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.
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.

- Georgia is going in the right direction
- Georgia is not changing at all
- Georgia is going in the wrong direction
Georgians say democracy is, first of all, equality before the law and freedom of speech.
Living in a democratic country is important for majority of Georgians.
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.
Majority: Georgia not a good example for neighbors

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

December 2021: 23, 34, 25, 18
August 2022: 25, 31, 25, 19
Increase in support for protection of LGBTQI+ rights
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.
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.
Compared to 2018, now less people say there is progress in regards to affordable healthcare and freedom of speech.
Low quality of education and online classes named as top challenges
Tbilisi residents are especially concerned about low quality of education and poor qualification of teachers.

<table>
<thead>
<tr>
<th>Issue</th>
<th>National</th>
<th>Capital</th>
<th>Large urban</th>
<th>Small urban</th>
<th>Rural</th>
<th>Minority settlements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low quality of education</td>
<td>31</td>
<td>51</td>
<td>29</td>
<td>21</td>
<td>4</td>
<td>9</td>
</tr>
<tr>
<td>Difficulties associated with online classes</td>
<td>30</td>
<td>35</td>
<td>33</td>
<td>25</td>
<td>22</td>
<td>24</td>
</tr>
<tr>
<td>High cost of education in the universities</td>
<td>13</td>
<td>13</td>
<td>9</td>
<td>24</td>
<td>23</td>
<td>28</td>
</tr>
<tr>
<td>Low qualifications of teachers/lecturers</td>
<td>9</td>
<td>11</td>
<td>21</td>
<td>19</td>
<td>18</td>
<td>36</td>
</tr>
<tr>
<td>High price of study materials/books</td>
<td>15</td>
<td>18</td>
<td>12</td>
<td>11</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>Low salaries of teachers/lecturers</td>
<td>13</td>
<td>11</td>
<td>13</td>
<td>11</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>High cost of tutors</td>
<td>12</td>
<td>11</td>
<td>11</td>
<td>16</td>
<td>15</td>
<td>15</td>
</tr>
</tbody>
</table>
Cost of medicine has become even bigger concern for citizens.
Water supply, roads, sewage, and homeless animals named as the top local concerns
Tbilisi is most concerned about cleanliness of streets, cost of utilities, and homeless animals.
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)

- National
  - Water supply: 25
  - Roads: 24
  - Sewage: 20
  - Homeless animals: 18
  - Pollution of environment: 15
  - Clean streets: 12
  - Cost of utilities: 12
  - Traffic: 10
  - Trash collection: 10
  - Public transport: 10

- Capital
  - Pollution of environment: 30
  - Cost of utilities: 24
  - Homeless animals: 23
  - Traffic: 22
  - Clean streets: 16
  - Public transport: 16
  - Roads: 16
  - Parking: 14
  - Trash collection: 12
  - Parks and green spaces: 9

- Small urban
  - Homeless animals: 41
  - Sewage: 28
  - Water supply: 24
  - Roads: 15
  - Pollution of environment: 15
  - Cost of utilities: 10
  - Clean streets: 10
  - Sports and leisure facilities: 6
  - Parks and green spaces: 6
  - Public transport: 5

- Rural
  - Water supply: 43
  - Sewage: 29
  - Roads: 27
  - Gas Supply: 19
  - Street lights: 14
  - Availability of internet: 14
  - Trash collection: 10
  - Homeless animals: 8
  - Clean streets: 6
  - Playgrounds: 6

- Large urban
  - Roads: 38
  - Sewage: 26
  - Homeless animals: 23
  - Clean streets: 22
  - Pollution of environment: 17
  - Cost of utilities: 15
  - Public transport: 12
  - Traffic: 9
  - Parks and green spaces: 8
  - Water supply: 8

- Minority settlements
  - Water supply: 40
  - Roads: 27
  - Trash collection: 24
  - Availability of kindergartens: 14
  - School infrastructure: 14
  - Clean streets: 11
  - Sewage: 11
  - Pollution of environment: 8
  - Playgrounds: 7
  - Public transport: 7
Economy
State of economy perceived as bad

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

- Good: 2, 3, 4, 4
- Average: 29, 38, 31, 38
- Bad: 66, 57, 63, 55

March 2016 ■ June 2018 ■ July 2019 ■ August 2022
Plurality say they can afford less than five years ago.
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
Tbilisi and other large cities are most critical towards the government, so are the younger citizens.

### Performance Rating of the Current Government

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

<table>
<thead>
<tr>
<th>Subcategory</th>
<th>Bad</th>
<th>Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>51</td>
<td>41</td>
</tr>
<tr>
<td>Capital</td>
<td>60</td>
<td>35</td>
</tr>
<tr>
<td>Large urban</td>
<td>59</td>
<td>34</td>
</tr>
<tr>
<td>Small urban</td>
<td>49</td>
<td>44</td>
</tr>
<tr>
<td>Rural</td>
<td>44</td>
<td>45</td>
</tr>
<tr>
<td>Minority settlements</td>
<td>38</td>
<td>53</td>
</tr>
<tr>
<td>18-34</td>
<td>57</td>
<td>37</td>
</tr>
<tr>
<td>35-54</td>
<td>49</td>
<td>40</td>
</tr>
<tr>
<td>55+</td>
<td>47</td>
<td>45</td>
</tr>
<tr>
<td>Male</td>
<td>50</td>
<td>43</td>
</tr>
<tr>
<td>Female</td>
<td>52</td>
<td>39</td>
</tr>
<tr>
<td>Georgian Dream (27%)</td>
<td>13</td>
<td>84</td>
</tr>
<tr>
<td>Opposition supporters (24%)</td>
<td>75</td>
<td>20</td>
</tr>
<tr>
<td>Did not name a party (50%)</td>
<td>60</td>
<td>27</td>
</tr>
</tbody>
</table>
President’s negative job assessment has increased.
Majority remain skeptical that parliament is responsive to citizens’ needs.

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

- If I tell a member of the Parliament about issues in my community, he/she will take action to help solve the problem
  - August 2022: Agree 36, Disagree 54, DK 10
  - December 2021: Agree 35, Disagree 52, DK 13
  - July 2021: Agree 26, Disagree 54, DK 18
  - March 2016: Agree 37, Disagree 48, DK 14

- Parliament is passing legislation on issues that matter to me
  - August 2022: Agree 36, Disagree 56, DK 8
  - December 2021: Agree 36, Disagree 53, DK 10
  - July 2021: Agree 29, Disagree 55, DK 15
  - March 2016: Agree 37, Disagree 48, DK 14

- Parliament is effectively overseeing the actions of the government (ministries)
  - August 2022: Agree 33, Disagree 45, DK 22
  - December 2021: Agree 35, Disagree 42, DK 22
  - March 2016: Agree 33, Disagree 45, DK 22

- Parliament communicates regularly with citizens
  - August 2022: Agree 27, Disagree 65, DK 8
  - December 2021: Agree 28, Disagree 61, DK 10
  - July 2021: Agree 24, Disagree 60, DK 15
  - March 2016: Agree 25, Disagree 60, DK 15
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.
Ruling party has the highest confidence in the ethnic minority and rural settlements

Elected opposition parties, too, have the highest confidence in minority settlements.
Majority of opposition supporters say opposition parties do not act in their best interest
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.

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.
If elections were held tomorrow, majority would vote
Undecided and ethnic minority settlements are most likely to skip elections.
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.

<table>
<thead>
<tr>
<th>Category</th>
<th>No (%)</th>
<th>Yes (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>56</td>
<td>39</td>
</tr>
<tr>
<td>Capital</td>
<td>59</td>
<td>36</td>
</tr>
<tr>
<td>Capital, Large urban</td>
<td>54</td>
<td>41</td>
</tr>
<tr>
<td>Capital, Small urban</td>
<td>57</td>
<td>40</td>
</tr>
<tr>
<td>Capital, Rural</td>
<td>56</td>
<td>40</td>
</tr>
<tr>
<td>Capital, Minority settlements</td>
<td>48</td>
<td>40</td>
</tr>
<tr>
<td>18-34</td>
<td>65</td>
<td>29</td>
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<tr>
<td>35-54</td>
<td>55</td>
<td>41</td>
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<tr>
<td>55+</td>
<td>48</td>
<td>47</td>
</tr>
<tr>
<td>Male</td>
<td>57</td>
<td>39</td>
</tr>
<tr>
<td>Female</td>
<td>55</td>
<td>39</td>
</tr>
<tr>
<td>Georgian Dream (27%)</td>
<td>30</td>
<td>65</td>
</tr>
<tr>
<td>Opposition supporters (24%)</td>
<td>37</td>
<td>61</td>
</tr>
<tr>
<td>Did not name a party (50%)</td>
<td>79</td>
<td>15</td>
</tr>
</tbody>
</table>
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)

<table>
<thead>
<tr>
<th>Factor</th>
<th>April 2019</th>
<th>August 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Politicians</td>
<td>56</td>
<td>67</td>
</tr>
<tr>
<td>Russia</td>
<td>48</td>
<td>49</td>
</tr>
<tr>
<td>Georgian Media</td>
<td>12</td>
<td>14</td>
</tr>
<tr>
<td>Current economic system</td>
<td>12</td>
<td>12</td>
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<tr>
<td>Country’s leaders</td>
<td>11</td>
<td>23</td>
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<tr>
<td>Law enforcement bodies</td>
<td>15</td>
<td>23</td>
</tr>
<tr>
<td>Civil society organizations/NGOs</td>
<td>15</td>
<td>18</td>
</tr>
<tr>
<td>European Union</td>
<td>39</td>
<td>48</td>
</tr>
<tr>
<td>Religion</td>
<td>50</td>
<td>56</td>
</tr>
<tr>
<td>NATO</td>
<td>36</td>
<td>48</td>
</tr>
<tr>
<td>Educational institutions</td>
<td>41</td>
<td>58</td>
</tr>
</tbody>
</table>

Scale: 0-100
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.
Majority remain confident that Georgia will benefit more from EU-NATO integration than closer ties with Russia.
EU membership support drops slightly, but remains high.

Support is the lowest among ethnic minority groups.
Slight drop in EU membership support is evident across the board.
Jobs and security are the main motivators behind EU support.
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)

- Georgia has grown closer to EU
- Georgia’s relationship with EU remains the same as before
- Georgia has distanced itself from EU
- DK

February 2022: 29, 35, 27, 9
March 2022: 26, 24, 36, 13
August 2022: 28, 27, 30, 15
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.
Support for NATO membership remains solid

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

![Graph showing support for NATO membership over years](image)

- **Approve**
- **Disapprove**
- **DK**

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<thead>
<tr>
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<tbody>
<tr>
<td>2013</td>
<td>62</td>
<td>71</td>
<td>73</td>
<td>69</td>
<td>68</td>
<td>69</td>
<td>68</td>
<td>64</td>
<td>61</td>
<td>66</td>
<td>64</td>
<td>65</td>
<td>66</td>
<td>64</td>
<td>75</td>
<td>78</td>
<td>74</td>
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<td>71</td>
<td>69</td>
<td>74</td>
<td>74</td>
<td>74</td>
</tr>
</tbody>
</table>
Plurality say Russia and occupied regions prevent Georgia from NATO membership.
EU candidacy status
Majority is aware about the European Council’s decision

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree with neither</th>
<th>DK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Georgian Government didn’t do enough to get the EU candidacy status for Georgia</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Georgian Government did everything in their power to get EU candidacy status for Georgia</td>
<td>32</td>
<td>5</td>
</tr>
<tr>
<td>56</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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: 71
- Not important: 12
- DK: 17
- RA: 1

**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: 32
- No, it won't: 33
- DK: 35
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)**

- **Opposition parties**
  - Yes: 70
  - No: 17
  - DK: 13

- **CSOs / NGOs**
  - Yes: 68
  - No: 16
  - DK: 15

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

- **Opposition parties**
  - Yes: 35
  - No: 35
  - DK: 30

- **CSOs / NGOs**
  - Yes: 34
  - No: 33
  - DK: 33
Russia
Majority say Russia is 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)

Ethnic minority groups less likely to call Russia a threat.
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.
Russian Invasion into Ukraine

#SlavaUkraini
Georgians are confident that war is Russia’s fault.
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.
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)**

<table>
<thead>
<tr>
<th>Scenario</th>
<th>August 2022</th>
<th>March 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic decline / hardship in Georgia</td>
<td>66</td>
<td>80</td>
</tr>
<tr>
<td>Advancement of pro-Russian political forces in Georgia</td>
<td>58</td>
<td>57</td>
</tr>
<tr>
<td>Russian military aggression against Georgia</td>
<td>49</td>
<td>52</td>
</tr>
<tr>
<td>Worsened relationship with EU</td>
<td>44</td>
<td>32</td>
</tr>
</tbody>
</table>
Demographic
Dramatic rise of internet
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)

<table>
<thead>
<tr>
<th>Settlement</th>
<th>At least once a week</th>
<th>Less often</th>
<th>Never</th>
<th>DK</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>76</td>
<td>5</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>Capital</td>
<td>86</td>
<td>2</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Large urban</td>
<td>88</td>
<td>2</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Small urban</td>
<td>70</td>
<td>4</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>Rural</td>
<td>67</td>
<td>5</td>
<td>27</td>
<td></td>
</tr>
<tr>
<td>Minority settlements</td>
<td>63</td>
<td>15</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>18-34</td>
<td>94</td>
<td>2</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>35-54</td>
<td>85</td>
<td>5</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>55+</td>
<td>50</td>
<td>7</td>
<td>43</td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>76</td>
<td>4</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>76</td>
<td>5</td>
<td>19</td>
<td></td>
</tr>
</tbody>
</table>
Only 17 percent of Georgian citizens attend religious services at least once a week.
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**
- Advanced: 19
- Intermediate: 42
- Beginner: 23
- No basic knowledge: 15
- DK: 1

**English**
- Advanced: 9
- Intermediate: 17
- Beginner: 16
- No basic knowledge: 55
- DK: 2

**Turkish**
- Advanced: 2
- Intermediate: 8
- Beginner: 6
- No basic knowledge: 80
- DK: 3

**Georgian (asked only when interview was in Armenian or Azerbaijani)**
- Advanced: 2
- Intermediate: 26
- Beginner: 29
- No basic knowledge: 37
- DK: 6
Knowledge of Russian is highest in Tbilisi and large cities, and amongst 55+ citizens.
Knowledge of English is highest in Tbilisi and large cities, as well as amongst younger citizens.
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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