Serbia
Public Opinion

JUNE/SEPTEMBER 2017

METHODOLOGY

METHODOLOGY

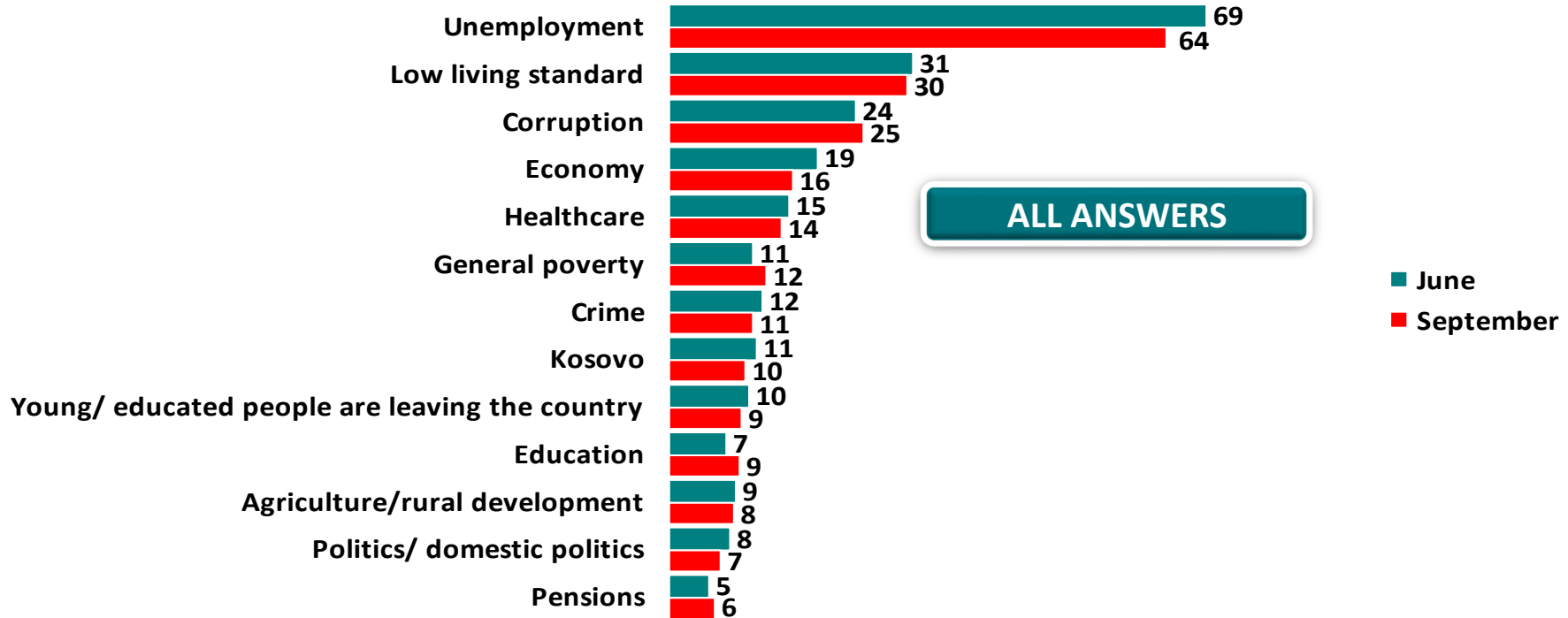|	
Realization:	**Field research conducted in the period from 22 - 28.09.2017.**
Sample frame:	**Population of Serbia 18+**
Sample size:	**1050 respondents**
	Three-stage random representative stratified sample
Type of sample:	**Unit of the first stage: Territory of polling place**
	Unit of the second stage: Households (SRSWoR – random walk)
	Unit of the third stage: Respondents within a household (Kish tables)
Type of research:	**Field questionnaire – average duration 45 minutes**
Place of survey:	**67 municipalities from Serbia, 127 local communities, Central Serbia, suburban and Urban**
Post-stratification:	**By gender, age and region**
Marginal error:	**±1.45% for the occurrences with the expected incidence of 5%**
	±2.86% for the occurrences with the expected incidence of 25%
	±3.31% for the occurrences with the expected incidence of 50% (*marginal error*)

DOMESTIC POLITICS

Economic issues are most important to the citizens of Serbia

In your opinion, what is the biggest problem facing Serbia at the moment, the problem because of which you yourself are the most concerned? – all answersa

Problem	June	September
Unemployment	69	64
Low living standard	31	30
Corruption	24	25
Economy	19	16
Healthcare	15	14
General poverty	11	12
Crime	12	11
Kosovo	11	10
Young/ educated people are leaving the country	10	9
Education	7	9
Agriculture/rural development	9	8
Politics/ domestic politics	8	7
Pensions	5	6

ALL ANSWERS

■ June
■ September

NOTE: Numbers on the slide represent percentages

Healthcare is also important for citizens of Serbia

In your opinion, which are the three areas in Serbia that are most important to you personally? Which one is in the first place, second place and the third place? – all answers

Area	June	September
Employment, creation of new jobs	70	69
General economic situation	49	57
Healthcare	29	30
Fight against corruption	25	28
Position of the young	26	24
Education	16	14
Respect of human rights	13	13
General security	11	11
Status of Kosovo	12	10
Rule of law	6	8
Arrival of foreign investors	10	7
Development of infrastructure	8	7
Regional stability	7	6
Freedom of media	4	3
Development of culture and art	4	3
European integration	4	3
Reputation of Serbia worldwide	3	1
Development of sport	2	1
Other	1	1

ALL ANSWERS

■ June
■ September

NOTE: Numbers on the slide represent percentages

Seven out of 10 citizens think that city mayors/municipality presidents should be elected directly by citizens

In your opinion, city mayors and municipality presidents should be elected how?

- ■ **Directly through local elections**
- ■ **Should be appointed through the local assemblies**
- ■ **Don't know**

NOTE: Numbers on the slide represent percentages
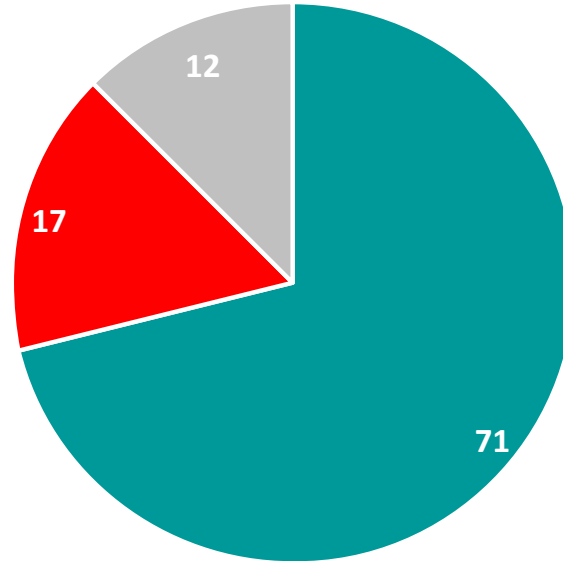
Religious and military institutions have higher levels of public satisfaction

To what extent are you satisfied with the work of the following institutions?
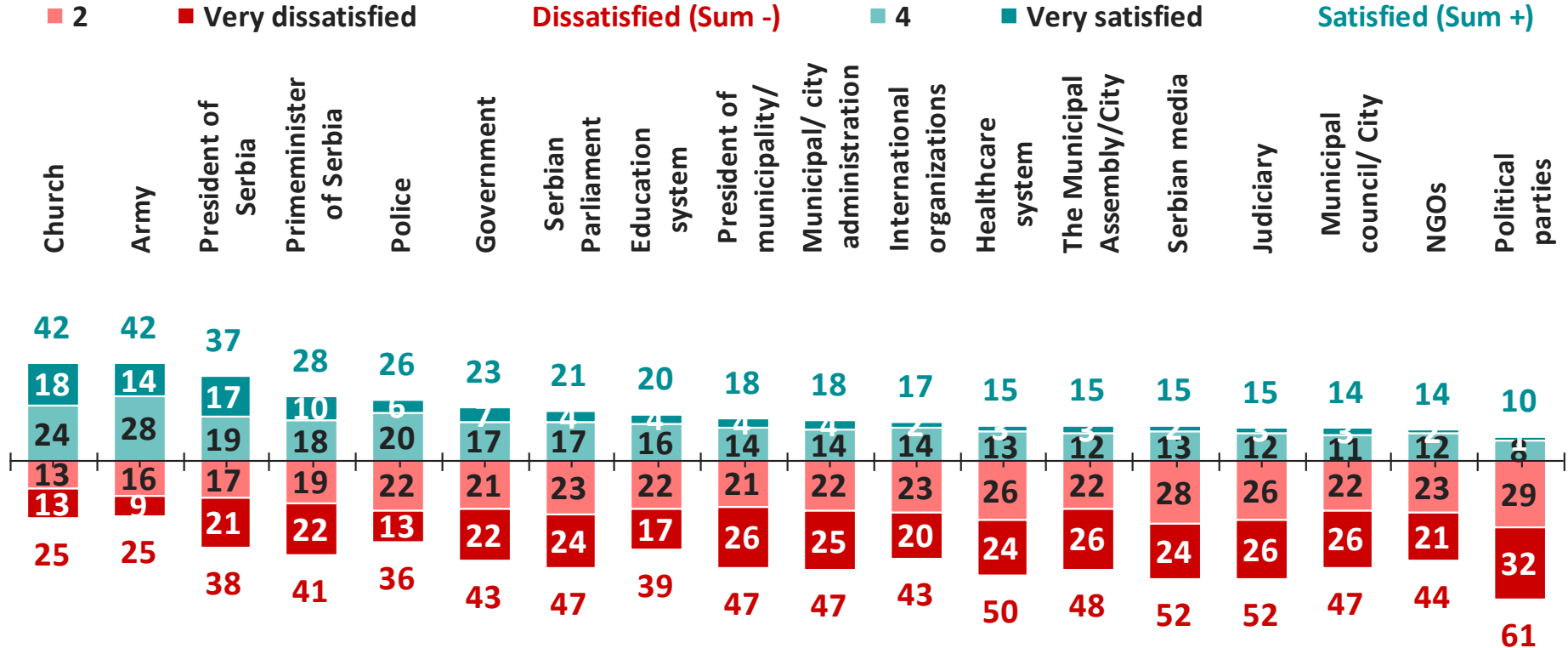
2 | **Very dissatisfied** | **Dissatisfied (Sum -)** | **4** | **Very satisfied** | **Satisfied (Sum +)**

	Church	Army	President of Serbia	Primeminister of Serbia	Police	Government	Serbian Parliament	Education system	President of municipality/	Municipal/ city administration	International organizations	Healthcare system	The Municipal Assembly/City	Serbian media	Judiciary	Municipal council/ City	NGOs	Political parties
Satisfied (Sum +)	42	42	37	28	26	23	21	20	18	18	17	15	15	15	15	14	14	10
Very satisfied	18	14	17	10	6	7	4	4	4	4	4	3	3	3	3	3	3	2
4	24	28	19	18	20	17	17	16	14	14	14	13	12	13	12	11	12	8
2	13	16	17	19	22	21	23	22	21	22	23	26	22	28	26	22	23	29
Very dissatisfied	13	9	21	22	13	22	24	17	26	25	20	24	26	24	26	26	21	32
Dissatisfied (Sum -)	25	25	38	41	36	43	47	39	47	47	43	50	48	52	52	47	44	61

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NOTE: Numbers on the slide represent percentages

FOREIGN POLITICS

But, comparing to the previous wave, favorable opinion about these states has decreased.

Observed in general, how would you evaluate your opinion about the following states and international institutions?

■ 2 **■ 1 Very unfavourable** **Unfavourable (Sum -)** **■ 4** **■ 5 Very favourable** **Favourable (Sum +)**

	Russia June	Russia Sept	China June	China Sept	Austria June	Austria Sept	Germany June	Germany Sept	EU June	EU Sept	USA June	USA Sept	NATO June	NATO Sept
Favourable (Sum +)	63	55	57	52	39	39	36	36	27	28	13	12	6	5
5 Very favourable	33	28	26	19	14	13	12	12	10	8				
4	30	27	31	33	26	26	24	24	17	20	9	9	4	3
2	8	11	10	10	17	14	20	16	20	19	29	25	17	18
1 Very unfavourable					8	8	12	11	20	20	29	30	62	63
Unfavourable (Sum -)	10	15	13	14	25	22	32	27	40	39	58	54	79	81

NOTE: Numbers on the slide represent percentages

'Microenvironmental' factors exert influence over citizen opinion on the EU and Russia, and public figures with regard to China and the U.S.

What influenced your opinion about the following states the most?

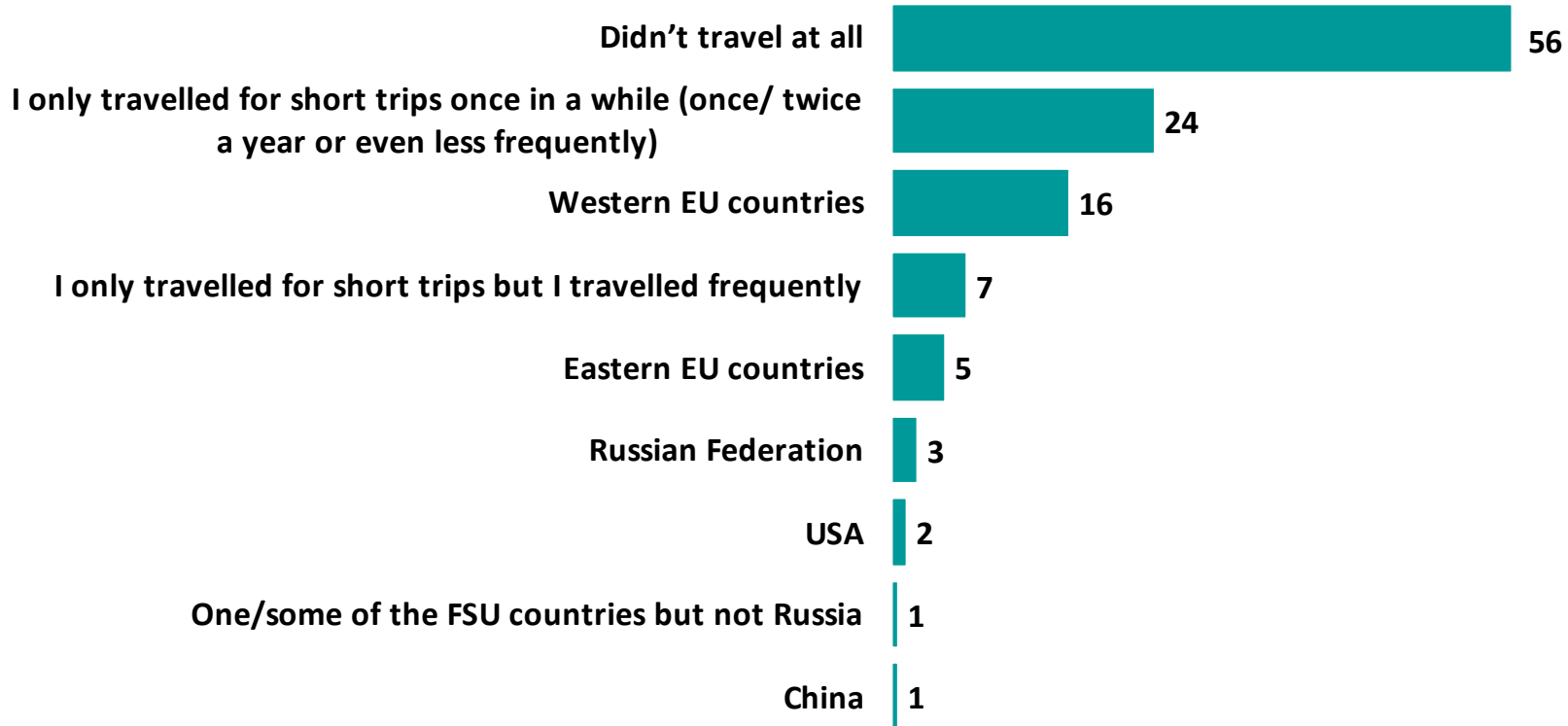**Legend:** ■ Family ■ Colleagues & friends ■ School ■ Travel ■ Media ■ Politicians I trust ■ Public figures I trust ■ Other ■ No one ■ DK/Refusal

microenvironment

European Union — 30%
Family	Colleagues & friends	School	Travel	Media	Politicians I trust	Public figures I trust	Other	No one	DK/Refusal
12	9	9	8	23	7	2	4	22	3

Russia — 34%
Family	Colleagues & friends	School	Travel	Media	Politicians I trust	Public figures I trust	Other	No one	DK/Refusal
13	8	12	2	25	9	3	3	21	3

China — 24%
Family	Colleagues & friends	School	Travel	Media	Politicians I trust	Public figures I trust	Other	No one	DK/Refusal
9	7	9	1	36	6	3	3	23	3

United States of America — 26%
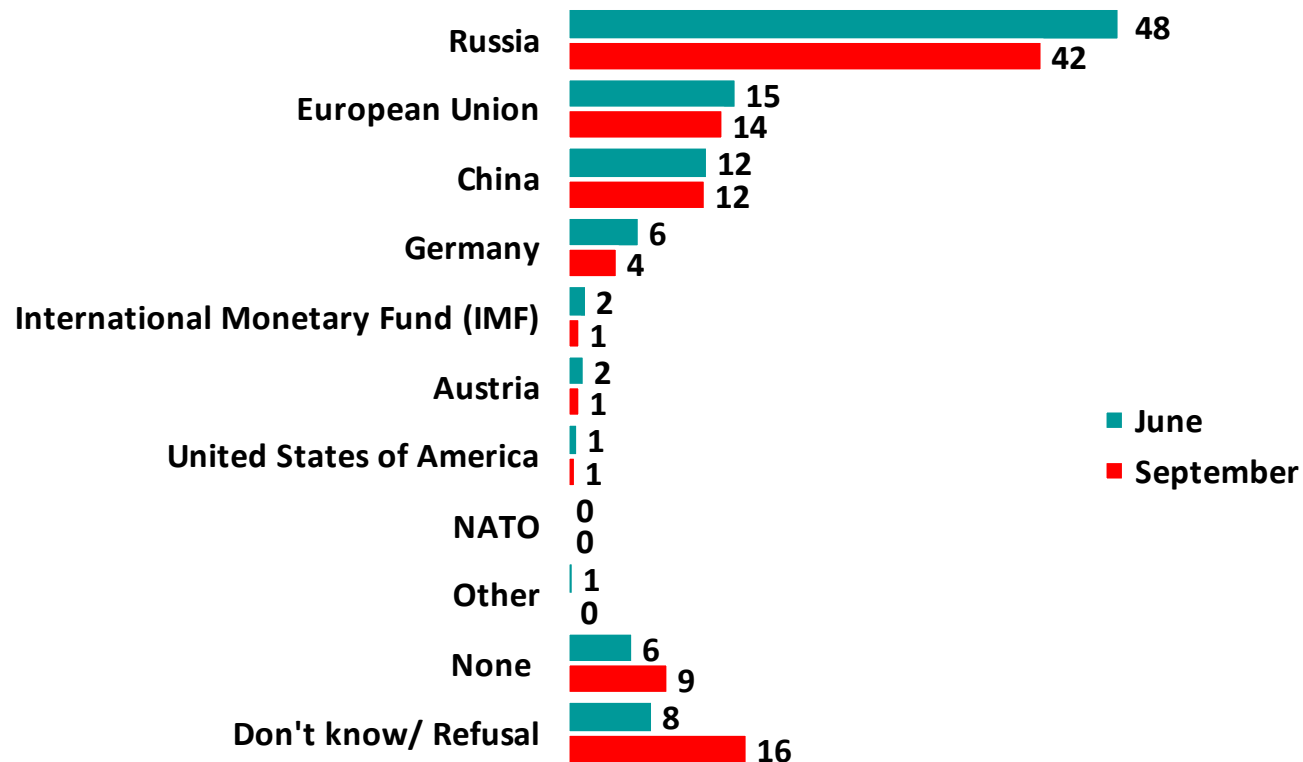| Family	Colleagues & friends	School	Travel	Media	Politicians I trust	Public figures I trust	Other	No one	DK/Refusal
9	10	8	1	34	6	2	5	21	4

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NOTE: Numbers on the slide represent percentages

One-quarter has recently travelled abroad

Do you travel to any of these locations two or more times a year?

Category	Value
Didn't travel at all	56
I only travelled for short trips once in a while (once/ twice a year or even less frequently)	24
Western EU countries	16
I only travelled for short trips but I travelled frequently	7
Eastern EU countries	5
Russian Federation	3
USA	2
One/some of the FSU countries but not Russia	1
China	1

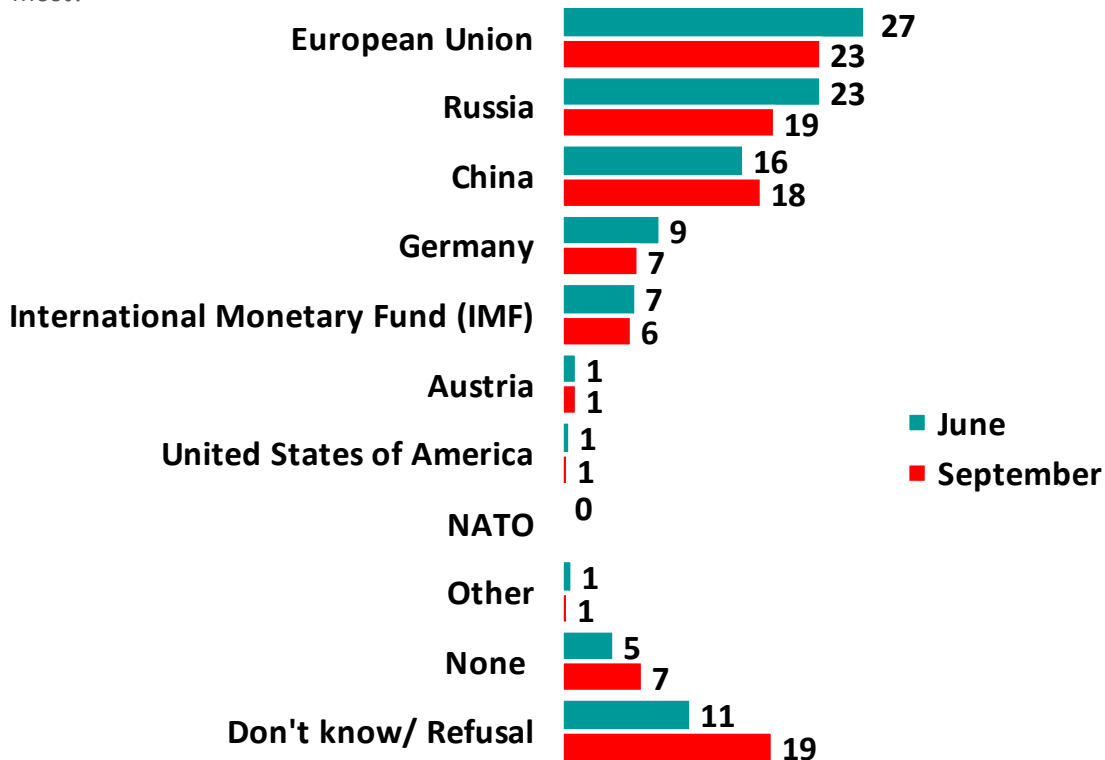*NOTE: Numbers on the slide represent percentages*

Russia is perceived as Serbia's best partner

In your opinion which state or international institution supports Serbia the most and with which Serbia has the best partnership relations?

Russia — June: 48, September: 42
European Union — June: 15, September: 14
China — June: 12, September: 12
Germany — June: 6, September: 4
International Monetary Fund (IMF) — June: 2, September: 1
Austria — June: 2, September: 1
United States of America — June: 1, September: 1
NATO — June: 0, September: 0
Other — June: 1, September: 0
None — June: 6, September: 9
Don't know/ Refusal — June: 8, September: 16

■ June
■ September

NOTE: Numbers on the slide represent percentages

The EU is perceived as Serbia's largest financial supporter

Thinking about financial support and investments exclusively, which country or international institution in last five years supported Serbia financially the most?

Chart data (Numbers represent percentages):

Entity	June	September
European Union	27	23
Russia	23	19
China	16	18
Germany	9	7
International Monetary Fund (IMF)	7	6
Austria	1	1
United States of America	1	1
NATO	0	
Other	1	1
None	5	7
Don't know/ Refusal	11	19

Official development assistance 2000 to 2013
-EU and EU countries 3.5 billion EUR
-US 0.64 billion EUR
-Japan 0.1 billion EUR
-China 0.01 billion EUR
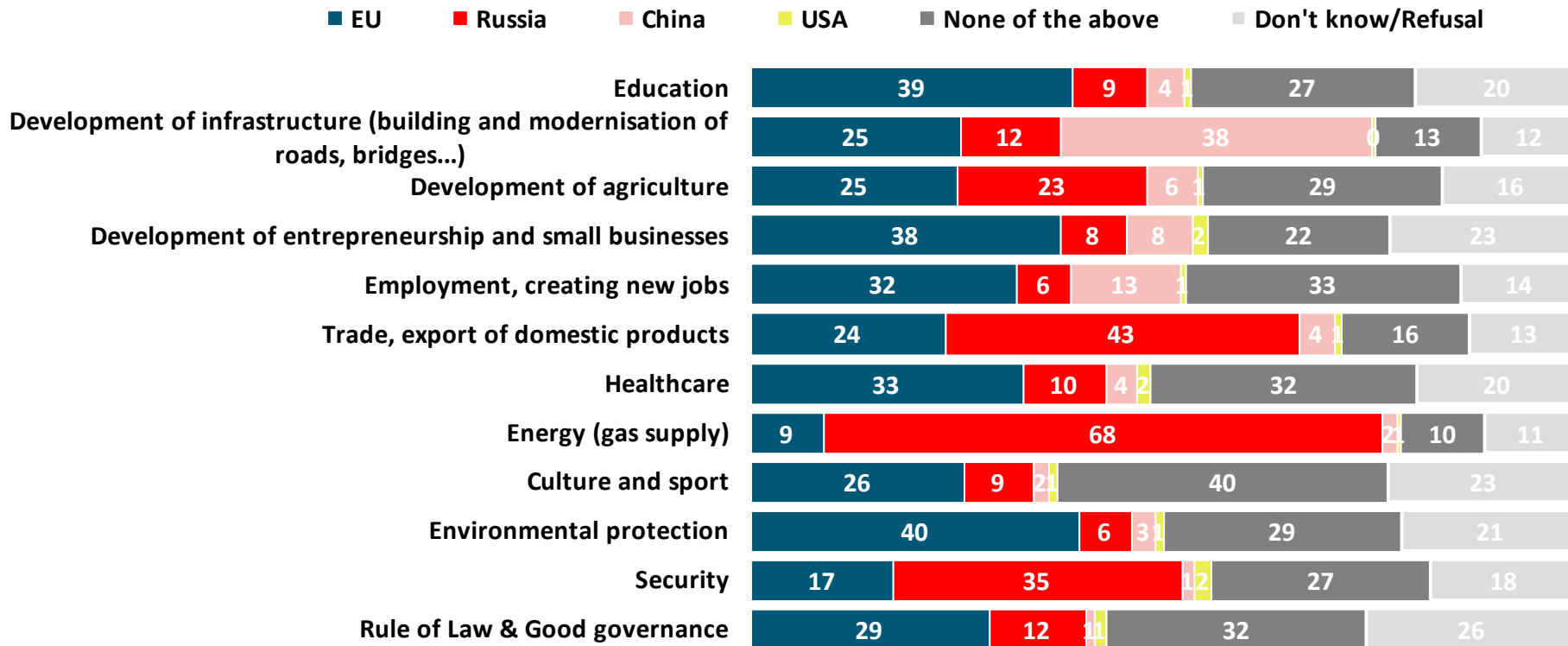-Russia 0 EUR

Official investments 2007 to 2017
-EU and EU countries 21 billion EUR
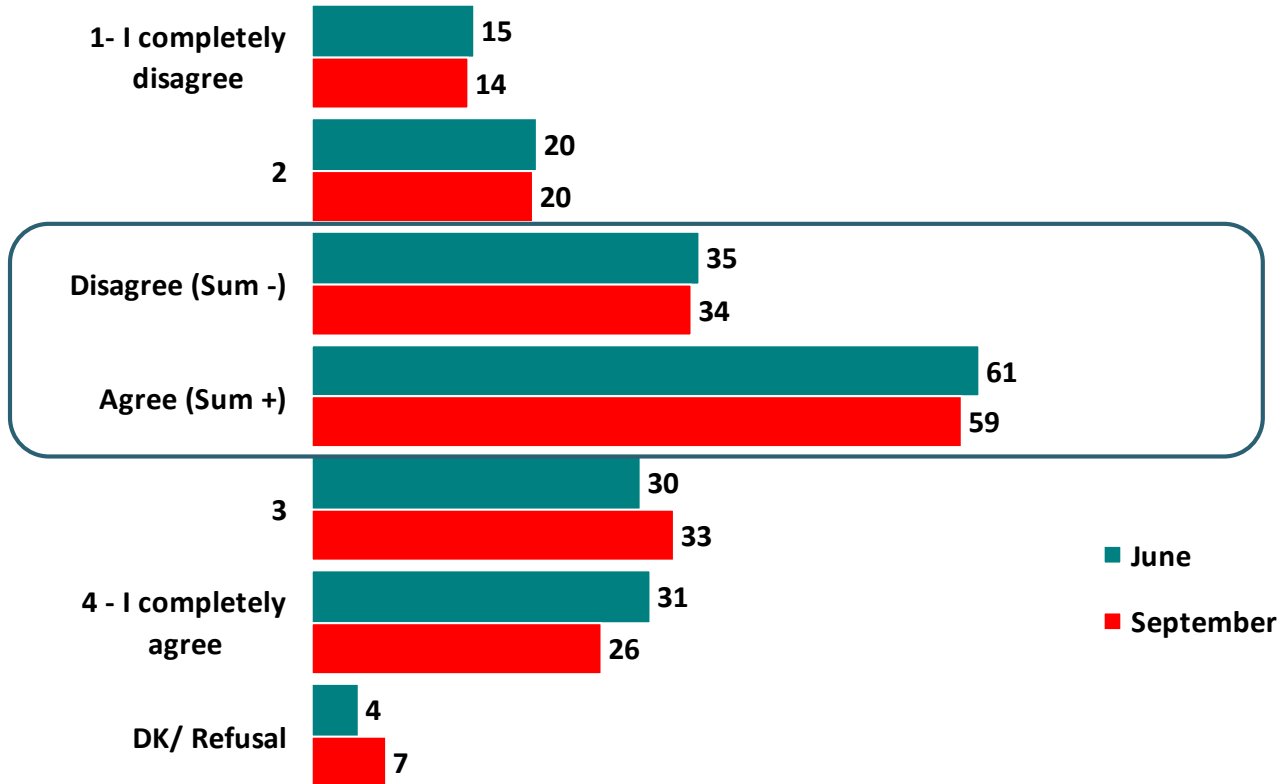-Russia 4 billion EUR

SOURCE: Serbia's Development Agency (RAS)

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NOTE: Numbers on the slide represent percentages

Citizens recognize a diversity of foreign support/partnership

Who helps and invests in Serbia most of all to develop these areas?

Legend: ■ EU   ■ Russia   ■ China   ■ USA   ■ None of the above   ■ Don't know/Refusal

Area	EU	Russia	China	USA	None of the above	Don't know/Refusal
Education	39	9	4	1	27	20
Development of infrastructure (building and modernisation of roads, bridges...)	25	12	38	0	13	12
Development of agriculture	25	23	6	1	29	16
Development of entrepreneurship and small businesses	38	8	8	2	22	23
Employment, creating new jobs	32	6	13	1	33	14
Trade, export of domestic products	24	43	4	1	16	13
Healthcare	33	10	4	2	32	20
Energy (gas supply)	9	68	2	1	10	11
Culture and sport	26	9	2	1	40	23
Environmental protection	40	6	3	1	29	21
Security	17	35	1	2	27	18
Rule of Law & Good governance	29	12	1	1	32	26

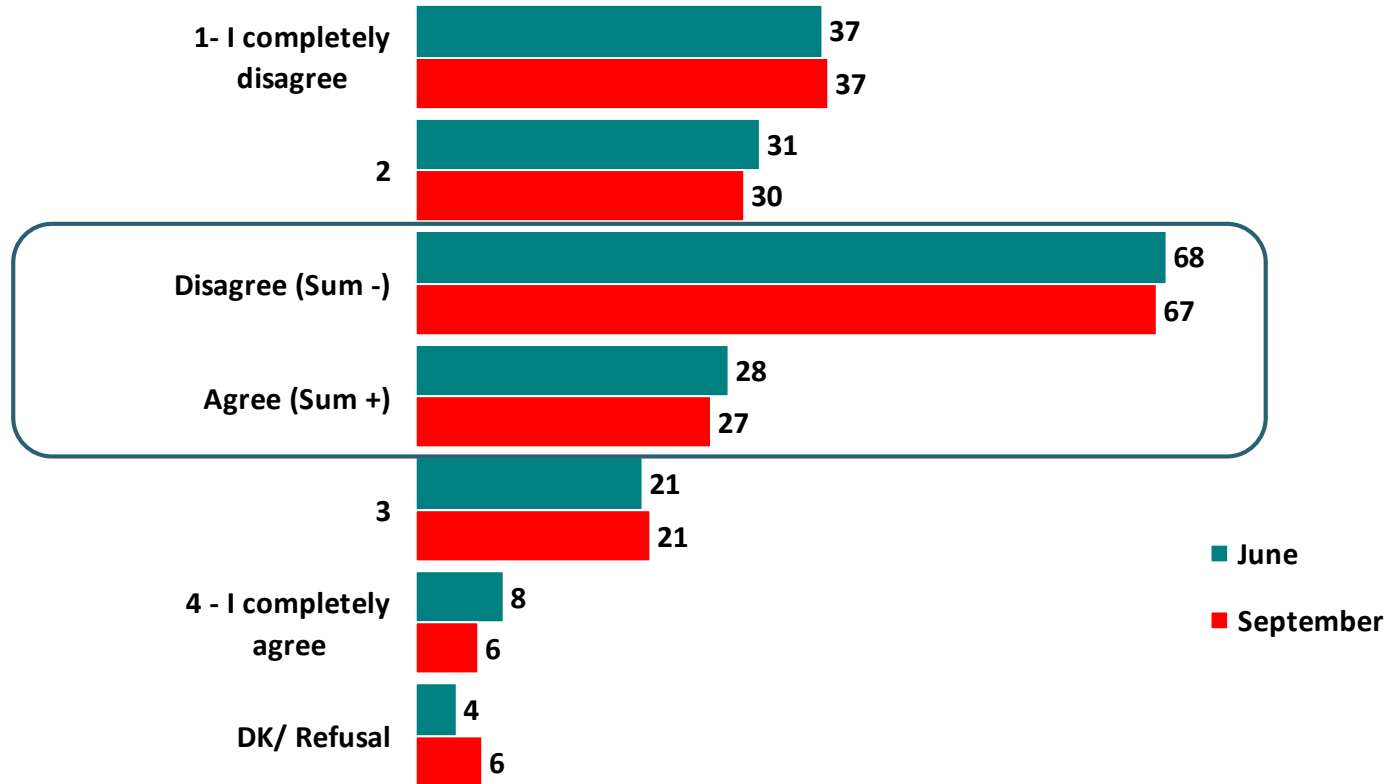*NOTE: Numbers on the slide represent percentages*

Six-in-10 see Russia treating Serbia as an equal partner

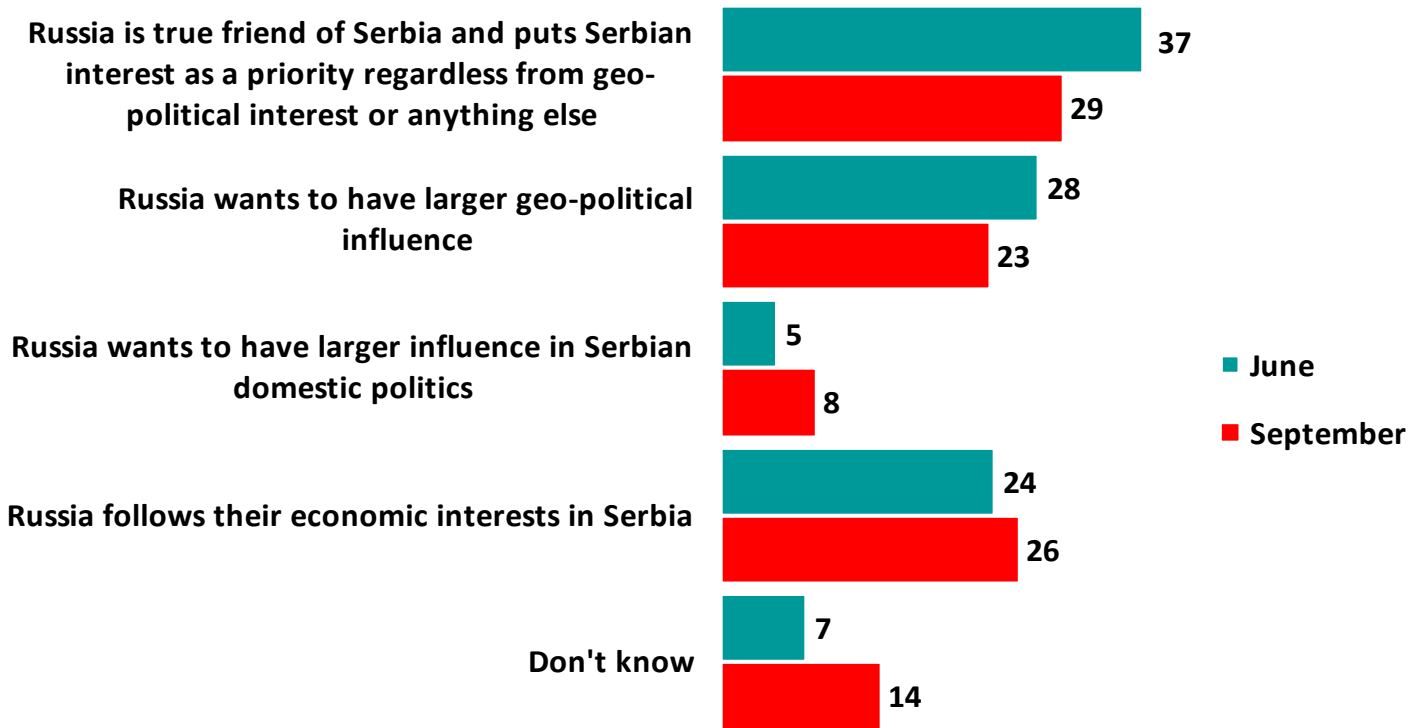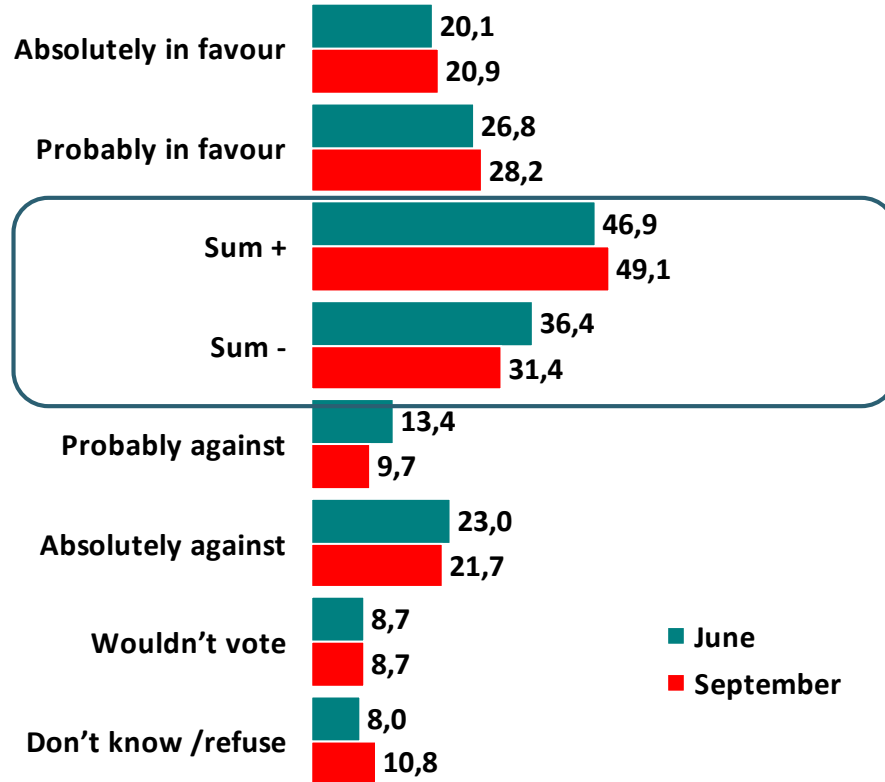*To what extent do you agree with the following statement: Russia is treating Serbia as an equal partner?*

Category	June	September
1- I completely disagree	15	14
2	20	20
Disagree (Sum -)	35	34
Agree (Sum +)	61	59
3	30	33
4 - I completely agree	31	26
DK/ Refusal	4	7

■ June
■ September

NOTE: Numbers on the slide represent percentages

Nearly 7-in-10 do not see the EU as treating Serbia as an equal partner.

To what extent do you agree with the following statement: The EU is treating Serbia as an equal partner?

	June	September
1- I completely disagree	37	37
2	31	30
Disagree (Sum -)	68	67
Agree (Sum +)	28	27
3	21	21
4 - I completely agree	8	6
DK/ Refusal	4	6

NOTE: Numbers on the slide represent percentages

Citizens see Russian self-interest and genuine support as the basis of its engagement with Serbia

In your opinion, what is the most important reason why Russia is maintaining good relations with Serbia?
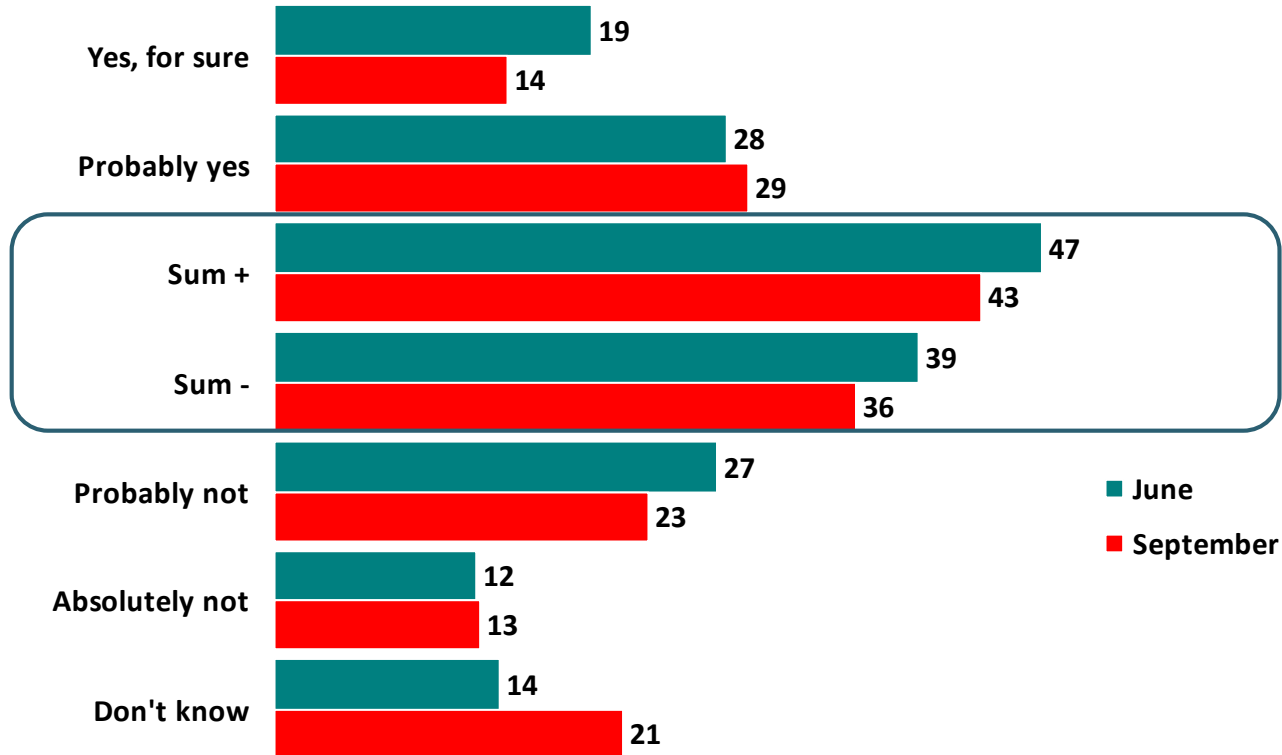

Russia is true friend of Serbia and puts Serbian interest as a priority regardless from geo-political interest or anything else
- June: 37
- September: 29

Russia wants to have larger geo-political influence
- June: 28
- September: 23

Russia wants to have larger influence in Serbian domestic politics
- June: 5
- September: 8

Russia follows their economic interests in Serbia
- June: 24
- September: 26

Don't know
- June: 7
- September: 14

■ June
■ September

NOTE: Numbers on the slide represent percentages

EU membership support is just below 50 percent

If the referendum for EU membership of Serbia were held this Sunday, how would you vote?

Category	June	September
Absolutely in favour	20,1	20,9
Probably in favour	26,8	28,2
Sum +	46,9	49,1
Sum -	36,4	31,4
Probably against	13,4	9,7
Absolutely against	23,0	21,7
Wouldn't vote	8,7	8,7
Don't know /refuse	8,0	10,8

■ June
■ September

NOTE: Numbers on the slide represent percentages

Citizens are lukewarm to jettisoning EU integration in favor of integration with Russia

Irrespective of your attitude towards the EU, do you think that Serbia would become a better place to live in if it gave up the EU integration and turned towards Russia?
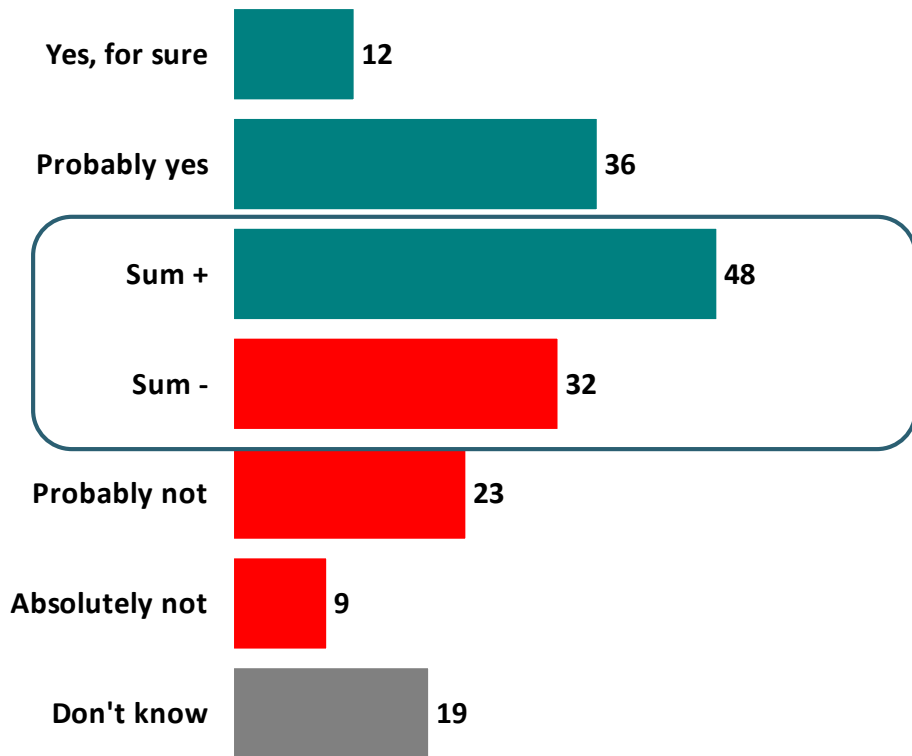

Category	June	September
Yes, for sure	19	14
Probably yes	28	29
Sum +	47	43
Sum -	39	36
Probably not	27	23
Absolutely not	12	13
Don't know	14	21

■ June
■ September

NOTE: Numbers on the slide represent percentages

A slight majority sees benefits to stronger economic links with Russia

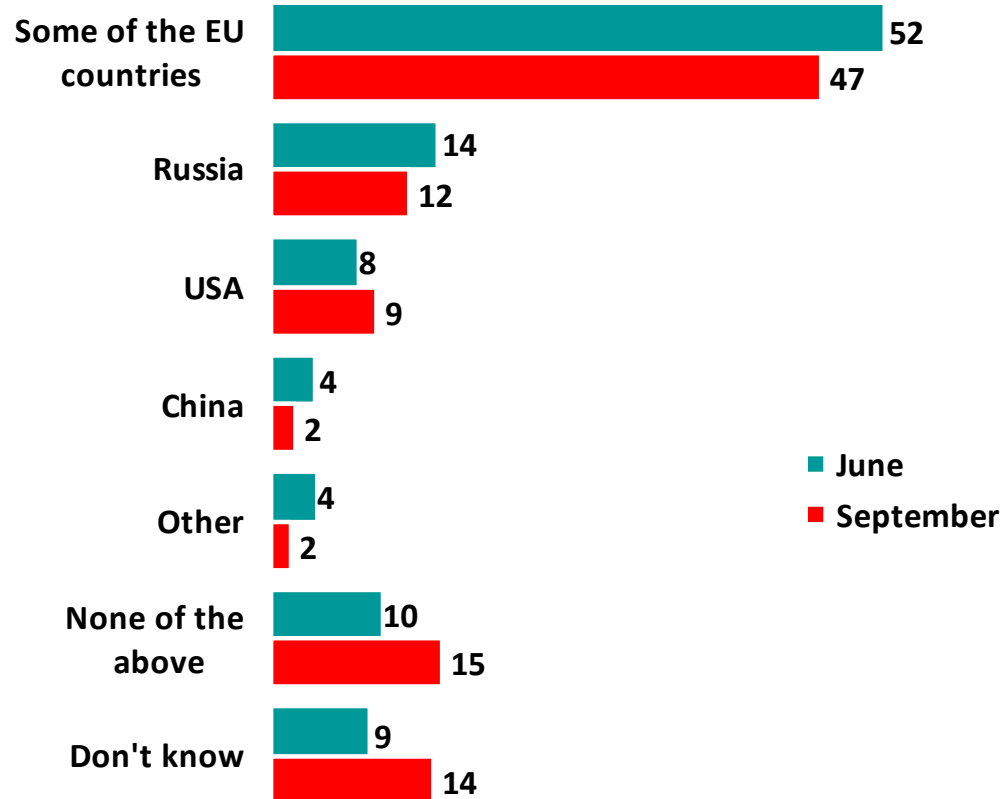*Do you think that Serbia would be able to upgrade its economy if it chose Russia as its key partner?*

Yes, for sure — June: 21, September: 16

Probably yes — June: 35, September: 34

Sum + — June: 56, September: 50

Sum - — June: 30, September: 31

Probably not — June: 20, September: 20

Absolutely not — June: 10, September: 11

Don't know — June: 14, September: 19

Legend: ■ June ■ September

NOTE: Numbers on the slide represent percentages
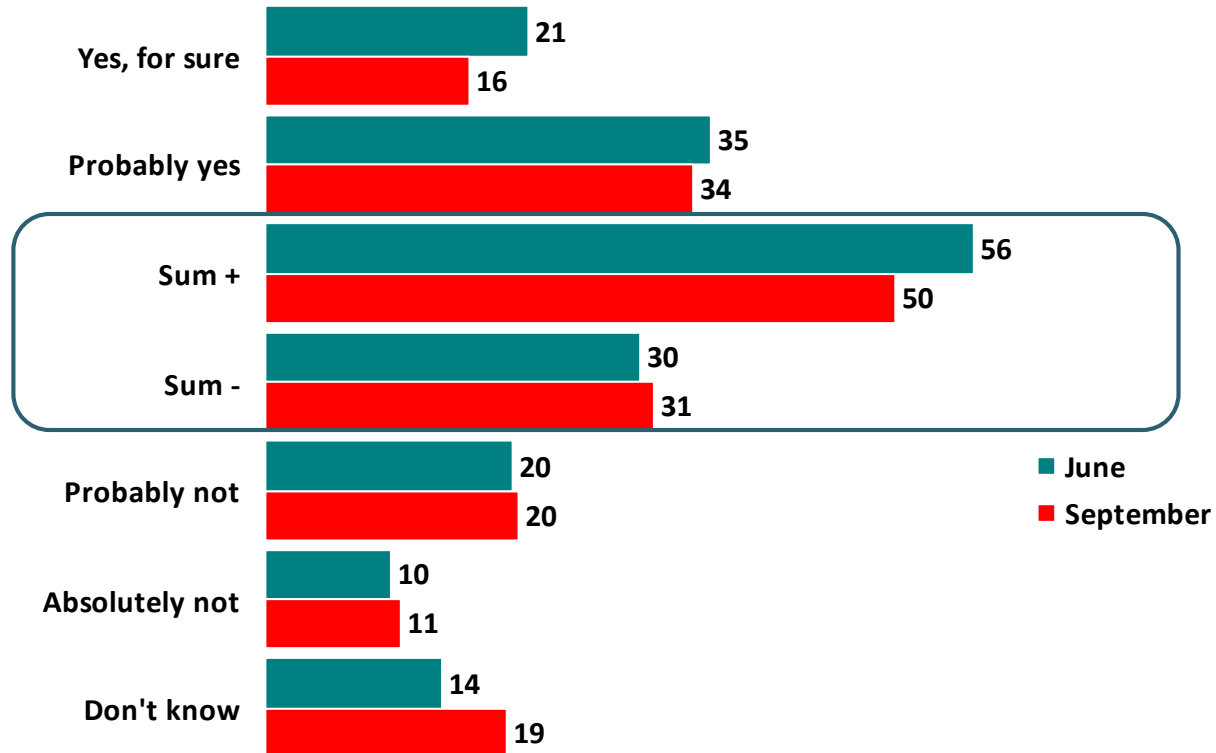
A plurality sees economic benefits to stronger economic links with the EU

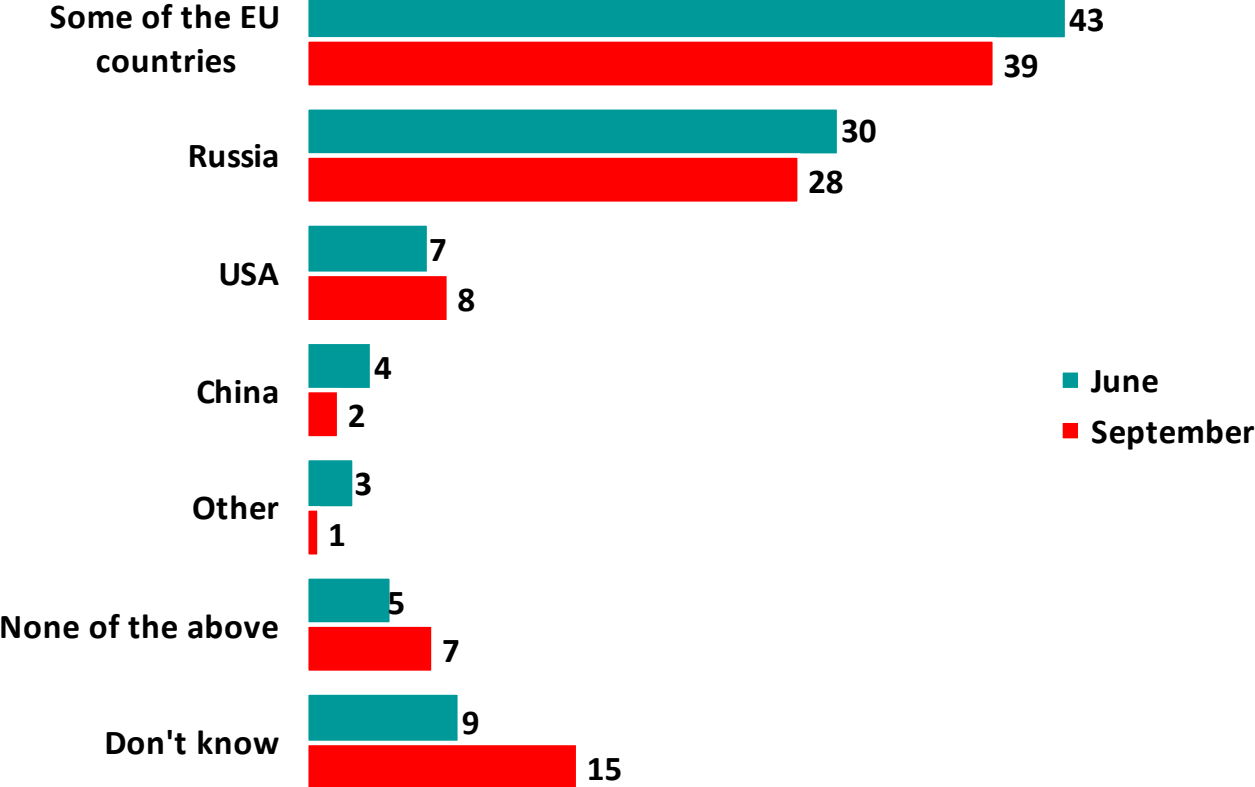*And do you think that Serbia would be able to upgrade its economy if it chose EU as its key partner?*

Category	Value
Yes, for sure	12
Probably yes	36
Sum +	48
Sum -	32
Probably not	23
Absolutely not	9
Don't know	19

NOTE: Numbers on the slide represent percentages

The European Union is favored for professional and personal opportunities

Speaking about the future, if your children had the opportunity to be educated, work or live abroad, which of these countries would you prefer?

Category	June	September
Some of the EU countries	52	47
Russia	14	12
USA	8	9
China	4	2
Other	4	2
None of the above	10	15
Don't know	9	14

■ June
■ September

NOTE: Numbers on the slide represent percentages

Citizens see the European Union as providing desired levels of healthcare

If you or your family member needed a medical treatment or a surgery, which of these countries would you visit first?

Some of the EU countries
- June: 43
- September: 39

Russia
- June: 30
- September: 28

USA
- June: 7
- September: 8

China
- June: 4
- September: 2

Other
- June: 3
- September: 1

None of the above
- June: 5
- September: 7

Don't know
- June: 9
- September: 15

Legend: ■ June ■ September

NOTE: Numbers on the slide represent percentages

VOTING

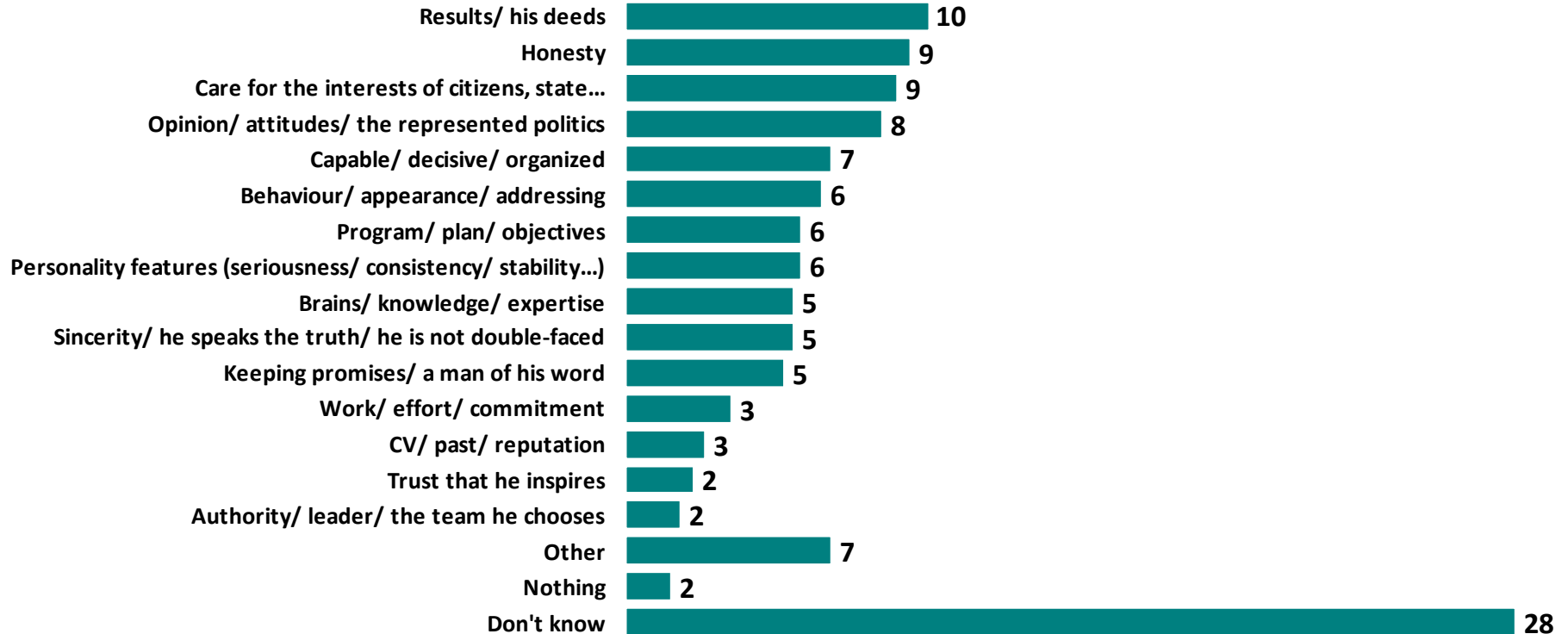# Domestic policy positions and party leadership primarily drive citizen considerations of whom to vote for

How do you decide to whom would you vote?

Legend:
- Because of the programme of the party for internal politics
- Because of the leader of the party
- Because that party is less bad than others
- Because of the programme of the party for external politics
- Other
- Don't vote

	Internal programme	Leader	Less bad	External programme	Other	Don't vote		
Total	30	24	20	5	3	3	9	7
SNS	24	48	15	7	2		4	1
SPS	29	31	31	4	5			
SRS	17	79		4				
Dveri	50	10	27		13			
Pokret na cijem je celu Sasa Jankovic	24	33	28	15				
Other	48	16	23	7	4	3	1	
Undecided	26	10	32	4	4		17	6
Refusal	38	11	23	2	3	1	7	14
Will not vote	22	8	10	1	1	16	26	16

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NOTE: Numbers on the slide represent percentages

Citizens prioritize effectiveness and personal attributes in evaluating political leaders

What influences the most on your opinion about the politicians?
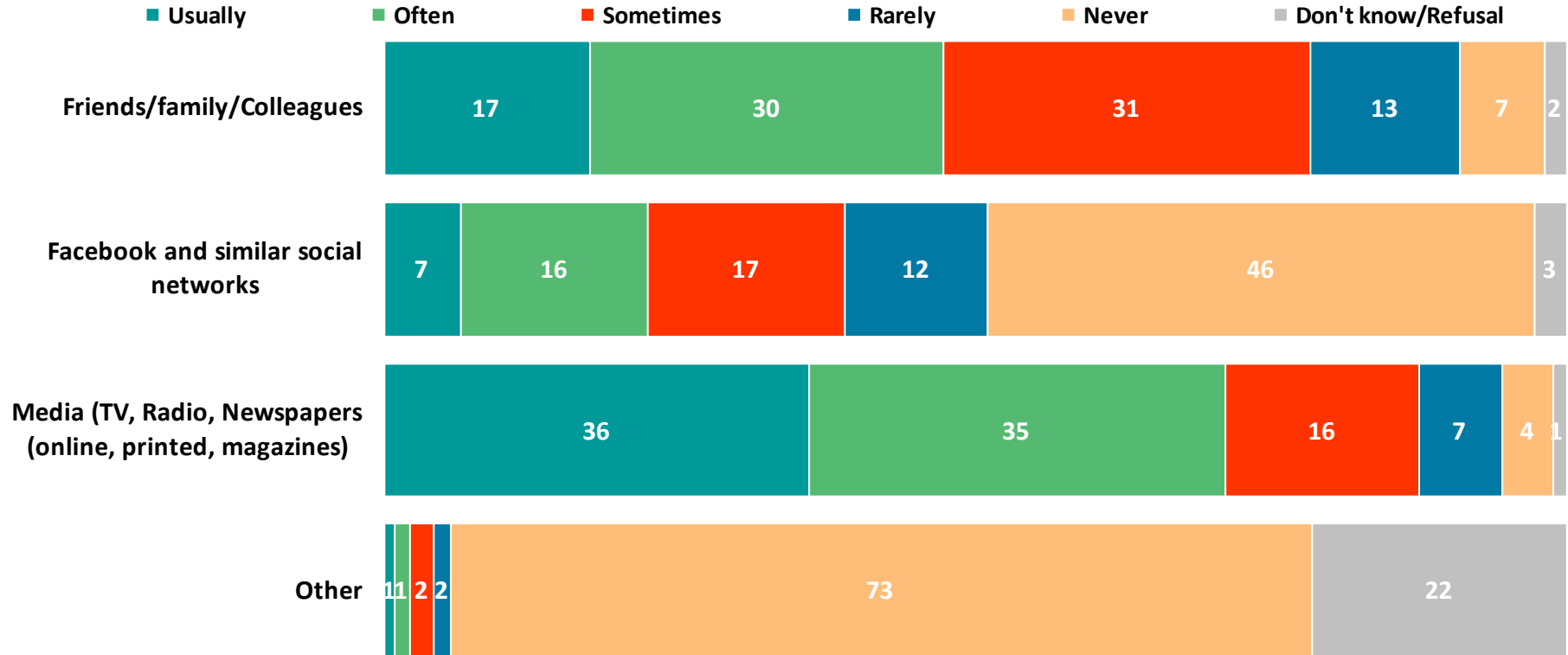
Category	Value
Results/ his deeds	10
Honesty	9
Care for the interests of citizens, state...	9
Opinion/ attitudes/ the represented politics	8
Capable/ decisive/ organized	7
Behaviour/ appearance/ addressing	6
Program/ plan/ objectives	6
Personality features (seriousness/ consistency/ stability...)	6
Brains/ knowledge/ expertise	5
Sincerity/ he speaks the truth/ he is not double-faced	5
Keeping promises/ a man of his word	5
Work/ effort/ commitment	3
CV/ past/ reputation	3
Trust that he inspires	2
Authority/ leader/ the team he chooses	2
Other	7
Nothing	2
Don't know	28

NOTE: Numbers on the slide represent percentages

MEDIA AND INFORMATION

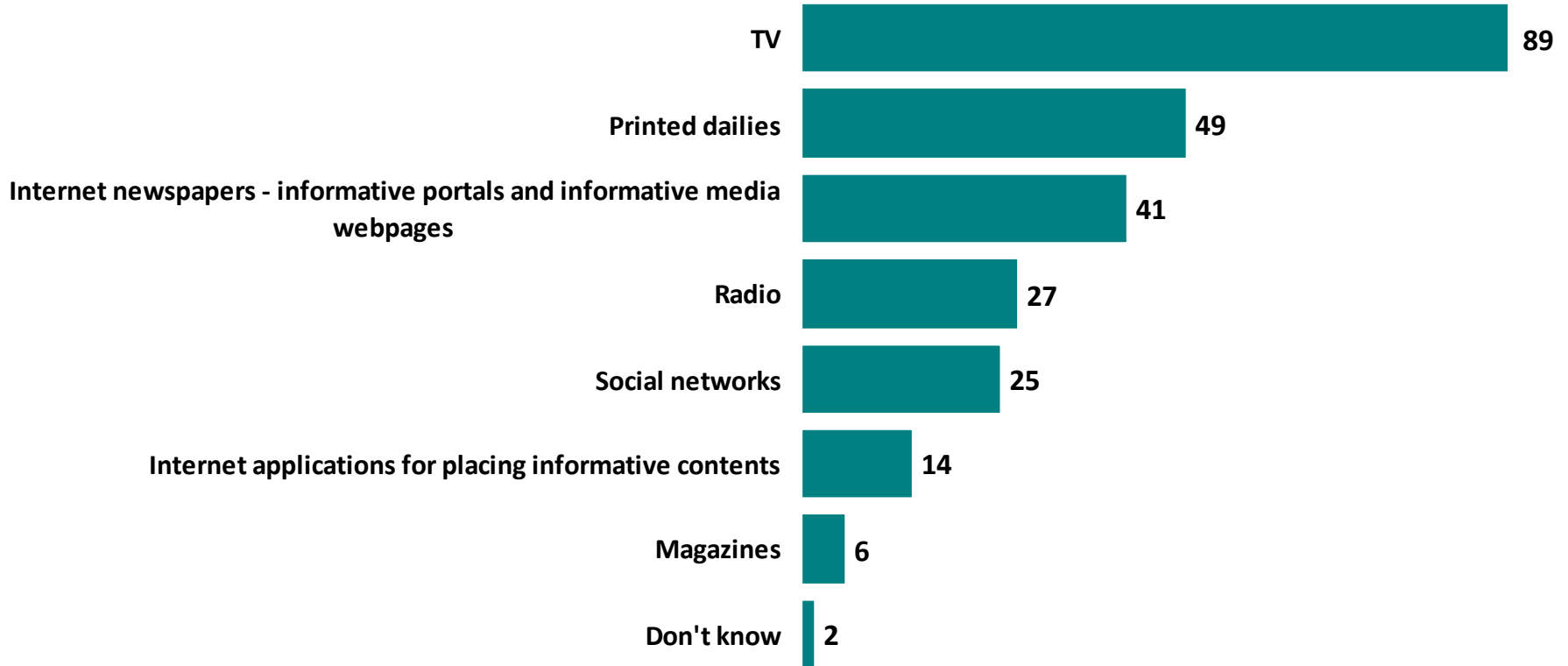# Conventional media and immediate environment are the sources of citizen information on public affairs

How do you usually get informed about social , political , economic and other similar local and global topics?

Legend: ■ Usually ■ Often ■ Sometimes ■ Rarely ■ Never ■ Don't know/Refusal

Source	Usually	Often	Sometimes	Rarely	Never	Don't know/Refusal
Friends/family/Colleagues	17	30	31	13	7	2
Facebook and similar social networks	7	16	17	12	46	3
Media (TV, Radio, Newspapers (online, printed, magazines)	36	35	16	7	4	1
Other	1	1	2	2	73	22

NOTE: Numbers on the slide represent percentages

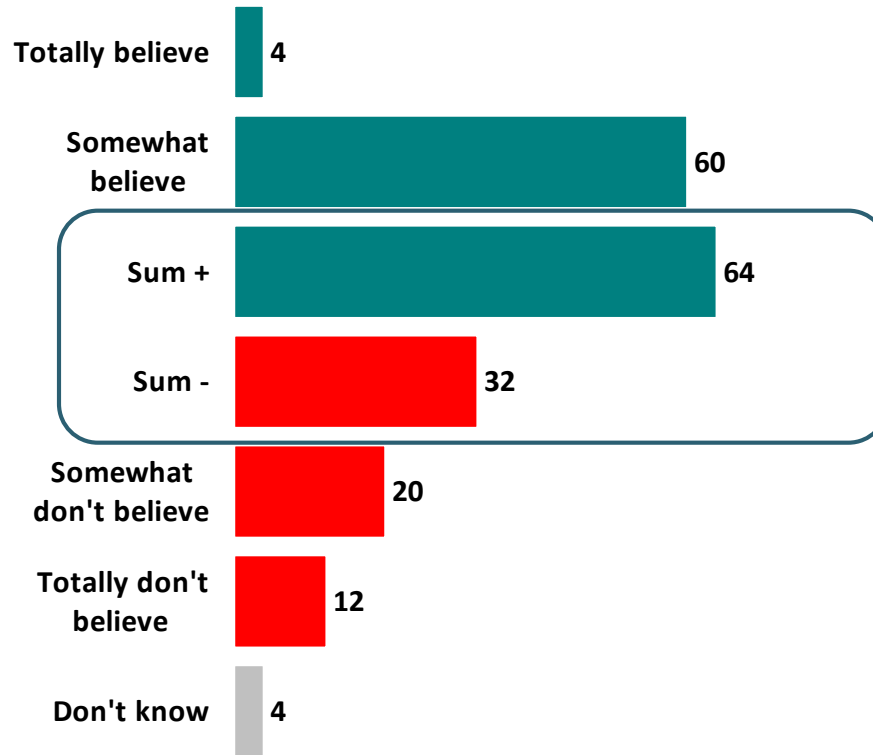# TV is the most used source for information on public affairs

Through which medium do you usually get informed about social, political, economic and other similar local and global topics?

Base: those who get informed about social, political, economic and other similar local and global topics from media (96% of target population)

Medium	Percentage
TV	89
Printed dailies	49
Internet newspapers - informative portals and informative media webpages	41
Radio	27
Social networks	25
Internet applications for placing informative contents	14
Magazines	6
Don't know	2

NOTE: Numbers on the slide represent percentages

A majority believes the information provided by media is credible

How much do you believe in the information gained through the media stated above?

Category	Value
Totally believe	4
Somewhat believe	60
Sum +	64
Sum -	32
Somewhat don't believe	20
Totally don't believe	12
Don't know	4

NOTE: Numbers on the slide represent percentages

Six-in-10 do not pay attention to the sourced cited in news coverage

When you read, listen or watch news in media, do you pay attention to the sources used in the news

Base: those who get informed about social, political, economic and other similar local and global topics from media (96% of target population)

Category	Value
Often I do	13
I do	22
Sum +	36
Sum -	59
I don't	43
Often I don't	17
Don't know	5

NOTE: Numbers on the slide represent percentages
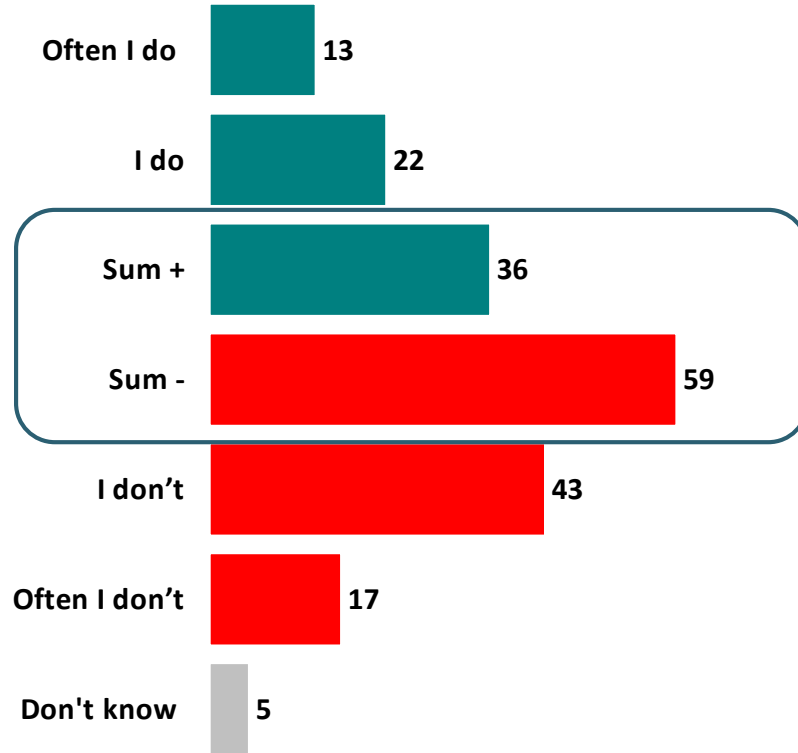
A majority selectively goes beyond media headlines to read articles of interest.

When you read, listen or watch news in media, what you do?

Base: those who get informed about social, political, economic and other similar local and global topics from media (96% of target population)
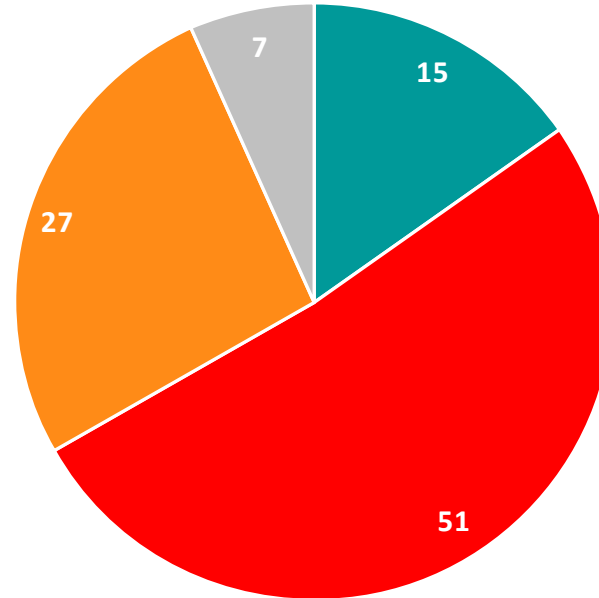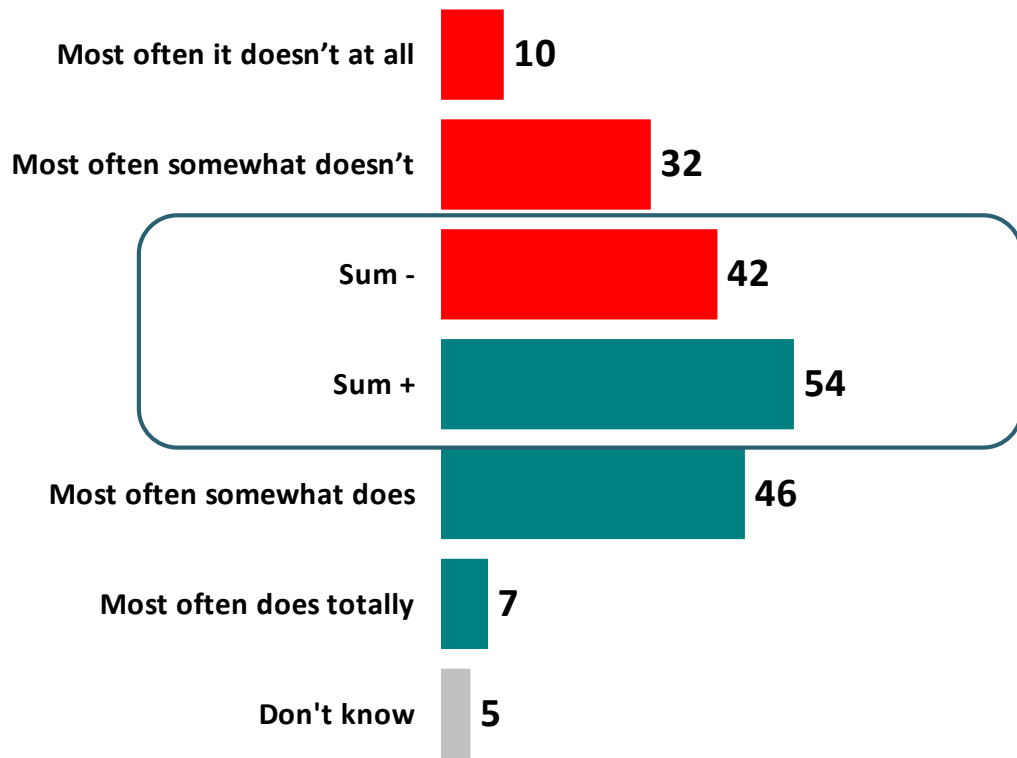
- ■ **I mostly read only headline and see the accompanying picture**

- ■ **I mostly read only headline and see the accompanying picture and if it really drags my attention I read the full article or listen/watch the entire news**

- ■ **I mostly read the entire articles**

- ■ **Don't know**

15
7
27
51

33

NOTE: Numbers on the slide represent percentages

A majority reading articles does not view headlines as adequately reflecting the information contained

How much you believe title of the news and accompanying picture reflects the story of the news*

Category	Value
Most often it doesn't at all	10
Most often somewhat doesn't	32
Sum -	42
Sum +	54
Most often somewhat does	46
Most often does totally	7
Don't know	5

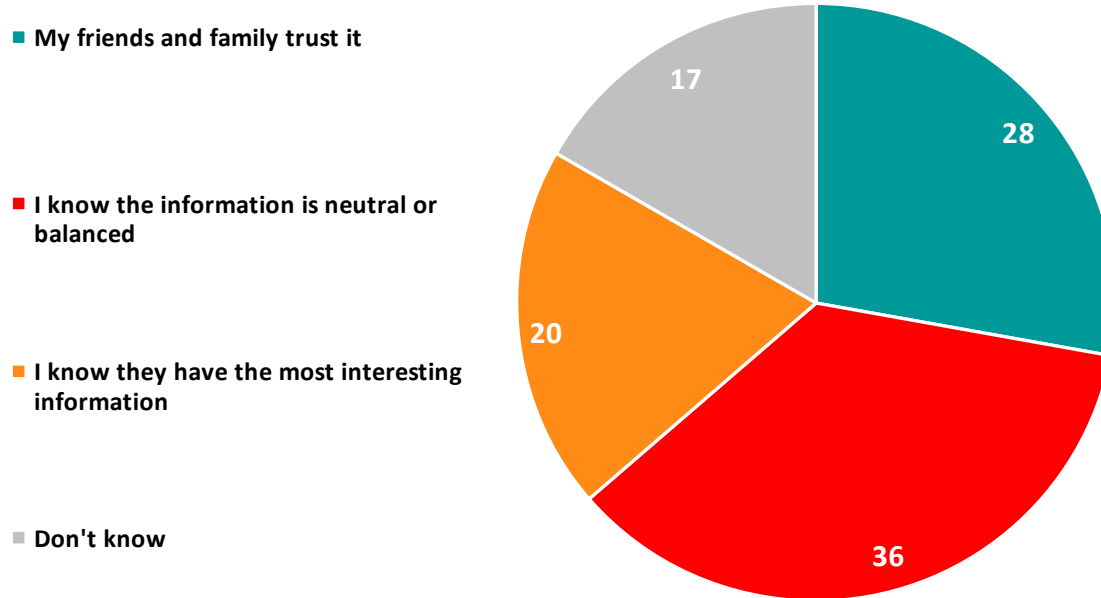*NOTE: Numbers on the slide represent percentages*

Citizens look to 'microenvironments' to fact-check information received

If you heard something important to you and/or for you happened, where would you go first to try to find out if it was true?

- Friends/Family/Colleagues: June 59, September 56
- I wouldn't go to anyone: June 5, September 10
- An online news portal: June 9, September 8
- A TV news station: June 10, September 7
- Facebook: June 4, September 4
- A newspaper: June 2, September 3
- A politician's statement: June 1, September 2
- The radio: June 0, September 1
- Other: September 1
- Nothing: June 3, September 5
- Don't know: June 8, September 6

Aleksandar Vucic 25.5%
Other 74.5%

■ June
■ September

35

NOTE: Numbers on the slide represent percentages
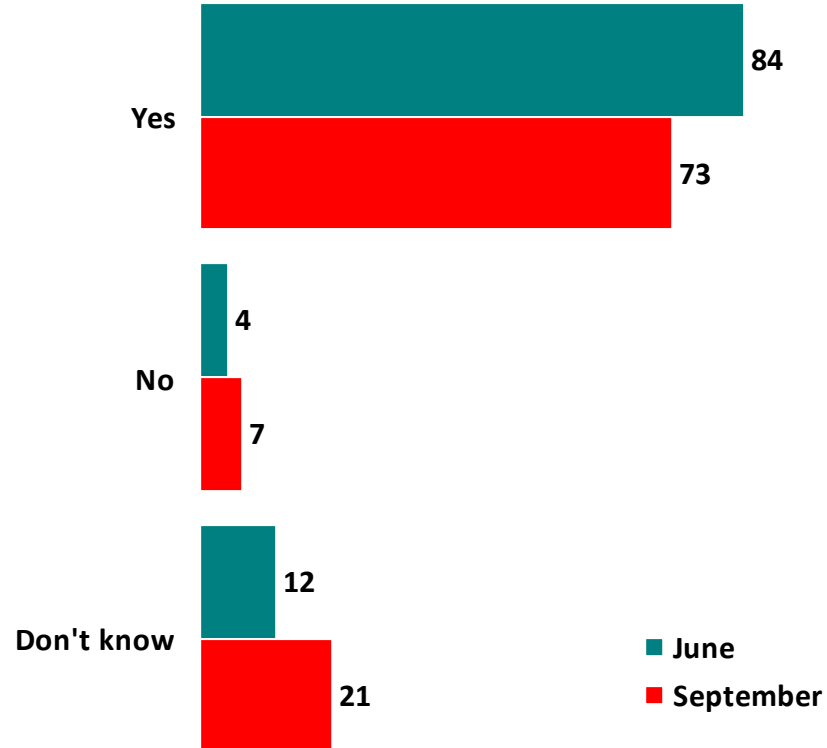
Neutrality and trust are the most important attributes of a news outlet.

What is the most important thing to you about a news outlet?

- ■ **My friends and family trust it**

- ■ **I know the information is neutral or balanced**

- ■ **I know they have the most interesting information**

- ■ **Don't know**

NOTE: Numbers on the slide represent percentages

A high percentage sees 'fake news' present in Serbian media

Do you believe there is "fake news" in Serbian media?

Yes — June: 84, September: 73

No — June: 4, September: 7

Don't know — June: 12, September: 21

■ June
■ September

NOTE: Numbers on the slide represent percentages

Citizens do not attribute disinformation to particular news sources

Please, tell me which news outlets you believe transmit 'fake news' in Serbian media?

Base: those who believe there is 'fake news' in Serbian media (73% of target population)

Source	%
All/ almost all media	17
Newspapers/ printed media	16
TV stations	12
Informer/ informer.rs	7
Kurir/ kurir.rs	6
Pink TV	6
Internet portals	5
Tabloids/ yellow press	5
Some newspapers/ magazines	4
Some TV stations	3
Some radio stations	1
Don't know	35

NOTE: Numbers on the slide represent percentages
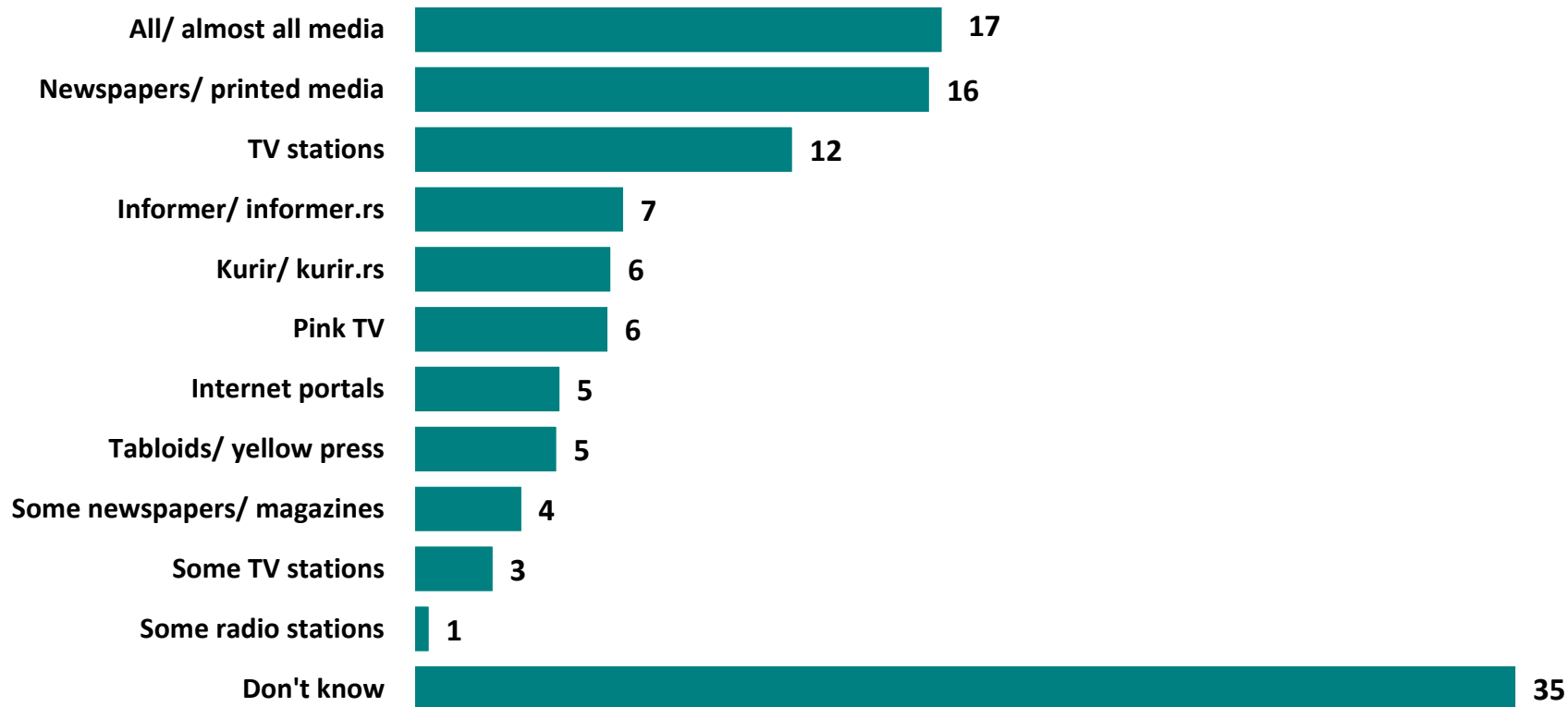
Citizens view domestic media, followed by Western media, as disinformation sources. Russia is not viewed as a source of disinformation

What is the most likely origin of "fake news?"

Category	Percentage
Domestic source of information	53%
European/Western source of information	24%
Russian Source of information	1%
Other	1%
Don't know	20%

These citizens are more likely to be:
- **EEU membership supporters**
- **Those holding unfavorable opinion of EU and US**
- **Those holding favorable opinion of Russia and China**
- **Male**
- **Older than 60**
- **From Vojvodina**
- **Voters of: SNS, SRS, Dveri-DSS and Jeremic**

Those in favor of EU membership believe that "fake news" comes from domestic sources

NOTE: Numbers on the slide represent percentages