

The Georgian Media: Popular Assessments and Development Perspectives

Report

Tbilisi, 2012

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A core competence of EPF is generating high-quality social science research in the South Caucasus. Recognizing that research and sound policy are built on the foundation of reliable and unbiased information, EPF supports the annual Caucasus Barometer, a yearly household survey of social attitudes and perceptions in the South Caucasus. The Foundation's primary mechanism for building research and policy capacity is the Caucasus Research Resource Center (CRRC). The Caucasus Research Resource Centers (CRRC) is a program of the Eurasia Partnership Foundation and is supported by the Carnegie Corporation of New York. It is a network of resource, research and training centers established in 2003 in Azerbaijan, Georgia and Armenia with the goal to strengthen social science research and public policy analysis in the region. Learn more about CRRC at <http://www.crrccenters.org/>.

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Introduction

Mass media that is diverse, balanced, professional, and pluralistic, is based on ethical standards of professional journalism, and performs its watchdog function, is a necessary part of any country's democratic development. And vice versa – such media is also only possible in a democratic country. In many post-Soviet countries, and Georgia is no exception, the tradition of a fact-based journalism free of political alliances has been alien for decades. Since gaining independence in 1991, Georgia has been working to build a democracy and the Georgian media is trying to find its place in this process.

During the early years of independence, with a strong inflow of donor programs, extensive journalism trainings designed to facilitate the switch from opinion-based journalism towards fact-based reporting were conducted. Many positive changes were achieved in this period. However, for most media outlets, especially those operating in the regions, financial sustainability has been difficult, and in some cases, impossible to achieve. Even today, a large portion of the news media produced in Georgia is done so only with the help of donor support. Consequently, it would appear that there is a discrepancy between what is produced and broadcast/printed by the mainstream media and the media needs of the population. However, since independence, no systematic assessment of the population's attitudes towards and expectations of the Georgian media industry was conducted until the Eurasia Partnership Foundation program Caucasus Research Resource Center (CRRC) made the first attempt to create a picture of the Georgian media landscape in September 2009. This research was undertaken as a part of the EU-funded project *Strengthening the Media's Role as a Watchdog Institution in Georgia* that was implemented by Eurasia Partnership Foundation in 2009-2011. A second wave of this survey was conducted in March-May of 2011 with the support of the Norwegian Ministry of Foreign Affairs.

The present report summarizes the major findings documented by both waves of this research, and provides recommendations for interested parties working in the field of media in Georgia. The report does not cover the legislative aspects of the media sphere in Georgia, but it does present the picture of the Georgian media as it is seen by the population. The questionnaires and datasets from both research waves are accessible at <http://crrc.ge/data/> and are free for download. The CRRC Online Data Analysis program (<http://www.crrc.ge/oda/>) allows users to make their own calculations, download the tables in excel format, and to visualize them as graphs online.

Survey Methodology

Both the 2009 and 2011 media landscape surveys were conducted by CRRG using the same methodology to ensure a consistency in the data. Results for the media landscape surveys are based on 1,768 face-to-face interviews (2009) and 2,009 face-to-face interviews (2011) with Georgian-speaking adults over the age of 18. Nationwide fieldwork was completed from October 3, 2009 to October 15, 2009 for the first survey and from March 30, 2011 to April 11, 2011 for the second survey. The media landscape surveys employed multi-stage cluster sampling. Interviews were conducted in the Georgian language. Necessary sample size calculations were made for an expected margin of error of 4% and the error attributable to random effects or sampling is \pm the margin of error with 95% confidence. Error or bias can be introduced into the findings of opinion polls when conducting surveys via sampling error, question wording and other general difficulties. This report has undergone rigorous review to ensure the accuracy of the findings.

Information Consumption¹

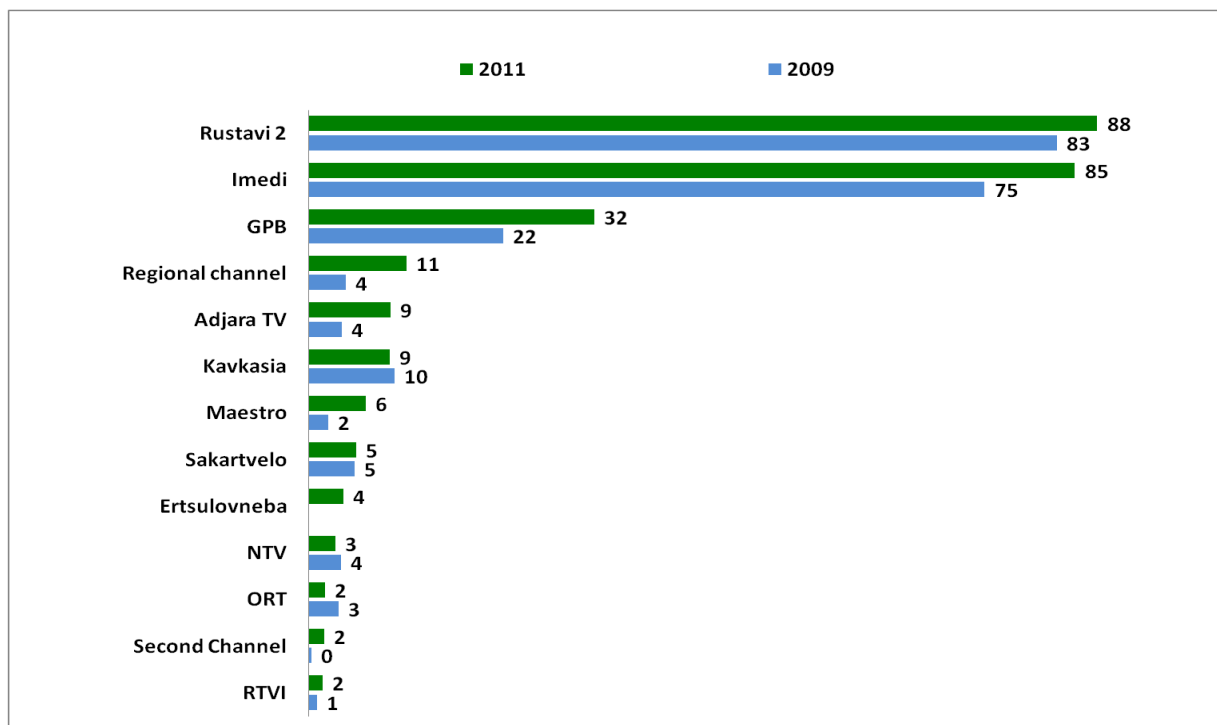
Television

In Georgia, TV monopolized the information market so clearly that there is little room for the majority of the population to obtain news from other types of the media. In 2011, 82% reported that they receive information about current events in Georgia from national TV stations everyday; eleven percent do so several times a week, 2% - once a week, 1% - once or twice a month, and only 2% of the population – ‘never’ receives information about current events in Georgia from national TV. An almost identical situation was observed in the 2009 survey.

Among Georgian stations, Rustavi 2 and Imedi TV are the channels that the population watches most often to receive information. The Georgian Public Broadcaster comes in third with a significant margin of more than 50% (Figure 1).

Figure 1.

Which of the following TV channels do you usually watch for news related to current events in Georgia? (%)



Comparing this data with the reported trust levels towards the news and political reporting broadcast by various TV stations uncovers an ambivalent situation: despite the fact that certain

¹ Questions about the frequency of receiving information from various sources on the situation in Georgia, or on a particular region/municipality, were asked only to those respondents who are media consumers.

TV stations have a high percentage of viewers, many people do not always trust the information broadcast². This is especially true in the cases of Imedi TV and Rustavi 2.

In addition to turning to TV for information, Georgians reportedly watch a wide range of programming in which news programs are most popular. However, several changes have occurred between 2009 and 2011 (Table 1). For example, the number of people who watch political talk shows on TV decreased between 2009 and 2011. One reason for this is that fewer talk shows were aired on the main channels in 2011. Additionally, the viewership of comedy shows has significantly increased, partially due to more TV channels broadcasting various comedy shows. A considerable increase is also observed in the percentage of Georgians who obtain news from local TV stations (from 10% in 2009 to 25% in 2011). This could be a sign that local TV stations fill a gap in local news for the population living in the regions.

Table 1.

TV programs watched at least once a week (%)

Programs	2009	2011
News on national channels	71	81
Comedy shows	51	74
Movies	48	57
Soap operas	40	43
Political talk-shows	34	23
Sport	24	26
History	12	13
Reality shows	11	20
News on local TV channels	10	25
Quiz shows	9	11
Religion	9	15
Popular music	7	12
Education	6	14
Other	5	5
Science	5	9
Nature	5	11
Art	5	11
Military programs	4	8
Business	4	12
Classical music	3	5
Home and DIY	2	6
Food and Cookery	2	8
Children's programs/animation	2	9

² For more discussion on the trust and distrust towards the Georgian media, see page 22 of current report.

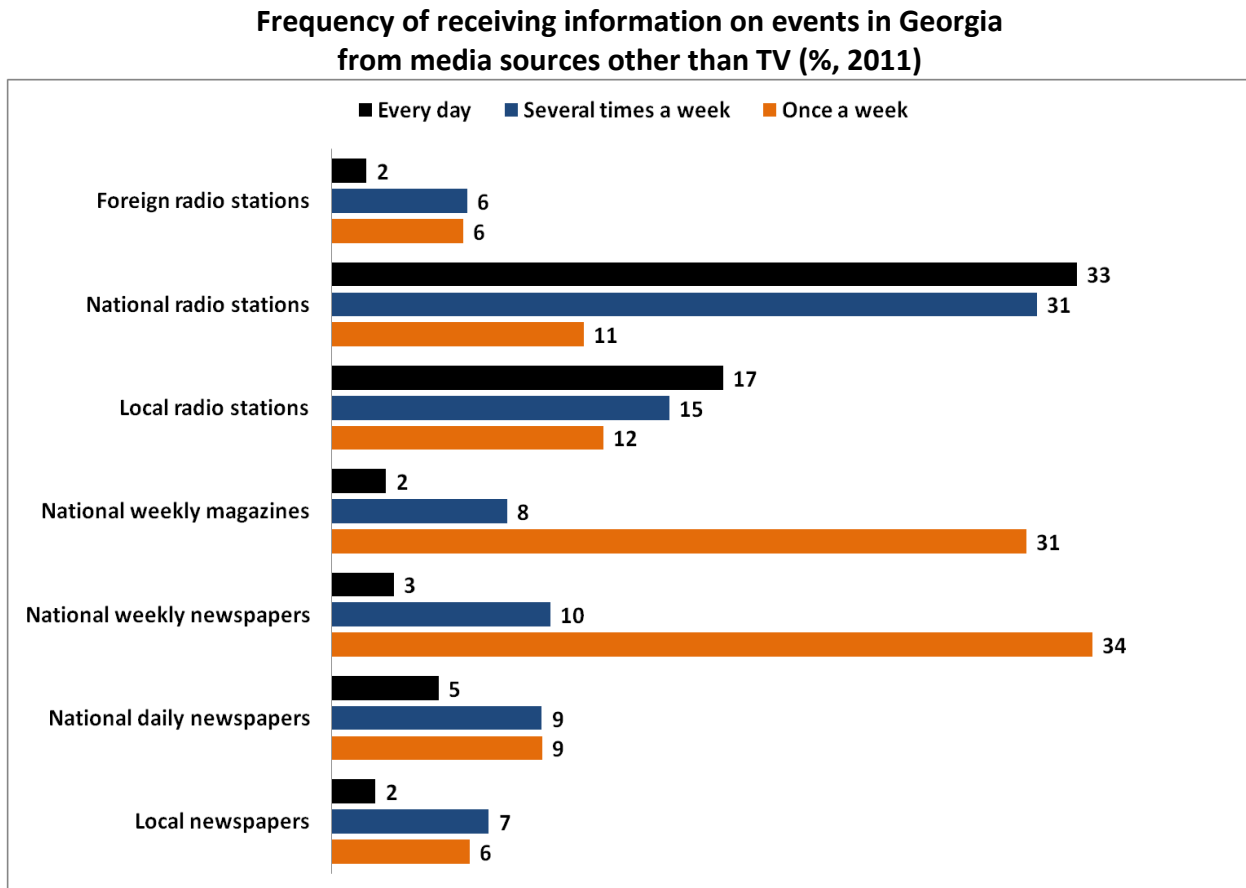
When it comes to the consumption of politics and current affairs, an almost equal number of TV viewers turn to Rustavi 2 (88% in 2011) and Imedi TV (85% in 2011), with the Georgian Public Broadcaster coming third at 32%. Regarding the population of Tbilisi, these three channels along with Maestro (13%) and Kavkasia (21%) are the channels that form the news agenda and serve as sources of news. Another 16% of TV viewers not living in the capital area reported that they most frequently watch news or programs about politics and current events in Georgia on local TV channels. Only 2% of the population in 2011 reported that they 'never' watch news on Rustavi 2, while 75% watch it everyday. The same is true for Imedi TV.

In the case of the Georgian Public Broadcaster, 18% of the population report that they 'never' watch news about politics and current events on this channel, while 30% watch it everyday, and another 25% do so several times per week. The Georgian channels that provide news on politics and current events to a lower percentage of Georgian TV viewers are Ajara TV, Second Channel, Sakartvelo, Pirveli Stereo, and Mze with more than 40% of respondents reporting that they 'never' watch news on these channels. This is partly caused by the type of programming broadcast on these channels: some of them, as in the case of the Second Channel, being oriented towards the broadcast of Parliamentary proceedings, and the provision of a platform for various political parties and the re-broadcasting of news and other programming originally aired on the Georgian Public Broadcaster. Pirveli Stereo is an entertainment channel, and Sakartvelo mainly broadcasts movies.

Print and Radio

Compared with TV, the Georgian population consumes other traditional media – particularly print and radio – on a much lower scale. Still, radio as a source of information remains relatively popular, while print media in general, and local newspapers in particular, occupies a smaller position (Figure 2_1 and Figure 2_2). Moreover, quite a large percentage of the population, for variously stated reasons, either never consumes information from these media, or never uses them for any purposes other than getting information.³

Figure 2_1.

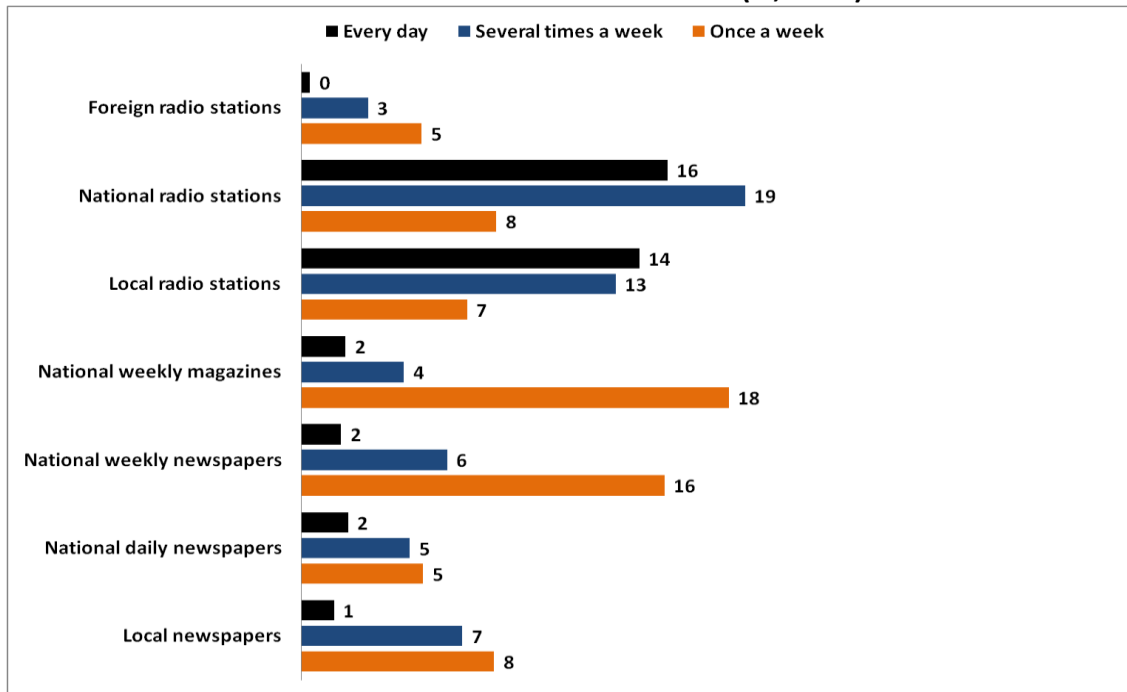


The general trend shows that Georgians consume far less media which has been produced and/or disseminated at the local, as compared to the national, level (Figure 2_2). This can be partially explained by the limited coverage received by regional/local issues in the national media, and partially by the limited opportunities for local media outlets to provide daily coverage of regional news: for example, most local newspapers are published weekly.

³ See Section ‘Un-Mediated’ on page 14 for detailed discussion of these groups.

Figure 2_2

Frequency of receiving information on events in your locality from media sources other than TV (% , 2011)

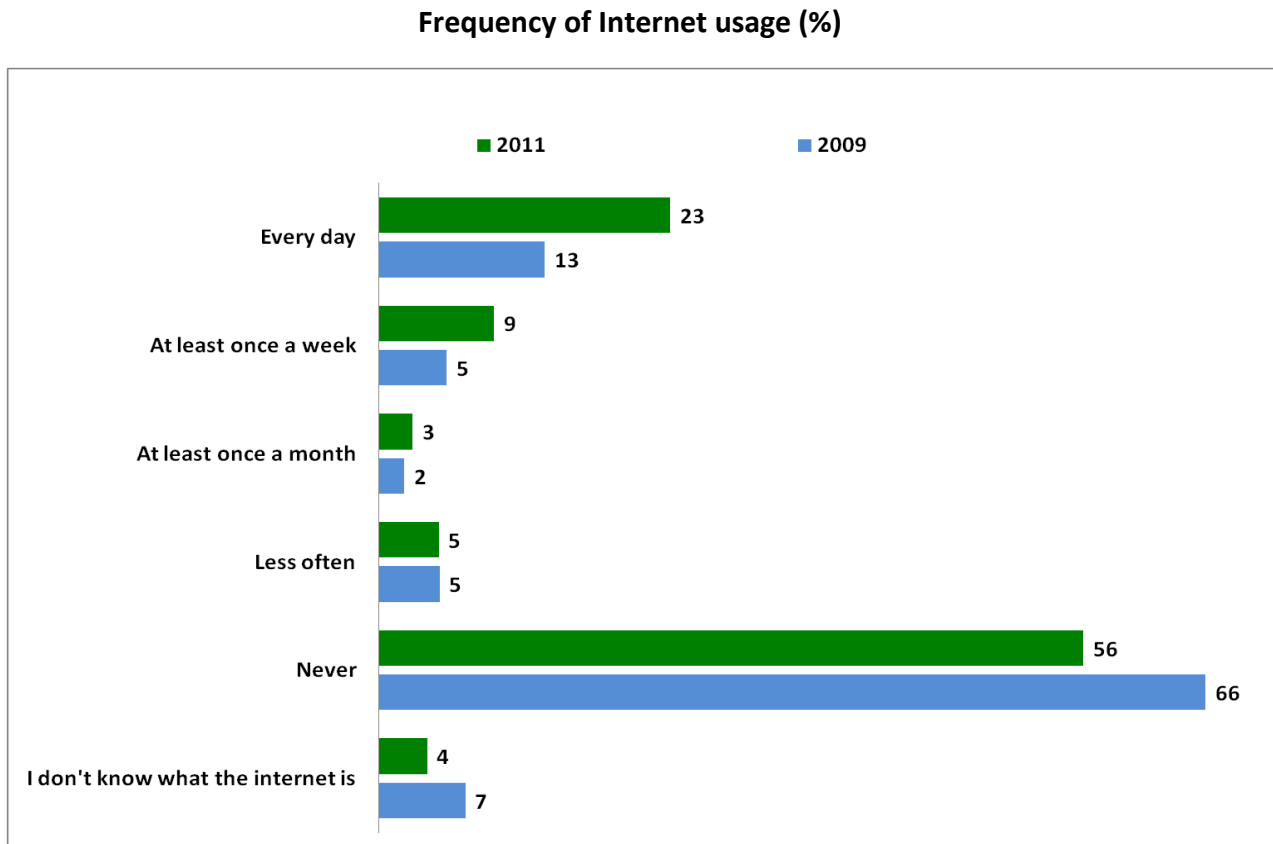


After TV, radio stations in general, and national radio stations in particular, are the sources of information that Georgians most use to receive news on events in Georgia. Print media is consumed much less frequently, although national weekly newspapers and magazines fare better than national daily publications.

Internet

Rates of Internet usage in Georgia have been steadily increasing in recent years, and more and more Georgians getting access to both landline and mobile Internet connections. Consequently, the number of Georgians who have either never heard of, or never used the Internet decreased by about ten percent between 2009 and 2011. In 2011, 33% of the population (compared with 20% in 2009) state that they have Internet access at home. However, over half of the population (56%) reports that they have never used the Internet (Figure 3). This is especially true for the senior population living in the regions.

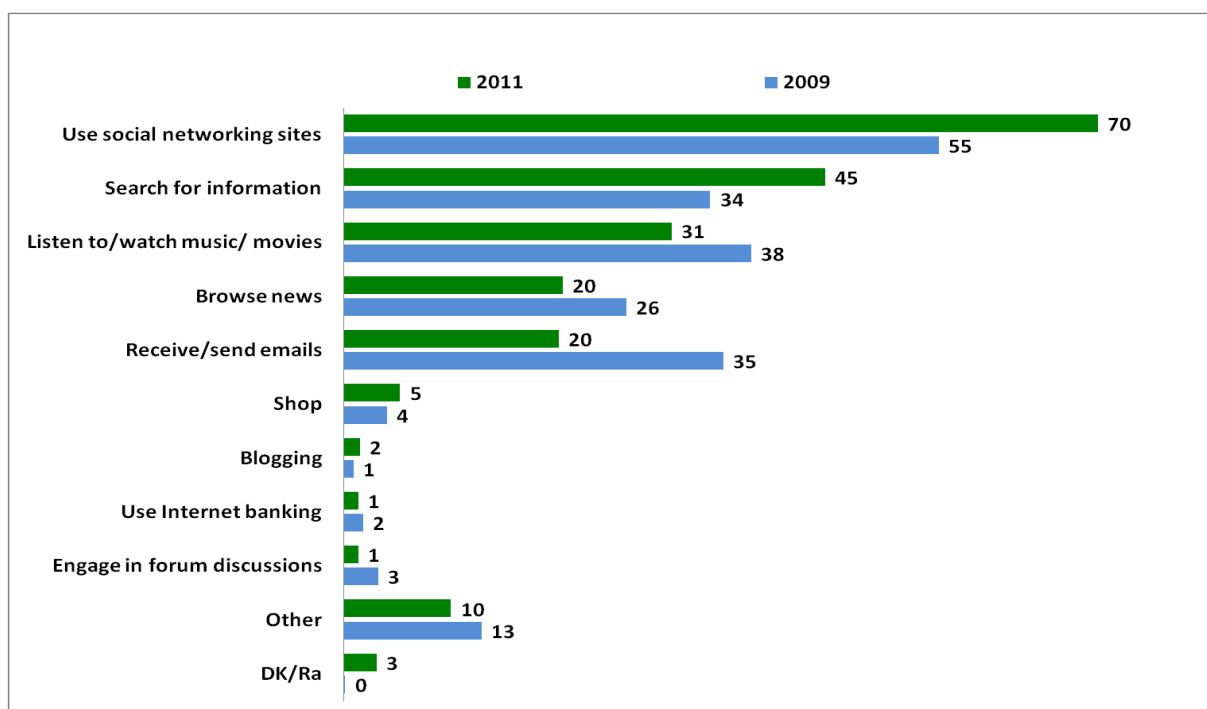
Figure 3.



Among the 40% of the Georgian population who are Internet users, social networking was the most frequent on-line activity for 70% of this group in 2011. About 20% of Internet users in 2011 reported that browsing for news was their most frequent on-line activity, while 45% say they use the Internet primarily to search for information. However, social networking may also be considered as an information source since news posted on social networking sites by 'friends' may redirect the users to the original news-providing sites. Other popular types of Internet usage are watching movies (31%), and sending/receiving email. Two percent of Georgian Internet users are engaged in blogging (Figure 4).

Figure 4.

Most frequent activities when browsing internet (%)



Social networking sites, especially Facebook, are becoming more popular in Georgia according to statistics provided by SocialBakers. At the end of December, 2011 SocialBakers stated that, “Facebook penetration in Georgia is 15.76% compared to the country's population and 55.78% of those who use the internet. The total number of FB users in Georgia is approaching 725,160 and grew by more than 94,320 in the last 6 months.”⁴ Even though a single individual may have more than one account, this increase in numbers is still impressive and may serve as motivation for traditional media organizations to engage more in social media activities in order to attract Internet users.

However, the Internet remains an unaffordable service for a significant percentage of those respondents who, although familiar with the Internet and with a computer at home, do not have Internet access (46% in 2009, and 40% in 2011).⁵ More than 40% of Georgians find it hard to come up with a monthly fee that they would feel comfortable paying for Internet access. However, most people reported that they would pay not more than 10-15 GEL per month.

Most Internet users (68% – an increase of 11% compared to the 2009 data) reported that during the past 30 days they had accessed the Internet most frequently from a home computer/laptop. Another 12% reported that they had gone on-line on a computer belonging

⁴ <http://www.socialbakers.com/facebook-statistics/georgia> (last accessed, January, 4, 2012)

⁵ These respondents constituted 5% of the total sample.

to a friend/relative, and an almost an equal number (5-6%) had accessed the Internet either from an Internet cafe, cell phone, or a workplace computer.

The increase of Internet use has occurred not only in the capital and urban areas, but in rural areas as well. This is partially caused by new market competitiveness as well as a decrease in Internet costs. This overall increase in usage should be taken into consideration by media professionals to further foster development in social media, especially since the Internet's potential to play an increased role as a source of information is high (especially among younger Georgians).

UN-Mediated

In 2011, only 2% of respondents stated they did not have a TV set in their household. Seventy-six percent of Georgian households have one set, 17% - two sets and 5% - three or more TV sets. Forty-three percent of households in 2011 were connected to either cable or satellite services. Access to TV stations broadcasting in foreign languages, including Russian TV channels, is not available to a significant part of the Georgian population, unless they have a satellite dish or cable TV. The two studies indicate that the percentage of households that are not connected to a satellite or cable has remained almost unchanged – 59% in 2009, and 57% in 2011. While TV is widely used as a source of information by the Georgian population, as mentioned above, smaller shares of population use print media to receive information. However, as Table 2 below demonstrates there is a large proportion of Georgians who never use certain types of Georgian media as sources of information (Table 2).

Table 2.

Share of respondents who NEVER receive news from the following sources (% of those who have access to these sources, 2011)

		Everyday	Several times a week	Once a week	Once or twice a month	Never	DK
National TV	2011	82	11	2	1	2	1
	2009	84	10	2	1	2	0
Local TV	2011	22	19	8	12	37	3
	2009	17	16	9	10	45	2
Internet	2011	15	11	4	7	61	1
	2009	10	6	4	7	72	0
Russian TV	2011	8	8	5	10	69	2
	2009	15	10	4	8	62	1
National radio	2011	8	8	4	8	70	1
	2009	11	9	3	6	70	1
Local radio	2011	5	5	4	5	80	3
	2009	5	5	1	5	82	2
International TV	2011	2	4	4	8	80	2
	2009	4	5	4	6	80	1
National daily newspapers	2011	2	4	5	11	77	1
	2009	3	7	8	14	67	1
National weekly newspapers	2011	1	5	18	18	56	1
	2009	3	8	17	23	49	1
National weekly magazines	2011	1	4	17	22	55	1
	2009	2	6	15	25	51	0
Local newspapers	2011	1	3	4	7	82	3
	2009	0	4	6	10	77	2

What are the characteristics of Georgians who, for a variety of reasons, never get information from various types of media? The characteristics which make ‘non-readers’/‘non-listeners’/‘non-surfers’ different from groups of active news consumers will be discussed in more detail below.

Non-readers vs readers

According to the 2011 survey, ‘**non-readers**’⁶ and ‘**readers**’ possess many similar characteristics. However, our findings point out certain differences: there are slightly more ‘**non-readers**’ who are unemployed (55%) than among ‘**readers**’ (44%); overall, more men (57%), tend to be among the ‘**non-readers**’ than females (49%); 59% of the Georgian population below subsistence income belongs to the group of ‘**non-readers**’, compared to 47% of the population, with income above subsistence minimum. However, the larger difference is in the level of education – while 59% of Georgian population with higher than secondary education is a ‘**reader**’, only 34% of those with a secondary or lower than secondary education, and 49% with a secondary technical education reads newspapers.

In 2009, when asked the reason they do not read daily newspapers/magazines, 27% (the biggest share) of Georgians said that newspapers/magazines were not sold in the area where they lived. In 2011, only 15% of respondents cited this as a reason, while the percentage of Georgians who do not read daily press due to lack of money to buy print media increased from 17% in 2009 to 29% in 2011. Most Georgians are not willing to pay more than 50 Georgian Tetri for national daily newspapers, 20-50 Tetri for local newspapers, and from 50 Tetri to 1 GEL for national weekly magazines. The percentage of the hard-core ‘**non-readers**’ who say they would never buy print media ranges from 13% to 17% (2011 data) depending on the type of media.

Non-listeners vs listeners

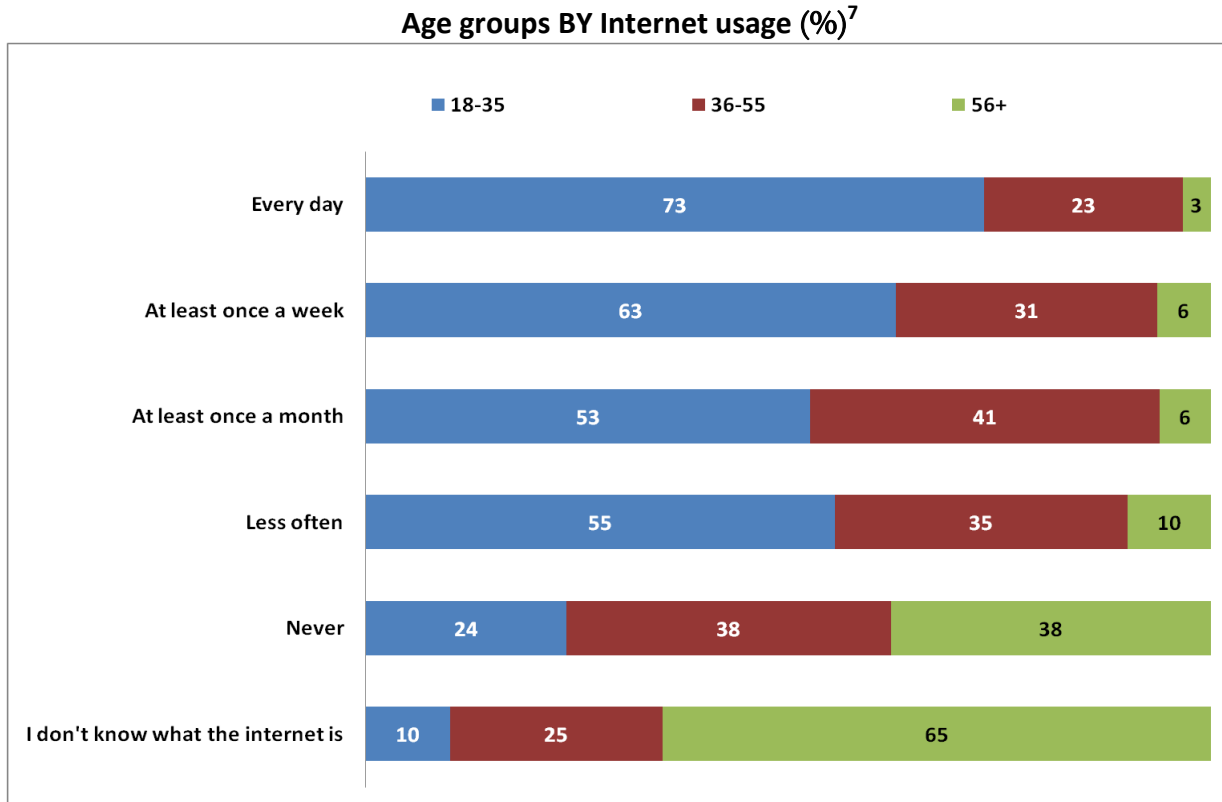
In 2011, 70% of Georgians did not listen to the radio as a source of information. In most cases, these were people living outside the capital – 75% vs 61% living in the capital; more females did not listen (77%) than males (63%). A younger and better educated population, who earns a higher income and is currently employed, tends to listen to radio more than the population that falls below the minimum subsistence level, and is over 56 years of age, with only a secondary or secondary technical education. The major reasons why Georgians do not listen to national radio stations is that they do not have radio receivers (61%), are simply not interested in doing so (19%), there is no radio reception in the area where they live (8%), or have no time to listen to the radio (8%).

Non-surfers vs surfers

As of 2011 56% of Georgians never access the Internet. There is almost no gender difference among ‘**surfers**’ and ‘**non-surfers**’; but twice as many people who live in the capital city surf, as those who live outside the capital (60% vs 30%). As expected, the age composition of the group that never uses the Internet, is comprised of the more senior respondents (Figure 5).

⁶ In 2011 there were 53% of respondents that never read newspapers, in 2009 the number was 49%.

Figure 5.



More of those who are currently employed (49%) use the Internet, but 35% of those unemployed also, use the Internet. Only 33% of the population educated above the secondary level does not use the Internet, while 68% of the population whose education is secondary/lower than secondary and 70% educated to the secondary technical level, are non-surfers.

Thus, in contemporary Georgia, the Internet is a service that is more accessible to that segment of the population with a higher socio-economic status (Table 3).

⁷ The question was recoded. Options "Once a month" and "Less often" were grouped to "Once a month or less often".

Table 3.

Frequency of Internet usage by Household income (%)

	Below Subsistence		Above Subsistence	
	2009	2011	2009	2011
Every day	3	11	15	26
At least once a week	1	4	6	12
At least once a month	1	2	3	3
Less often	5	4	5	5
Never	81	73	62	50
I do not know what Internet is	8	6	7	3
Do not know/Refuse to answer	1	0	2	0

However, as Table 3 demonstrates, there was an increase in Internet usage among Georgians from the low-income strata as well. This is an optimistic trend that will result in an increased reach of the Internet for the lower income population as well.

Popular Assessments of the Georgian Media

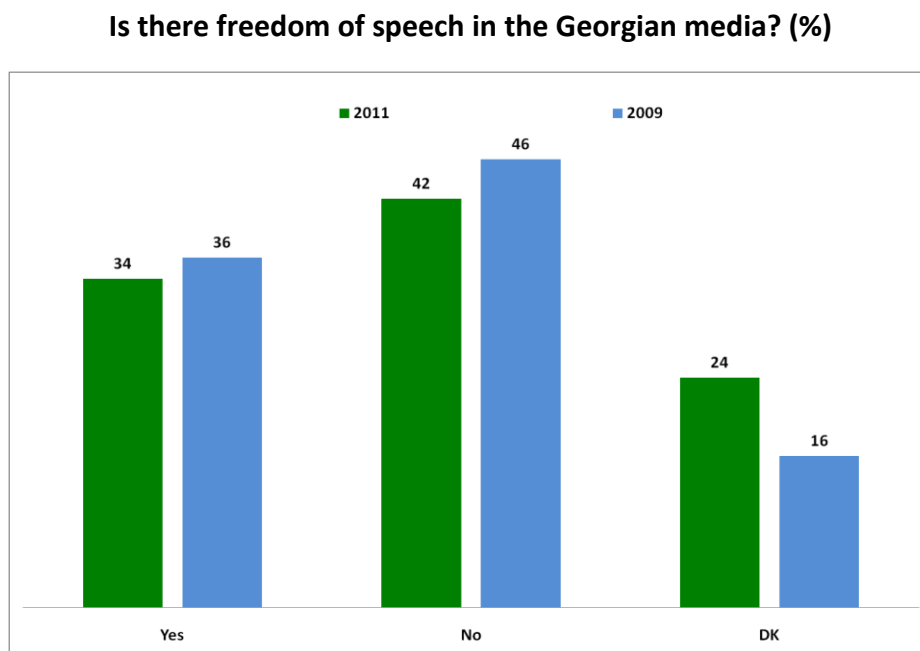
General views of the population towards the situation in the Georgian media and journalists did not change much during 2009-2011--a year and a half since the first media landscape survey was conducted. Most Georgians credit TV, more than other types of media, with influencing public opinion in the country. This is not surprising when one takes into account the fact that watching TV is the most common way of spending free time in the country (80% in 2009 and 83% in 2011), with about 40% of the population watching TV three or more hours a day. The following sections present several major problems identified in Georgian media during the 2009 and 2011 studies.

Freedom of Speech

The majority of respondents (74% in 2009 and 72% in 2011) believed that media should not be biased even in cases when the government provides funding. In both surveys, only about 10% reported that when financing is provided by the government, channels need to present information in a way government desires.

Georgians have a rather pessimistic assessment of the media situation (Figure 6) even though findings of reports published in 2011 by Freedom House and IREX (Media Sustainability Index) indicated that Georgia slightly improved its standing with regard to free speech and media freedom compared to the previous year.⁸

Figure 6.



⁸Freedom in the World 2011: The Authoritarian Challenge to Democracy. Freedom House. p. 6, 13, 18. http://www.freedomhouse.org/images/File/fiw/FIW_2011_Booklet.pdf
IREX Sustainability Index 2011, IREX, p.144. http://www.irex.org/sites/default/files/MSI_2011_EE_Full.pdf (last accessed December, 20, 2011).

Georgians do not report any increase in the level of freedom of speech, and although the decrease is within the margin of error, it could be symptomatic. Regular studies of the populations' attitudes, as well as of the journalist corps will allow for the building of a more comprehensive analysis of these perceptions.

Polarization⁹

The Georgian population can often clearly distinguish between 'pro-governmental' and 'oppositional' media outlets, thereby indicating the overall polarization of the media industry. The bias or neutrality of major TV stations as perceived by the Georgian population, is presented in the Table 4 below. According to the Georgian population, more TV stations 'serve the interests of the government' than vice versa, but in any case the distinction made by the people is clear. However, respondents often found it difficult to answer this question. The Georgian Public Broadcaster channel tries to position itself as balanced and neutral. Nevertheless, a significant portion of the population still perceives it represents the interests of the government rather than being neutral. This perception may well have roots in Georgia's Soviet history, however, this study shows that a significant part of the population demonstrates lack of understanding that the status of the channel has changed and continues to see it as a 'state' channel.

Table 4.

Whose interests are reflected in news broadcast on TV channels? (% , 2011)

TV Channel	Reflects the interests of the government	Reflects the interests of the opposition	Does not reflect the interest of either	Do not know/Refuse to Answer
Ertsulovneba	1	1	52	43/3
Maestro (TBS only)	4	42	14	35/4
First Caucasian (PIK)	5	2	3	86/5
Kavkasia (TBS only)	6	56	11	24/3
Real TV	7	1	4	84/5
Region TV	11	2	4	79/4
Sakartvelo	12	1	18	65/4
Local/regional TV (OUTSIDE TBS)	19	3	23	51/4
Second Channel	20	3	7	66/4
Adjara TV	26	1	11	59/3
Imedi TV	43	2	28	24/3
GPB	48	1	16	31/3
Rustavi 2	53	1	22	20/3

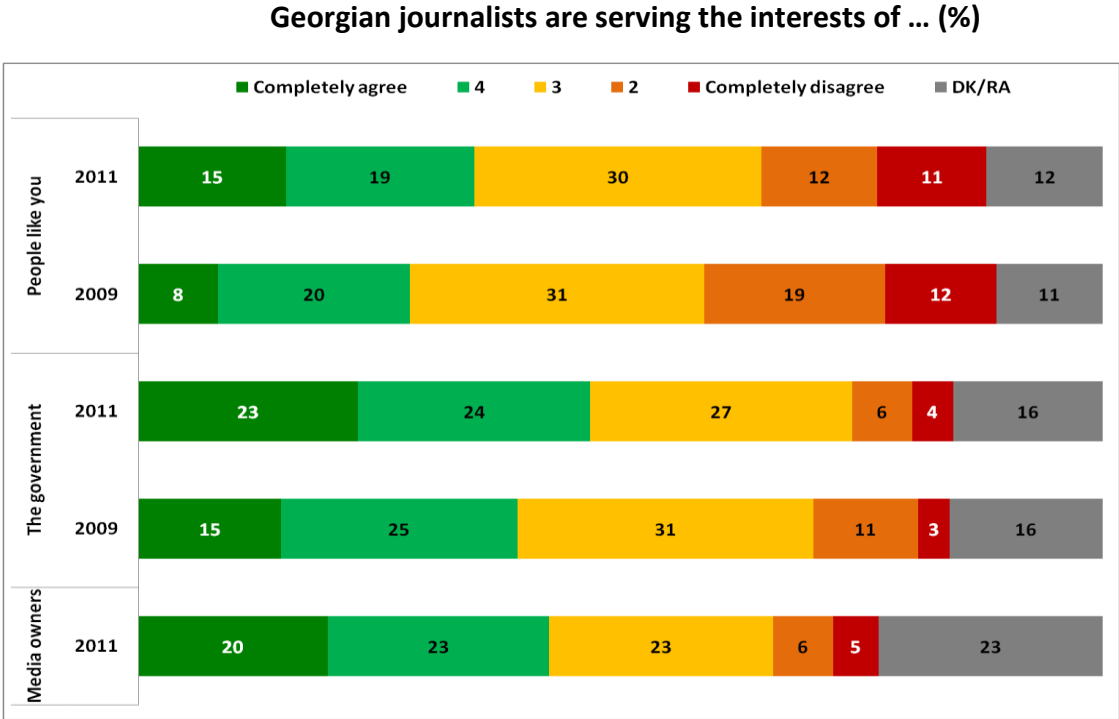
⁹ Polarization of the media describes a situation in which the media landscape is divided along political, religious or other lines, and the media is sympathetic to various parties by presenting biased and unbalanced information.

In the case of Rustavi 2, 24% (2009) and 20% (2011) of Georgians believe it to be funded by the Government. Imedi TV is perceived to be less financially dependent on the Government as only 12% (2009) and 15% (2011) of Georgians think it is Government-funded. Officially the Georgian Government does not provide funding for private TV stations, and funding for the Georgian Public Broadcaster is a specifically defined percent of the state budget. But because the coverage of current events provided by some channels is seen to be pro-governmental, we assume, this has led to the perception that they receive government funding.

Not Serving Public Needs

Journalists are also often perceived pessimistically by the Georgian population as not serving public needs. More Georgians report that journalists serve either the interests of the Government or media owners¹⁰ than the interests of the broader population (Figure 7).¹¹ However, quite a large percent of Georgians did not report their opinion on this topic.

Figure 7.



In spite of this pessimistic view, the profession of journalist remains appealing to the majority of the Georgian population. In 2011, almost 70% of Georgians who have children would approve their child’s decision to become a journalist (14% disapprove and 16% find it difficult to

¹⁰ In May, 2011 the Parliament of Georgia amended the broadcasting law, which, among other changes, requested all owners of the broadcasting media to make public the information on all shareholders, and license-holders, regardless to where they are registered by January, 1st, 2012. These amendments received a positive assessment from the donor community, media professionals and civil sector, and are considered to be the step forward towards the freedom of the media.

¹¹ In 2009 there was no option of ‘Media Owners’ in this question.

answer this question). Factors contributing to the approval of this career are more connected with status – Georgians would support their children in this choice because journalists are ‘well paid’ (15%), ‘journalists are very popular in Georgia’ (13%), and ‘being a journalist in Georgia is prestigious’ (11%). For a quarter of Georgians, the primary reason to support their child’s desire to become a journalist is because ‘journalists serve society’ (25%).

In the 2011 survey, out of the 14% of the population who would disapprove of their children’s choice to become journalists, 24% stated that it is because ‘journalists usually have a difficult schedule’; 22% said that ‘journalists are under the pressure from the Government’, and another 15% justified their disapproval by their belief that ‘journalists in Georgia often work in uncomfortable conditions’. Nine percent also mentioned that journalists are often insulted in Georgia. These reasons can be divided into two parts. The first part is connected to the technical/logistical part of journalism with its erratic working hours, travelling, and deadlines. The second part consists of institutional reasons, connected with limited freedom of speech and a situation in which the rights of journalists are not well protected.

On the whole, viewers perceive Georgian TV channels as more concerned with profit than in serving the public interest.¹² This assessment has not changed much from the first wave of the survey – 31% in 2009 and 38% in 2011 agreed with this statement, while 15% in 2009 and 10% in 2011 disagreed.¹³ 24% of Georgians in each survey gave neutral responses to this question.

In response to the question of whether the news coverage of TV stations is influenced by the interests of their owners, only 5% in 2009 and 4% in 2011 disagreed with this statement. In 2009, 28% of Georgians said that TV stations are owned by businessmen with close ties to the government. Only 11% did not agree and 24% chose to remain neutral.¹⁴

¹² To answer this question, respondents were given a 10-point scale, where ‘1’ meant ‘completely disagree’, and ‘10’ meant ‘completely agree’. Points 10-7 were recoded as agree, ‘5-6’ were recoded as ‘neutral’ and 4-1 recoded as disagree.

¹³ In both 2009 and 2011, 27% found it hard to answer this question.

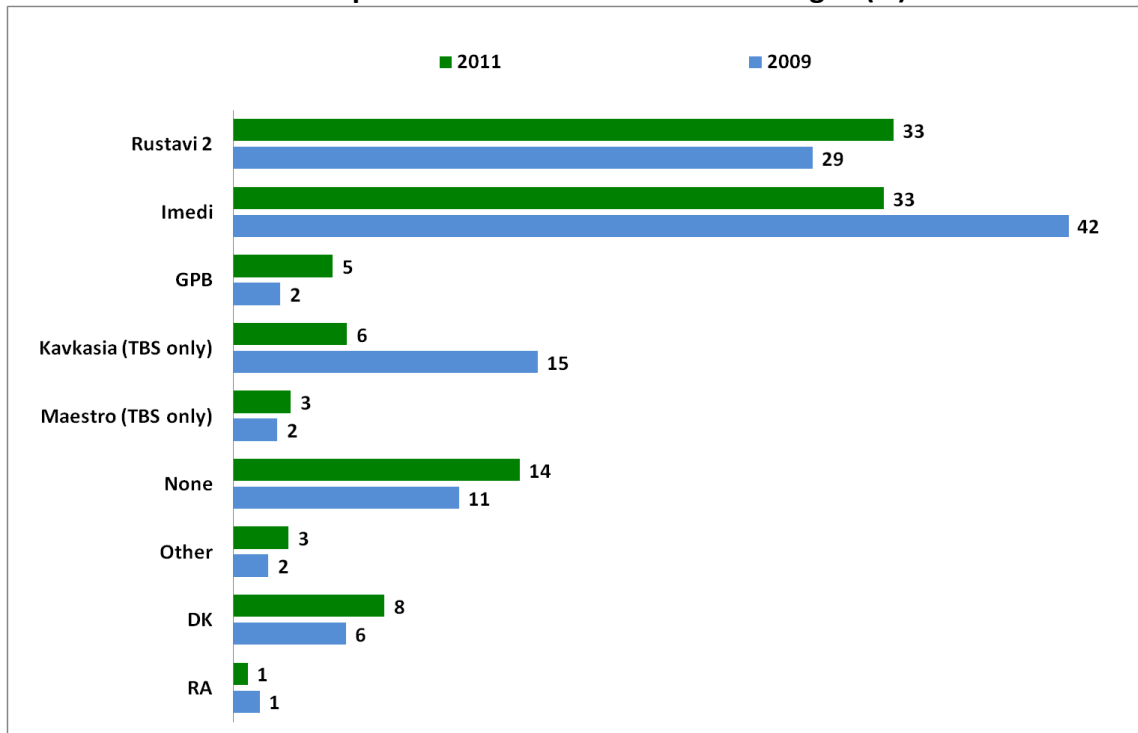
¹⁴ To answer this question, respondents were given a 10-point scale, where ‘1’ meant ‘completely disagree’, and ‘10’ meant – ‘completely agree’. Points 10-7 were recoded as agree, ‘5-6’ were recoded as ‘neutral’ and 4-1 recoded as disagree. 35% of people found the question difficult to answer and another 3% refused to answer.

To Trust or not to Trust

In order to measure the extent to which audiences trust news and political reporting on TV, respondents were asked to name the Georgian TV channel they most trusted in the coverage of Georgian politics and current events (Figure 8).

Figure 8.

Please name the Georgian TV channel that you trust the most when it comes to reporting on politics and current events in Georgia. (%)



The most visible change in trust from 2009 to 2011 is the decrease (from 42% in 2009 to 33% in 2011) in the percentage of Georgians who trust Imedi TV. This decrease could be partly caused by the March, 2010 airing on Imedi TV of a program imitating war with Russia. This program prompted discussions among media professionals, policy-makers, and the general public about the necessity and purpose of the format of the program.¹⁵ When speaking about the trust in news and political reporting on various channels regardless of whether respondents most frequently turn to them, only 9% in 2011 and 7% in 2009 reported that they ‘completely trust’ the news and political reporting on the Georgian Public Broadcaster. To compare, in 2011 the highest percent of ‘complete trust’ (27%) went to ‘Erstulovneba’, followed by Rustavi 2 (17%) and Imedi TV (16%). The fact that Rustavi 2 and Imedi TV are the most viewed TV stations in Georgia is also confirmed since fewer people found it difficult to report their opinion; only about 10% of Georgians say they ‘don’t know’ their level of trust for Imedi TV and Rustavi 2 in both 2009 and 2011. This is in contrast to other channels, such as ‘Erstulovneba’ in which 53% chose the ‘don’t know’ option. ‘Erstulovneba’, a TV channel associated with the Georgian Orthodox church, broadcasts programming mainly of a religious character. Thus, viewers may

¹⁵ See page XX for more analysis of this case.

watch it partly due to their religious affiliation, suggested by the higher level of trust towards the information it broadcasts.

Survey respondents were also asked to indicate their level of trust towards the news about Georgia on the TV channels they most frequently watch (Table 5). Although we expected a higher level of trust, quite a large number of Georgians neither trust nor distrust the news on politics and current events in Georgia on the channels that they watch most often. Moreover, there is even a small part of the population – in some cases more than 10% – who completely distrusts news reporting on these channels.

Table 5.

Share of viewers who trust the news/programs about politics, on which they most frequently watch news or programs about politics and current events in Georgia (%)¹⁶

		5 – Completely trust	4	3	2	1 – Completely distrust	Do not know/Refuse to answer
Rustavi 2	2011	27	29	28	7	4	4/1
	2009	23	32	24	10	3	8/0
Imedi TV	2011	26	32	27	7	3	5/1
	2009	29	33	21	7	3	8/0
Georgian Public Broadcaster	2011	21	26	33	8	4	7/1
	2009	18	21	31	9	9	12/0
Kavkasia	2011	27	33	23	7	1	8/1
	2009	39	31	23	3	1	3/0
Maestro	2011	24	21	43	6	0	4/2
	2009	40	42	12	1	0	5/0

Overall, from 2009 till 2011 the picture has pretty much remained the same. There is a slight increase in the level of trust reported towards news broadcasts by the Georgian Public Broadcaster, and a decrease in trust towards Maestro news reporting with more of its viewers neither trusting nor distrusting its news or programs on current affairs in Georgia.

When asked about the level of trust towards various Georgian institutions and professions, journalists occupy a middle position (Table 6). In general, although there are no extreme

¹⁶ **How much do you trust news on politics and current events in Georgia on the following TV channels?"** BY **"On which TV channels do you most frequently watch the news or programs about politics and current events in Georgia?"** A 10 point scale was used where '10' meant 'completely trust' and '1' meant – 'completely distrust'. The scale was recoded. In this table are presented the data only on the most watched channels.

changes in the assessments there are two exceptions: trust has increased significantly towards police, army and religious institutions.¹⁷

Table 6.

Please assess your trust towards ... (%)

	Fully trust		Do not trust at all	
	2009	2011	2009	2011
NGOs	6	7	6	5
Judges	4	8	13	11
Parliament	7	11	12	11
Prime Minister and ministers	7	12	12	11
Local self-government/Gamgebeli	7	12	9	11
Ombudsman	17	15	2	4
Journalists	16	17	3	2
Doctors	24	18	4	6
Banks	16	21	8	7
President	19	25	12	8
Teachers	34	31	1	2
Police	20	32	8	5
Army	37	53	2	1
Religious institutions	58	72	0	1

Many people (more than 30% in some cases) found it difficult to determine their level of trust towards certain institutions such as the Ombudsman, judges, banks, and NGOs. This could be partly caused by limited contacts with these institutions.

¹⁷ To answer this question, respondents were given a 10-point scale, where '1' meant 'Do not trust at all, and '10' meant 'Fully trust'. This table only presents the percentage of answers to '1' – 'Do not trust at all' and '10' – Fully trust'.

The Case of the ‘Imitated Chronicle’ at Imedi TV

Assessments of the media and relationships between the media and government often become more vivid when extraordinary real-life events have occurred in Georgia. Such an event was the airing of a show on Imedi TV in March, 2010 that imitated the invasion of Georgian soil by the Russian army. The 2011 survey included a special block of questions designed to measure what the population thought about this event.

The first question in this block aimed at measuring the level of knowledge about the event among the population. After more than a year, 71% remembered that the show was staged. The follow up questions discussed below, aimed at assessing the attitudes of the population to the show, were asked only to these 71% of respondents – 1424 out of the total 2009.

Sixty-eight percent of Georgians actually watched the show and the remaining 31% only heard about it. Out of those who watched, 62% realized that the events in the show were unreal, or acted-out only after the show had ended. Twenty-two percent read or heard the notice at the beginning of the show, and another 13% was informed during the show by family members and/or friends that the events had been acted. Even in cases when people knew that the show was staged, the predominant feelings experienced while watching the show were fear (37%), confusion (13%), and panic (11%). Another 9% felt indignation and another 9% became angry. After the show, 36% were simply angry (Table 7).

Table 7.

Feelings during and after the show (% , N=949 and 922)

	During the show	After the show
Surprised	5	3
Confused	13	4
Interested	4	3
Fear/frightened	37	10
Insulted	2	4
Angry	9	36
Panicked	11	6
Mobilized	1	2
Indignation	9	16
No special feelings	9	13
Other	0	1

The general public, as well as the journalist corps and human rights defense organizations demanded strict sanctions on the TV station, yet the only sanction issued by the Georgian National Communication Committee was to publicly apologize. Imedi TV apologized for not

making the disclaimer visible during the entire show which would have informed the audience that the show was staged regardless of when they tuned in to watch it.¹⁸

Almost a year has passed since the airing of the show, and still the overwhelming majority (82%) of those who watched or heard about it believe that it should not have been aired. Only 13% agreed (either completely or partially) to the statement that ‘such a show was necessary to remind us about the threats we are facing’.

¹⁸ <http://www.humanrights.ge/index.php?a=main&pid=8127&lang=geo> (Last accessed December, 20, 2011)

Conclusions

The Freedom House and IREX reports cited above, use methodology that is mostly based on expert assessments and a study of legislative changes in countries, rather than on a survey of media consumers. While expert assessments have their own value, perceptions of the population are no less relevant, since they can indicate existing problems in the media industry.

The population's overall assessments of the media in Georgia are not positive. A significant segment of the Georgian population believes there is limited freedom of speech in their country, and they do not have a high level of trust in the media in general, especially with regard to news and political reporting. The majority also thinks the media is biased and represents interests either of the government or the opposition. Despite such assessments, the majority of the population steadfastly consumes Georgian media, especially TV. In a situation of limited plurality and diversity, the population is left without a choice and watches what is available.

Those who do have the choice migrate towards the Internet. The Internet can serve as a niche for watchdog journalism and fill the need for balanced and unbiased media, especially since the Internet usage in Georgia enjoys growth, and there is a decrease in Internet connection fees. Internet users still form a minor part of the population, but there is an opportunity to create a strong online media platform that will attract the country's growing number of Internet users.

Georgian population perceives the Georgian media as polarized along the pro-government/oppositional lines. On the one hand, this could be considered a reflection of a polarization of Georgian society itself. On the other hand, the older generation that grew up with the traditions of Soviet journalism and its 'Cold War' rhetoric, is used to opinion-based journalism, rather than fact-based journalism. This group may feel more comfortable reading or watching media that in certain ways follows these traditions. However, due to the limited financial opportunities of Georgian media outlets, there is a scarcity or non-existence of audience and market research, which limits their ability to define the needs of their audience.

The new Internet generation is a generation for whom reading hard-copy publications is not part of their daily routine. They would rather consume news from electronic devices. Hence, print media in Georgia, as in many other countries world-wide, is in a more difficult position today. Using the Internet more actively, especially, its social media tools, could become a solution to mitigate the problems and stay afloat.

Today, the Georgian media has the difficult task of finding its place in a changing reality. Without adapting to these changes and finding solutions to existing problems, such as polarization and unfulfilled public service, there is a threat that the Georgian media will lose its opportunity to become a socially responsible media that is ready to serve the interests of Georgian society however ideal this may sound.

About Eurasia Partnership Foundation Media Program

Eurasia Partnership Foundation's (EPF) mission is to empower people to effect change for social justice and economic prosperity through hands-on programs, helping them to improve their communities and their own lives. With locally registered offices in Georgia, Armenia, and Azerbaijan, EPF is the legacy institution of Eurasia Foundation, a privately managed nonprofit organization established in 1992 to deliver seed capital to emerging civil society organizations in the former Soviet countries. EPF began functioning as a local organization in Georgia in February 2008.

EPF has a long history of supporting Georgian media outlets as part of its overall strategy to strengthen civil society in Georgia. Activities have focused on capacity building and the development of media outlets as sources of unbiased information. From 2001-2004, Eurasia Foundation in Georgia implemented a large-scale media program aimed at regional radio and television stations to enhance staff professionalism, improve technical capacity, and increase viewership. Starting in 2009, EPF revamped its media work, starting with the €530,000 European Commission-funded *Strengthening the Media's Role as a Watchdog Institution in Georgia* project, which focused on increasing public access to high quality, professional, independent information. Through the project, EPF established the Georgian Media Legal Defense Center to provide free legal aid to journalists and media outlets and to advocate for legislative changes (in cooperation with the Georgian Young Lawyers' Association). EPF also worked with the Georgian Association of Regional Broadcasters (GARB), linking it with CIRCOM Regional, an EU-based association of regional broadcasters, and providing a series of trainings in investigative journalism, media management, and fundraising for GARB member stations. Along with providing technical assistance to the project partners and beneficiaries, EPF also awarded 14 investigative journalism grants to various NGOs and media outlets.