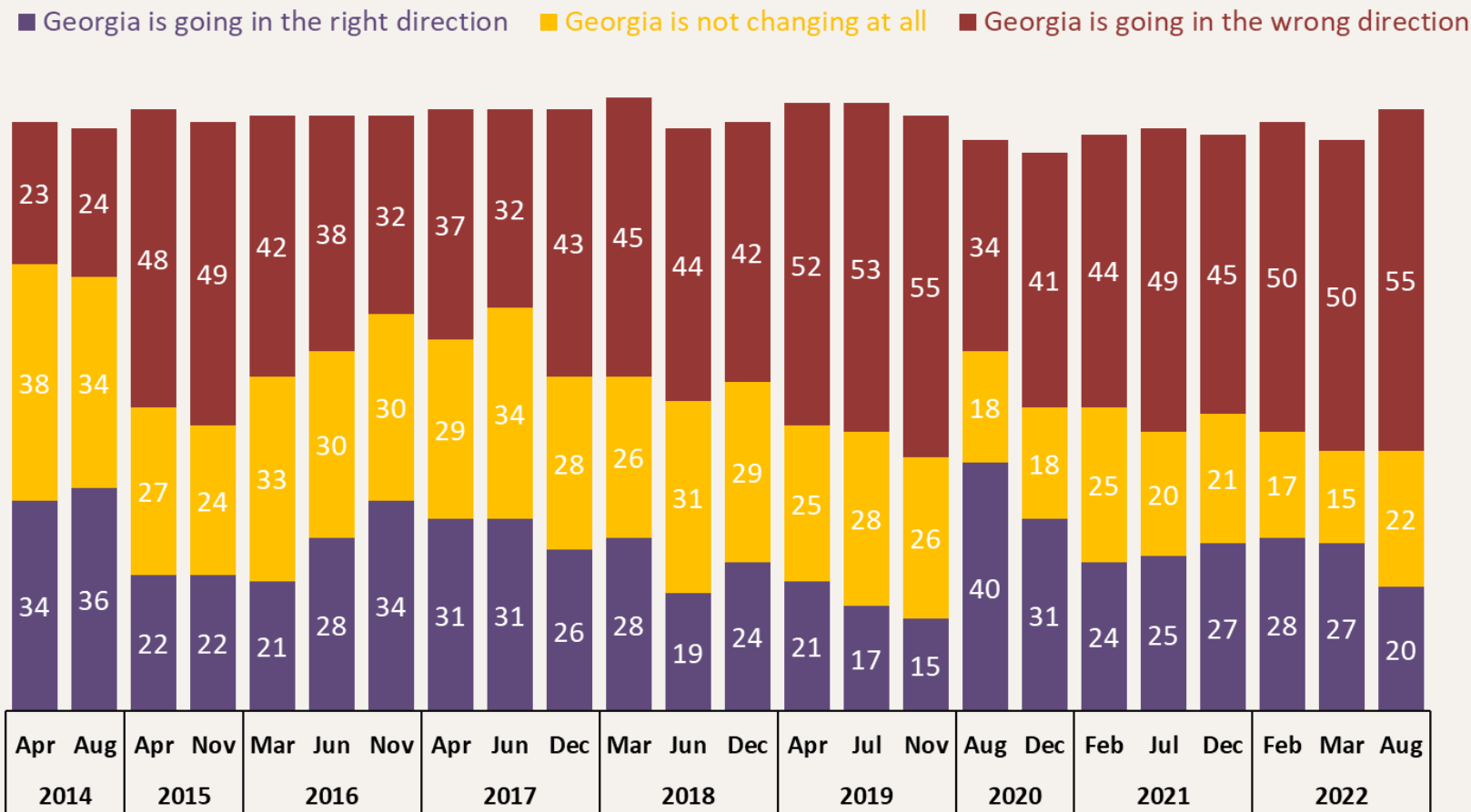
There are different opinions regarding the direction in which
Georgia is going. Using this card, please, rate your answer. (q1)

■ Georgia is going in the right direction ■ Georgia is not changing at all ■ Georgia is going in the wrong direction



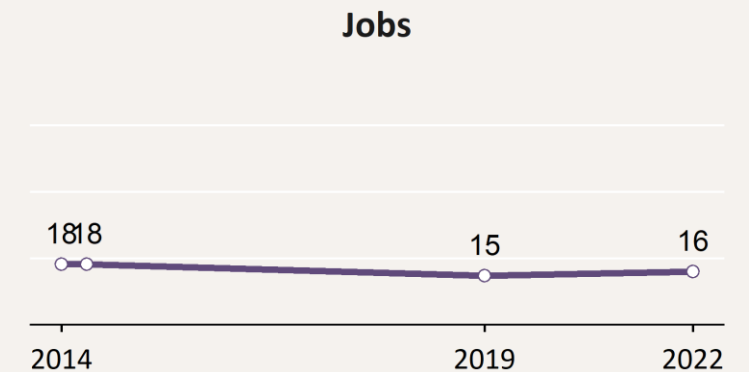
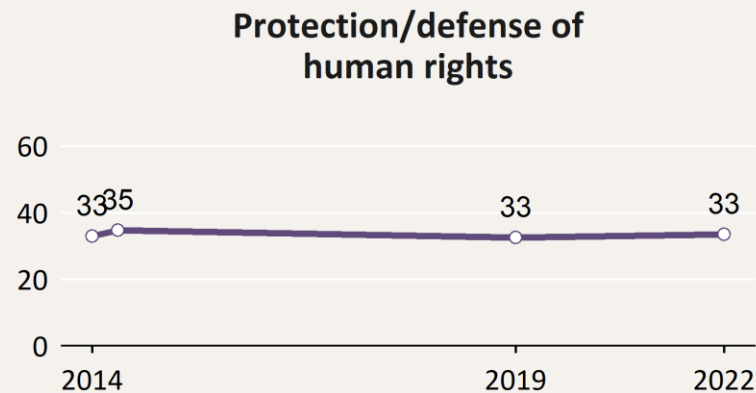
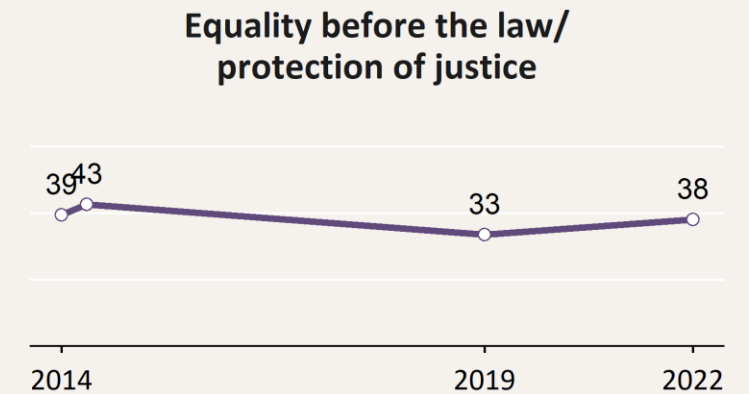
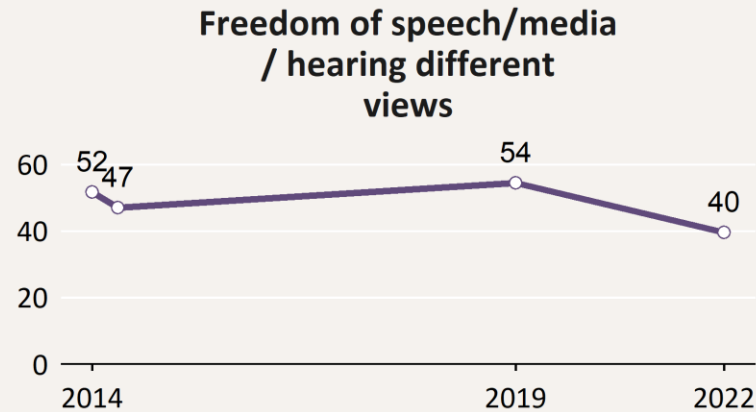
Majority of Tbilisi residents not happy about the country direction

There are different opinions regarding the direction in which Georgia is going. Using this card, please, rate your answer. (q1)
Tbilisi only.



Georgians say
democracy is,
first of all,
equality before
the law and
freedom of
speech

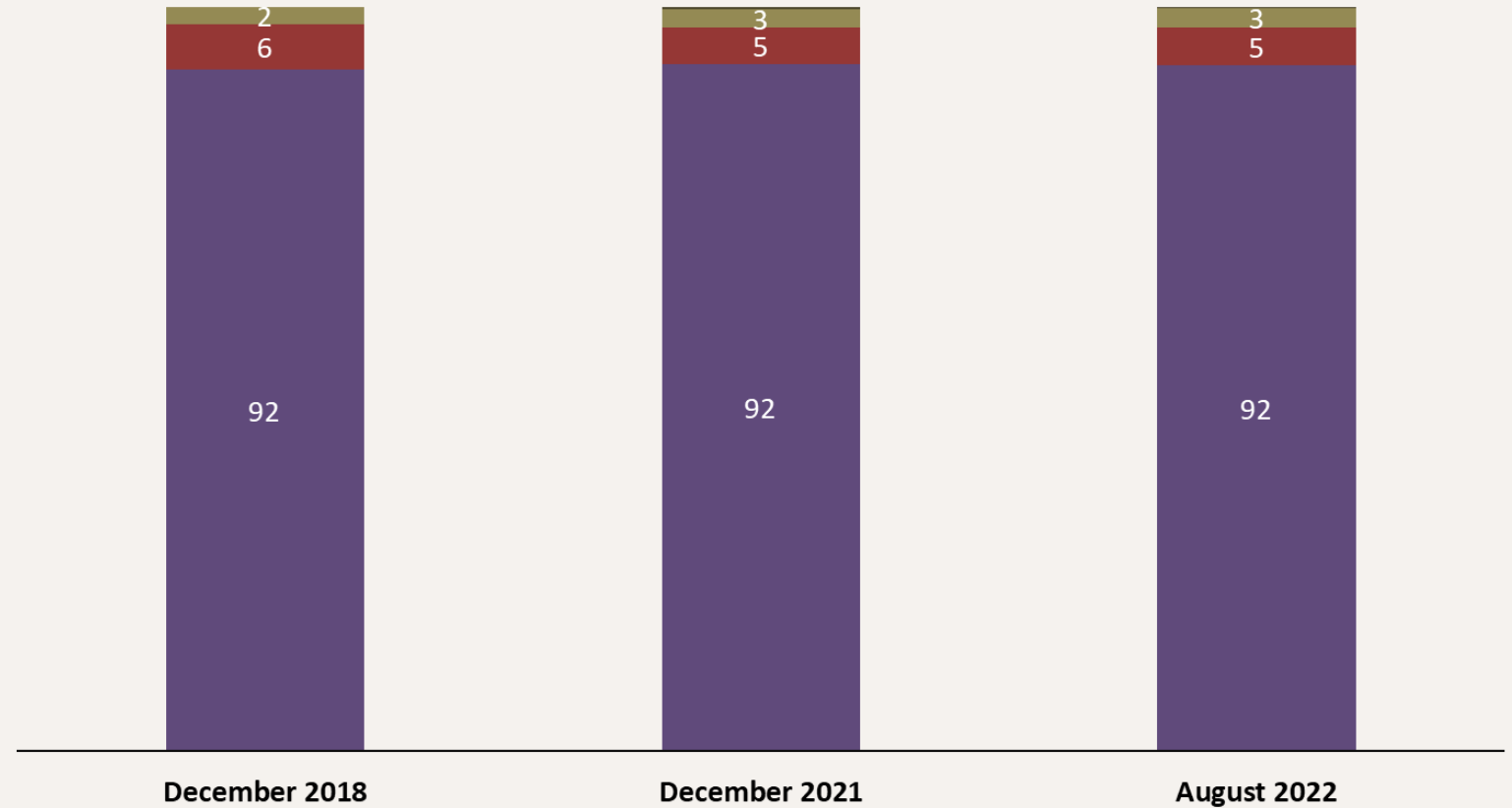
**What does democracy mean to you? Up to three things.
Open question. (q8)**



Living in a democratic country is important for majority of Georgians

Overall, how important or unimportant is it for you to live in a democratic country? (q9)

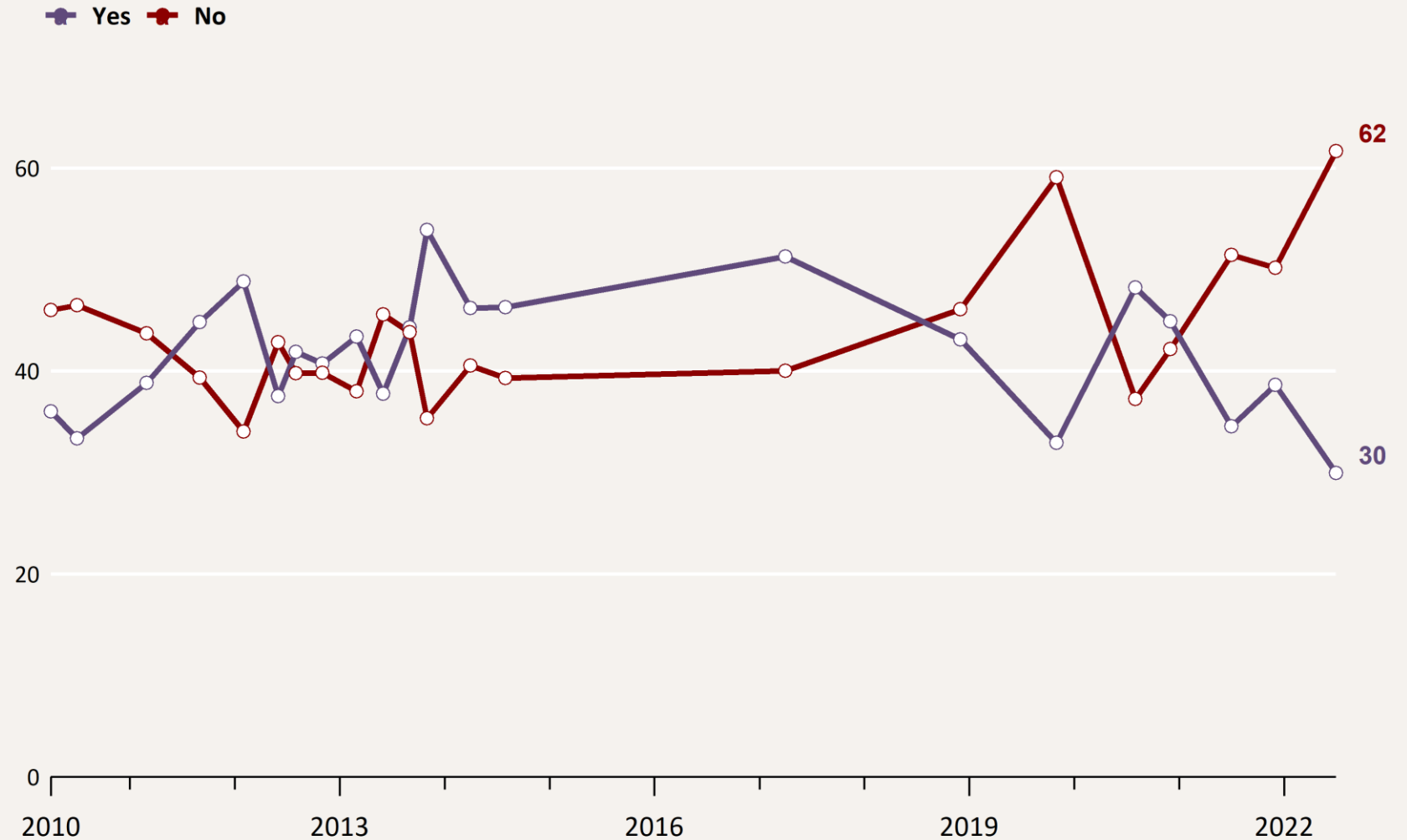
■ Important ■ Not important ■ DK ■ RA



Majority say Georgia not a democracy

Citizens living in the ethnic minority settlements and supporters of Georgian Dream are more likely to say that Georgia is a democracy.

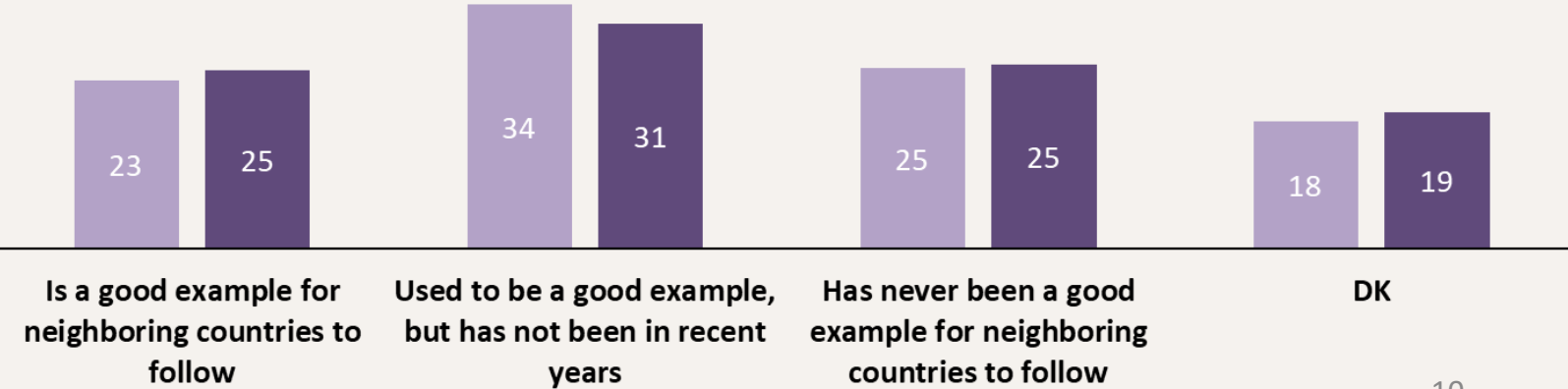
In your opinion, is Georgia a democracy now? (q10)



Majority: Georgia not a good example for neighbors

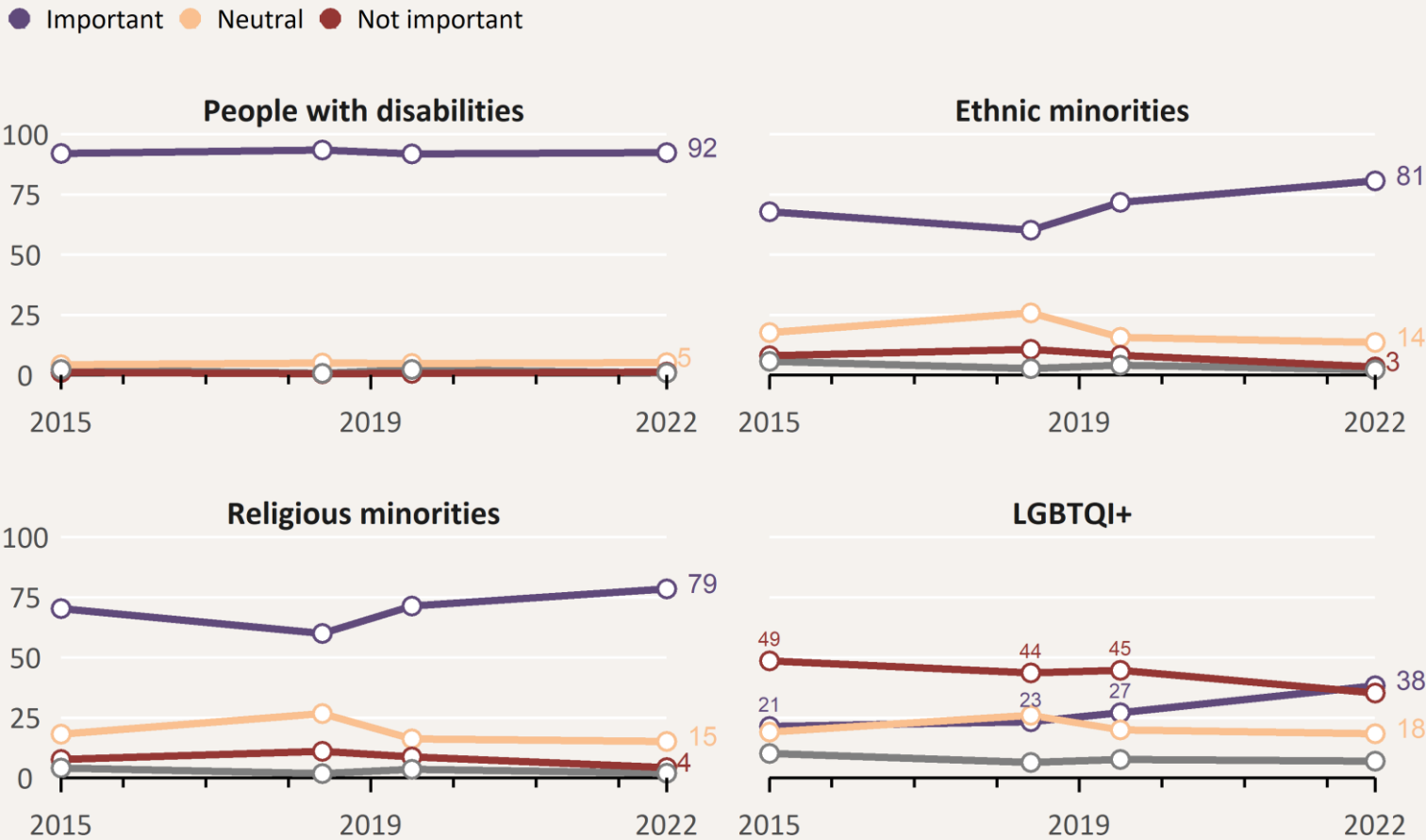
Which statement comes closest to your view?
Democracy in Georgia ... (q11)

December 2021 August 2022



Increase in support for protection of LGBTQI+ rights

Please tell me how important or unimportant is the protection of rights of the following minorities? (q42)



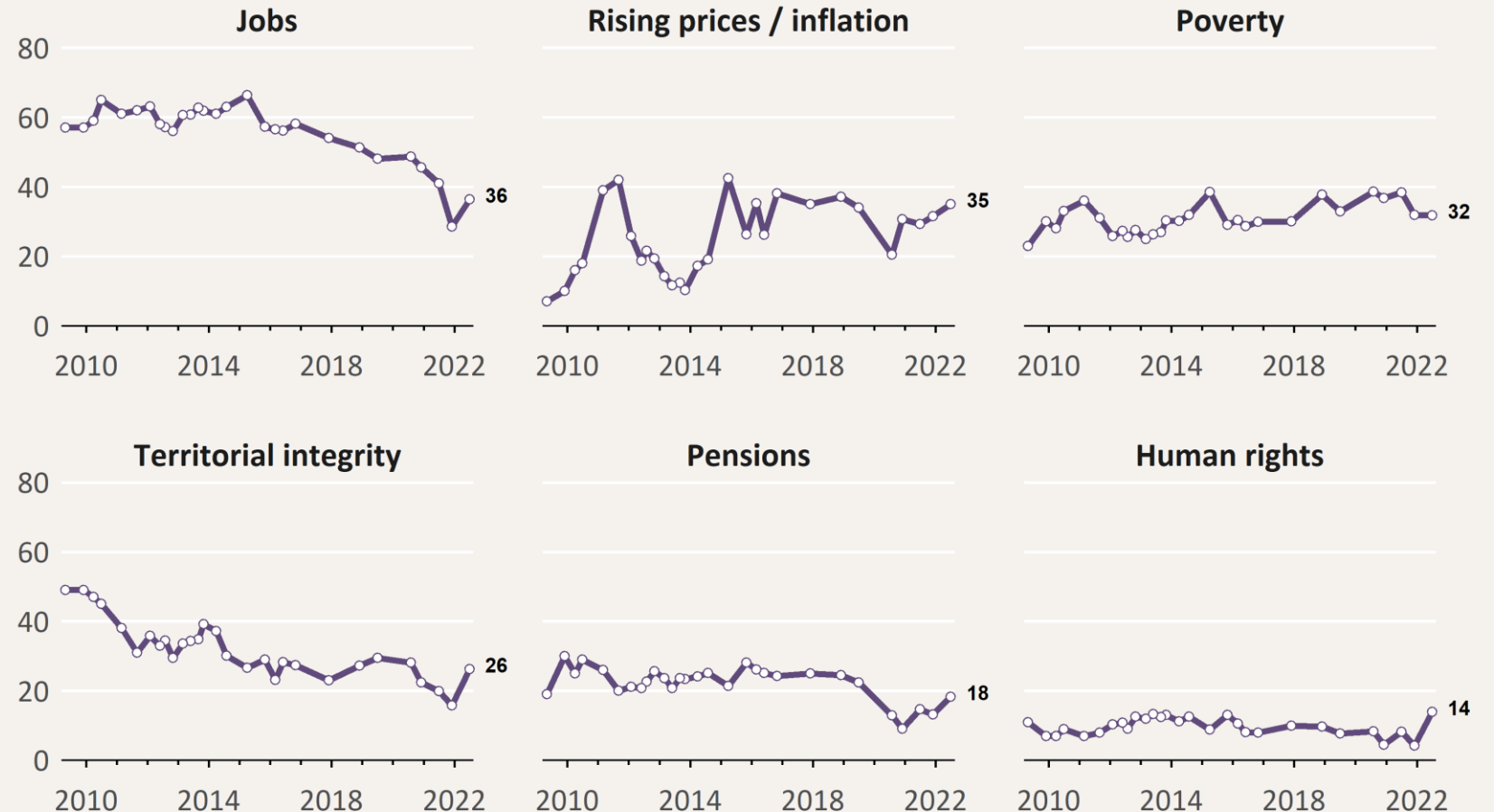
National and local issues

Jobs, rising prices and poverty remain top national concerns

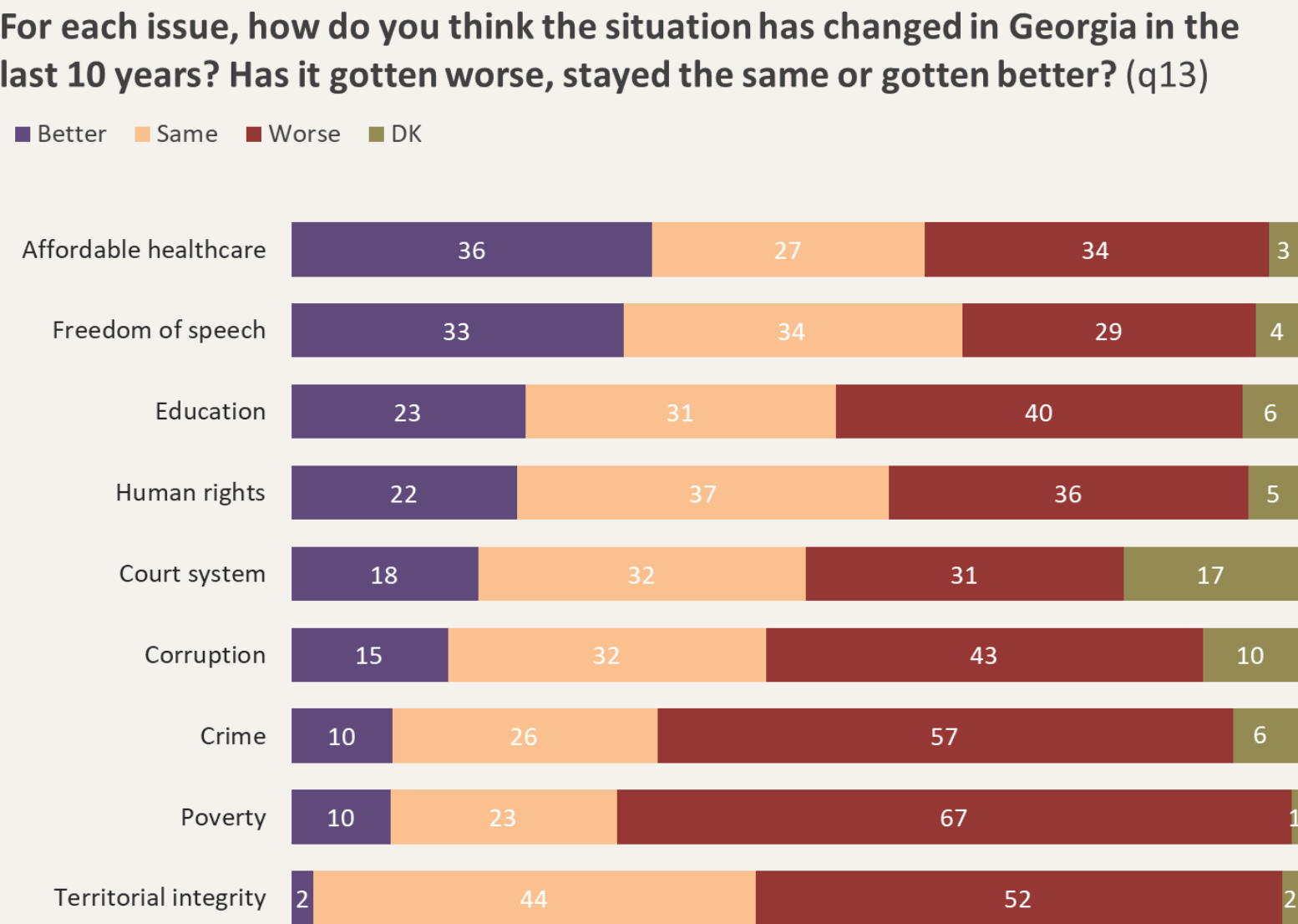
Ethnic minorities are more likely than others to name poverty; unlike the rest of Georgian citizens, ethnic minorities don't name territorial integrity among the most important national issues.

National priorities are similar across partisan lines.

What are the most important national issues facing you and your family? Please name up to three. (q12)

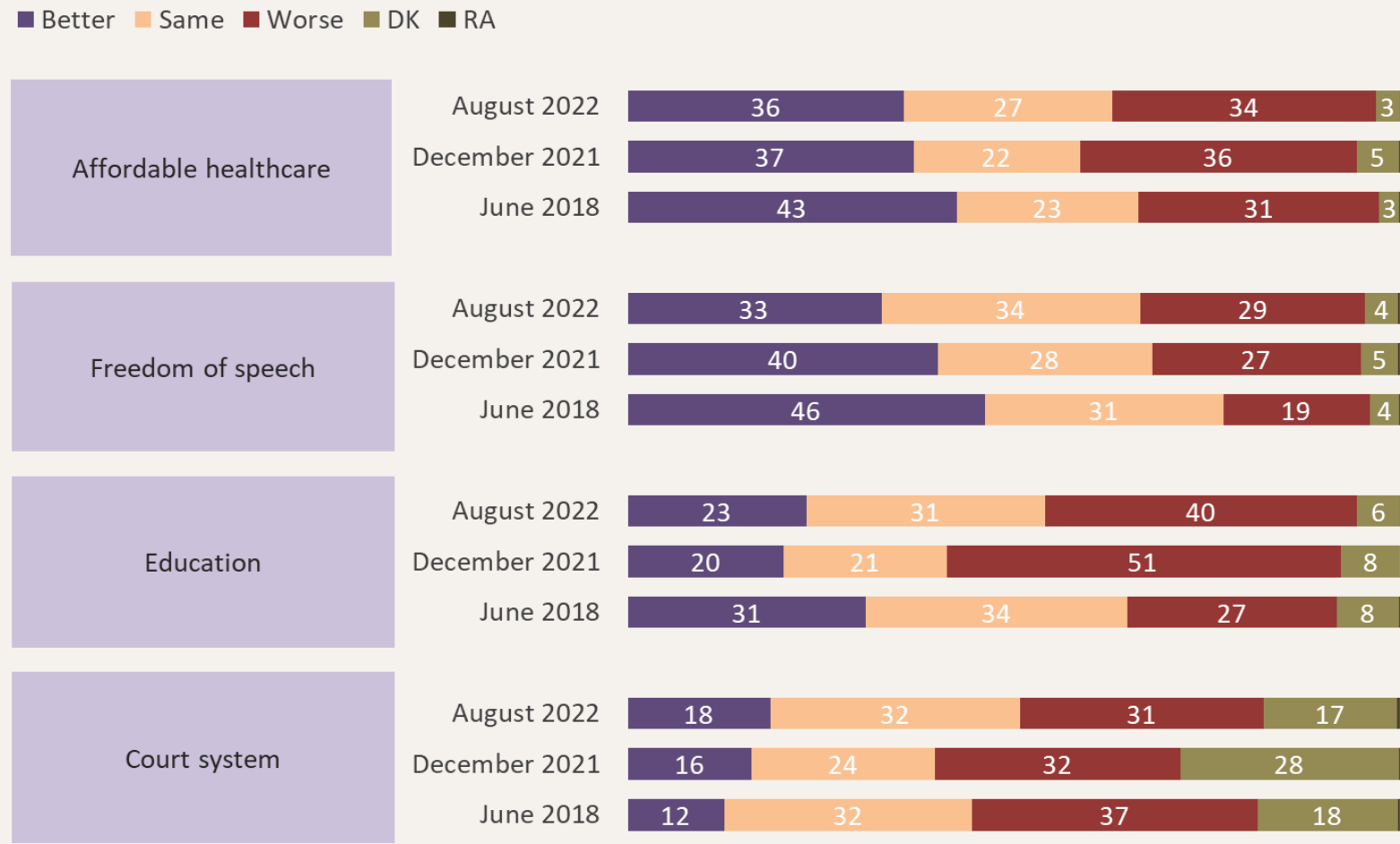


Majority say
in the last 10
years situation got
worse in regards
to territorial
integrity, poverty
and crime



Compared to 2018, now less people say there is progress in regards to affordable healthcare and freedom of speech

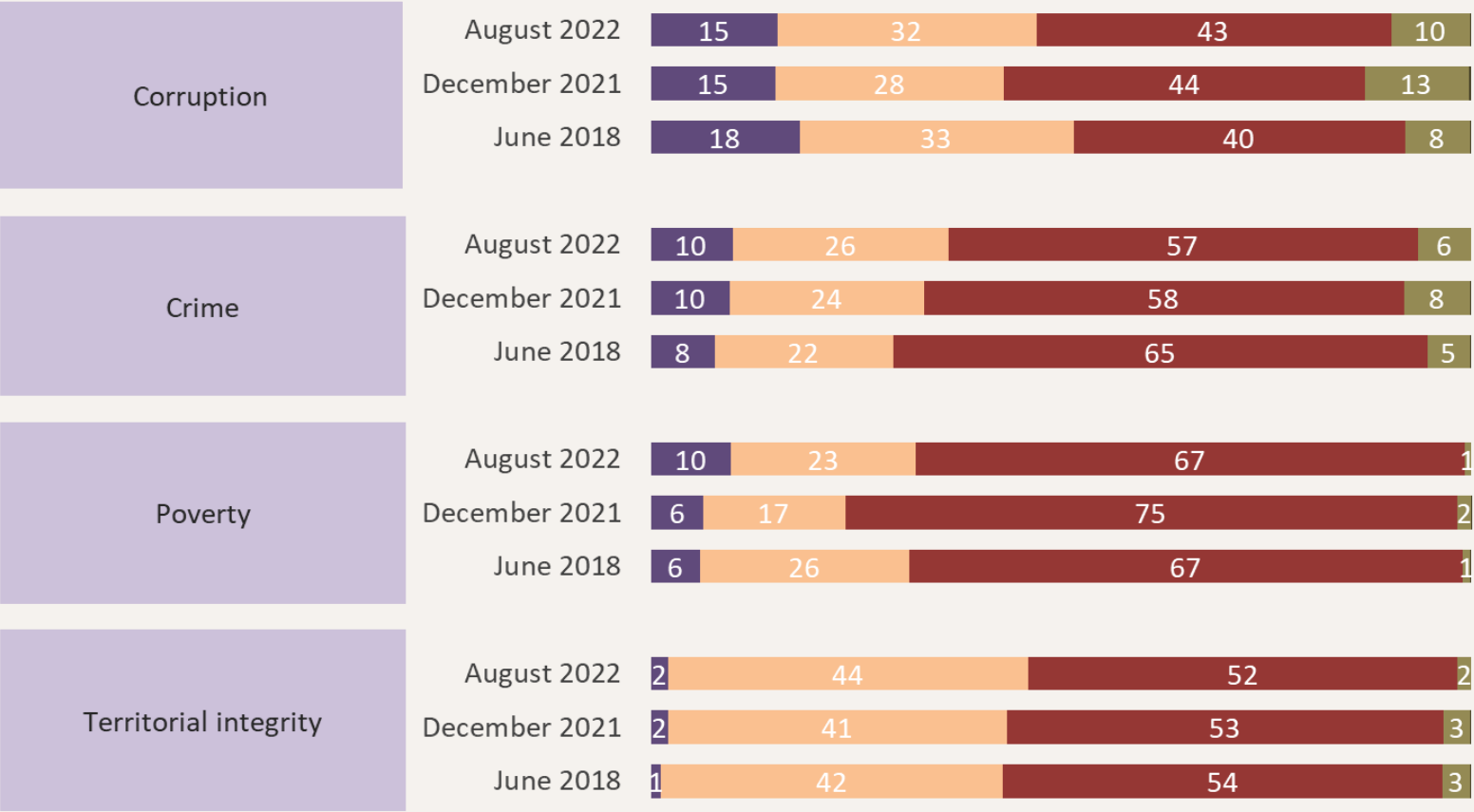
For each issue, how do you think the situation has changed in Georgia in the last 10 years? Has it gotten worse, stayed the same or gotten better? (q13) Part 1



Compared to 2018, now less people say there is progress in regards to affordable healthcare and freedom of speech

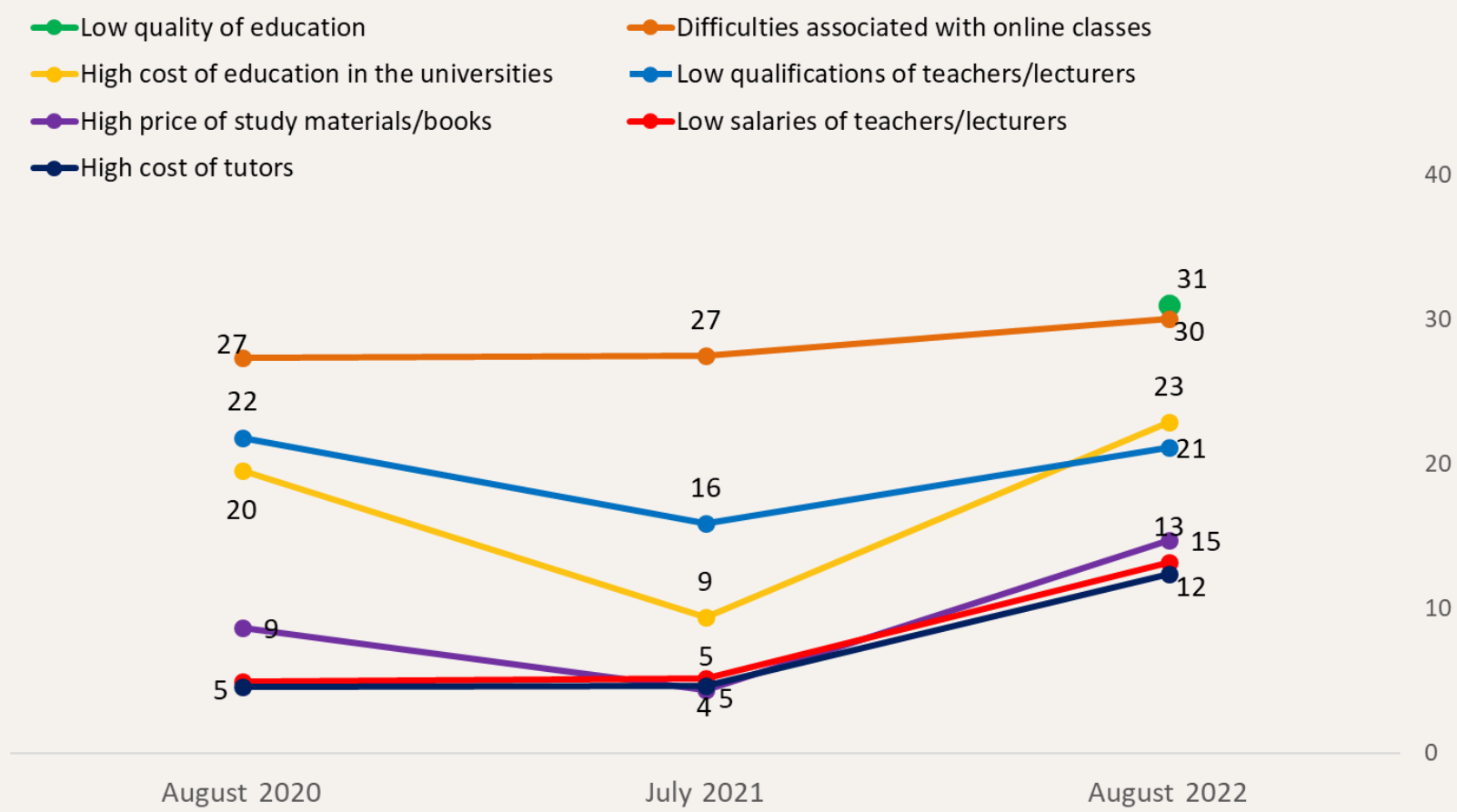
For each issue, how do you think the situation has changed in Georgia in the last 10 years? Has it gotten worse, stayed the same or gotten better? (q13) Part 2

Better Same Worse DK RA



Low quality of education and online classes named as top challenges

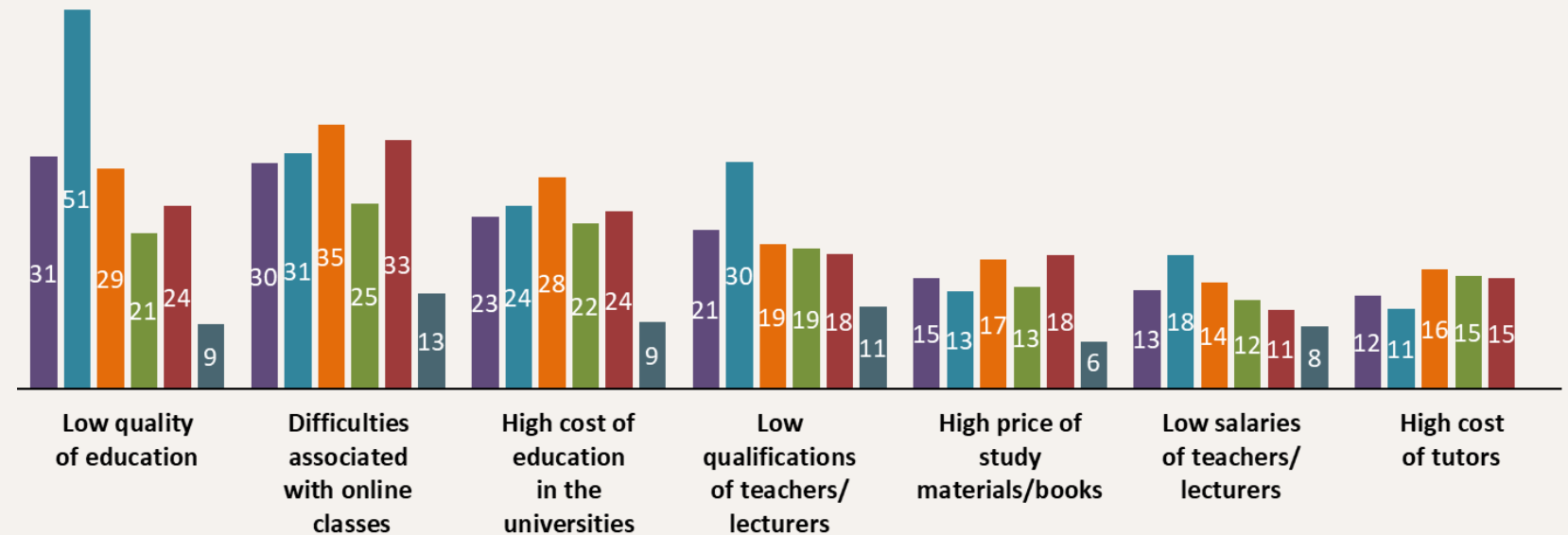
What are three biggest issues facing the education system in Georgia today? (q15)



Tbilisi residents are especially concerned about low quality of education and poor qualification of teachers

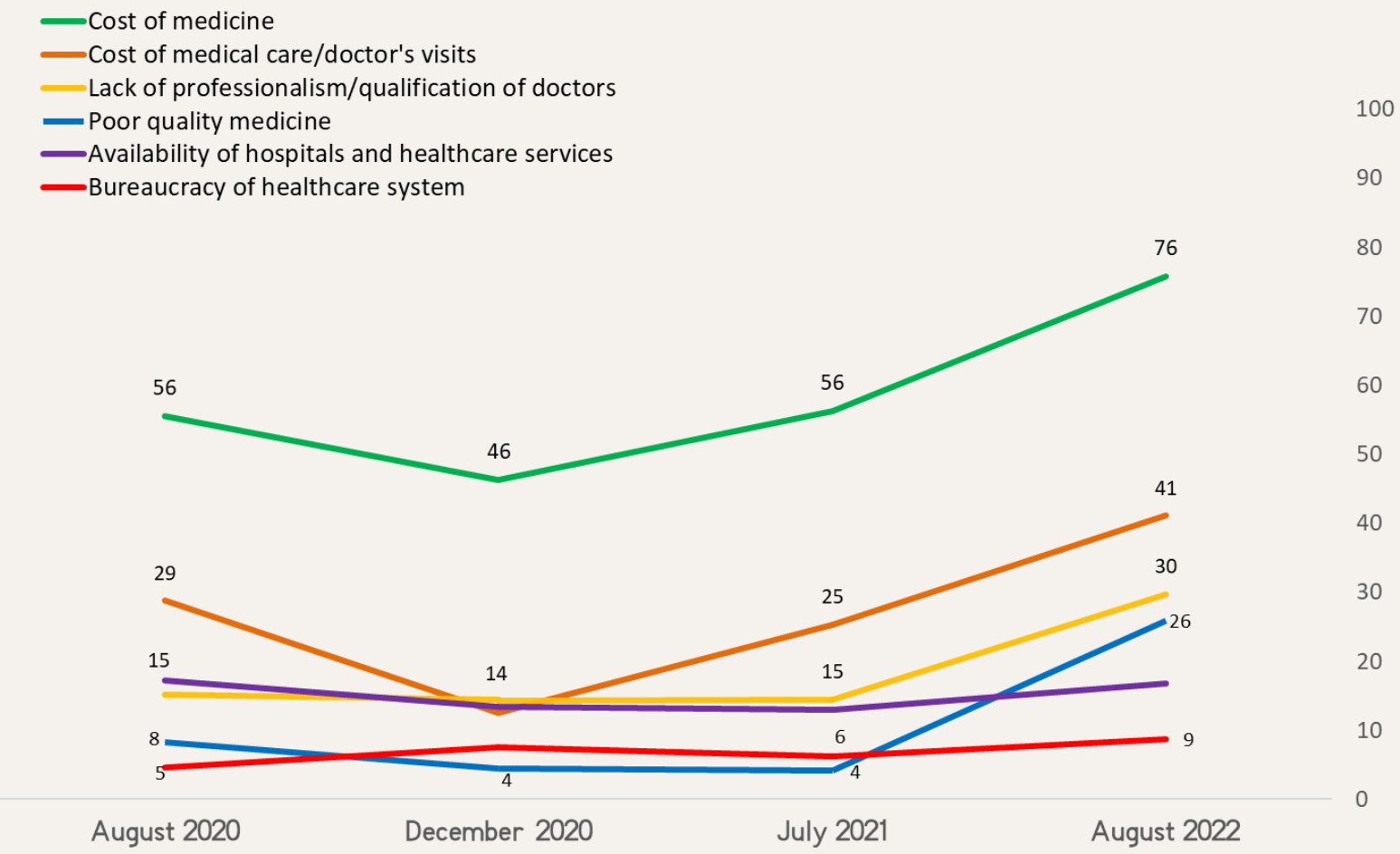
What are three biggest issues facing the education system in Georgia today? (q15 X Settlement) Part 1

■ National ■ Capital ■ Large urban ■ Small urban ■ Rural ■ Minority settlements



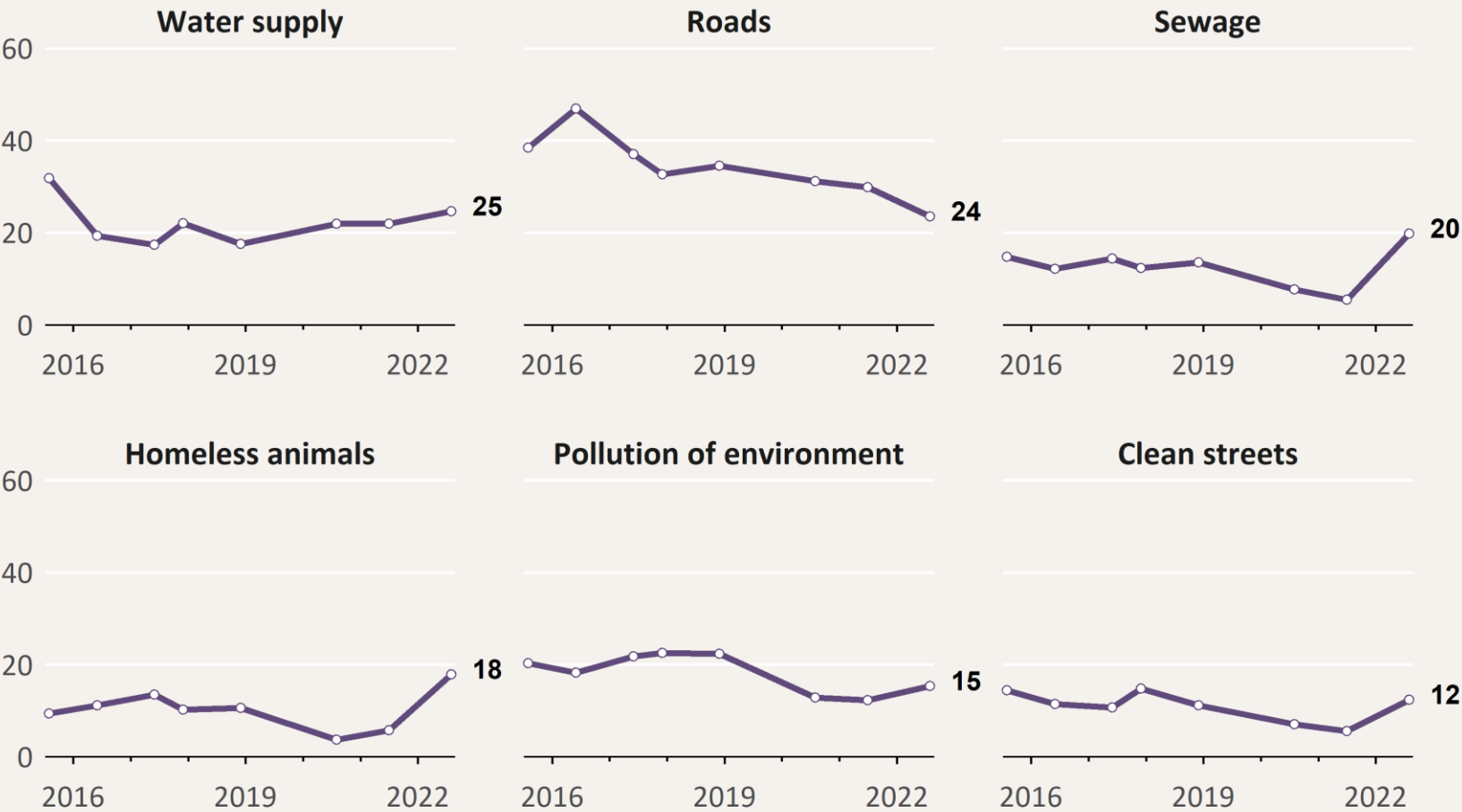
Cost of medicine has become even bigger concern for citizens

What are three biggest issues facing the healthcare system today? (q16)



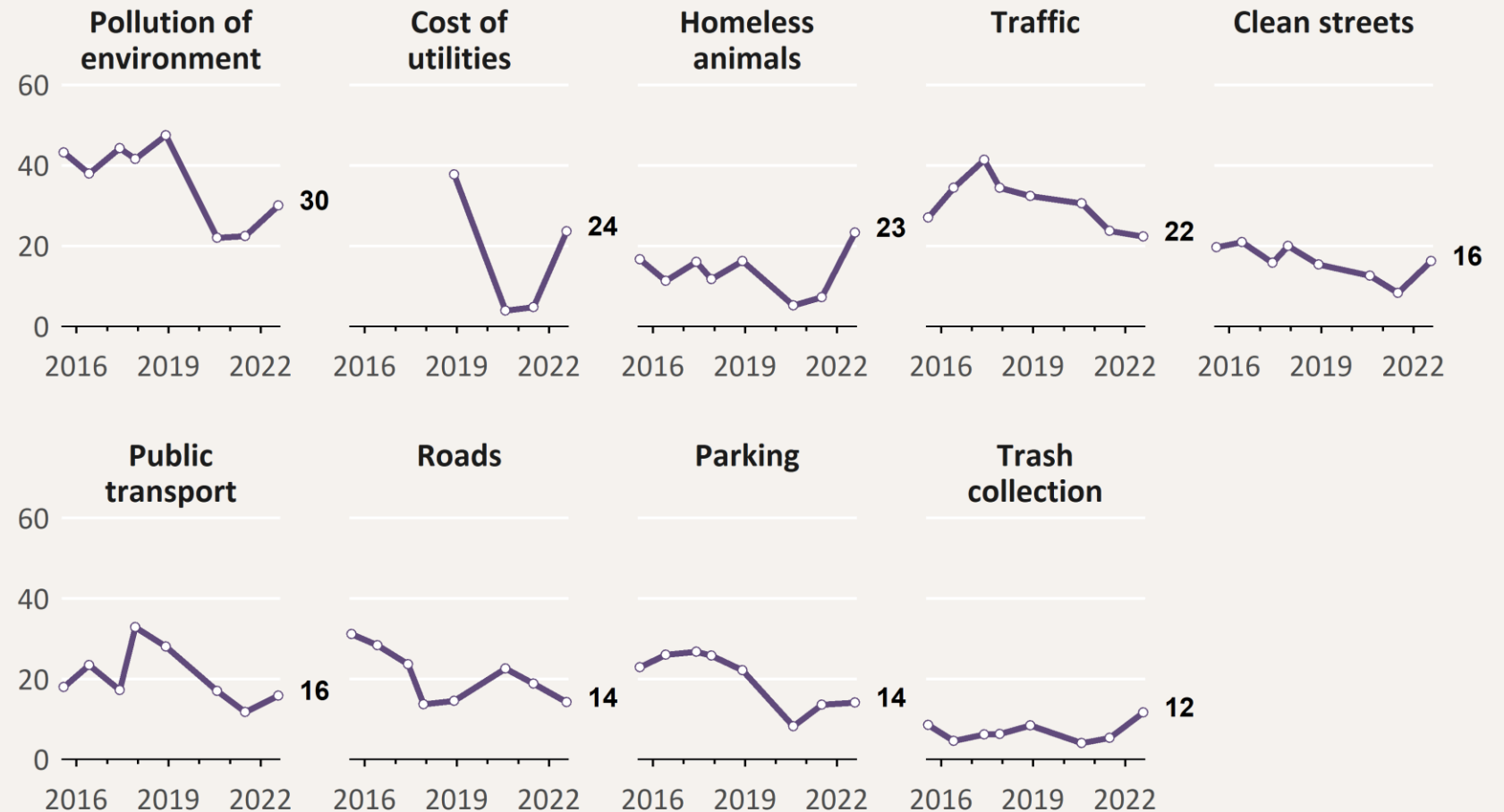
Water supply,
roads, sewage,
and homeless
animals named
as the top local
concerns

What are three most important infrastructural issues
in your city/village? (q14)



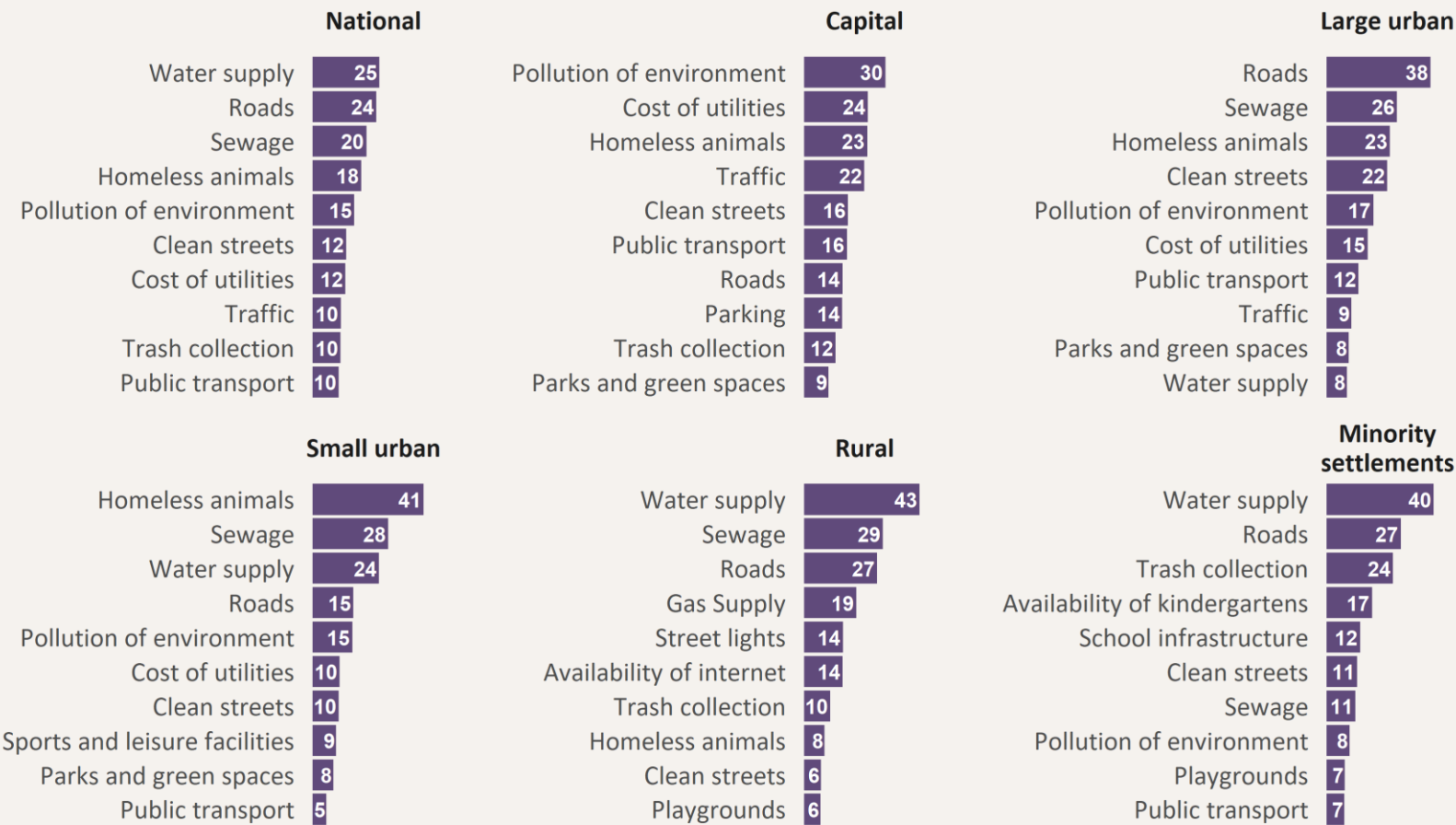
Tbilisi is most concerned about cleanness of streets, cost of utilities, and homeless animals

What are three most important infrastructural issues in your city/village? (q14). Tbilisi only.



Roads, homeless animals and water supply amongst the leading local issues

What are three most important infrastructural issues in your city/village? (q14 x Settlement)

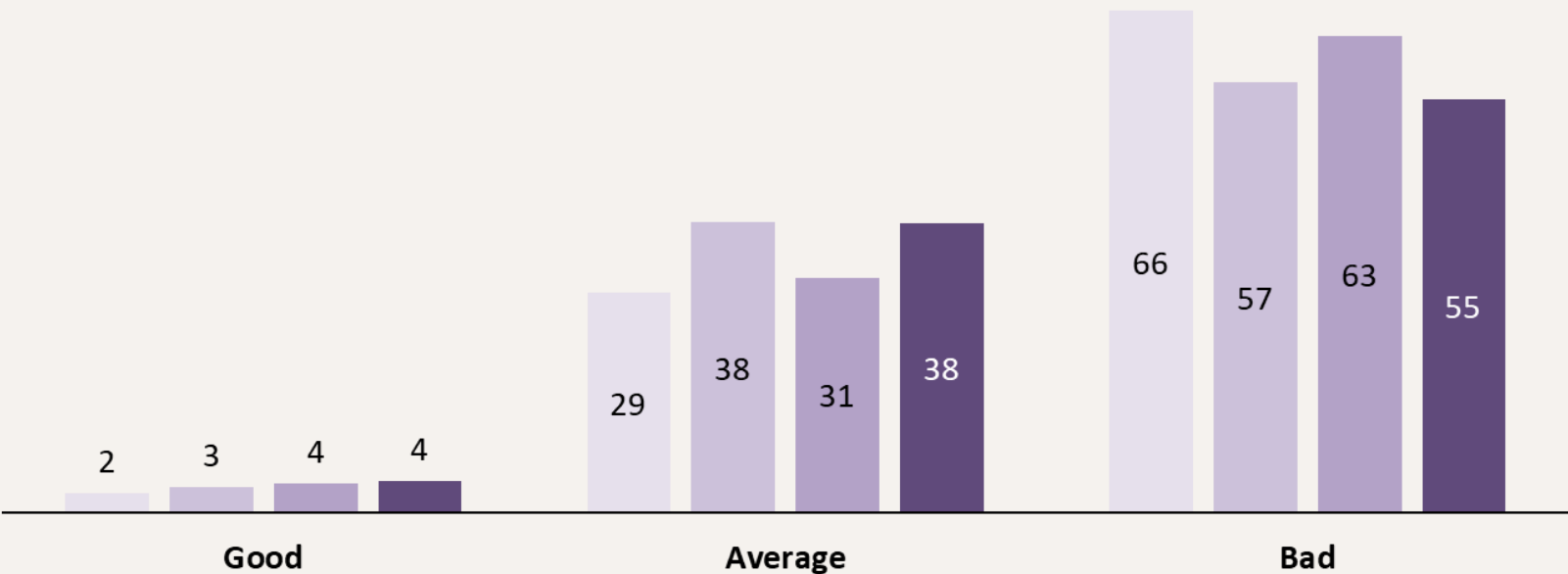


Economy

State of economy perceived as bad

Using this card, please evaluate the current situation
of Georgia's economy. (q18)

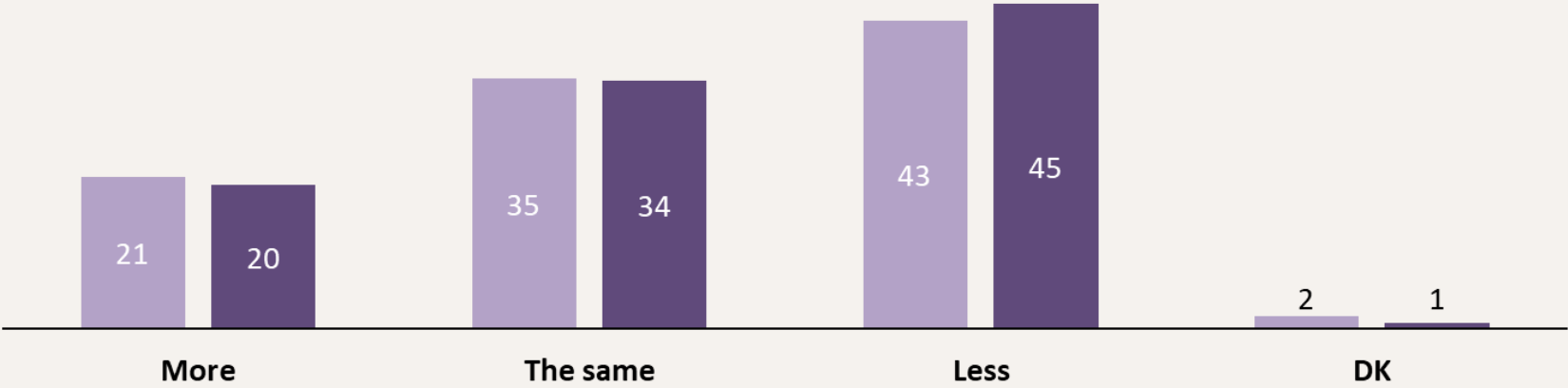
March 2016 June 2018 July 2019 August 2022



Plurality say
they can
afford less
than five
years ago

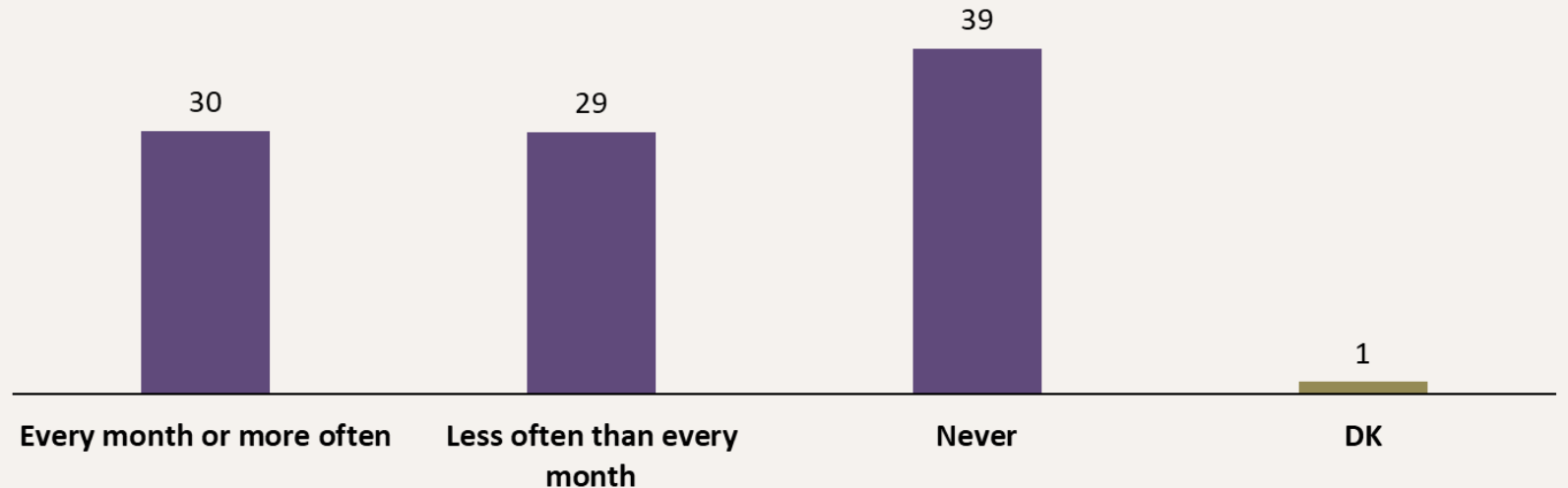
Thinking about your current situation, are you personally able to afford more, the same or less than you could 5 years ago? (q17)

July 2019 August 2022



Every third citizen struggled to buy food

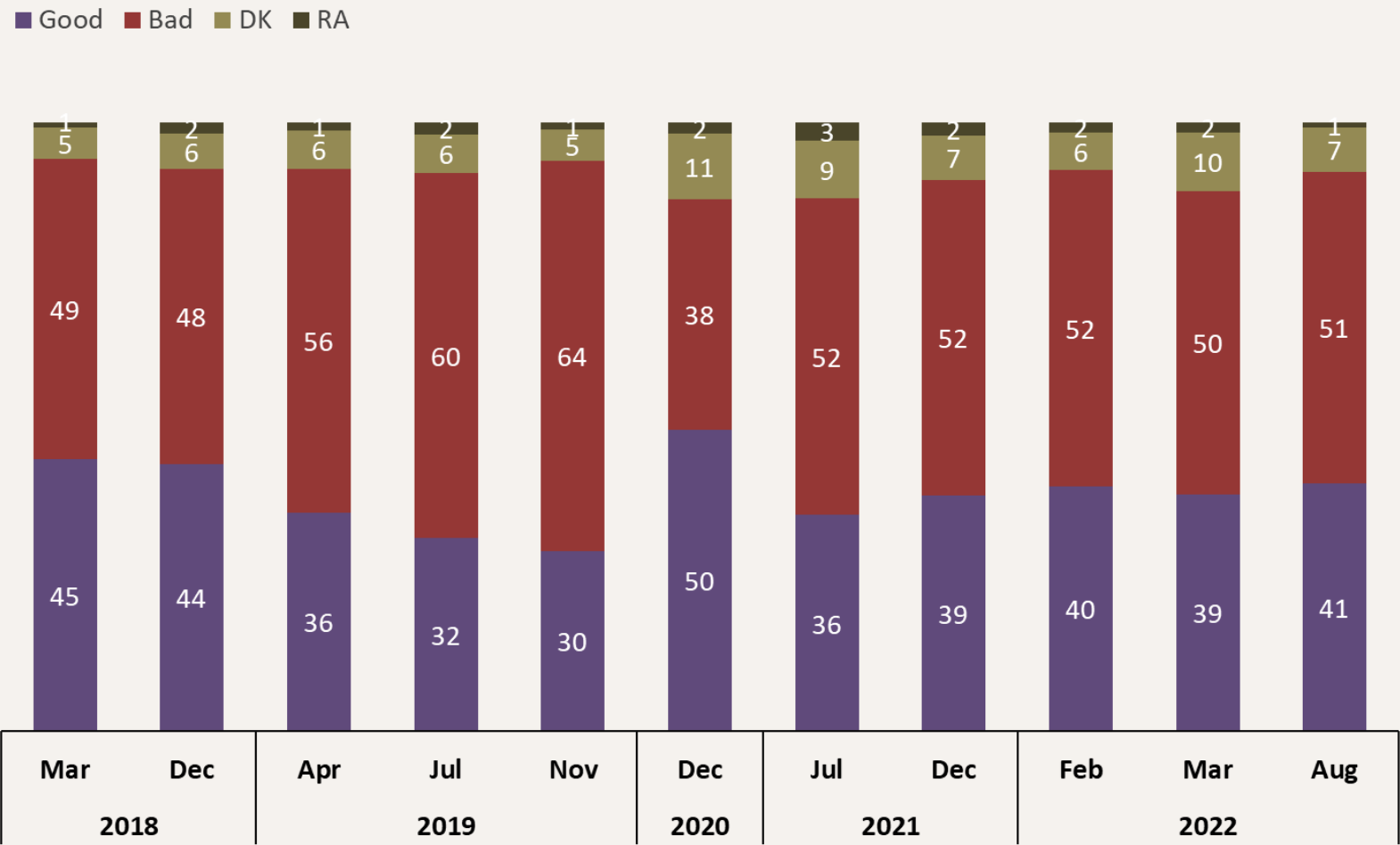
In the last 12 months, how often did it happen that you did not have enough money to buy the food you or your family needed?
(q19)



Institutions and leaders

Performance of the government remains same – half of the population say it’s doing a bad job

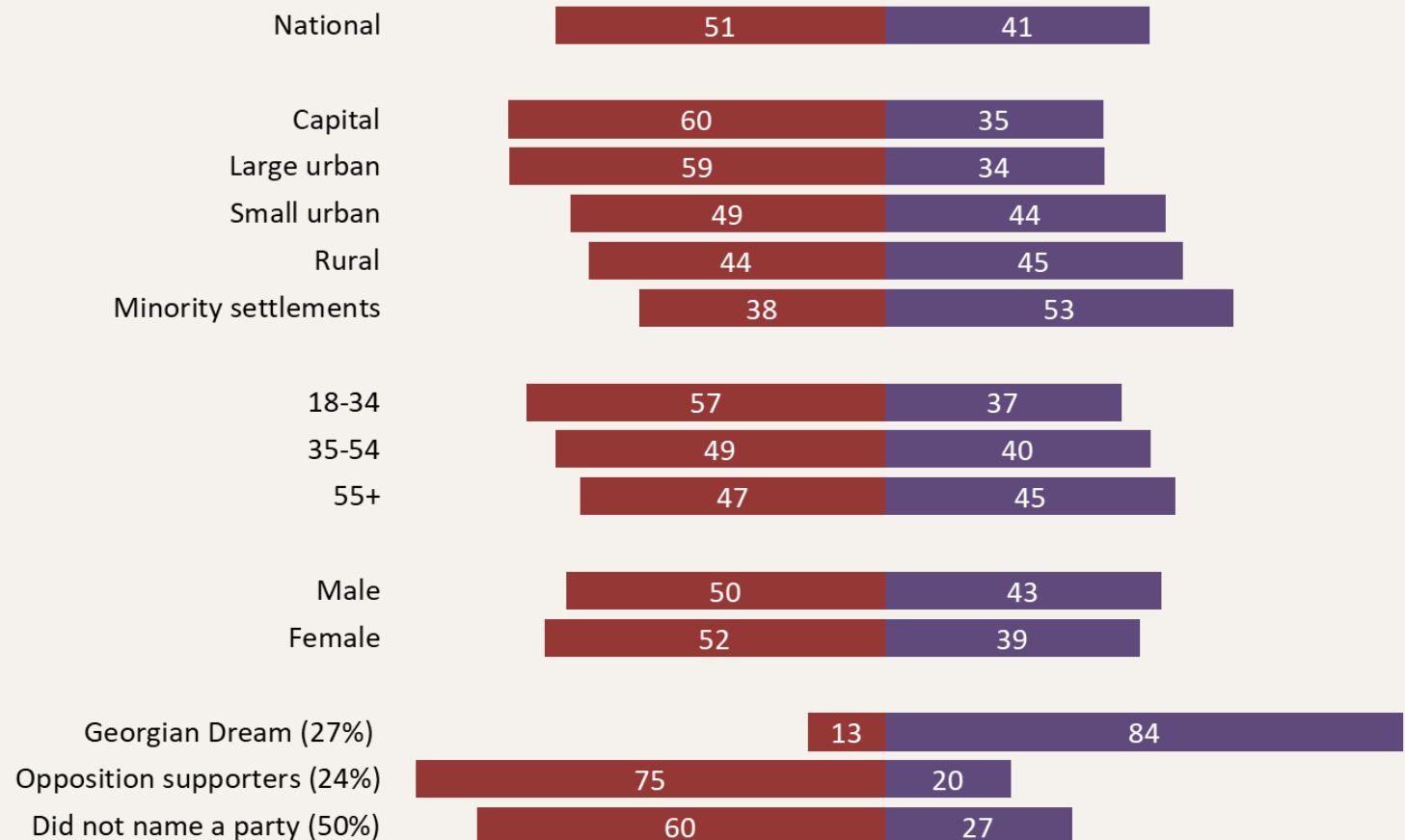
Please, tell me, how would you rate the performance of the current government? (q2)



Tbilisi and other large cities are most critical towards the government, so are the younger citizens

Please, tell me, how would you rate the performance of the current government? (q2 X Settlement, Age, Gender, Party closest to you)

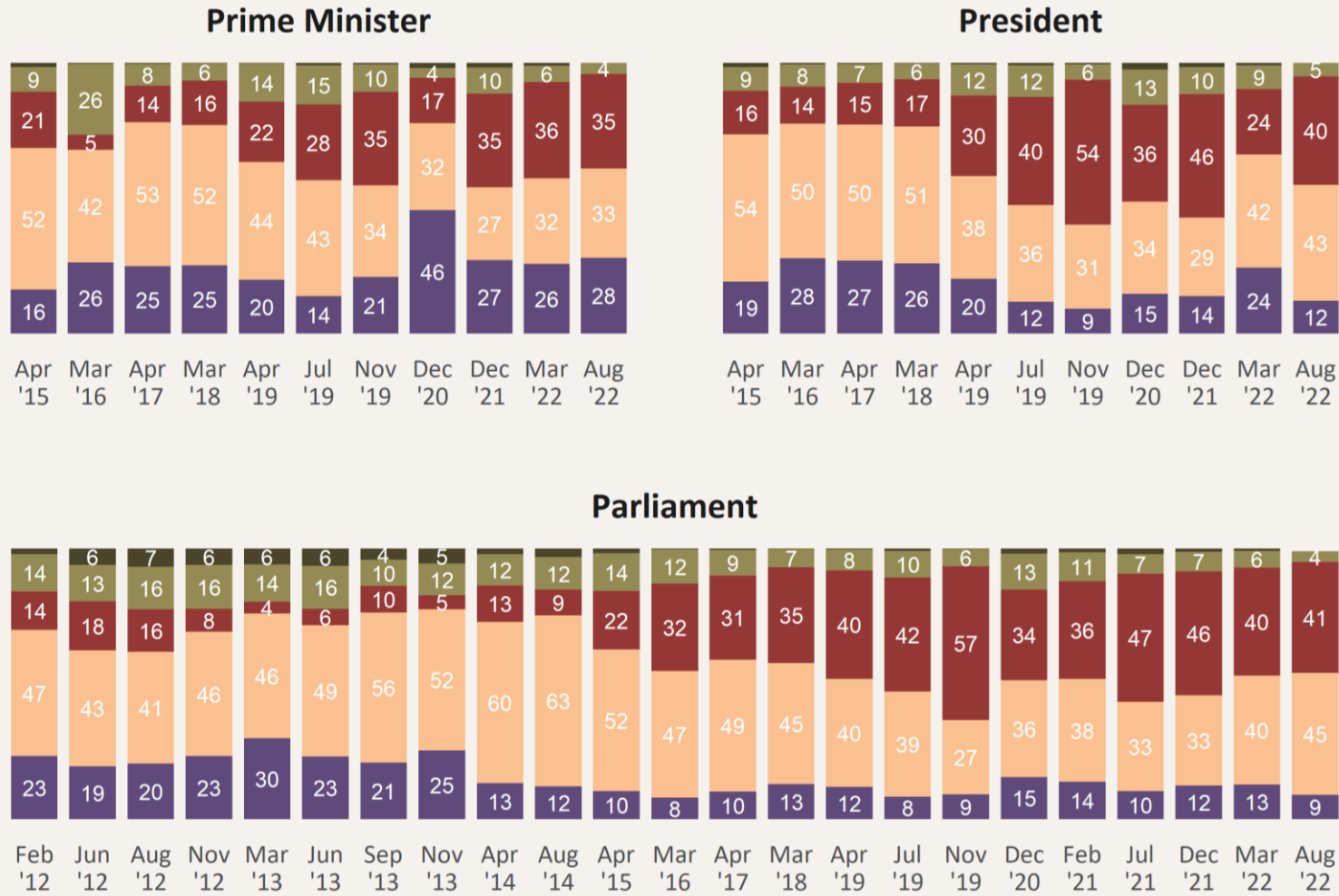
■ Bad ■ Good



President's
negative job
assessment
has increased

How would you rate the performance of...? (q4)

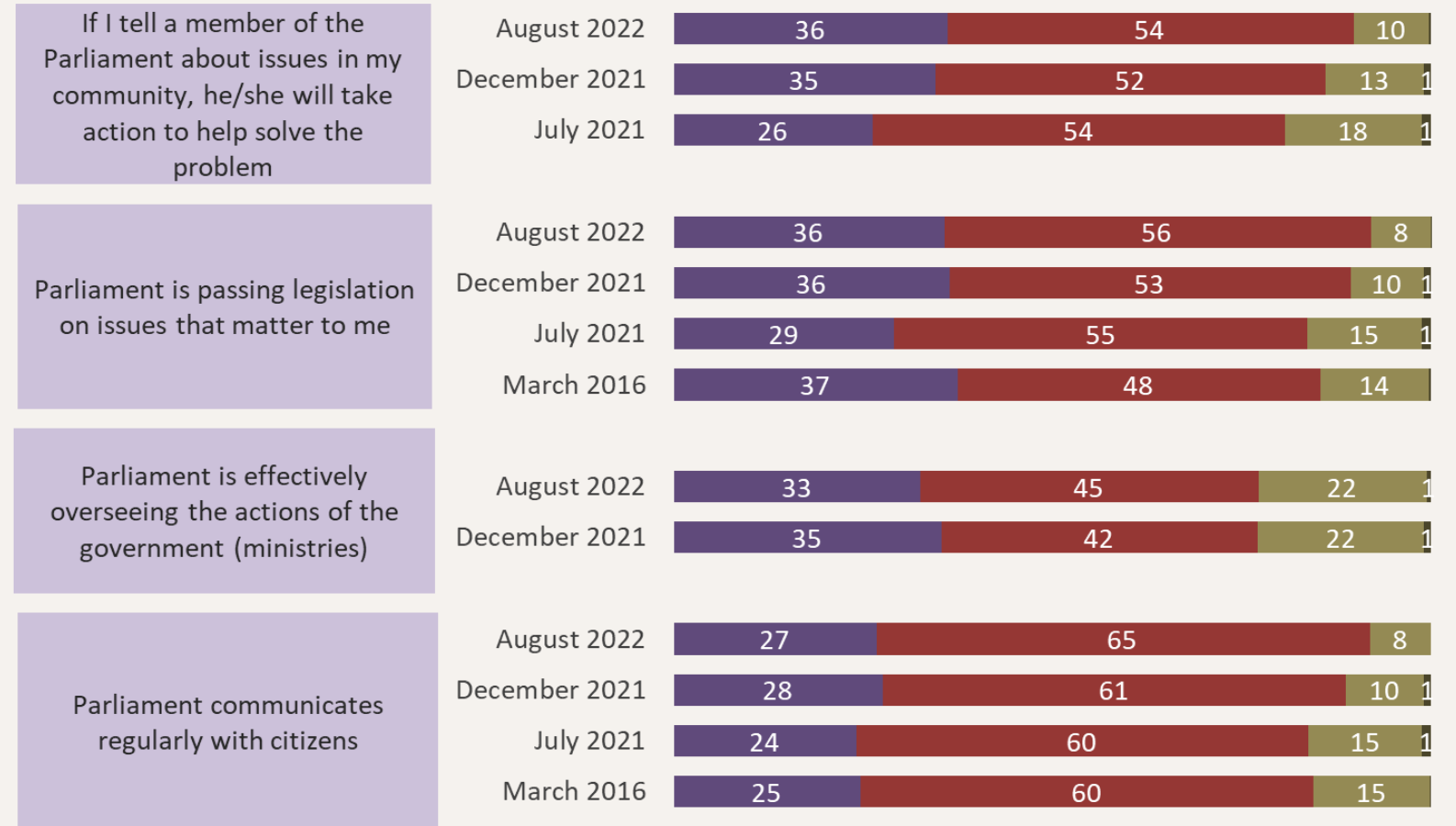
Good Average Bad DK RA



Majority remain skeptical that parliament is responsive to citizens' needs

How much do you agree or disagree with the following statements? (q5)

■ Agree ■ Disagree ■ DK ■ RA



Majority say neither the ruling party, nor elected opposition parties act in their interest

14 percent increase in people who believe that elected opposition parties do not act in the best interest of the Georgian people.

Do you agree or disagree with the following statements? (q3)

■ Agree ■ Disagree ■ DK ■ RA

Ruling party Georgian Dream is acting in the best interests of the country and Georgian people

August 2022



December 2021



Elected opposition parties in the parliament and the local government act according to the interests of the country and Georgian people

August 2022



December 2021



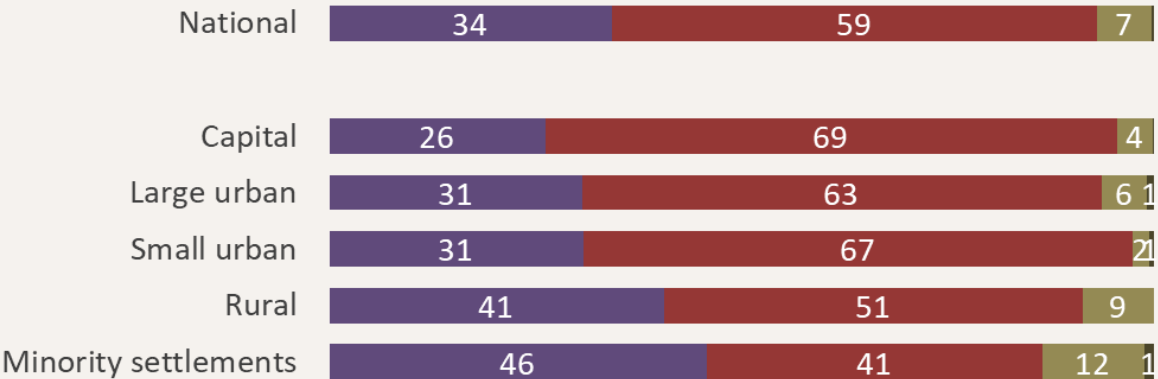
Ruling party has the highest confidence in the ethnic minority and rural settlements

Elected opposition parties, too, have the highest confidence in minority settlements.

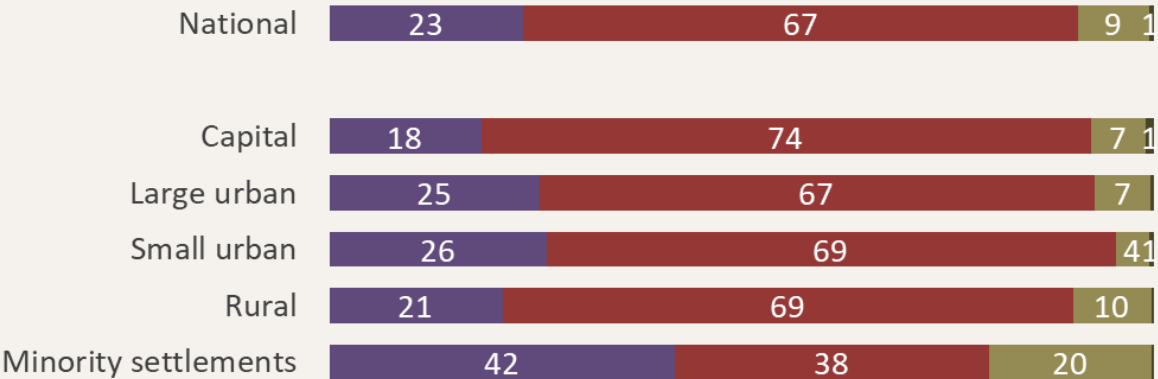
Do you agree or disagree with the following statements? (q3 X Settlement)

■ Agree ■ Disagree ■ DK ■ RA

Ruling party Georgian Dream is acting in the best interests of the country and Georgian people



Elected opposition parties in the parliament and the local government act according to the interests of the country and Georgian people

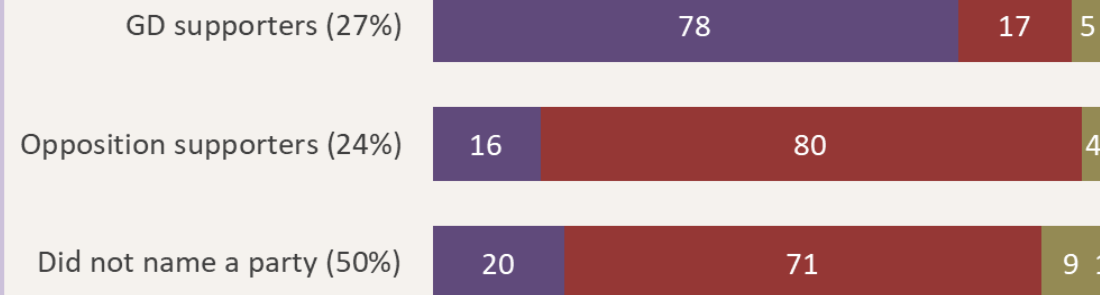


Majority of
opposition
supporters say
opposition
parties do not
act in their best
interest

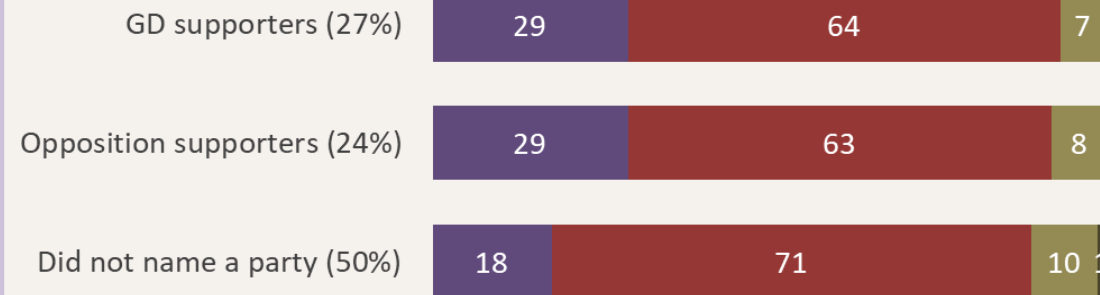
**Do you agree or disagree with the following statements?
(q3 X Party closest to you)**

■ Agree ■ Disagree ■ DK ■ RA

Ruling party Georgian Dream is
acting in the best interests of
the country and Georgian
people



Elected opposition parties in
the parliament and the local
government act according to
the interests of the country and
Georgian people



Plurality remain politically undecided

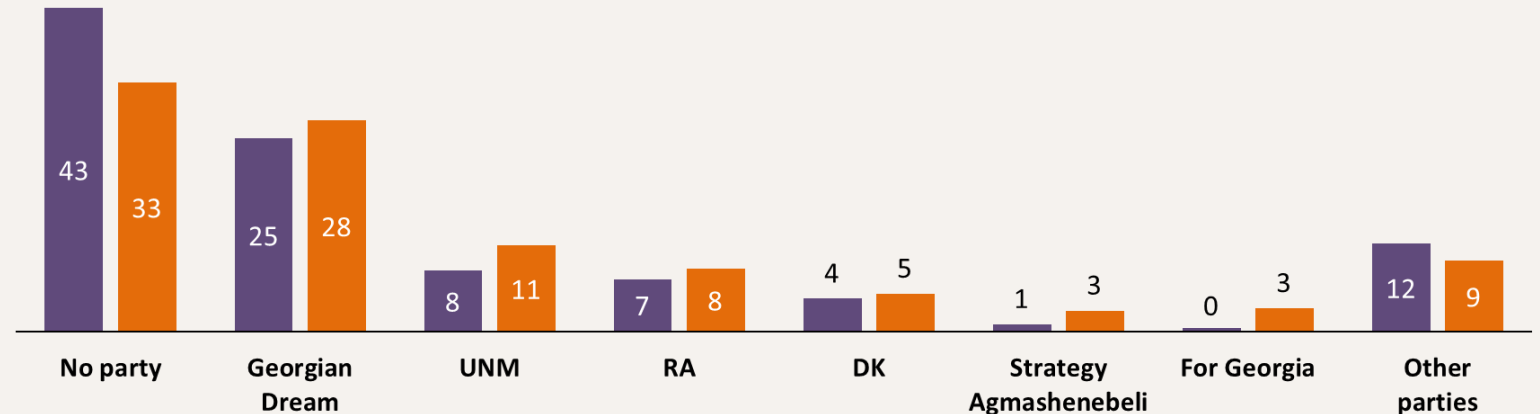
Plurality do not know or do not say which party is closest to them.

Declared support for individual parties is so low that they cannot be taken as a guide to the outcome of future elections.

Which party is closest to you? (q6a, q6b)

■ Show card ■ Self-administered

Disclaimer: sample was split in two representative samples. Sample 1: respondent was offered a show card with a long list of political parties; response was marked by interviewer. Sample 2: respondent was handed a tablet with a shorter list of political parties, and citizen would mark their answer on their own.



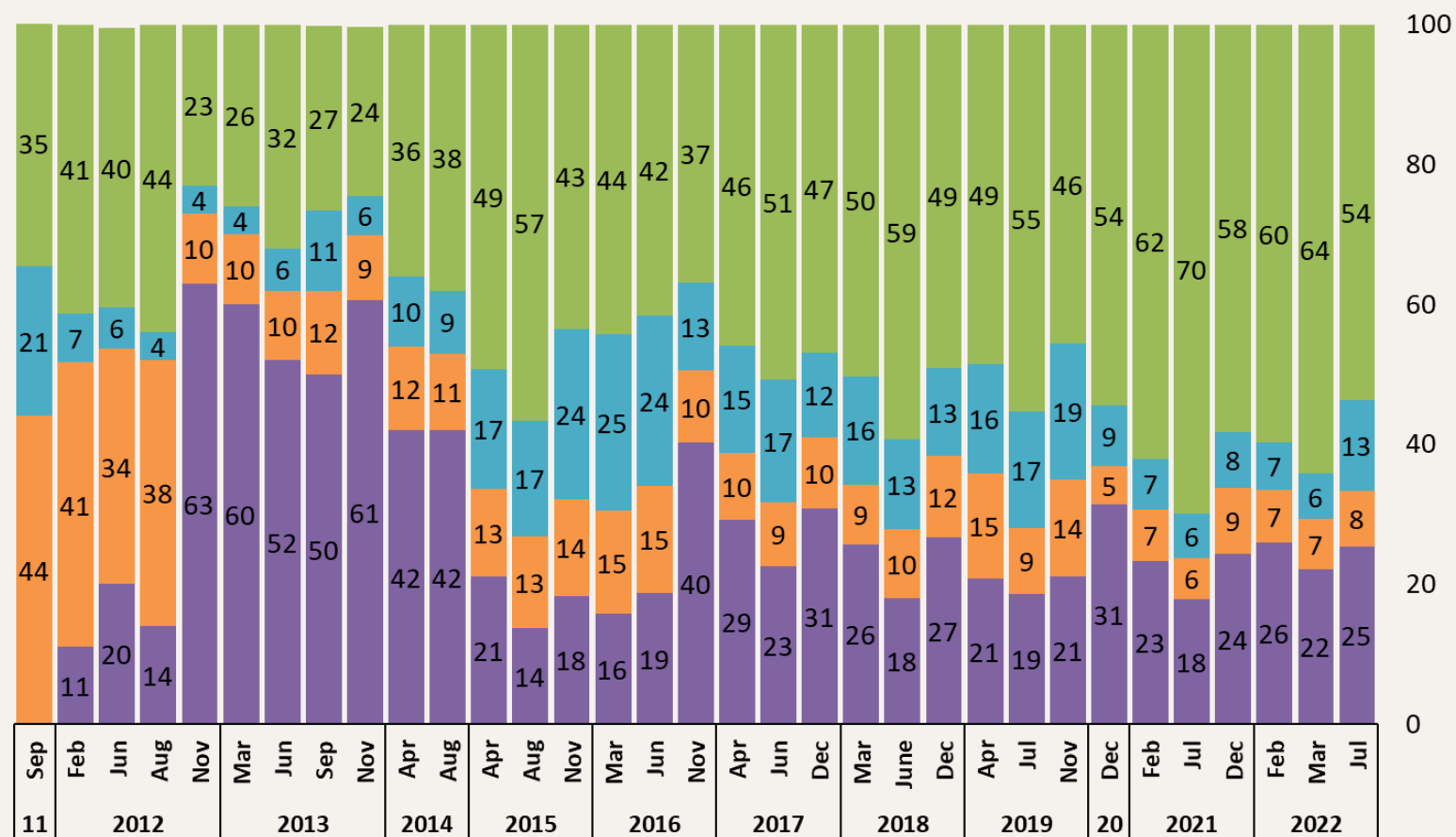
Most citizens remain politically undecided

Most citizens do not know or do not say which party is closest to them.

Declared support for individual parties is so low that they cannot be taken as a guide to the outcome of future elections.

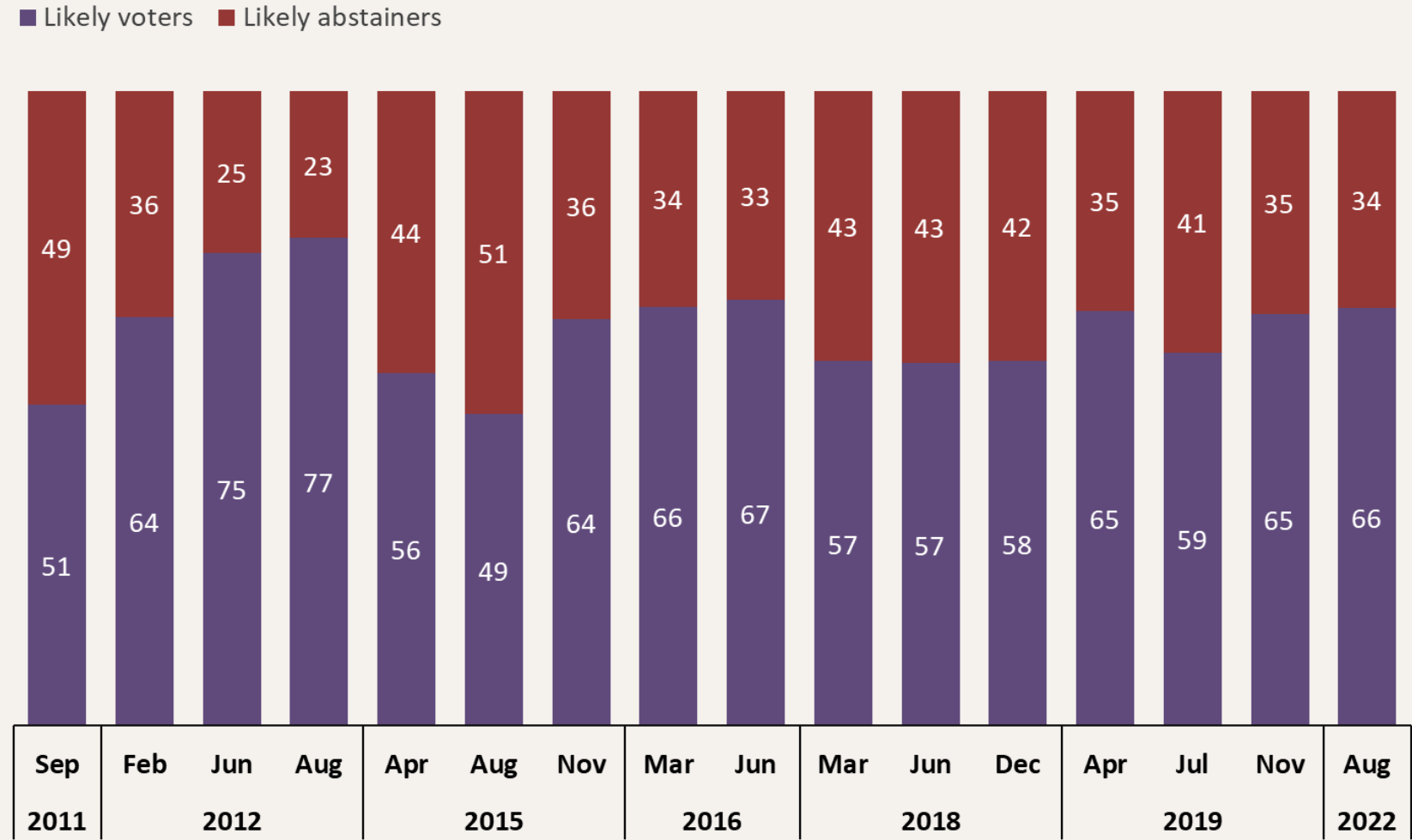
Which party is closest to you? (q6a)

Georgian Dream UNM Other No Party+DK+RA



If elections
were held
tomorrow,
majority
would vote

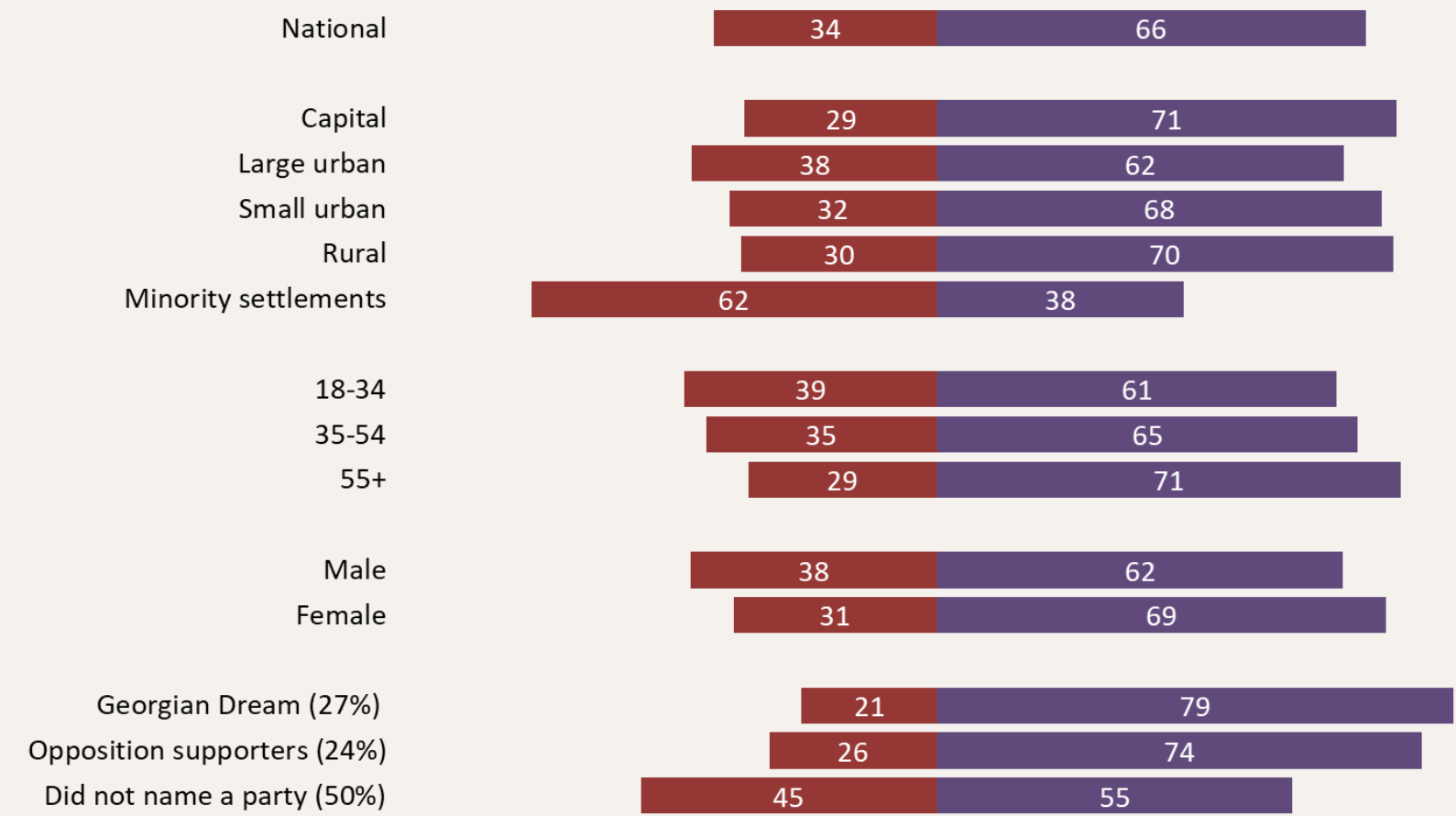
If Parliamentary elections were held tomorrow, would you vote?
(q7)



Undecided and ethnic minority settlements are most likely to skip elections

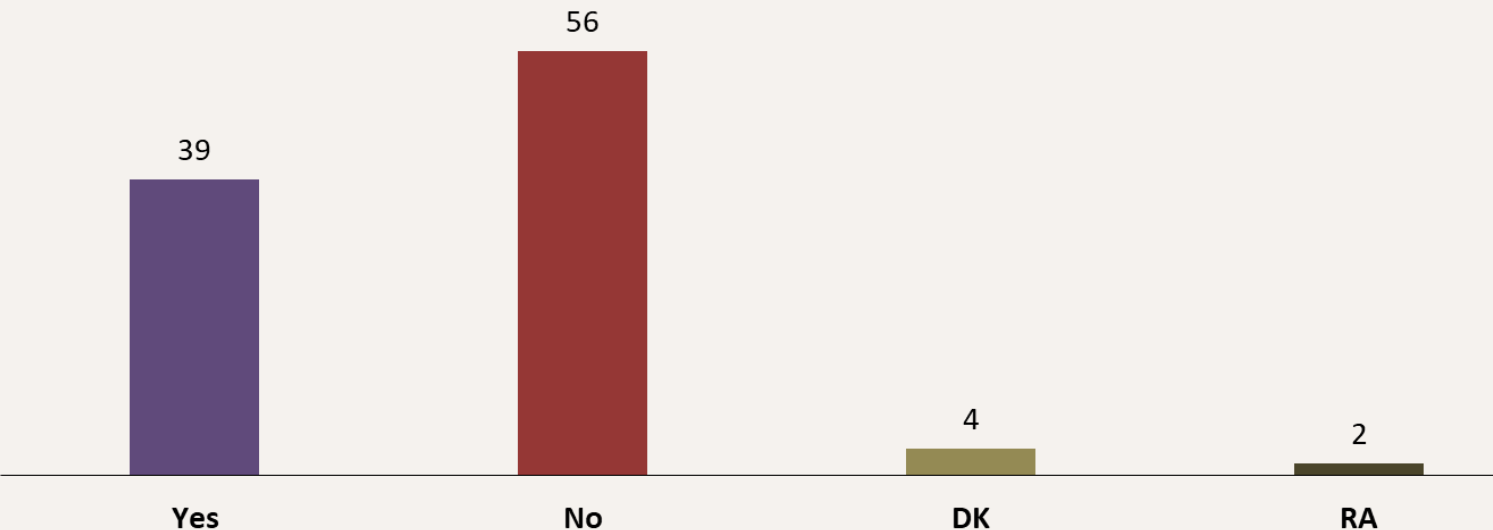
If Parliamentary elections were held tomorrow, would you vote?
(q7 X Settlement, Age, Gender, Party closest to you)

■ Likely abstainers ■ Likely voters



Majority say
none of the
Georgian parties
represent their
interests

Do you believe that at least one political party in Georgia that more or less represents your interests? (q21)

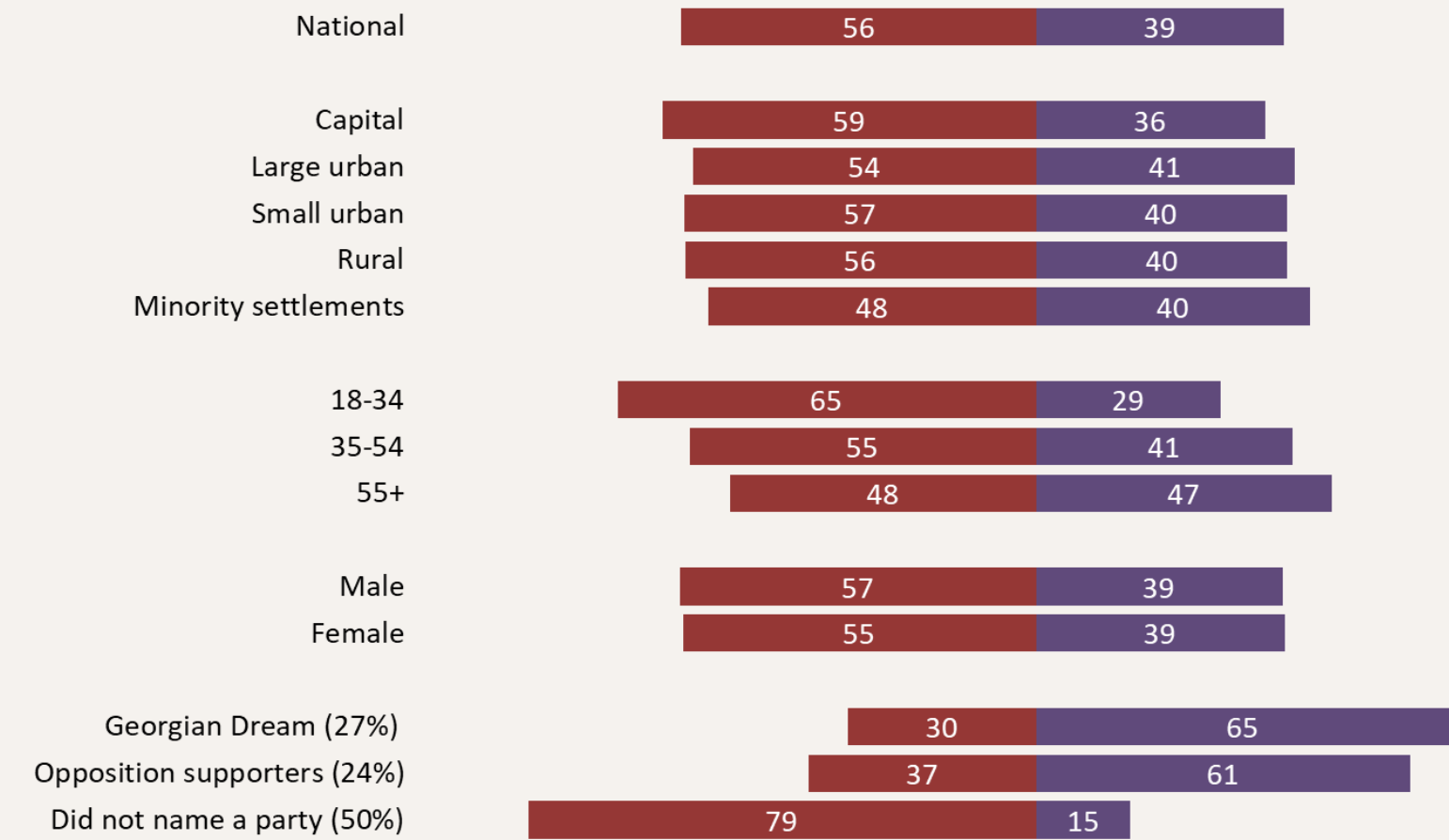


65 percent of young citizens say no party represents their interests

30 percent of Georgian Dream supporters and 37 percent of opposition supporters say none of the existing parties represent their interests.

Do you believe that at least one political party in Georgia that more or less represents your interests? (q21 X Settlement, Age, Gender, Party closest to you)

No Yes

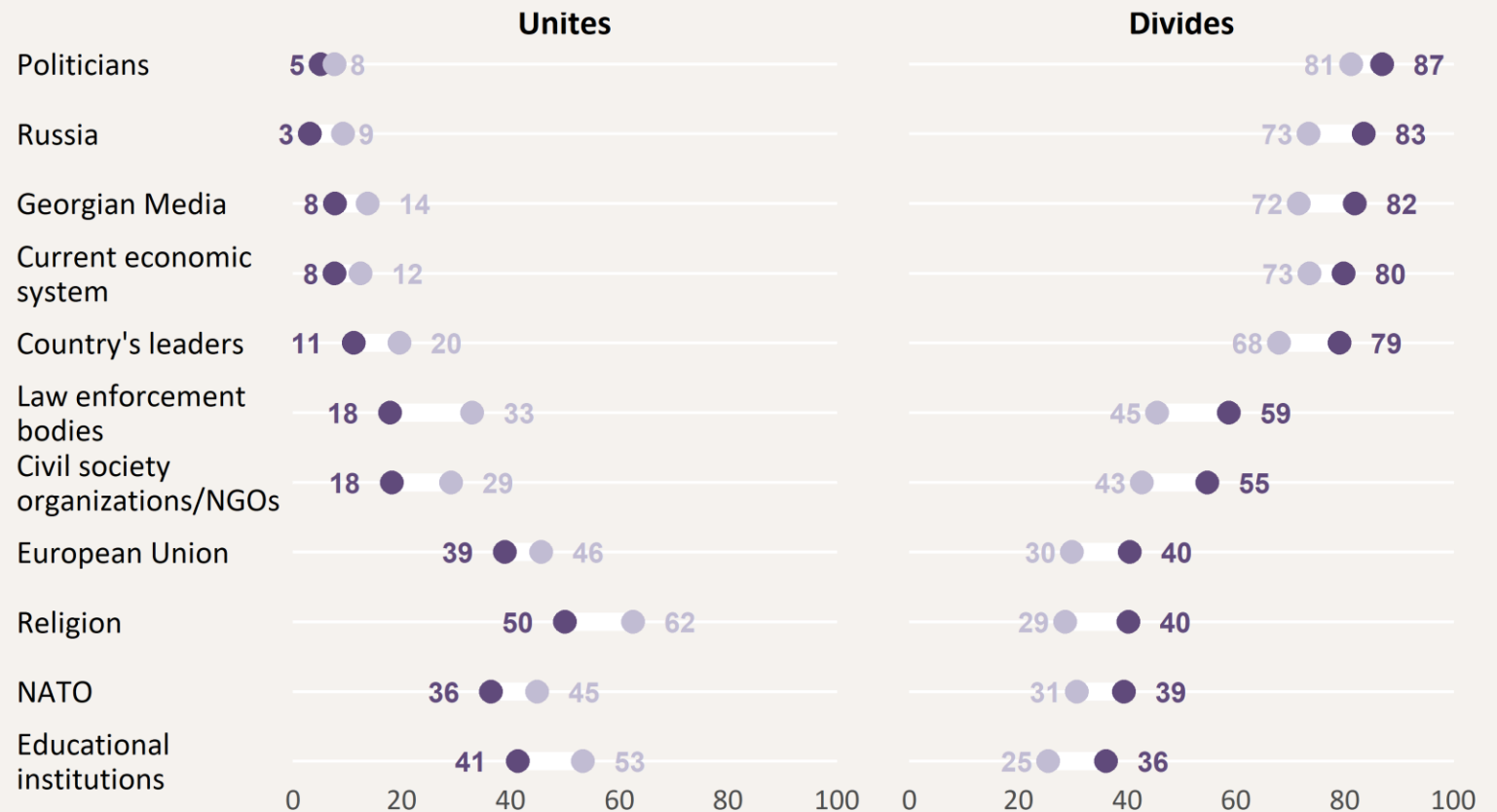


Absolute majority say politicians and Russia push Georgians apart

Religion, educational institutions, EU and NATO are named as the biggest uniting factors for the Georgian society.

Please, tell me, do the following push us apart/divide or bring us together/unite us as a society: (q22)

● April 2019 ● August 2022



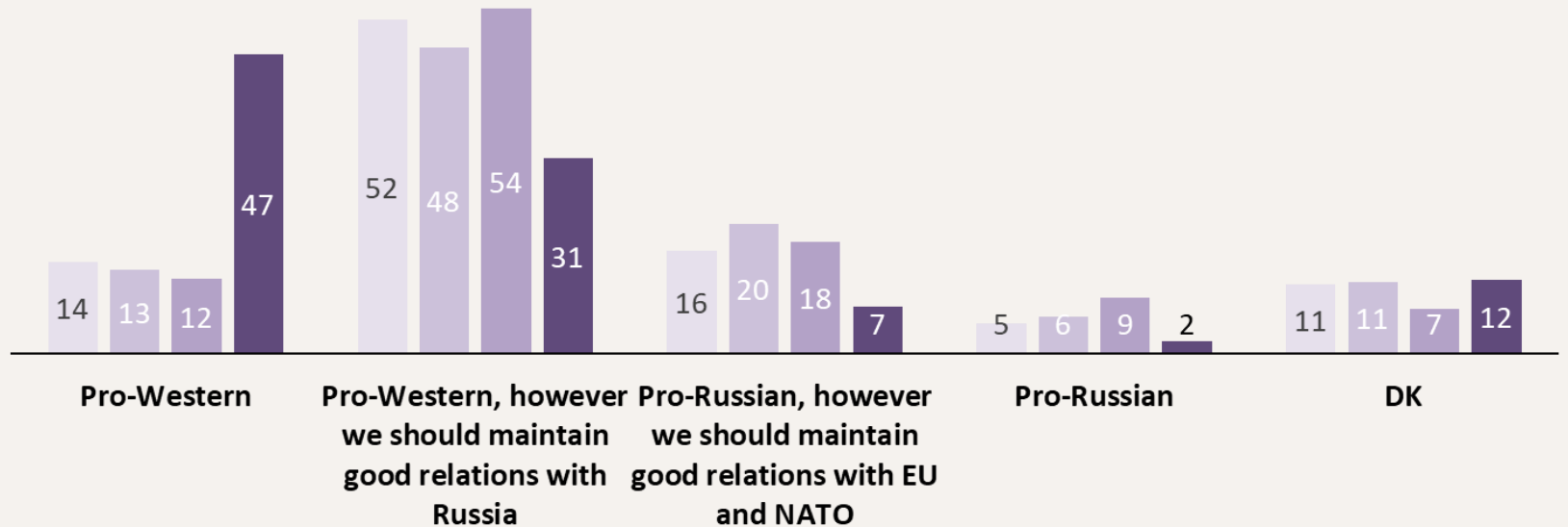
European and Euro-Atlantic Integration

Dramatic shift in favor of a pro-western course

Support for a pro-western foreign policy is the highest among young citizens and opposition supporters.

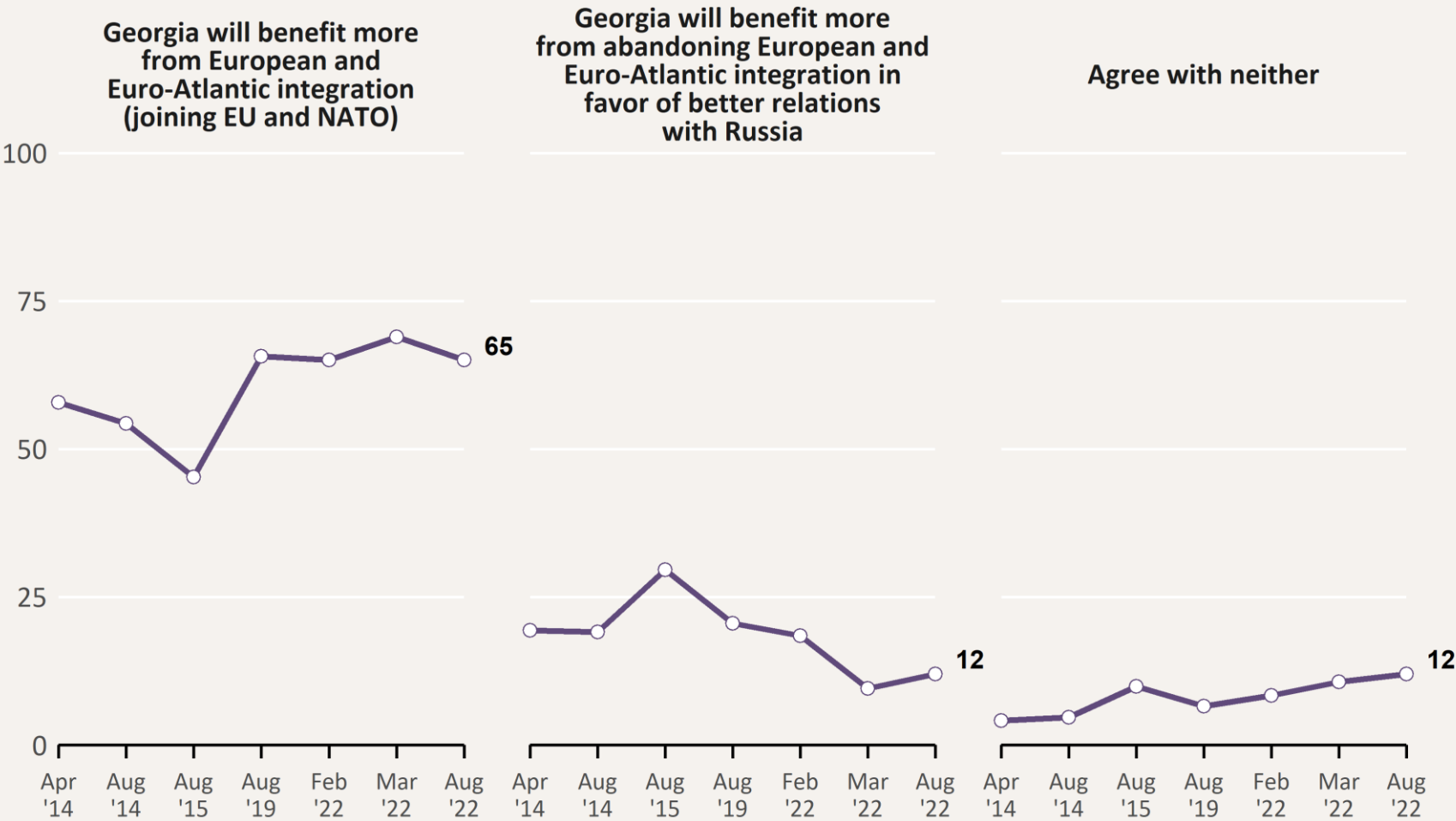
In your opinion, Georgia's foreign policy should be: (q30)

March 2016 June 2016 November 2016 August 2022



Majority remain confident that Georgia will benefit more from EU-NATO integration than closer ties with Russia

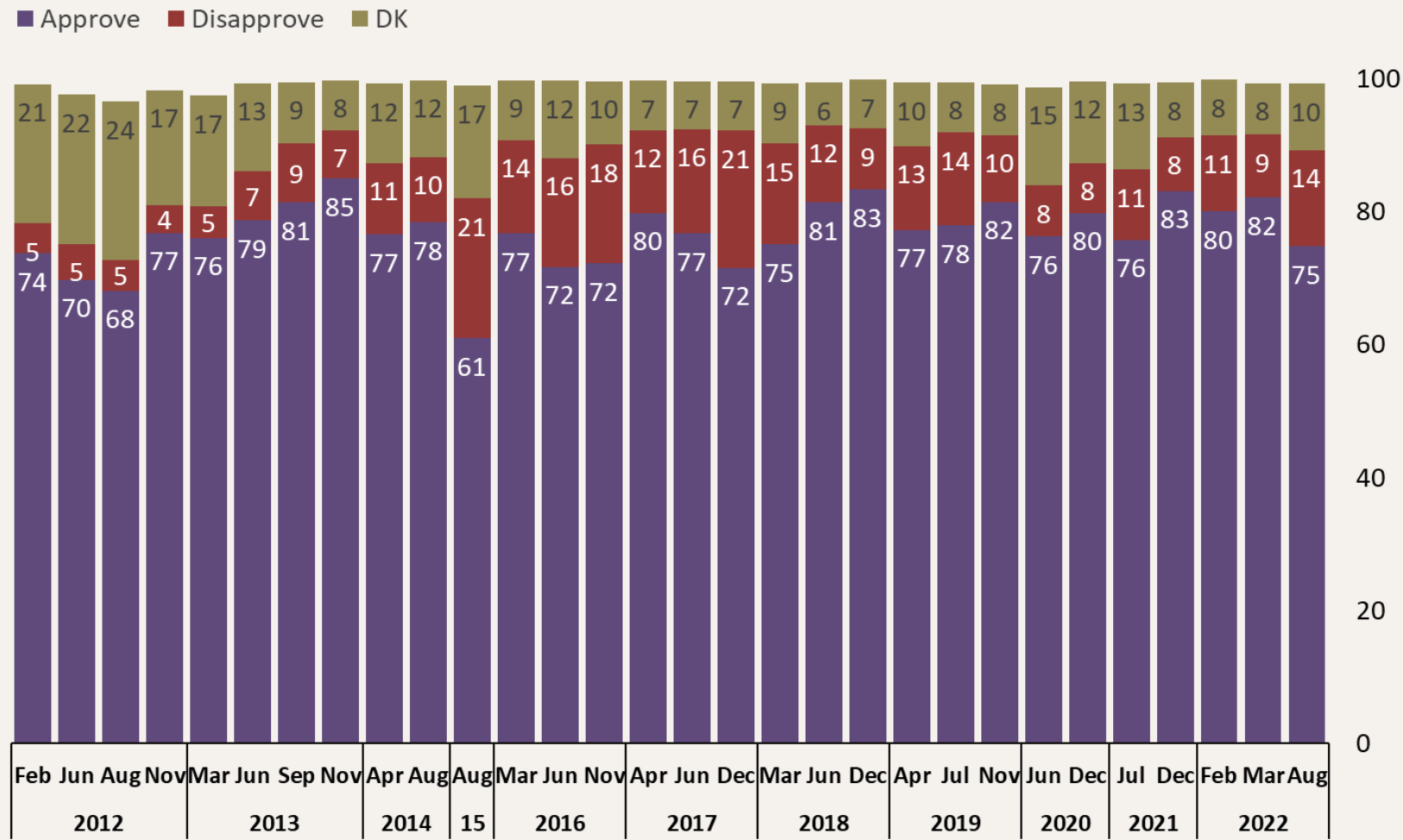
Which of the following statements do you agree with? (q27)



EU membership support drops slightly, but remains high

Support is the lowest among ethnic minority groups.

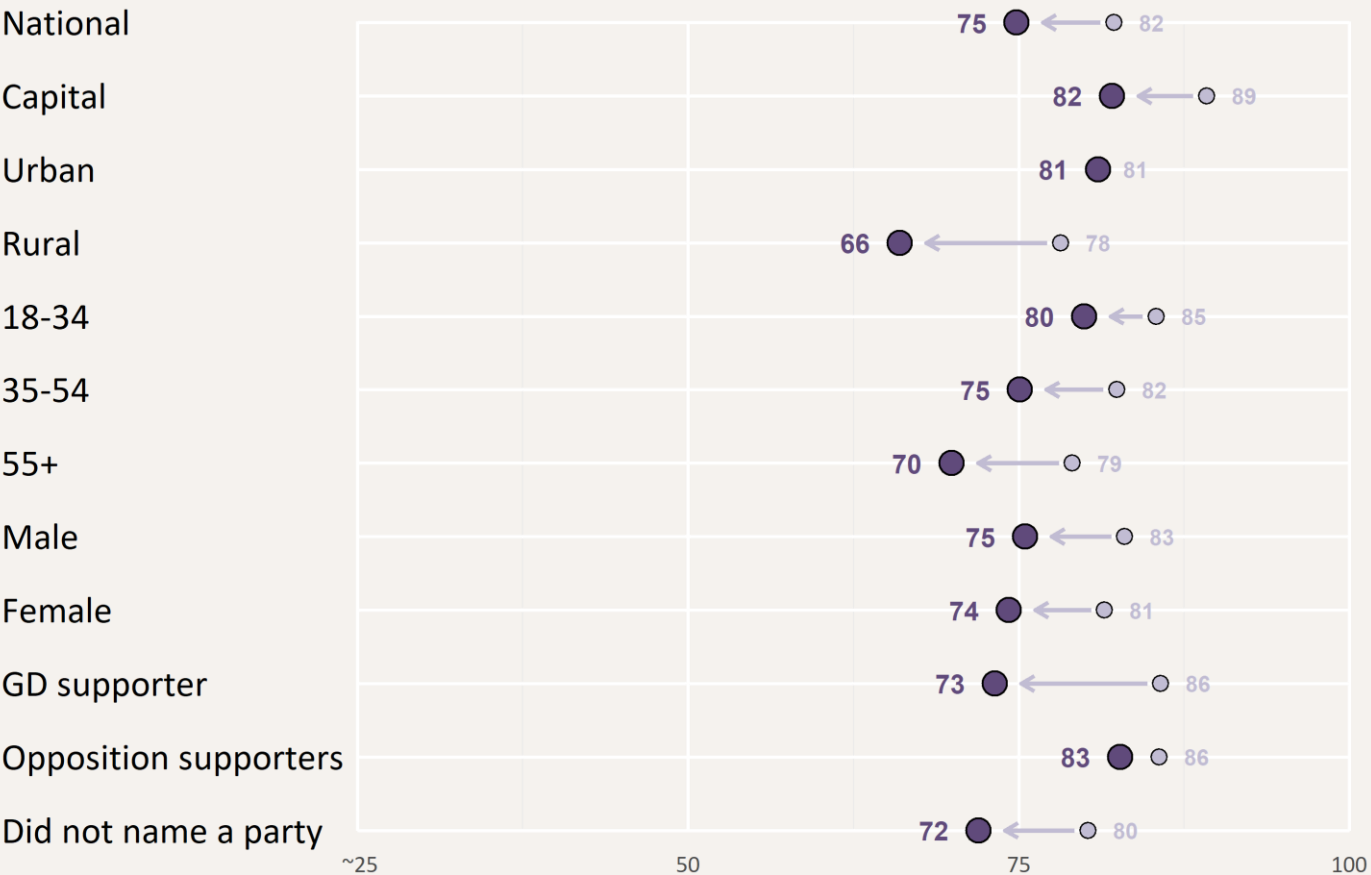
Do you approve or disapprove of Georgian government's stated goal to join the EU? (q23)



Slight drop in EU membership support is evident across the board

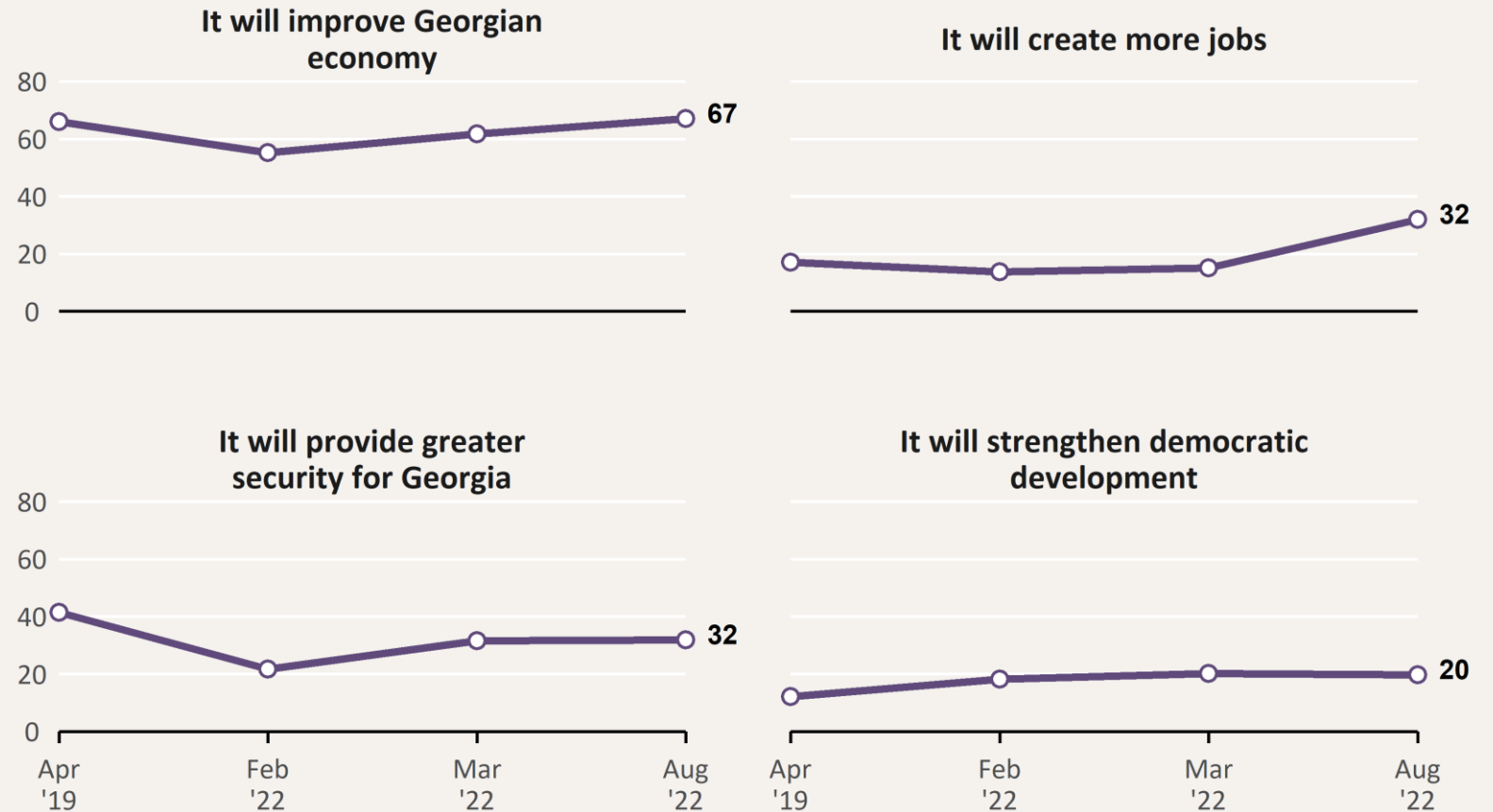
Do you approve or disapprove of Georgian government’s stated goal to join the EU? (q23)

○ March '22 ● August '22



Jobs and security are the main motivators behind EU support

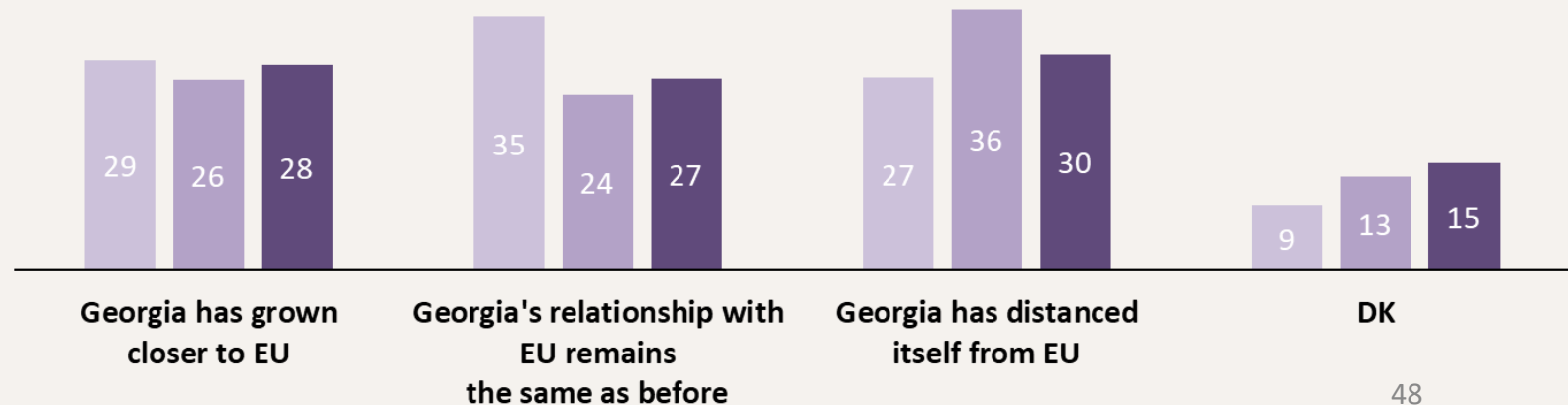
If Approve, why do you approve it? Open question. (q24)
Of those 75% who approve joining the EU



Georgians split on how close is Georgia getting to EU

Which of the following statements do you agree with?
In the last 5 years ... (q25)

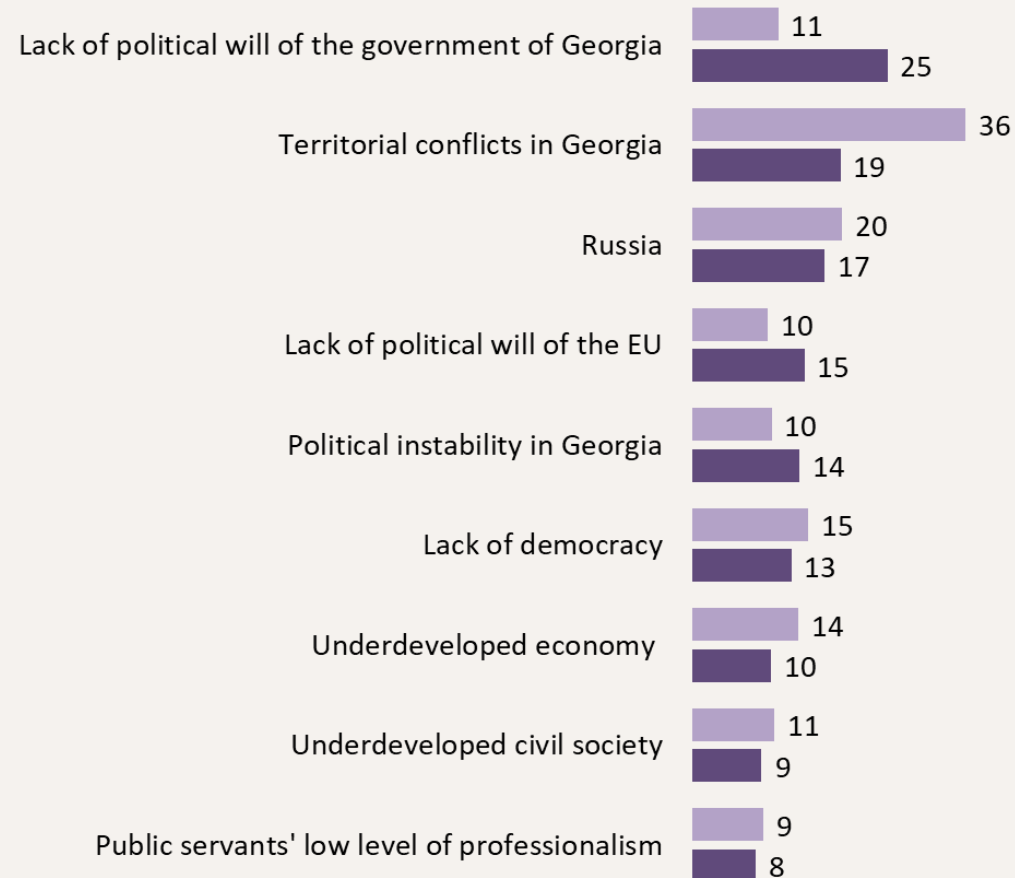
■ February 2022 ■ March 2022 ■ August 2022



Compared to 2019,
twice as many people
believe that the
government's lack of
political will is the
main factor
preventing Georgia
from EU membership

In your opinion, what are the main factors preventing Georgia from EU membership? Up to three answers (q26) Part 1

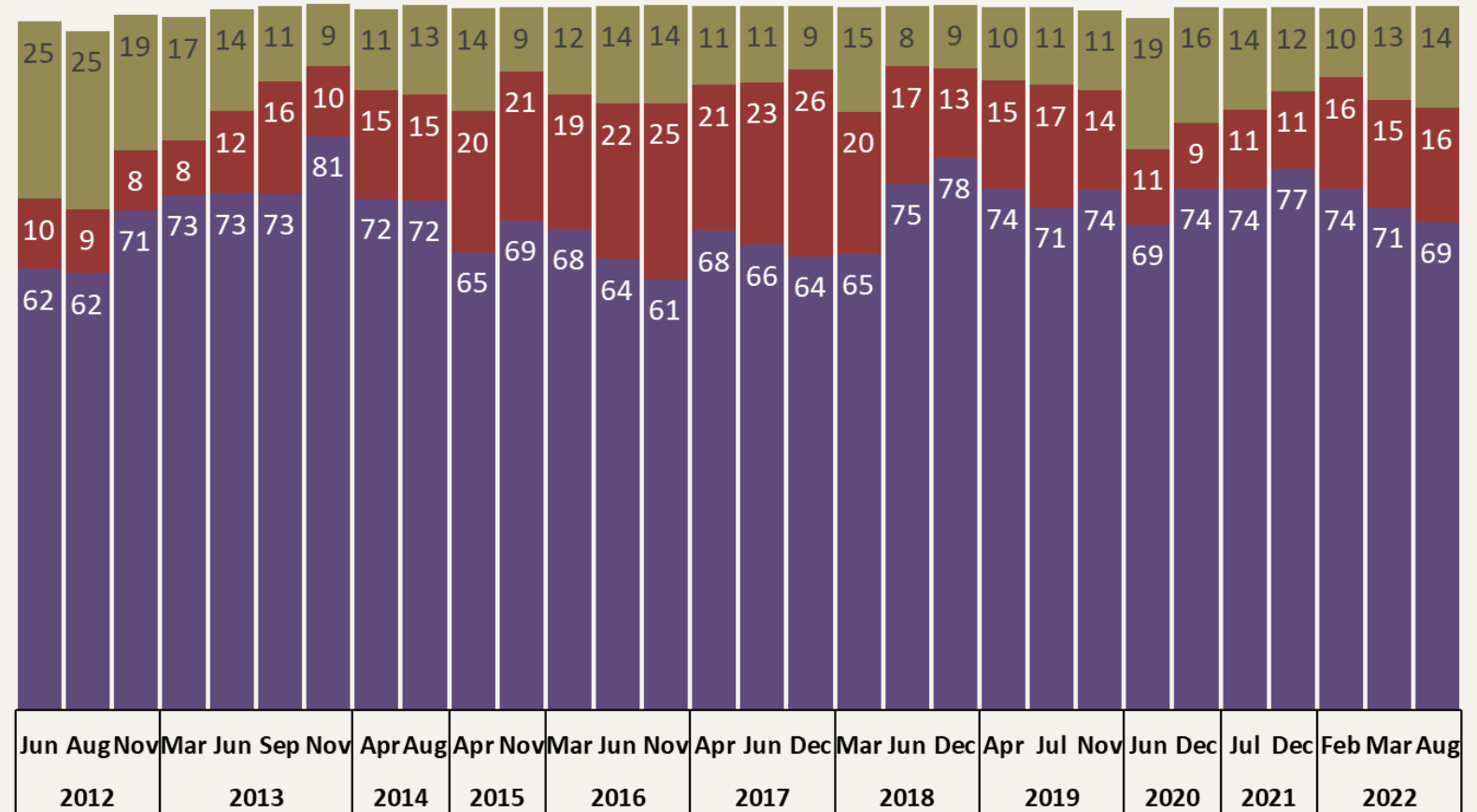
■ April 2019 ■ August 2022



Support for NATO membership remains solid

Do you approve or disapprove of Georgian government's stated goal to join the NATO? (q28)

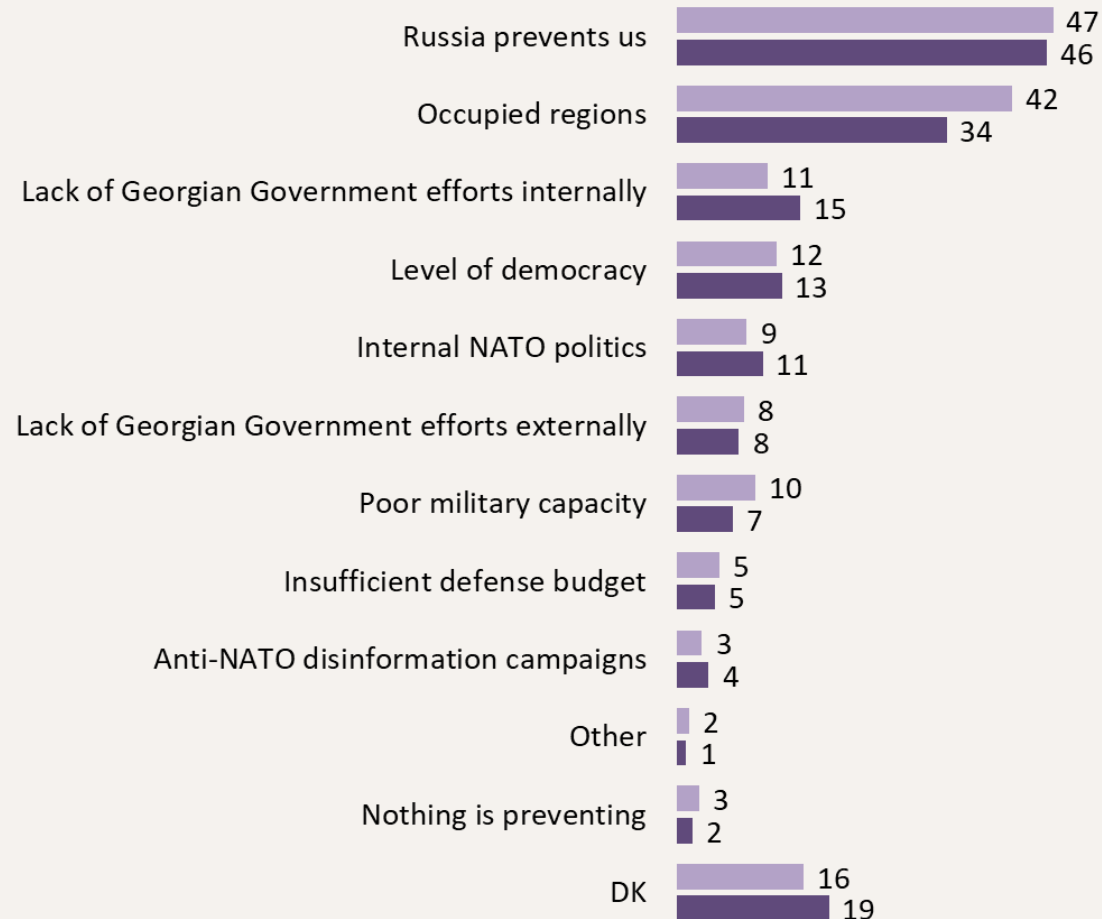
■ Approve ■ Disapprove ■ DK



Plurality say Russia and occupied regions prevent Georgia from NATO membership

What factors, if any, are preventing Georgia from joining NATO? Up to three answers (q29)

■ April 2019 ■ August 2022

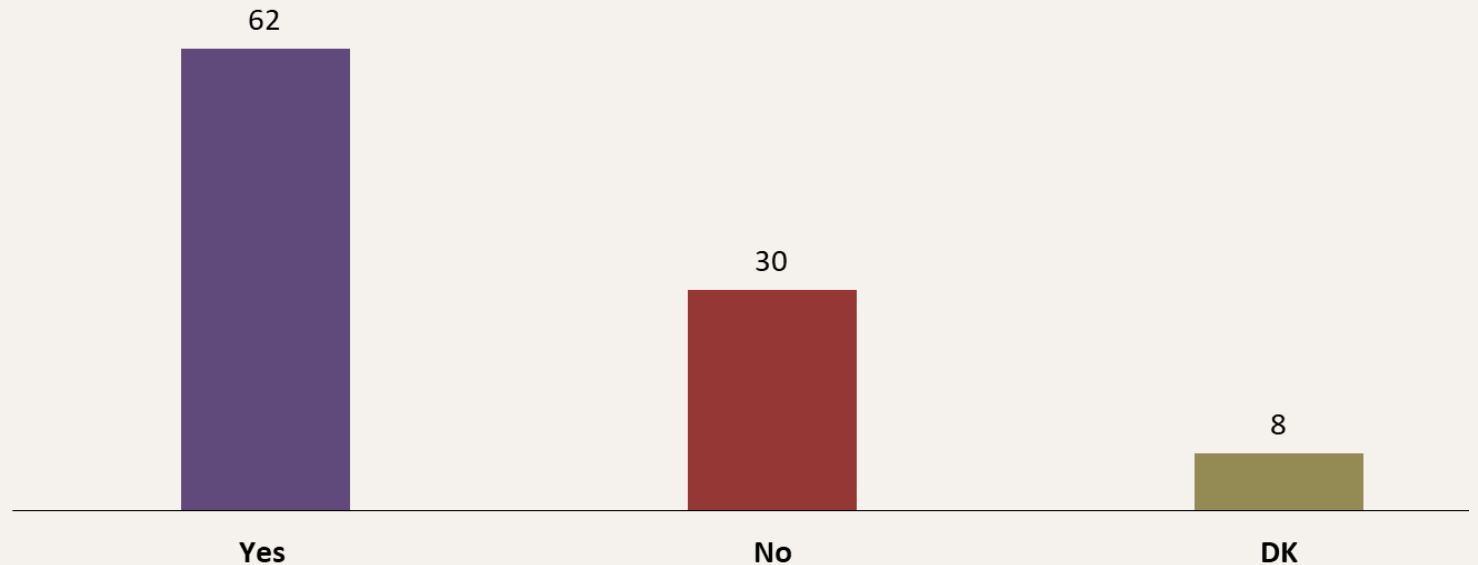


EU candidacy status

Majority is aware about the European Council's decision

Majority of citizens in the ethnic minority regions (72 percent) and 40 percent of citizens in small cities were not aware about this event.

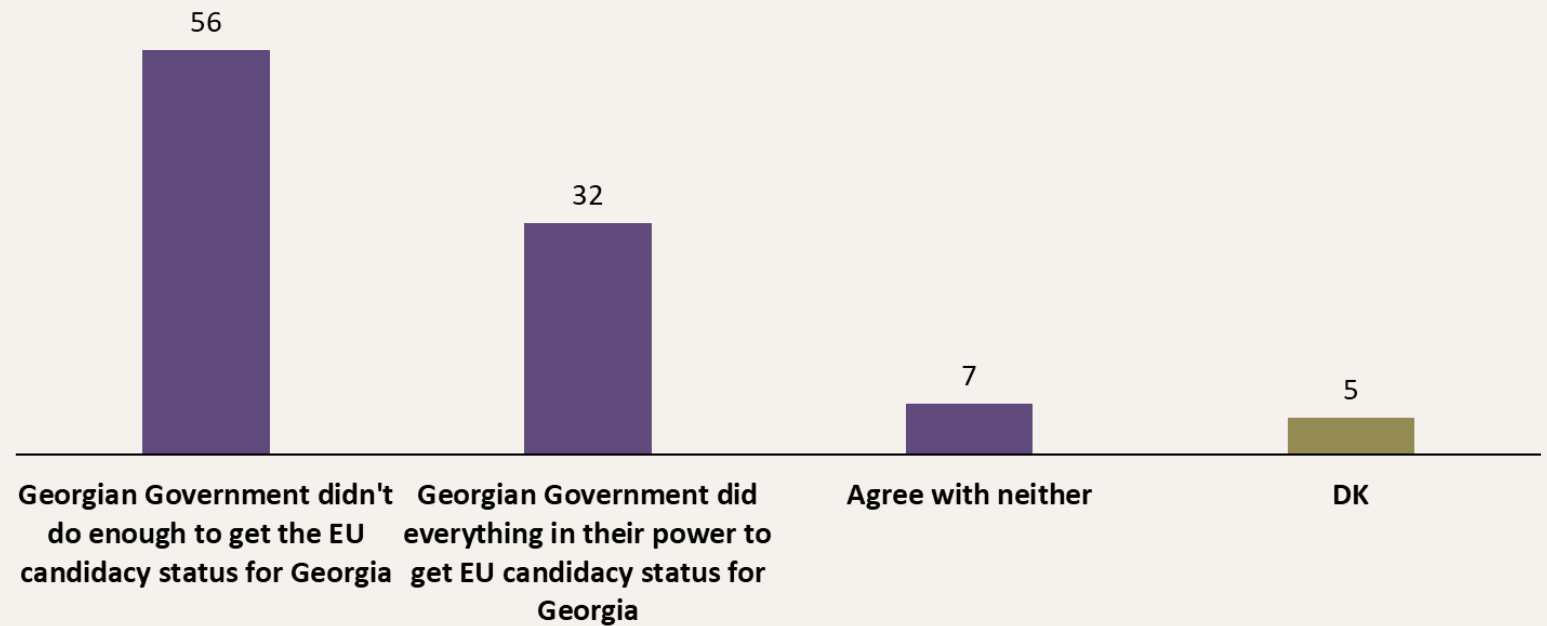
On June 23th, 2022 The European Council recognized the European perspective of Georgia and expressed readiness to grant the status of candidate country to Georgia once the certain conditions are met. Have you heard about this decision? (q35)



Majority of those who was aware about the European Council's decision believe that the Georgian government didn't do enough to get EU candidacy status

Highest number of people believing the government didn't do enough come from Tbilisi, younger demographic and opposition supporters' circle.

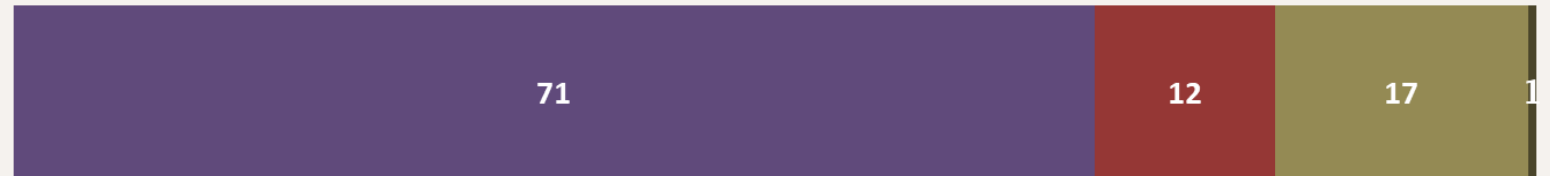
Which statement do you agree with the most? - Of those 62% who have heard about the European Council decision on June 23, 2022 (q36)



While meeting the EU candidacy conditions is important for most citizens, they are skeptical that government will fulfill them

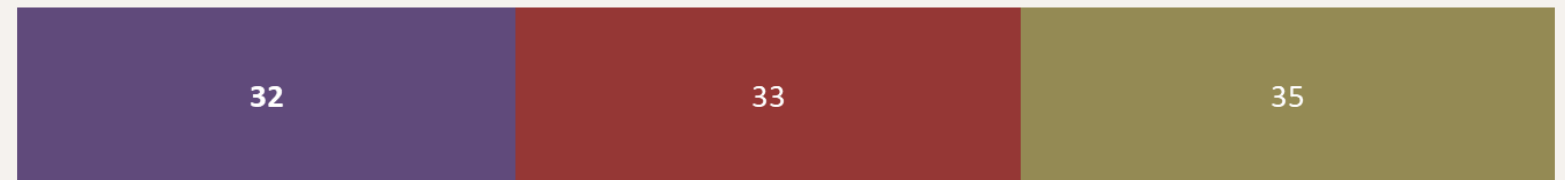
How important or unimportant is it for you that Georgia meets all the conditions set out by the European Council for receiving EU candidate country status? (q37)

■ Important ■ Not important ■ DK ■ RA



Do you think that the Georgian government will fulfill conditions laid out by the European Council for EU candidate country status? (q38)

■ Yes, it will ■ No, it won't ■ DK



Wide public consensus on importance of opposition and CSO inclusion, but only a third believe the government will include them

In your opinion, should the government include the following in the process towards fulfilling the European Council's conditions? (q39)

■ Yes ■ No ■ DK ■ RA

Opposition parties



CSOs / NGOs



In your opinion, will the government include the following parties in the process towards fulfilling the European Council's conditions? (q40)

Opposition parties



CSOs / NGOs

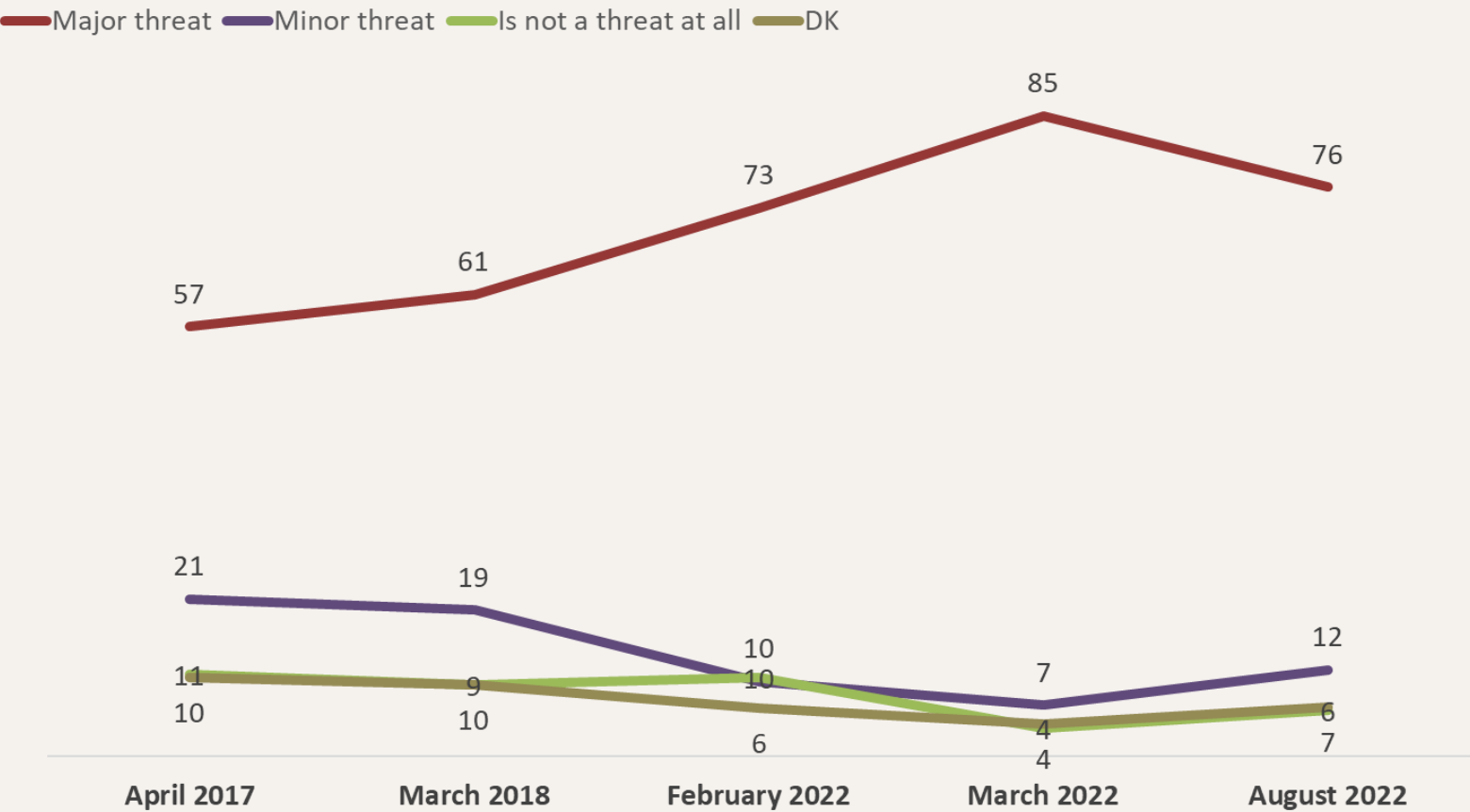


Russia

Majority say Russia is a threat

Ethnic minority groups less likely to call Russia a threat.

In your opinion, how much of a military threat, if at all, is Russia to its neighboring countries? A major threat, a minor threat or not a threat at all? (q31)

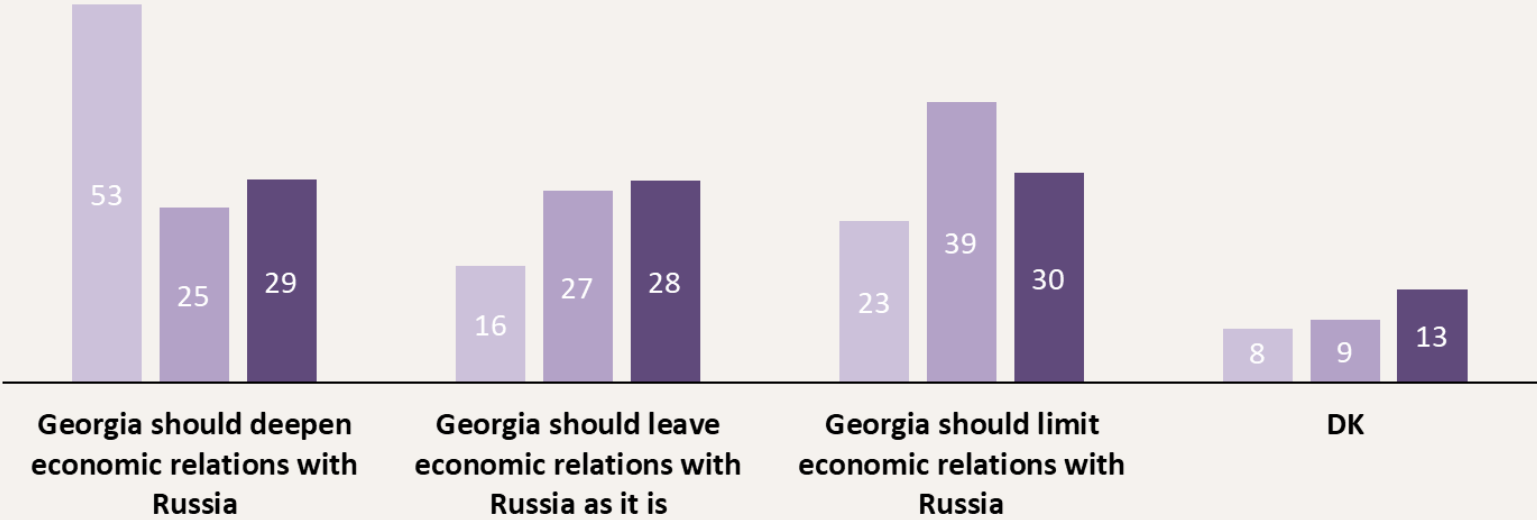


Majority believe Georgia should cut economic ties with Russia or leave as it is

Support for deepening economic relations with Russia is the highest among male citizens, ethnic minority settlements, and Georgian Dream supporters.

Thinking about Georgia's economic relations with Russia, in your opinion: (q32)

February 2022 March 2022 August 2022



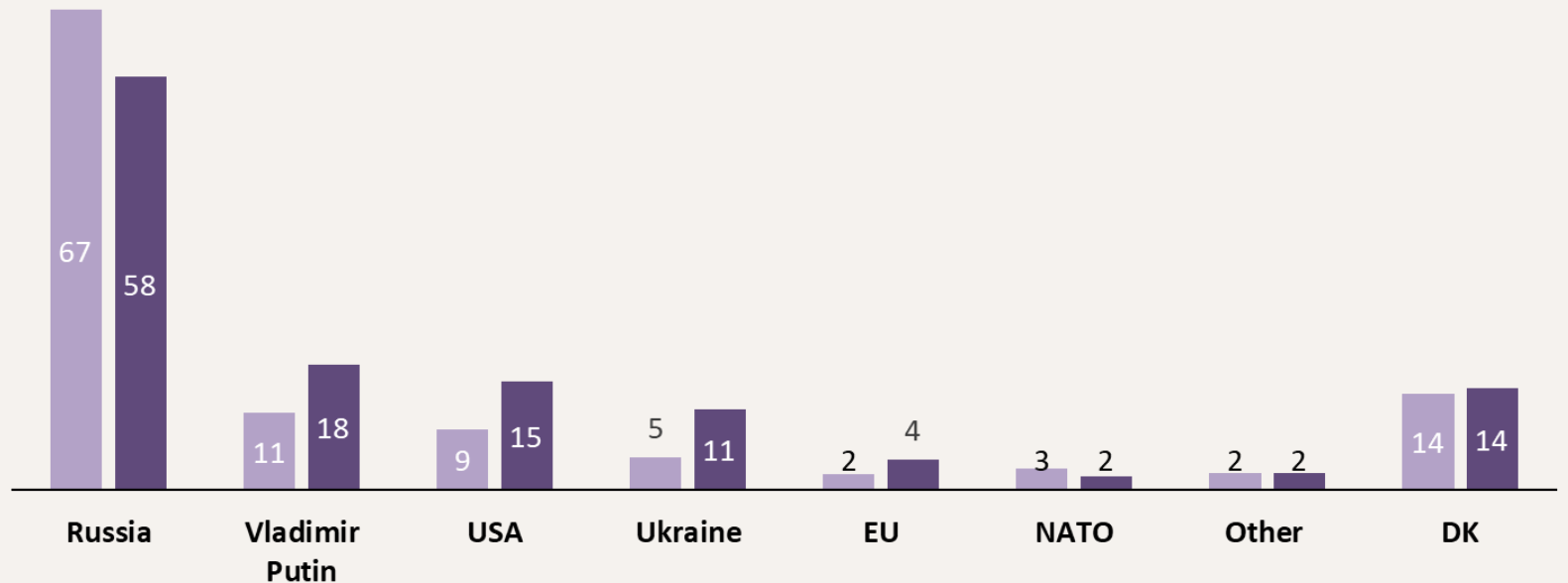
Russian Invasion into Ukraine

#SlavaUkraini

Georgians are confident that war is Russia's fault

To the best of your knowledge, whose fault is the War in Ukraine? Up to three answers. Open question. (q33)

■ March 2022 ■ August 2022

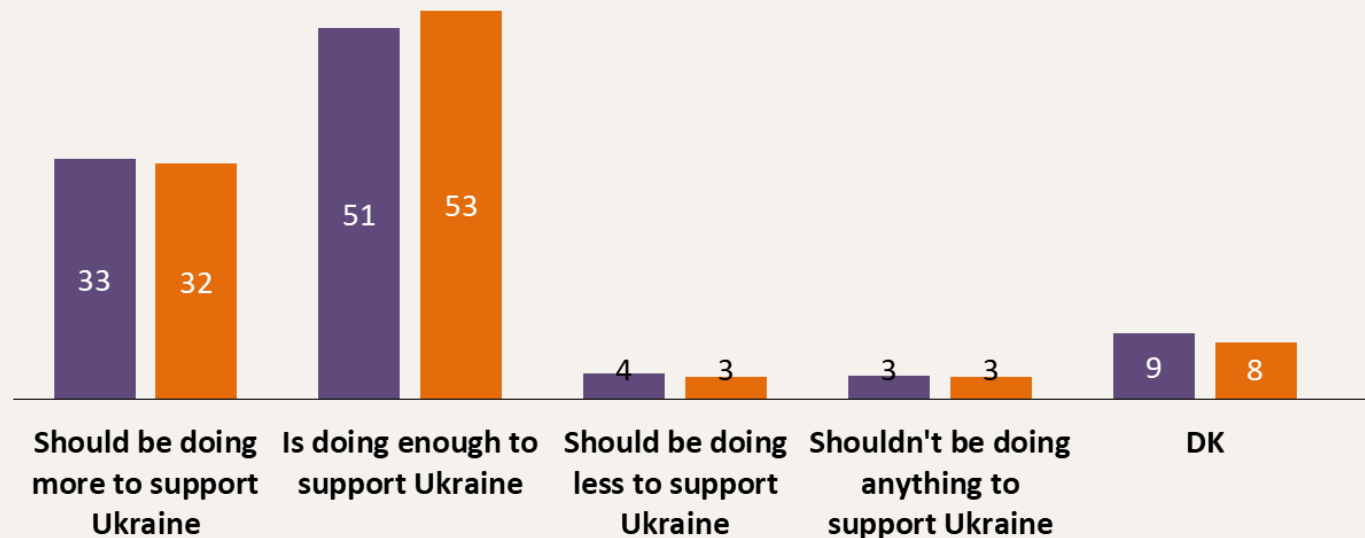


Majority believe the government and parliament are doing enough to support Ukraine

Younger citizens, Tbilisi residents and opposition supporters are more likely to say that Georgian government and parliament should be doing more to support Ukraine.

Thinking of the Georgian Government's/Parliament's response towards the war in Ukraine. Do you believe that the Government of Georgia/The Parliament of Georgia: (q34-34b)

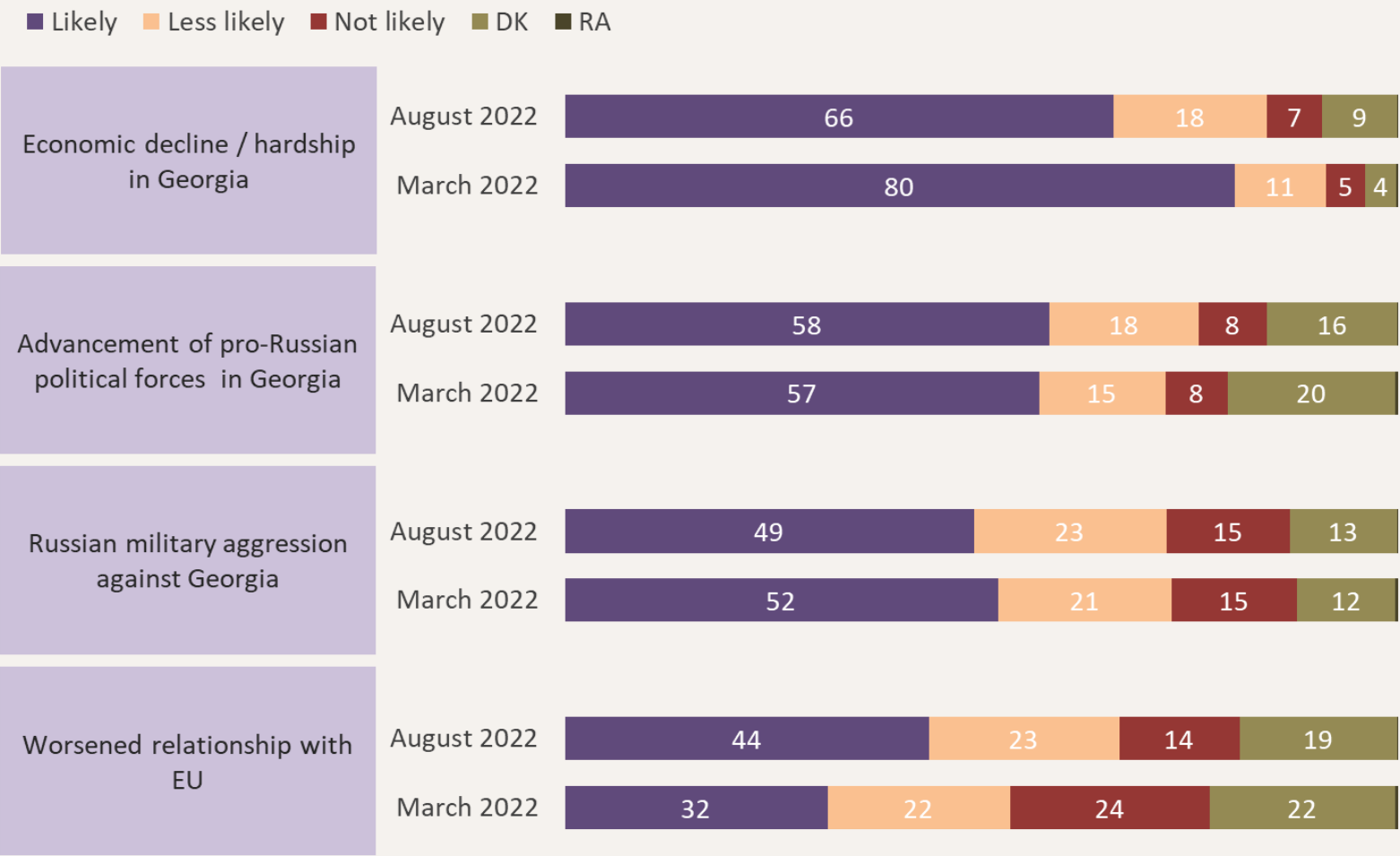
■ The Parliament of Georgia ■ The Government of Georgia



Future

Citizens expecting economic decline, advancement of pro-Russian forces, Russian military aggression, and worsened relationship with EU

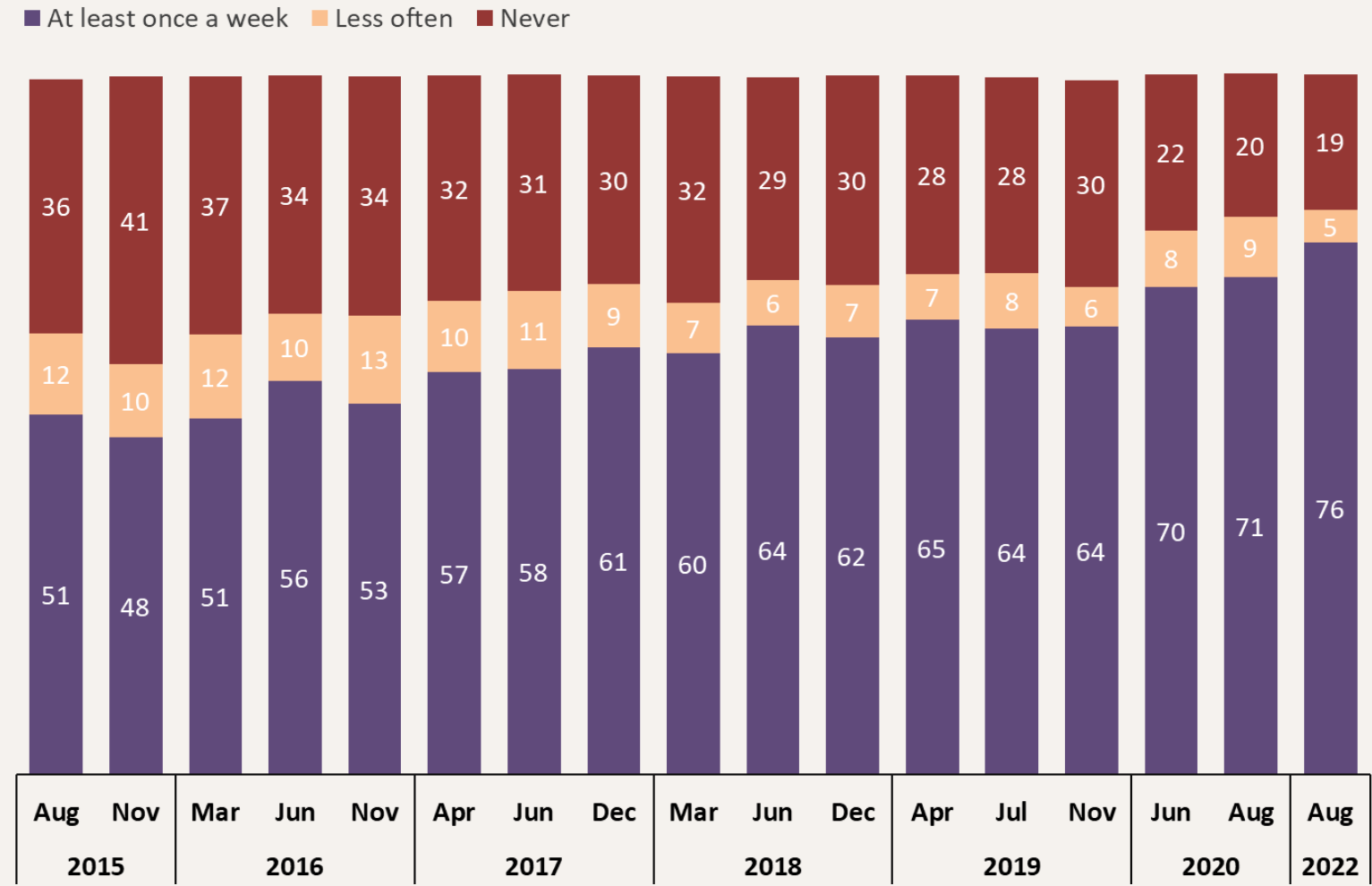
Considering the current situation, please tell me how likely or unlikely it is that the following scenarios will unfold in Georgia during the next year? (q41)



Demographic

Dramatic rise of internet

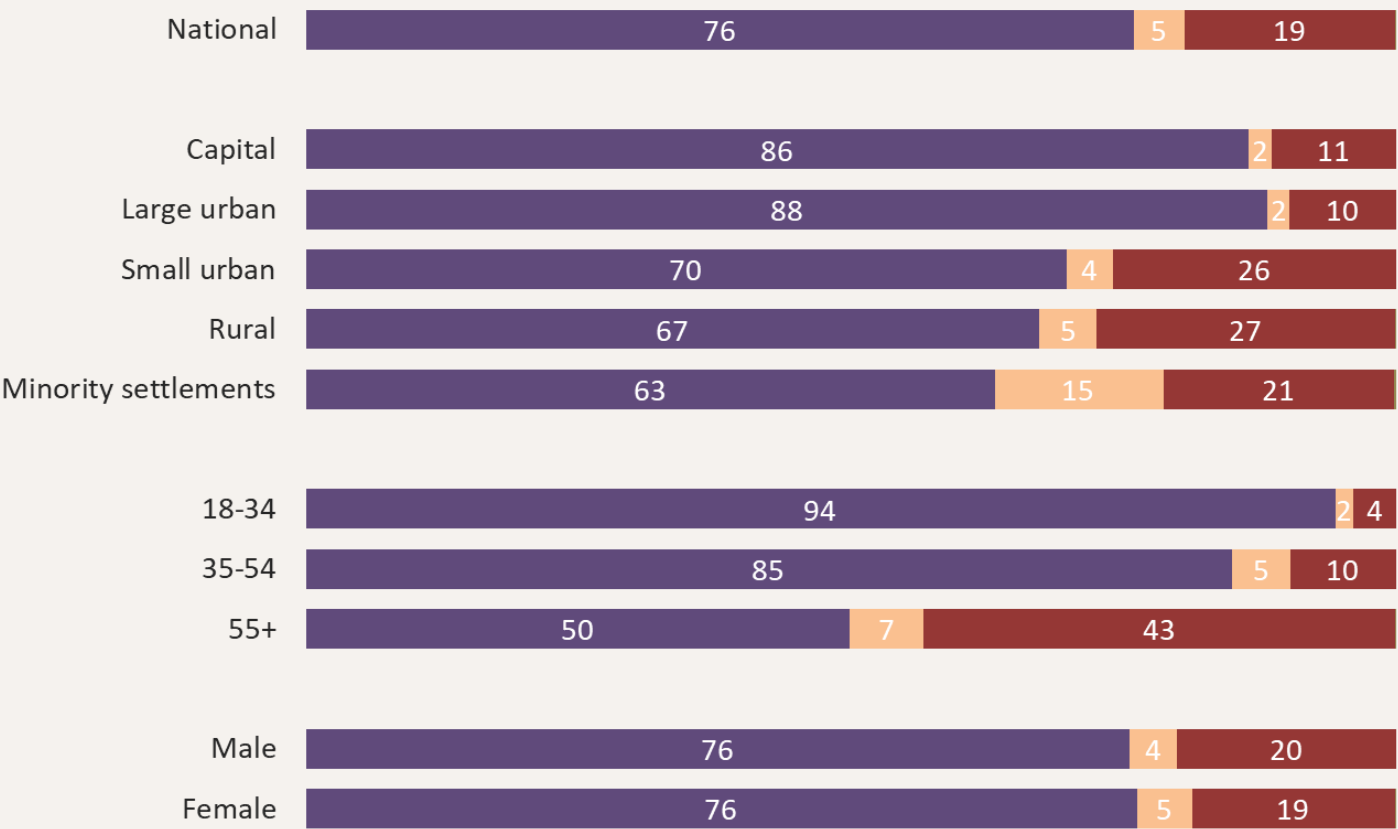
How often do you use the Internet? Do you use the Internet...
(q46)



Internet usage
remains lower
in rural and
minority
settlements,
and older
citizens

How often do you use the Internet? Do you use the Internet ...
(q46 X Settlement, Age, Gender)

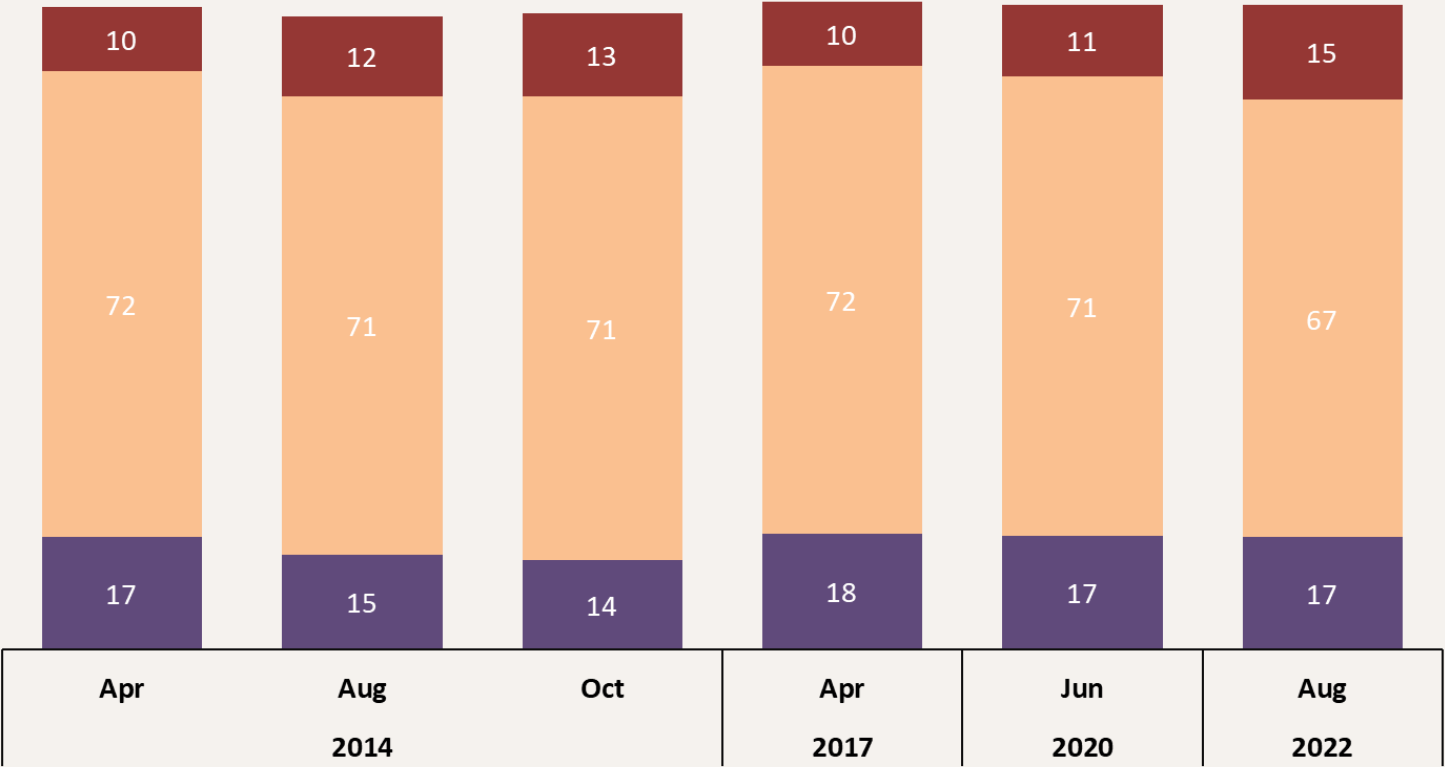
At least once a week Less often Never DK



Only 17 percent of Georgian citizens attend religious services at least once a week

Using this card, apart from special occasions such as weddings and funerals, about how often do you attend religious services? (q47)

At least once a week Less often Never



Majority understands Russian language.

Knowledge of English is limited.

Using this card, please tell me which one of these levels best describes your ability in the following: (q48)

Advanced Intermediate Beginner No basic knowledge DK

Russian



English



Turkish

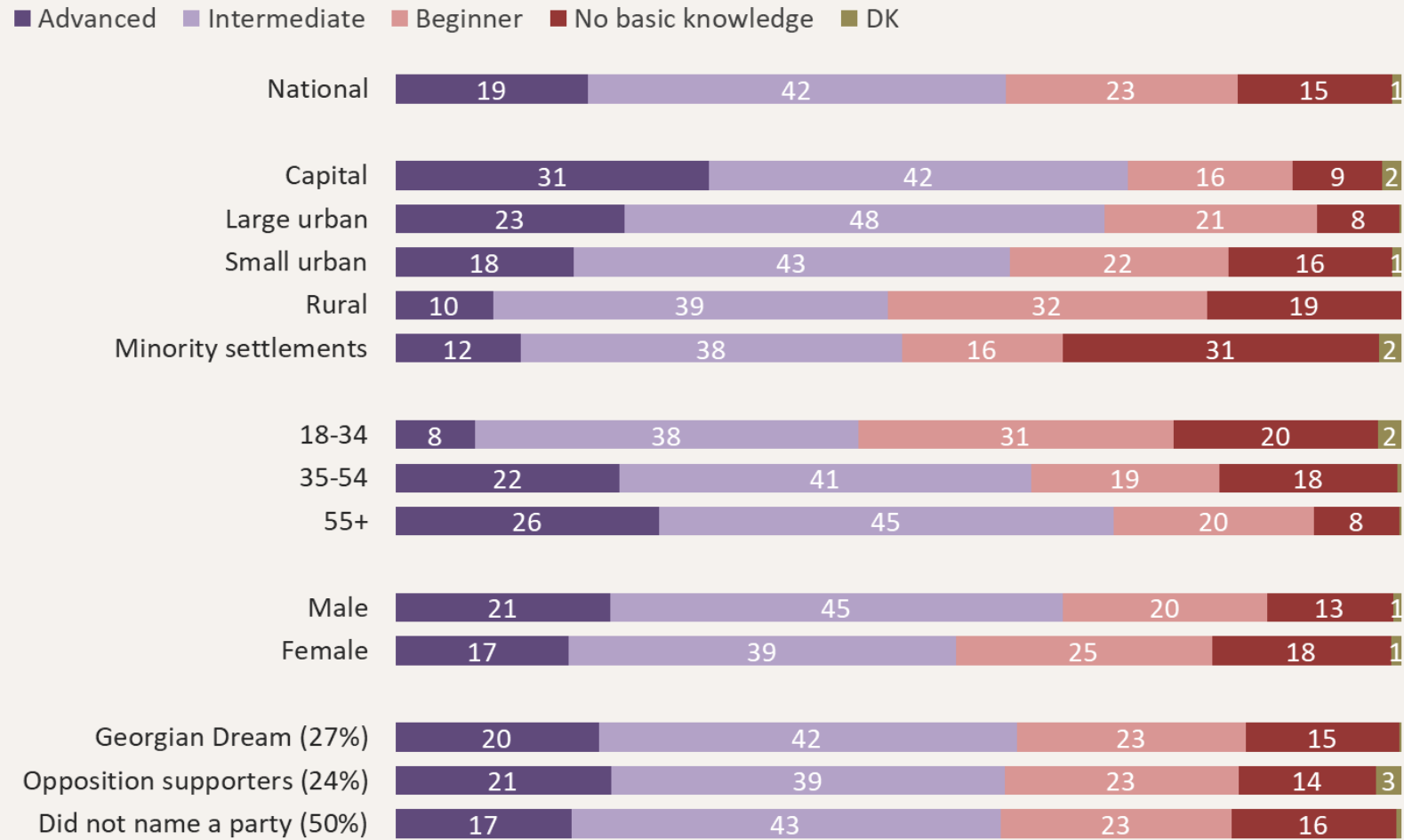


Georgian (asked only when interview was in Armenian or Azerbaijani)



Knowledge of Russian is highest in Tbilisi and large cities, and amongst 55+ citizens

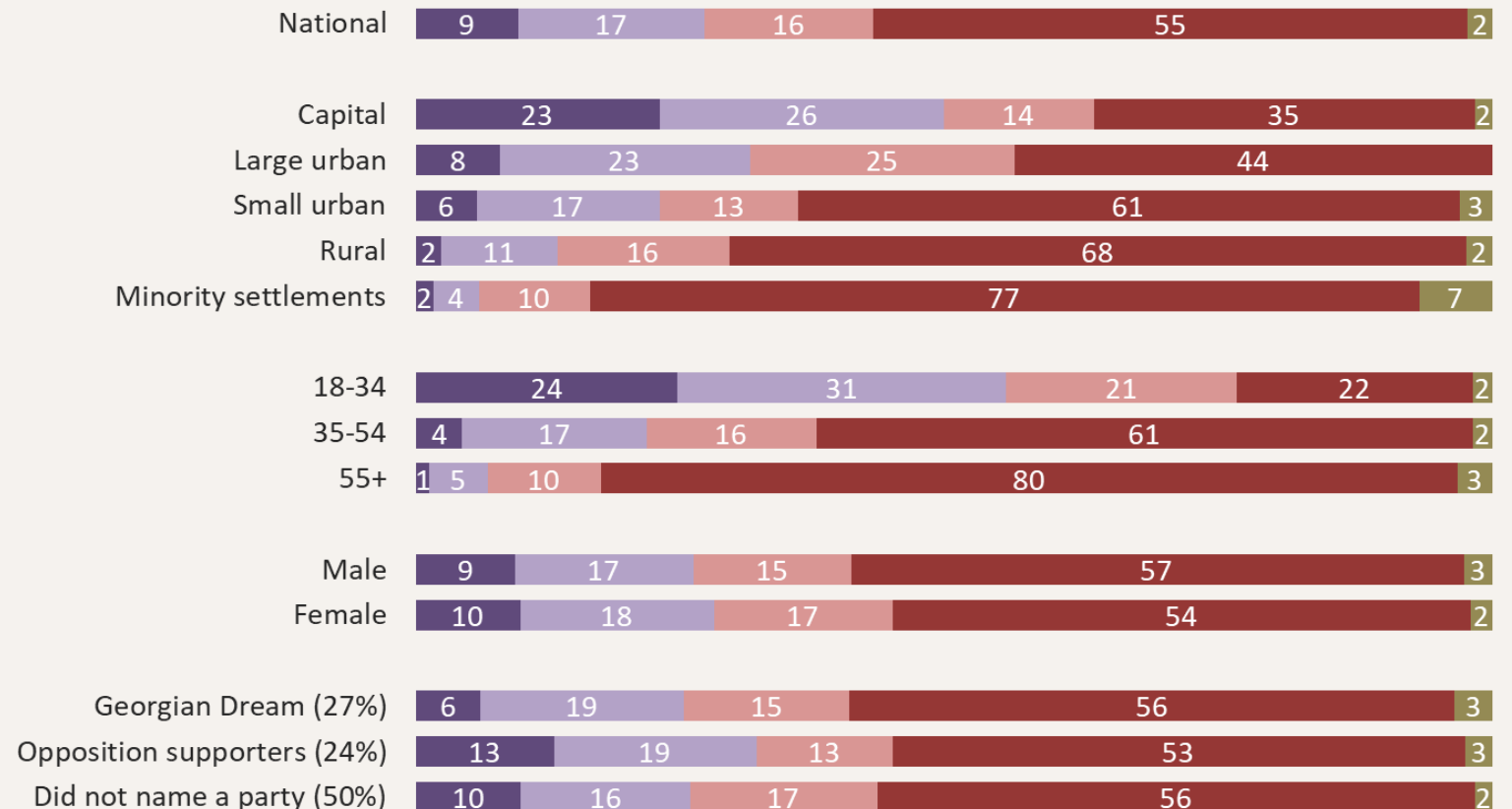
Using this card, please tell me which one of these levels best describes your ability in Russian: (q48_1 X Settlement, Age, Gender, Party closest to you)



Knowledge of English is highest in Tbilisi and large cities, as well as amongst younger citizens

Using this card, please tell me which one of these levels best describes your ability in English: (q48_2 X Settlement, Age, Gender, Party closest to you)

■ Advanced ■ Intermediate ■ Beginner ■ No basic knowledge ■ DK



Research is funded by the United Kingdom of Great Britain and Northern Ireland through the foreign, commonwealth and development office's good governance fund.

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