CAUCASUS RESEARCH RESOURCE CENTER

CRRC GEORGIA

REPORT

COVID-19 MONITOR: WAVE 2

Tbilisi, Georgia

May, 2020

ABOUT CRRC GEORGIA

CRRC-Georgia is a non-governmental, non-profit research organization, which collects, analyzes and publishes policy relevant data on social, economic and political trends to strengthen social science research and public policy analysis in the South Caucasus.

RIGHTS AND PERMISSIONS

SUPPORT FOR THIS PROJECT

This project was made possible through the financial support of the Embassy of the Netherlands in Georgia. The views expressed herein represent the views of the authors alone.

Kingdom of the Netherlands

CRRC – GEORGIA

1 Liziko Kavtaradze Street | Entrance III-IV, First Floor | 0179 Tbilisi | Georgia
crrc-geo@crrccenters.org | +995 32 250 52 90
crrc.ge | crrc-caucasus.blogspot.com | caucasusbarometer.org

TABLE OF CONTENTS

KEY FINDINGS

INSTITUTIONAL PERFORMANCE

- Institutional performance assessments remain generally high, however, the degree of approval of many institutions declined slightly between late April and early May.

POLICY APPROVAL

- The public continues to support most government policies. The increased penalties for violating emergency rules are the least supported policy measured on this survey, with 59% of the public reporting approval of the policy.

ECONOMY AND CONSUMER CONFIDENCE

- Five percent or the country reports that they have started working again after losing a job or temporary work stoppage. An additional percent reports finding a new job.
- Consumer confidence remains a mix of uncertainty and pessimism, with families reporting they are worse off than a year ago at significantly higher rates than just a month ago. There is however some room for optimism, with more families reporting it is a good time to purchase durable goods.

ATTITUDES TOWARDS OPENING UP AND THE EXPECTED LENGTH OF THE CRISIS

- The public tends toward agreeing with the statement that the economic damage of the virus is worse than the virus itself. A slight majority also disagrees with the idea that before opening up, it is important for the virus to subside.
- This finding should be viewed in the context of the heavy economic hardship the population is facing as described in the first wave of this report.[1]

PRACTICES

- The share of people socializing outside their homes in Georgia is rising, with a quarter of the public reporting they have socialized outside the home in the week prior to the survey.

EDUCATION POLICY

- The vast majority of students in secondary and primary education can access their teachers either online or over the phone;
- The vast majority of young people are engaged in distance learning activities, at least to some extent;
- The main challenge reported for distance learning is that young people find it difficult to focus;
- Among those not able to access distance learning online (8%), the lack of internet and/or computer is the cause of lack of access;

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[1] For instance, 1 in 7 households reported having no income last month, up from 0.5% and a majority reported experiencing at least some food insecurity in the month prior.

- Children who are unable to access online distance based learning appear to come from relatively disadvantaged backgrounds.
- The public largely approves of the Ministry of Education’s performance when it comes to distance learning.

INTRODUCTION

Covid-19 has led to wide ranging changes in societies around the world. The response in Georgia has been particularly effective to date. In order to provide the Government of Georgia and the international community with an evidence base to support decision making, CRRC Georgia is conducting the Covid-19 Monitoring Project. The project is supported by the Embassy of the Netherlands in Tbilisi. Within the project CRRC will carry out six nationally representative telephone surveys focused on knowledge, attitudes, and practices surrounding the crisis. This document provides the results of the second wave of the survey.

The survey was conducted over cell phone between May 7 and May 10. The results are nationally representative, with a margin of error of 3%. Overall 1,037 individuals responded to the survey. The response rate for the survey was 40.5%. Respondents were selected using random digit dialing to ensure that a representative sample was taken. The data was then weighted to population characteristics using census data. The details of the survey methodology are provided in Annex 1 of this report.

The data analysis below uses frequencies and cross tabulations. Cross tabulations provide differences between different groups and a chi-square test or t-test is used to test for statistical significance of apparent differences. Tests for differences between the following groups were conducted within the study:

- Settlement types (Tbilisi, other urban, rural);
- Age groups (18-34, 35-54, 55+);
- Education levels (Secondary or vocational, tertiary);
- Sex (Male versus female);

In some cases, the sum of percentages presented does not equal 100%. This usually stems from rounding error.

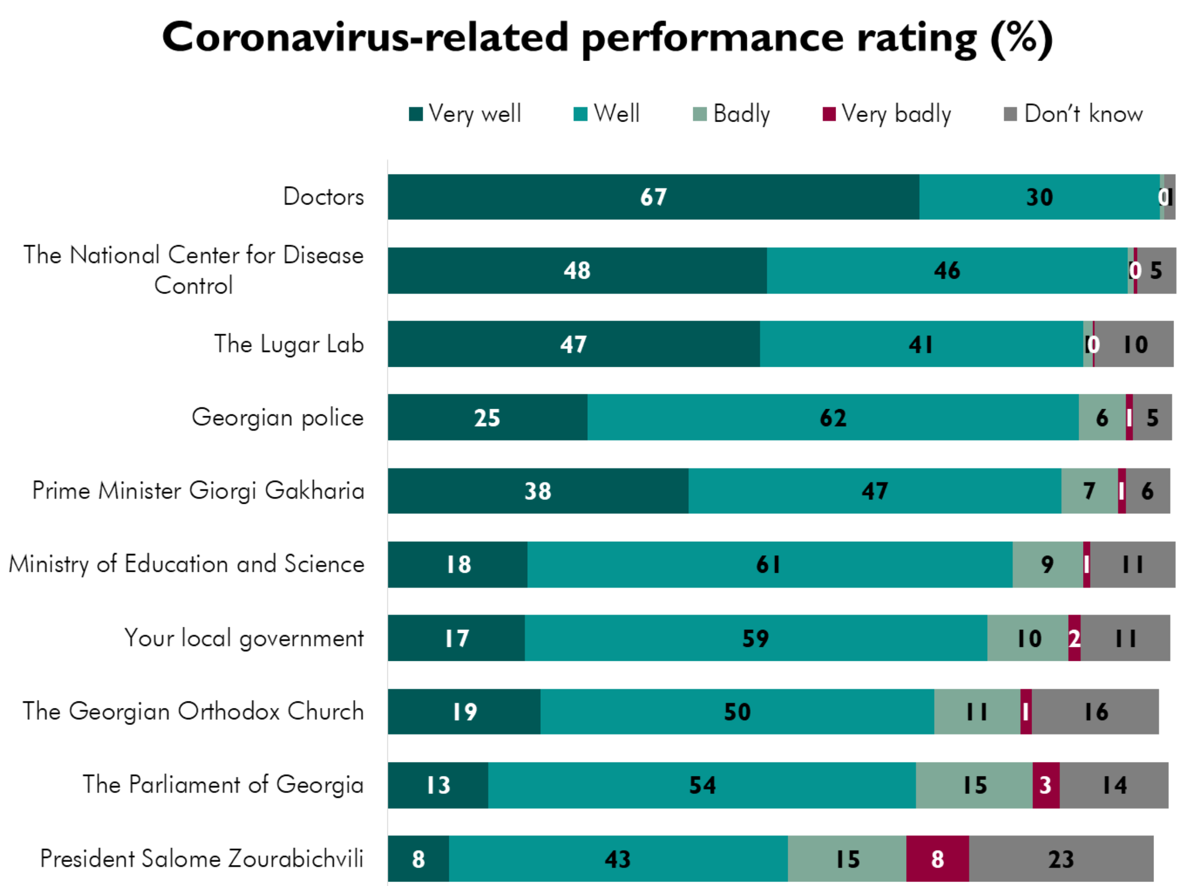
This document proceeds as follows. In the next section, the results of the survey are presented as relates public opinion on institutional performance of different institutions in the crisis and how this has changed since the first wave of the study. In the subsequent section, attitudes towards policy responses are discussed. The next section discusses consumer confidence and how it has changed since April. Next, attitudes towards opening up the economy and the anticipated length of the crisis are discussed. Thereafter, behavior is discussed. The final findings section provides attitudes towards education policy during the crisis. The report finishes with conclusions based on the data. In Annex to the report, the study methodology is provided.

INSTITUTIONAL PERFORMANCE

The country's medical and political authorities have generally received significant praise for the current response to the current crisis. This generally shows up in the data, and has remained consistent over the course of the week since the first wave of the survey was conducted.

The vast majority of the public continue to approve of the institutional performance of governmental actors and medical professionals. However, there are small declines in how positive the public is about the performance of a number of institutions. There is a decline in the shares of "very well" and corresponding increases in "good" performance assessments of seven percentage points for the Lugar Lab (from 54% to 47% very well), and of six percentage points for the National Center for Disease Control (54% to 48%) and the police (31% to 25%). There are changes in the same categories of five percentage points for local government (22% to 17%) as well as doctors (72% to 67%). There were no other changes beyond the margin of error in terms of institutional performance assessments.

Despite the above noted small declines, public approval of different institutions' performance in response to the Covid-19 outbreak remains high. The Ministry of Education's performance rating was added to the second wave of the survey, and its performance rating stands at 79% (well or very well), similar to other governmental agencies.

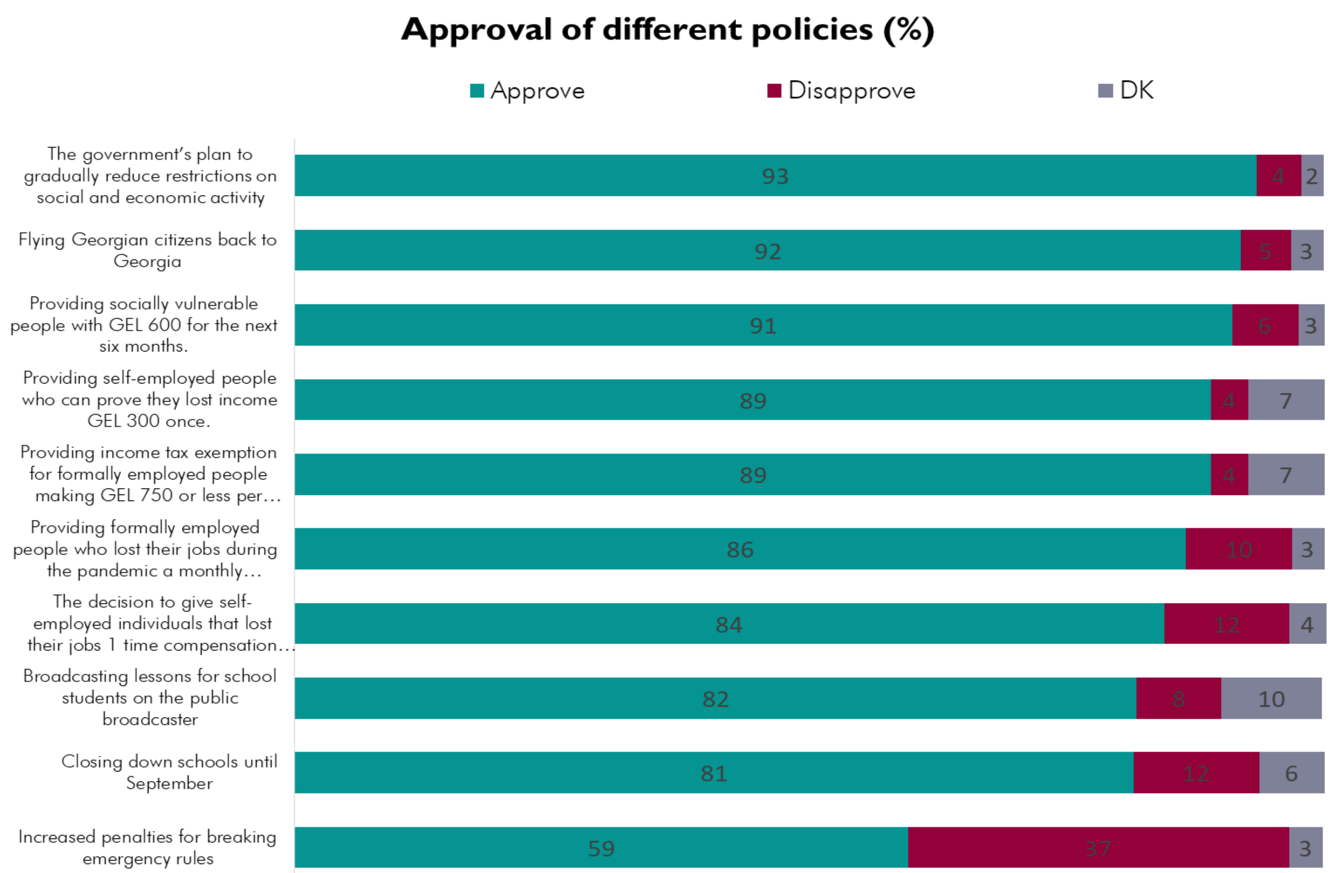


When the above data were broken down by different social and demographic characteristics and between different waves of the survey, the data show substantively small changes within demographic groups, generally within the realm of five percentage point changes within a group. Hence, these changes are not presented.

POLICY APPROVAL

The Government of Georgia has taken numerous measures to contain the spread of the virus as well as attempt to mitigate the economic impact of the crisis. For prevention measures to be effective, the public has to comply with them and people need to be aware of potential economic assistance they can access. In this regard, the survey asked respondents about their approval of different measures the government implemented.

The data indicate varying degrees of support for the different policies. The policies that are most approved of include the government's plan to gradually reduce restrictions (93%), flying Georgian citizens back to Georgia (92%), providing socially vulnerable families with support (91%), providing the self-employed monetary support (89%), and providing income tax exemption for formally employed people (89%). All of the policies asked about on the survey have the support of a large majority of the public, with the exception of stiffening penalties for breaking emergency rules, which only 59% support.



Crosstabs were again conducted to understand which groups are more and less supporting of each of the above policies. The results show a number of differences by settlement type, sex, age, and education level.

There are relatively limited differences between settlement types and sexes. In rural areas, support is higher for increased penalties for violations of emergency rules (65%) compared with Tbilisi (54%) and other urban areas (58%). Women are more supportive of the stiffer penalties for violating emergency rules (56% of men approve versus 62% of women).

Looking at age groups suggests that there is greater support for the tax exemption policy among those between the ages 35 and 54 (18-34:87%, 35-54: 92%, 55+:86%). People in this age group are also more supportive of broadcasting lessons on the public broadcaster (18-34:80%, 35-54: 87%, 55+:77%). The younger age groups are also more supportive of closing schools down until September, however, this stems from higher uncertainty in the older age groups (Approval: 18-34: 83%, 35-54: 84%, 55+:76%. Uncertainty: 18-34: 3%, 35-54: 5%, 55+:11%).

People with higher levels of education are more supportive of the income tax exemptions (92% versus 87%), flying citizens back to Georgia (96% versus 90%), and closing schools down until September (85% versus 79%).

People with children in their households are generally more supportive of both the closing of schools until September (84% versus 80%) and using the public broadcaster to disseminate lessons (85% versus 80%).

RETURNING TO WORK AND CONSUMER CONFIDENCE

The key secondary impact of the Covid-19 crisis have been economic, with the world having entered recession. To understand a key component of the economic outlook, CRRC collected questions on whether people have started new jobs, returned to work after being furloughed, and started working more or less hours than normal as well as consumer confidence, using the standard set of questions for doing so. This data was also collected in early April on CRRC Georgia's Omnibus Survey.

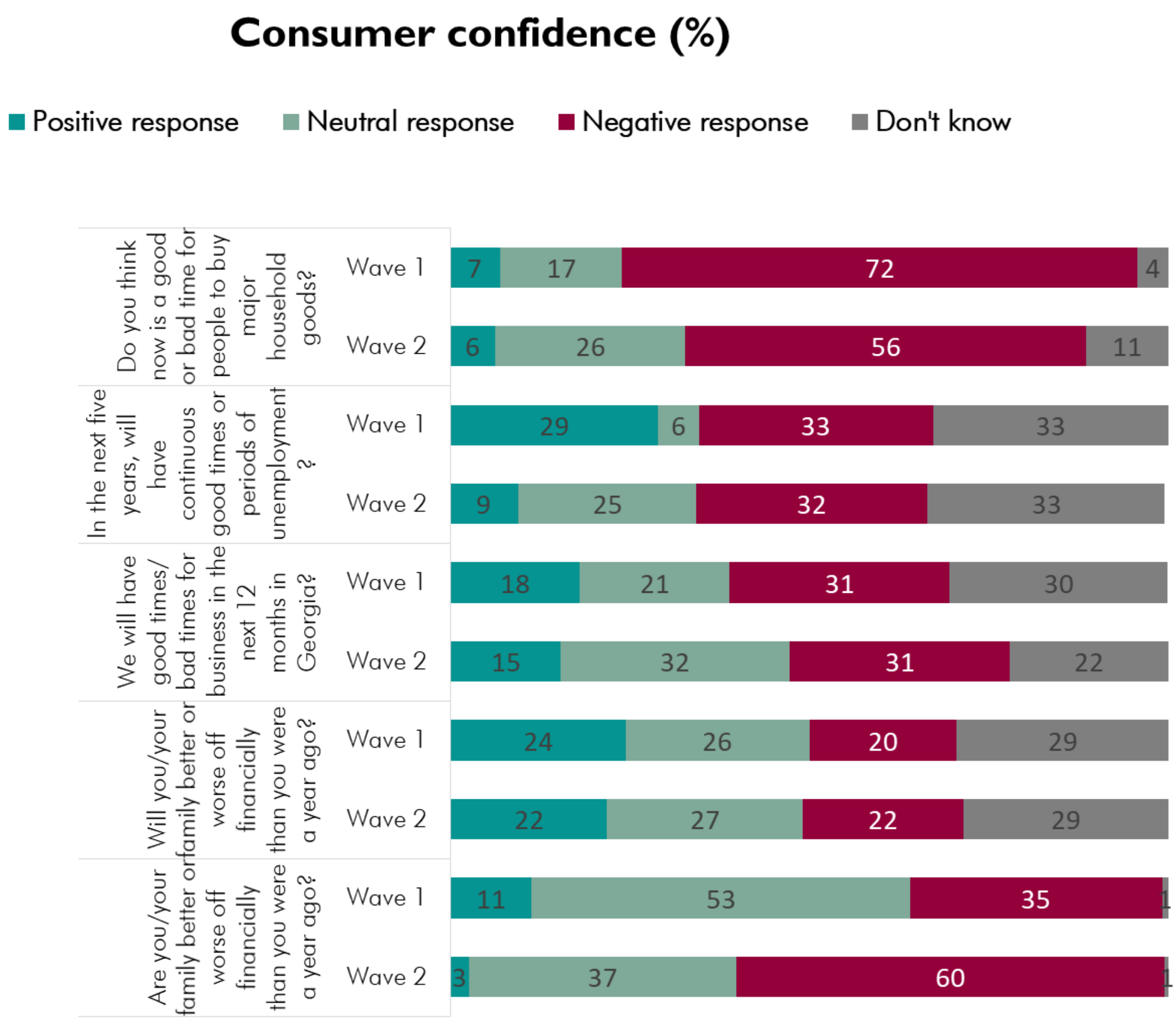
The data on working behavior suggests that 5% of the public has returned to work after stopping during the Coronavirus. A further 1% of the public has started a new job. Given that the past wave of the survey suggested that 18% of the public had lost a job, this can be seen as positive news for the Georgian economy. As restrictions slowly ease on the economy, more people are likely to return to work. Aside from asking whether people had gotten a new job or returned to work, the study also asked about whether people had been working more or less hours than usual. The results suggest that 12% of the public is working less hours than usual and 6% more than usual.

When it comes to consumer confidence, compared with early April, the situation is still negative, with declines along certain dimensions. Still there are improvements in others. Nonetheless, a high level of uncertainty and pessimism remains.

The majority (April: 72%, May: 56%) report it is a bad time to purchase a durable good. However, there is a nine percentage point increase in neutral responses on this question. There is also a seven point increase in uncertainty.

The share of people reporting that their family is worse off than a year ago has nearly doubled in the last month (April: 35%, May: 60%). The share of people reporting that they will be better off a year from now has also declined from 29% in April to 9% in May. However, rather than increased reporting of anticipating being worse off, there has been an increase in people reporting they will be doing about the same (April: 6%, May: 25%).

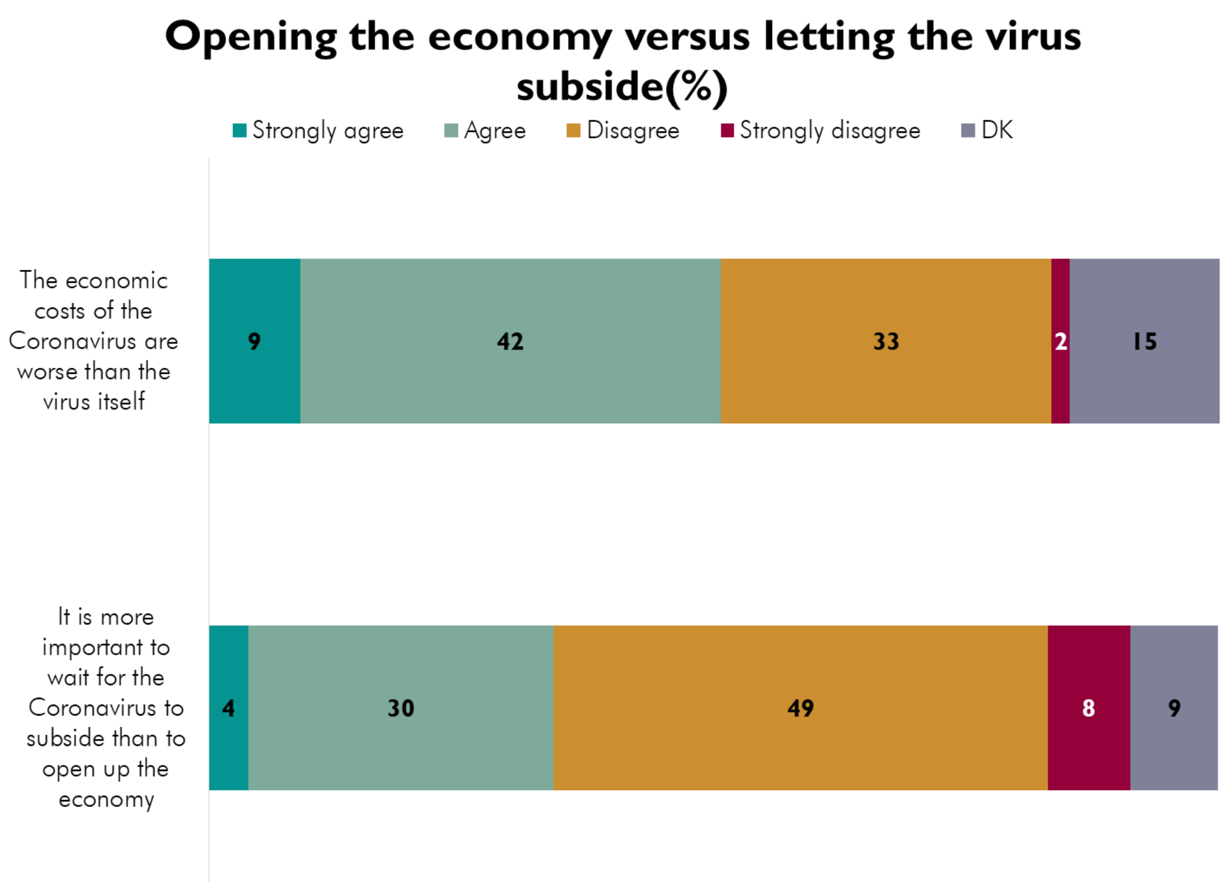
For the remaining questions in the consumer confidence index, there have been limited changes, with the outlook mixing uncertainty and pessimism. The chart below provides the breakdown of responses to the above questions.



ATTITUDES TOWARDS OPENING UP THE ECONOMY AND LENGTH OF THE CRISIS

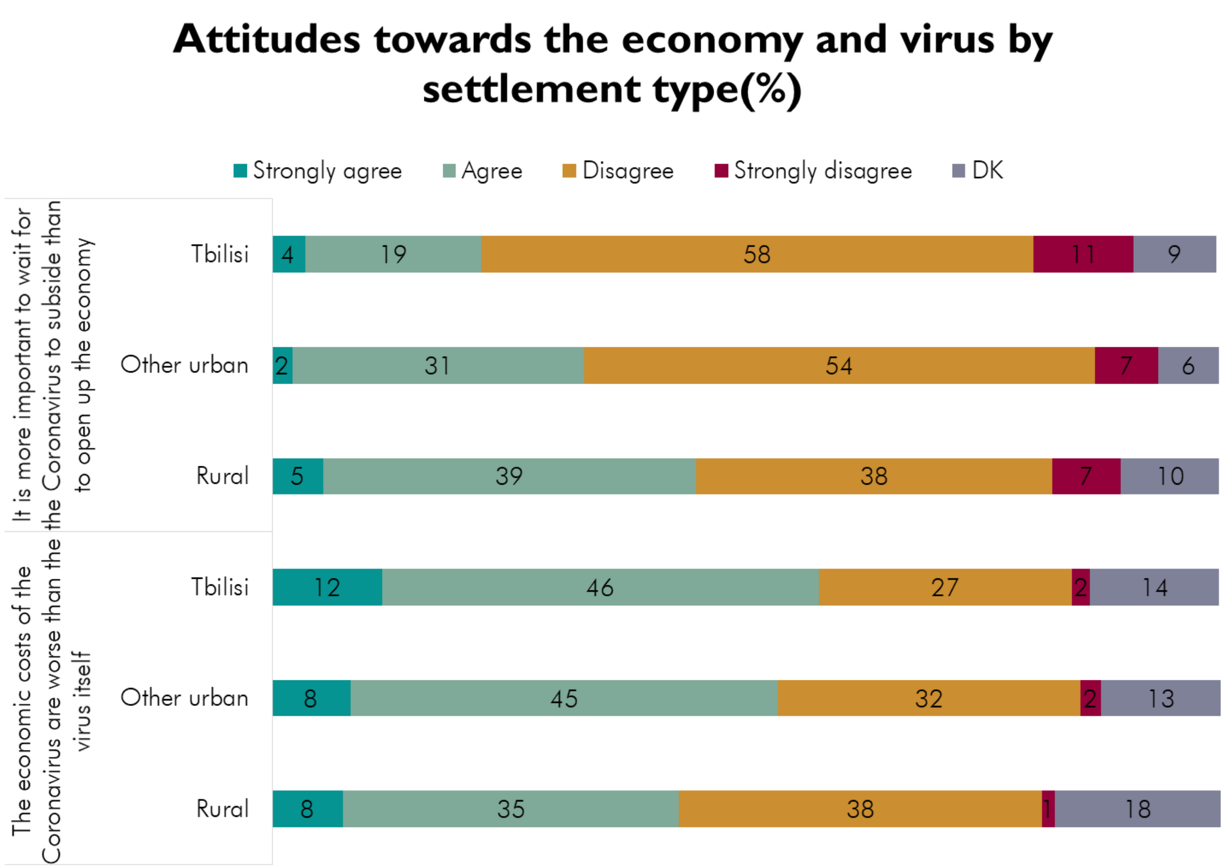
The government has announced that the economy will be opened over the course of six different stages. As noted above, 93% of the population agrees with this policy. At the same time, the data indicate that the public favors opening up for the sake of the economy to waiting for the virus to subside.

This study also asked about the relative weight of opening the economy versus containing the virus expectations and expectations regarding how long the crisis would last.When it comes to opening up the economy, the data suggest that the public tends towards thinking the economic harm has been worse than the virus. A third (34%) of respondents strongly or simply agree with the statement that it is more important for the Coronavirus to subside than to open up the economy. In contrast, 48% disagree and 9% strongly disagree. The remaining 9% were uncertain. Respondents were also asked how much they agree with the statement "The economic costs of the Coronavirus are worse than the virus itself." Half (51%) agreed with the statement, and only a third disagreed (34%). A further 15% were uncertain.

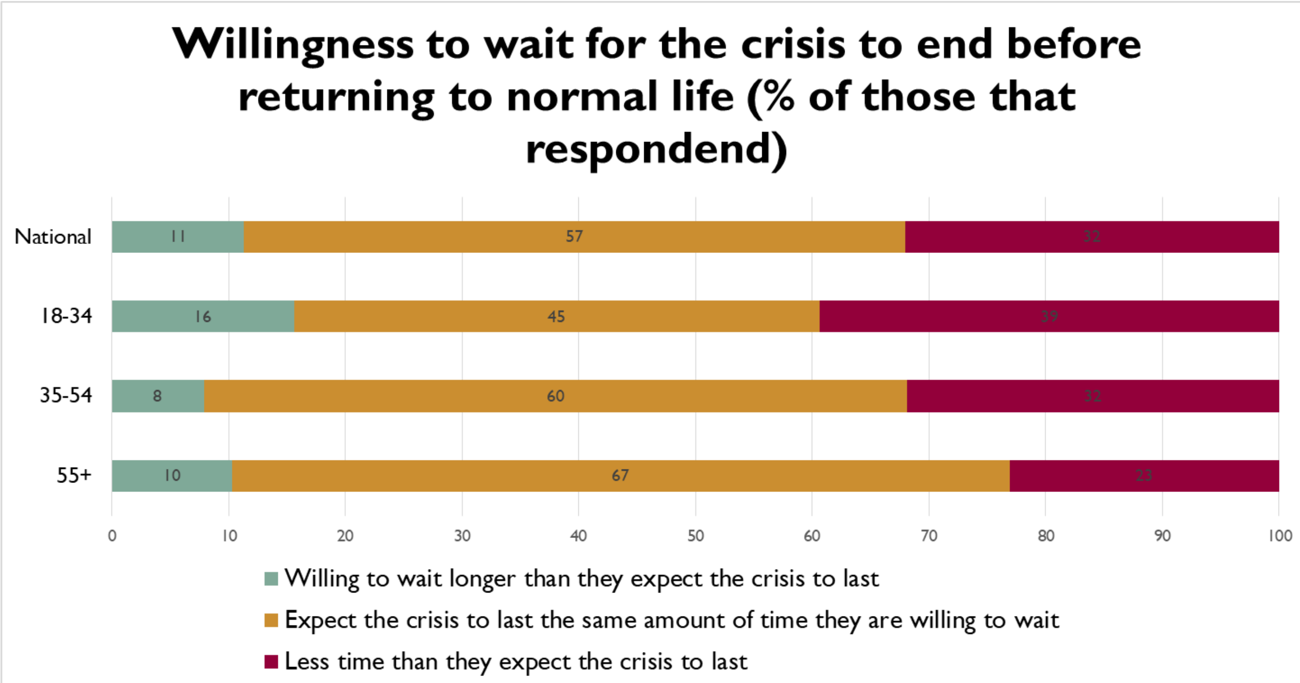


When the above questions are crosstabbed with eachother to look at the consistency of responses, the results show a degree of ambivalence and uncertainty. In total 13% of the public is uncertain about one or the other question and 5% is uncertain about both. Still a majority (56%) have consistent responses, reporting they agree with both statements favoring the economy (37%) or both statements favoring precaution surrounding opening up and the harm of the virus (19%). Only 12% agree with both statements and 14% disagree with both statements, potentially suggesting some degree of inconsistency or nuance in thee views of this quarter (26%) of the public.

People in Tbilisi are more likely to agree that the economic costs are worse than the virus and to disagree with the idea that waiting for the virus to subside is more important than opening up the economy. People with higher levels of education are also more likely to disagree with the idea that it is more important to wait for the virus to subside (65% disagree versus 53%). There are no statistically significant differences in attitudes between men and women and younger and older people on these questions.



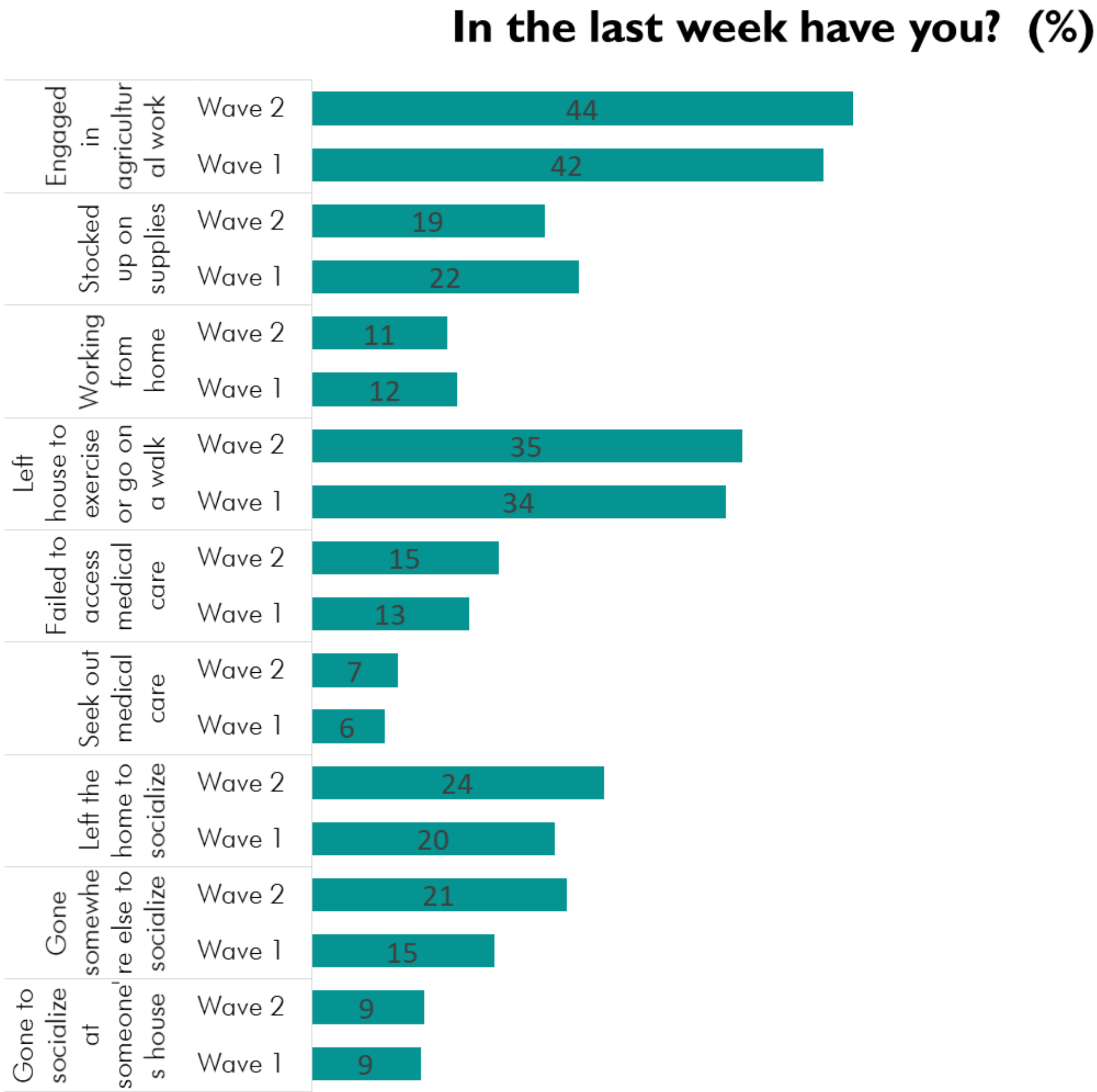
Aside from the above, the survey also asked respondents how long they thought the crisis would last as well as how long they were prepared to wait until going back to normal life. Uncertainty was high for both questions, with 34% uncertain of how long the crisis would last and 44% how long they could wait. Among those that did respond, the data indicate that the average time people expect to wait is 3.1 months (median 2 months) and the average time they are willing to wait is 1.9 months (median 1 month). Most people are willing to wait the same amount of time they report they expect the crisis to last (57%). A third of people (32%) are unwilling to wait as long as they expect the crisis to last, and 11% are willing to wait longer than they expect the crisis to last. Young people report significantly less patience in terms of how long they are willing to wait out the crisis.



PRACTICES

The study also looked at a number of behaviors that were also asked on the first wave of the survey. Overall, the data suggest that practices are not changing along most dimensions. However, people are increasingly socializing outside the house.

The data suggest that 9% of people had gone to someone's house to socialize and 21% had gone somewhere else to socialize in the week prior to the survey. In the first wave of the survey, the same figures stood at 9% and 15%. In total, 24% of people reported moving somewhere to socialize in the second wave of the survey and 20% in the first. Men (30% versus 19% women) and younger people (18-34: 30%, 35-54: 25%, and 55+: 17%) report going to socialize at higher rates than others.



Aside from socializing, the survey also asked about a number of other activities. The data suggest 7% of people sought medical care, and 15% were unable to access medical care. These numbers have not changed significantly since the first wave of the survey. There are no significant differences between groups in terms of being unable to access medical care, in contrast to the first wave of the survey wherein more educated people and women reported greater difficulty in access.

The study also asked about whether people were purchasing more food and supplies than normal. Overall, 19% report they have. This is comparable with the previous wave of the survey, in which 22% reported the same.

EDUCATION POLICY

One of the first steps the government took to stem the flow of the virus in Georgia was to close down educational institutions and move activities to online forums. To understand how the population is coping with and the challenges associated with this for young people, the survey asked adults with children in their household attending primary and secondary education (42% of the surveyed population) about access to and challenges associated with distance based learning.

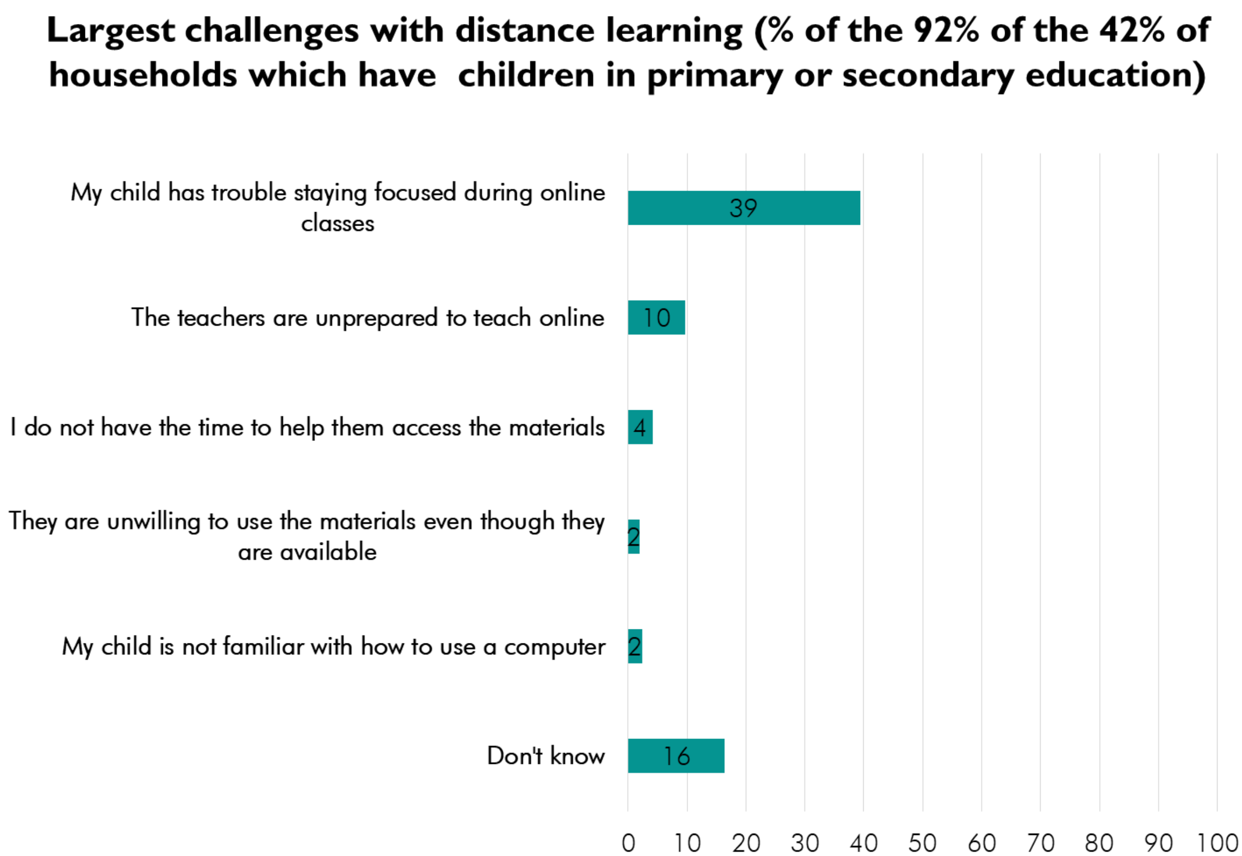
Overall, 97% report the children in their household have access to their teachers. Respondents report that students are primarily accessing their teachers through internet based applications of one form or another (84%), telephone audio (35%), and SMS (6%).

Respondents were also asked about whether the children in their households had been accessing distance learning options, including though the Public Broadcaster and online. The results suggest that the vast majority are, with 92% of respondents reporting the children in their household are accessing distance learning online and 63% through the Public Broadcaster. Only 4% of households with children in them report that children are using neither resource. A third (30%) report using only online resources, 4% only the public broadcaster, and 62% both resources. In terms of accessing lessons through the public broadcaster, children outside Tbilisi (69% in other urban areas and 68% in rural areas compared with 52% in Tbilisi) are more likely to report using this resource.

The data also suggest that children in less advantaged households are less likely to be able to access online distance based learning. Households in rural areas (88%) compared with other urban areas (97%) and Tbilisi (93%) are less likely to report accessing online distance learning options. Similarly, respondents with lower levels of education reported the children could access online distance learning less often (89%) than in households were the respondent had tertiary education (99%). Tertiary education is a strong proxy for household economic well being in Georgia, suggesting that children who were in worse situations prior to the crisis are being more strongly disadvantaged by it.

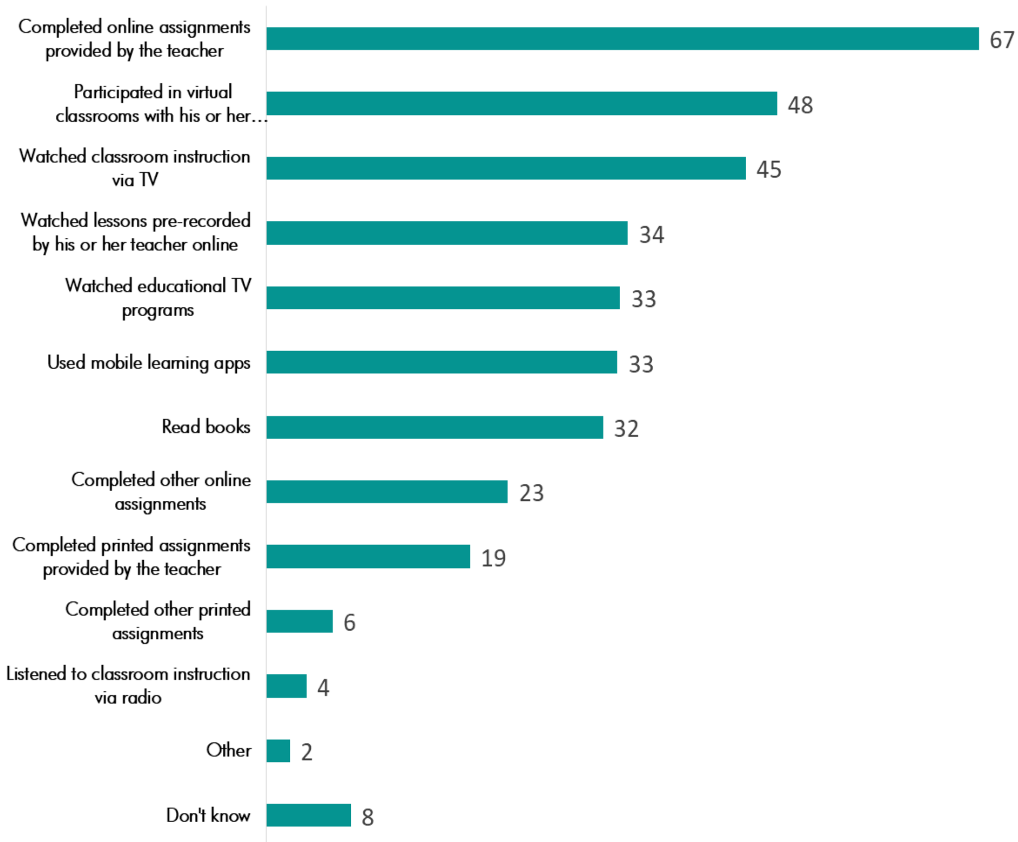
To better understand the challenges associated with distance based learning, the survey asked those who were and were not accessing online learning tools the largest challenges with accessing online learning and the reasons why they were not using the tools, respectively.

In households that have children that are accessing education through distance based learning tools, the most common challenge reported is that the child has trouble staying focused in online classes (39%). The next most commonly named issue is that the teachers are unprepared. Other issues were named less often. People with children in their households in urban areas outside Tbilisi report significantly more often that the children of the household have trouble staying focused (58%) than in Tbilisi (29%) or rural areas (35%). The data indicate that among those that are not able to access the online learning tools, a lack of internet connection or computer are nearly unanimously cited.



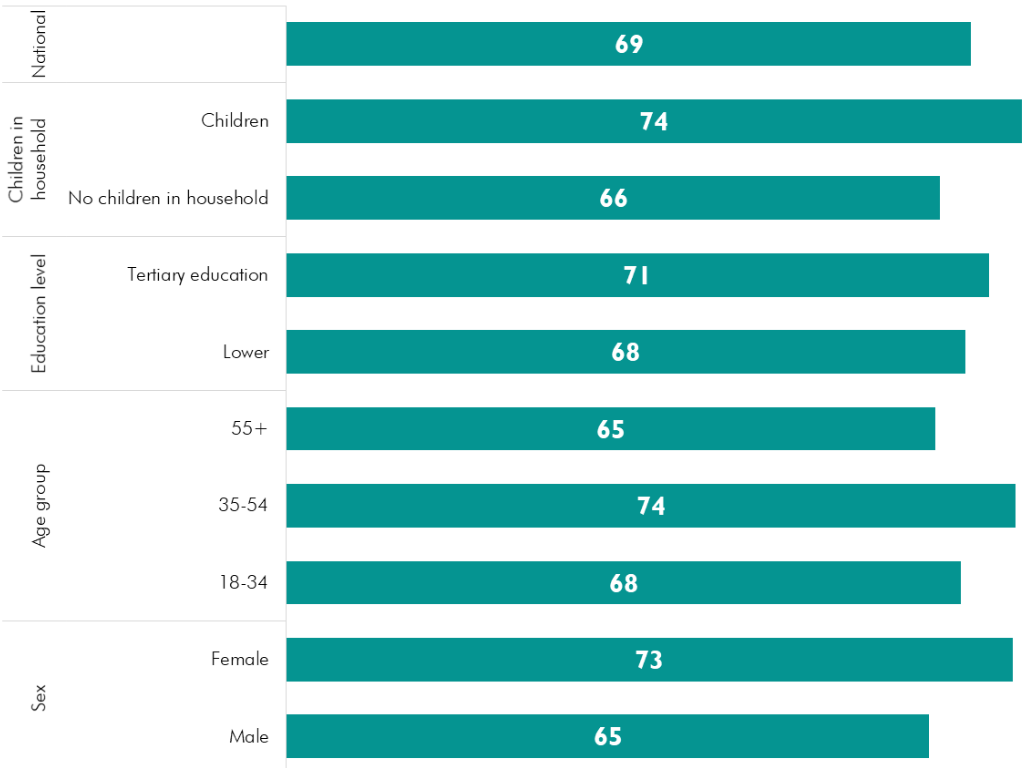
Aside from the above, the survey also asked for the general types of educational activities which children had been involved in. The data suggest that children are most frequently engaged in completing online assignments from their teachers (67%), participating in virtual classrooms with their teacher (48%), and watching classroom instruction via TV (45%). They are less frequently engaged in completing print based tasks. Overall, 8% of households with children reported that their children were not engaged in any form of educational activity. No educational activity is not more or less frequent among children in primary or secondary school. Nor are there any other statistically significant differences based on demographics.

Types of educational activities (% of the 42% of households with a young person in primary or secondary education)



The study also asked all respondents about their attitudes towards how the Ministry of Education was dealing with the crisis in terms of providing distance based learning tools. The results suggest that 69% are either positive or very positive about the Ministry's response and 7% are negative or very negative. About one in six (16%) hold a neutral view and 8% are uncertain. People with children in their households, younger people, women, and people with higher education are more positive compared to other groups.

Performance Assessment of the Ministry of Education on Distance Learning (%)



CONCLUSIONS

The above data leads to a number of conclusions.

With institutional performance assessments remain generally high. However, the degree of approval of many institutions declined slightly between late April and early May. Further surveys will help in undertanding whether this change is a mere blip in the data or the first sign of sustained trend.

In light of the high levels of performance, it is perhaps unsurprising that approval of most policies is high, with over 80% of the public supporting most policies. The singular exception is with the increasing of fines for violation of emergency rules. Still, a majority support this policy.

When it comes to the economic situation, consumer confidence remains a mix of uncertainty and pessimism. For instance, there is a substantial increase in the share of the population reporting they are worse off than a year ago. However, there are some signs of improvement in terms of the public's willingness to purchase durable goods. Aside from consumer confidence, 5% of the public reports having returned to work and a percent of the public reports finding a new job.

The public tends towards thinking that the economic costs of the virus are worse than the virus itself, and is in favor of opening the economy rather than waiting for the virus to subside. These views are more common in Tbilisi. In light of the rather dire economic circumstances that the first wave of this study depicted,[2] these findings may be unsurprising. Yet, they do underline the economic hardship many in Georgia are experiencing.

Although most people in Georgia are not leaving home to socialize, a quarter of individuals in Georgia report that they had left the house to do so in the week prior to the survey. Men and younger people are more likely to report going out to socialize.

The education system has moved to distance based learning. The vast majority of households with children report being able to access either the online option or television based options the Ministry of Education has provided. Most of the public approve of the Ministry's performance in relation to the Coronavirus and the distance based learning options they are providing specifically. Among the households where children can access distance based learning, the data indicated that the main challenge is for children to focus online. However, the data indicate that underprivelaged children are less likely to be able to access distance based education.

[2] For instance, 1 in 7 households reported having no income last month, up from 0.5% and a majority reported experiencing at least some food insecurity in the month prior.

APPENDICES

APPENDIX 1: METHODOLOGY

The survey was a nationally-representative cell phone survey covering the adult population of Georgia (except the areas of Abkhazia and South Ossetia). Respondents are selected using the random-digit-dial (RDD) method and were interviewed through live interviewing.

The present wave of the survey was conducted between May 7 and 10, 2020. Overall, 1,037 completed interviews were collected, with a minimum response rate of 40.5%.[3] Respondents were interviewed in Georgian, Armenian, Russian, or Azerbaijani.

Results are weighted. CRRC-Georgia used demographic information from the 2014 Georgian National Census for adjusting results based on respondents' gender, age, ethnic identity, education, and residence. This helps balance the proportions of those groups which might be underrepresented in the raw data. Overall, the theoretical margin of error for proportions does not exceed 3%.

[3] According to the standards of the American Association for Public Opinion Research (AAPOR) minimum response rate is the ratio of the number of complete interviews and all interview attempts. This excludes non-existing phone numbers dialed as a part of the RDD process.