

WESTERN BALKANS

BETWEEN EAST AND WEST

PUBLIC OPINION RESEARCH IN
Bosnia and Herzegovina • Macedonia • Montenegro • Serbia

November 2018

RESEARCH METHODOLOGY

SAMPLE DESIGN

Sample frame:

Population of countries 18+, Census data

Type of sample:

Three stage random representative:

- 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 (Random selection of the respondent)

SAMPLE SIZE

- Serbia: 1200 respondents
- Montenegro: 1211
- Macedonia: 1221
- BiH: 1258
- Margin of error: $\pm 3.1\%$

TIME FRAME

November, 2018

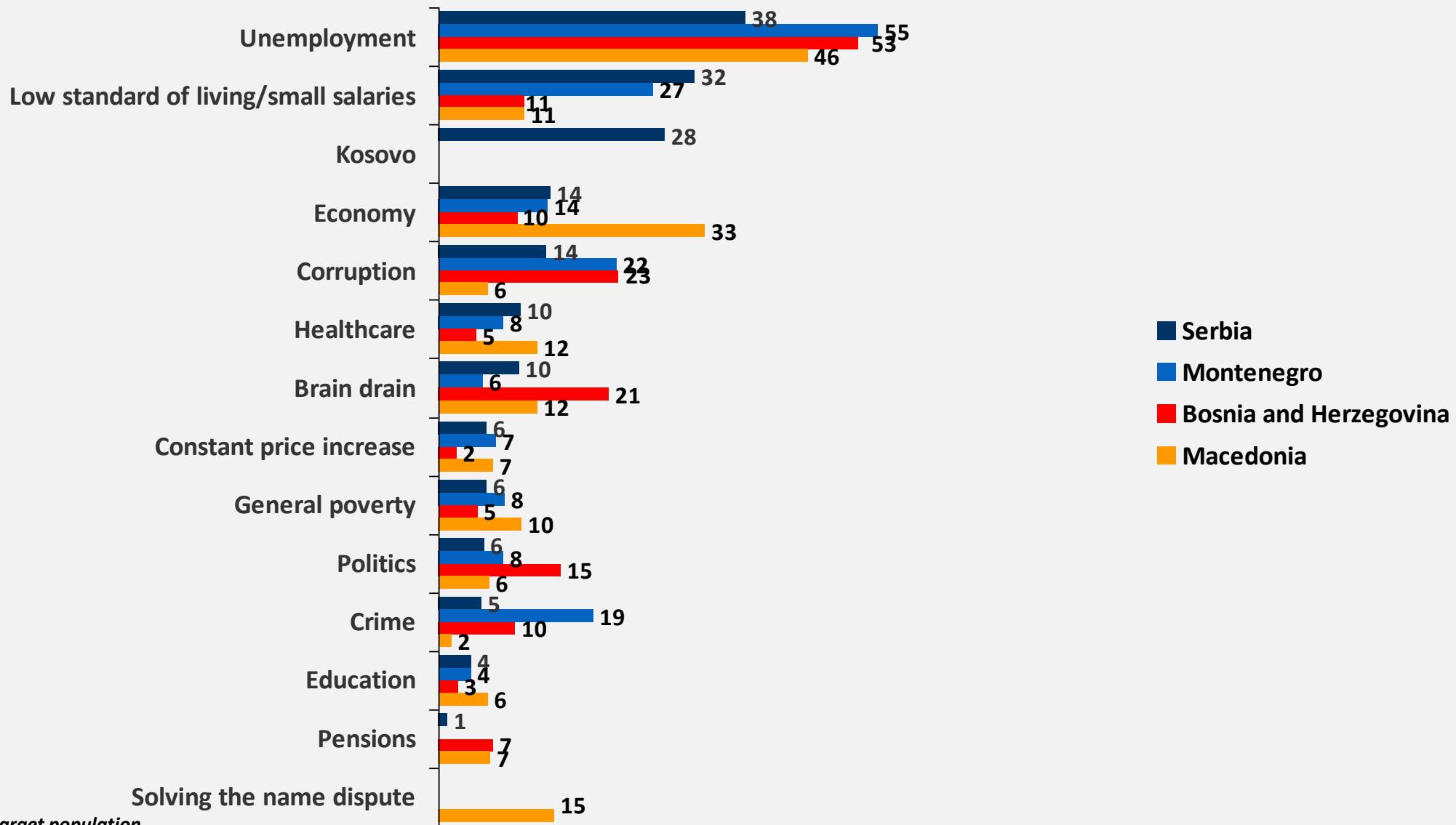
INTERVIEWER NETWORK

- Field questionnaire – average duration 50 minutes
- CAPI data collection
- Interviewers were engaged, both gender and with wide experience in public opinion projects

CITIZEN PRIORITIES

ECONOMIC ISSUES TOP CITIZENS CONCERN ACROSS THE WESTERN BALKANS

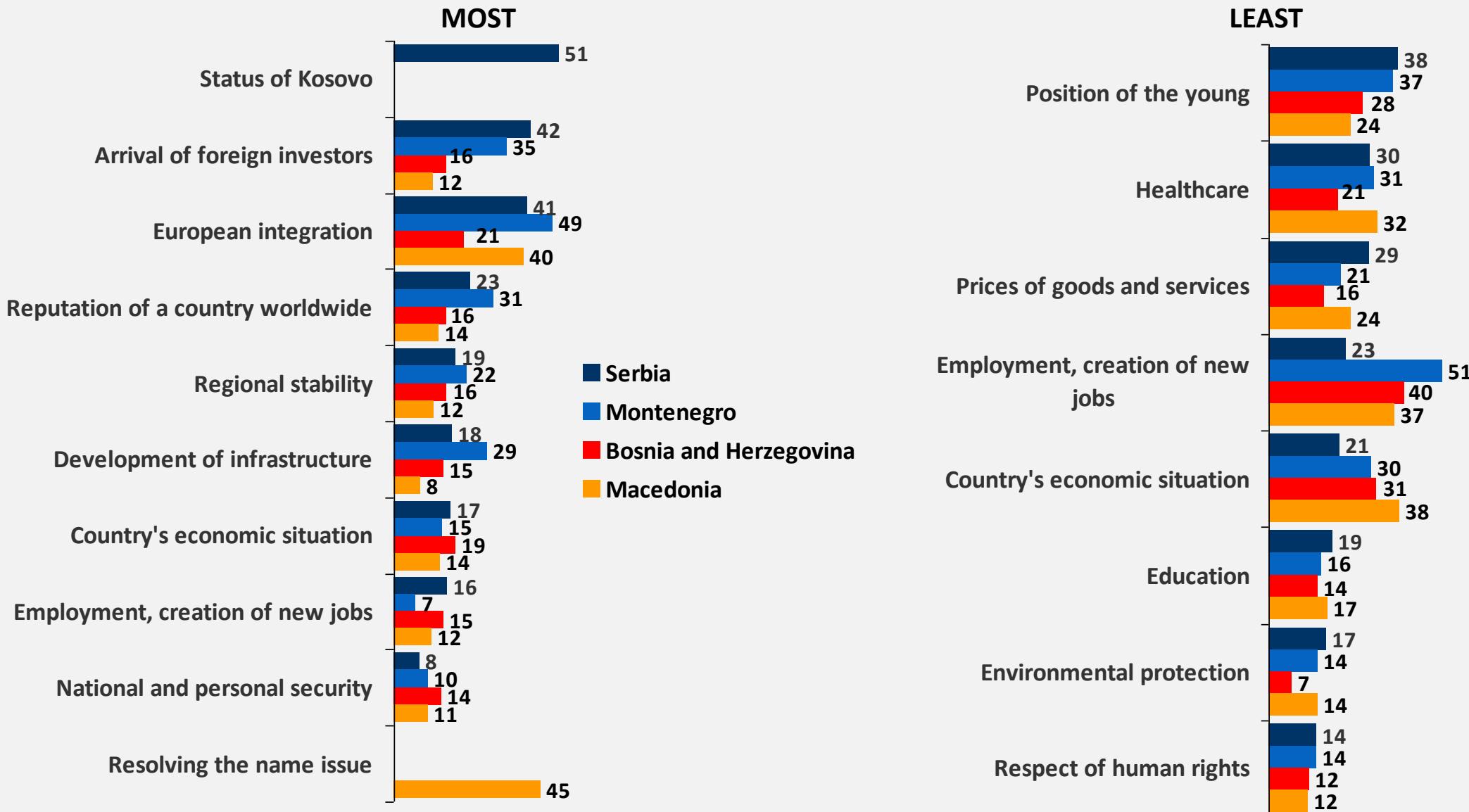
What is the biggest problem facing your country at the moment?



Multiple answers; BASE: Total target population

GAPS EXIST BETWEEN GOVERNMENT AND CITIZEN POLICY PRIORITIES

In your opinion, which are the three areas that the Government of the country most and least pays attention to?



GAPS EXIST BETWEEN GOVERNMENT AND CITIZEN POLICY PRIORITIES

Citizens across the four countries do not perceive their governments to pay the most attention to quality of life issues that they care about.

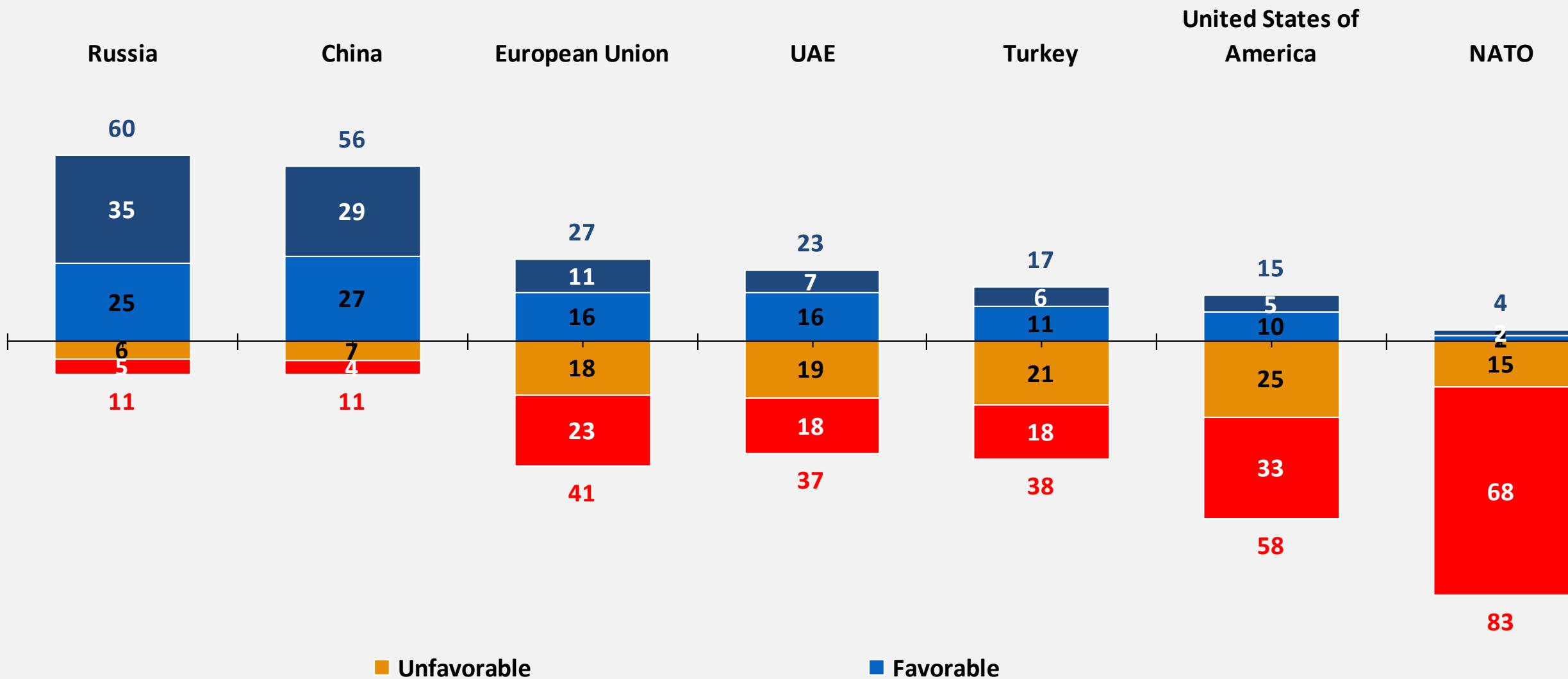
Citizens see European Union integration as a government priority, but do not connect government actions in this sphere with improvements to healthcare, employment, the cost of living, etc.

Media narratives in all four countries align with citizens' outlook. News coverage on European Union integration tends to focus on the institutional/policy level and not emphasize tangible impact.

WEST, WESTERN BALKANS, AND EAST

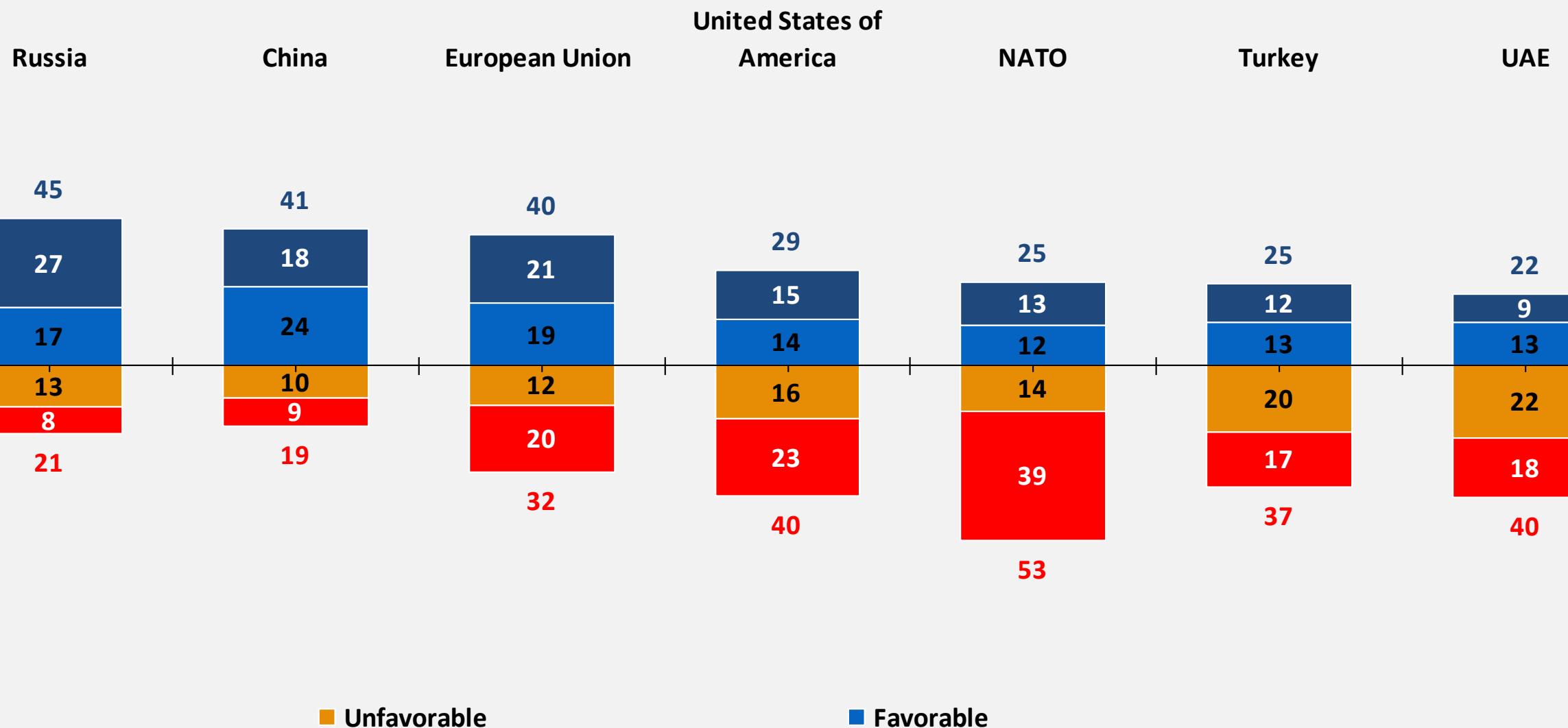
SERBIA: RUSSIA AND CHINA ARE SEEN MOST FAVORABLY AMONG FOREIGN ACTORS

How would you evaluate your opinion about the following states and international institutions?



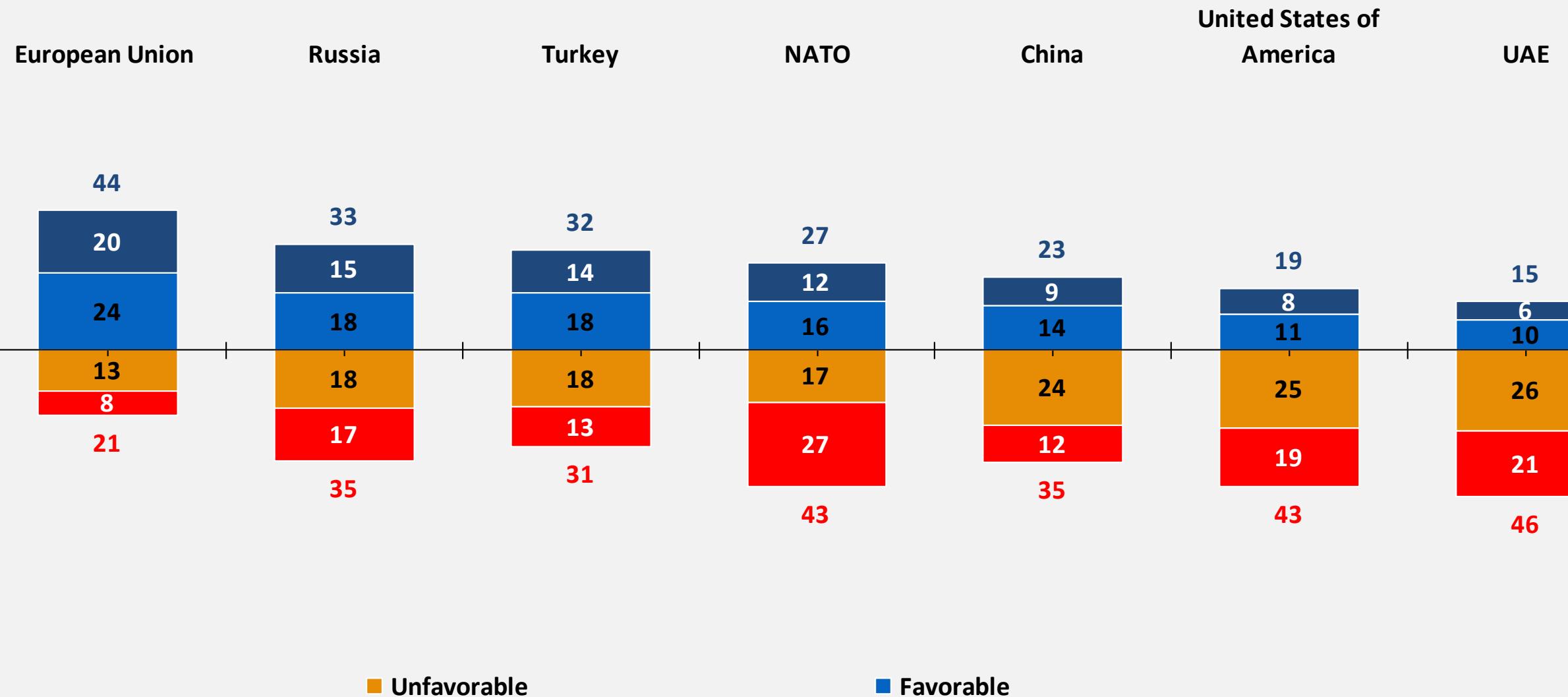
MONTENEGRO: RUSSIA, CHINA, AND EU SEEN MOST FAVORABLY

How would you evaluate your opinion about the following states and international institutions?



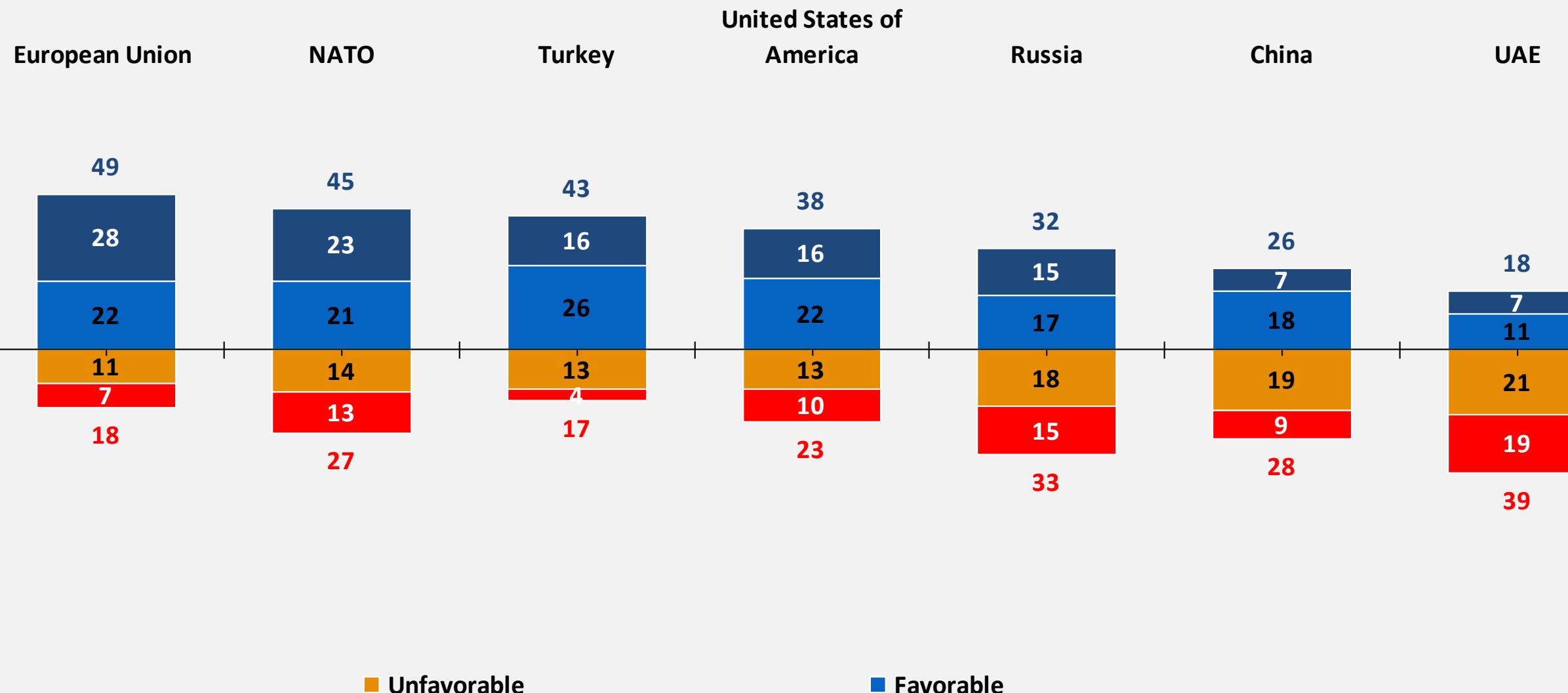
BOSNIA-HERZEGOVINA: CITIZENS FAVOR THE EU

How would you evaluate your opinion about the following states and international institutions?



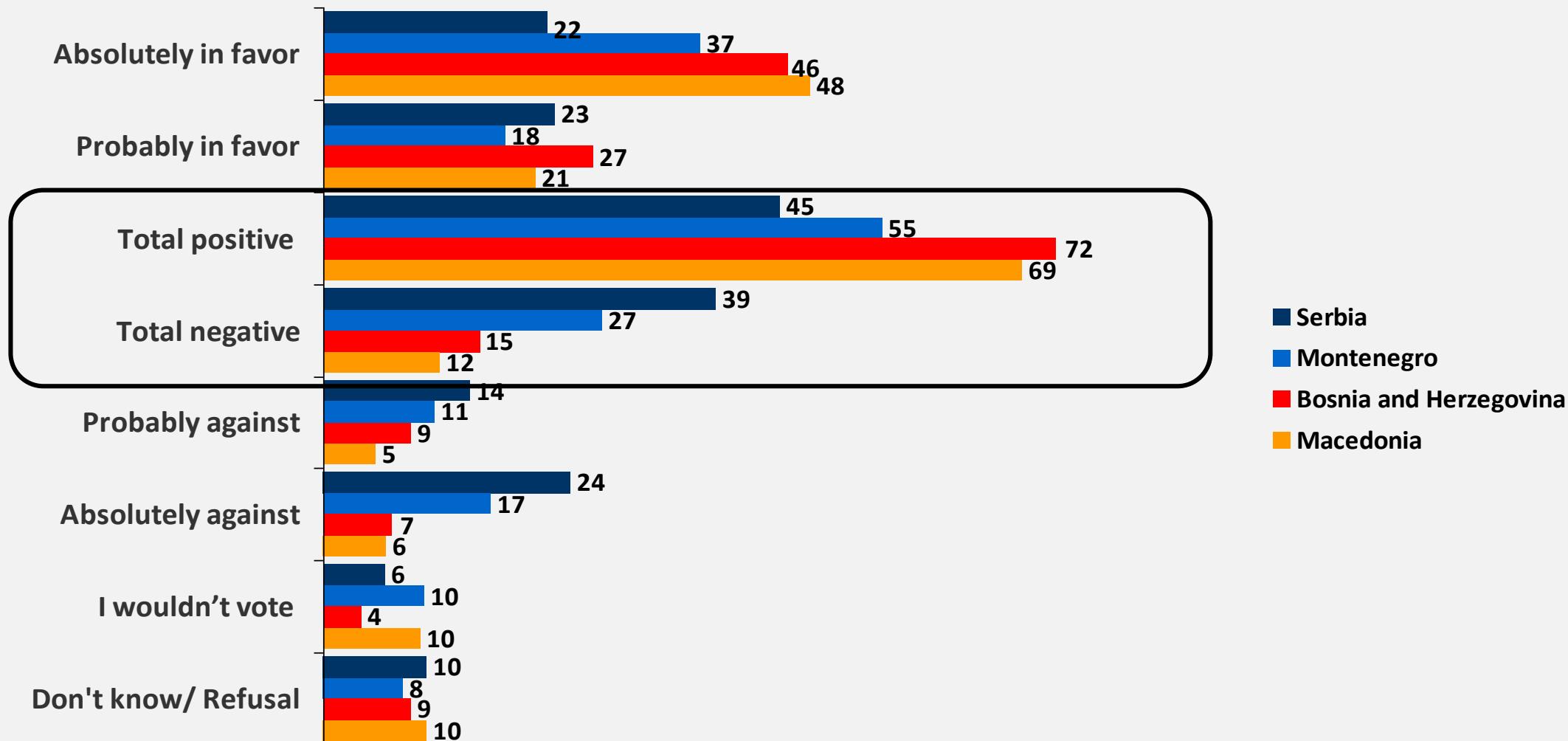
MACEDONIA: PEOPLE ARE MOST FAVORABLE TOWARD EU AND NATO

How would you evaluate your opinion about the following states and international institutions?



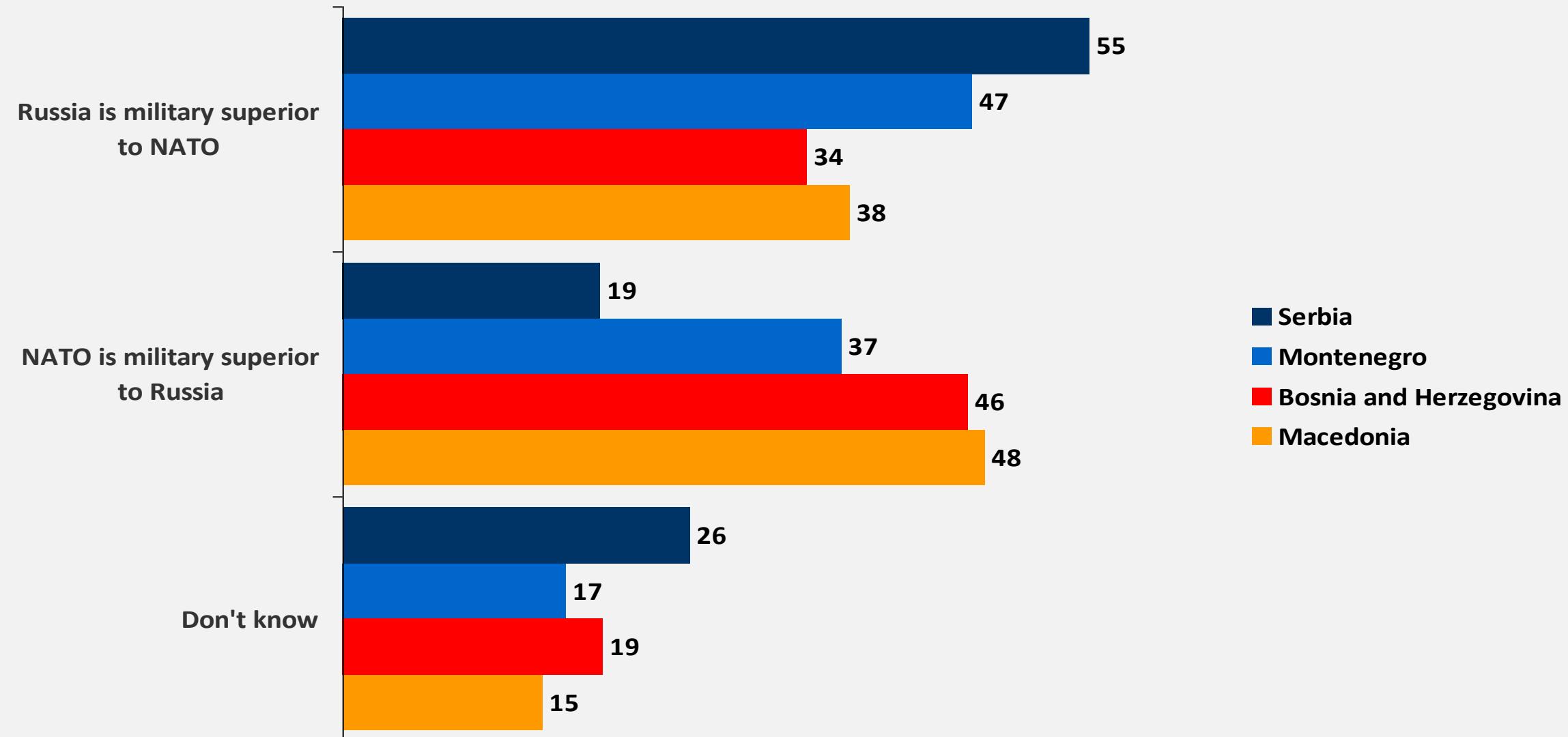
SUPPORT FOR EU MEMBERSHIP IS STRONG—EXCEPT IN SERBIA

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



NATO VS. RUSSIAN MILITARY: SERBIA AND MONTENEGRO SEE RUSSIA AS STRONGER

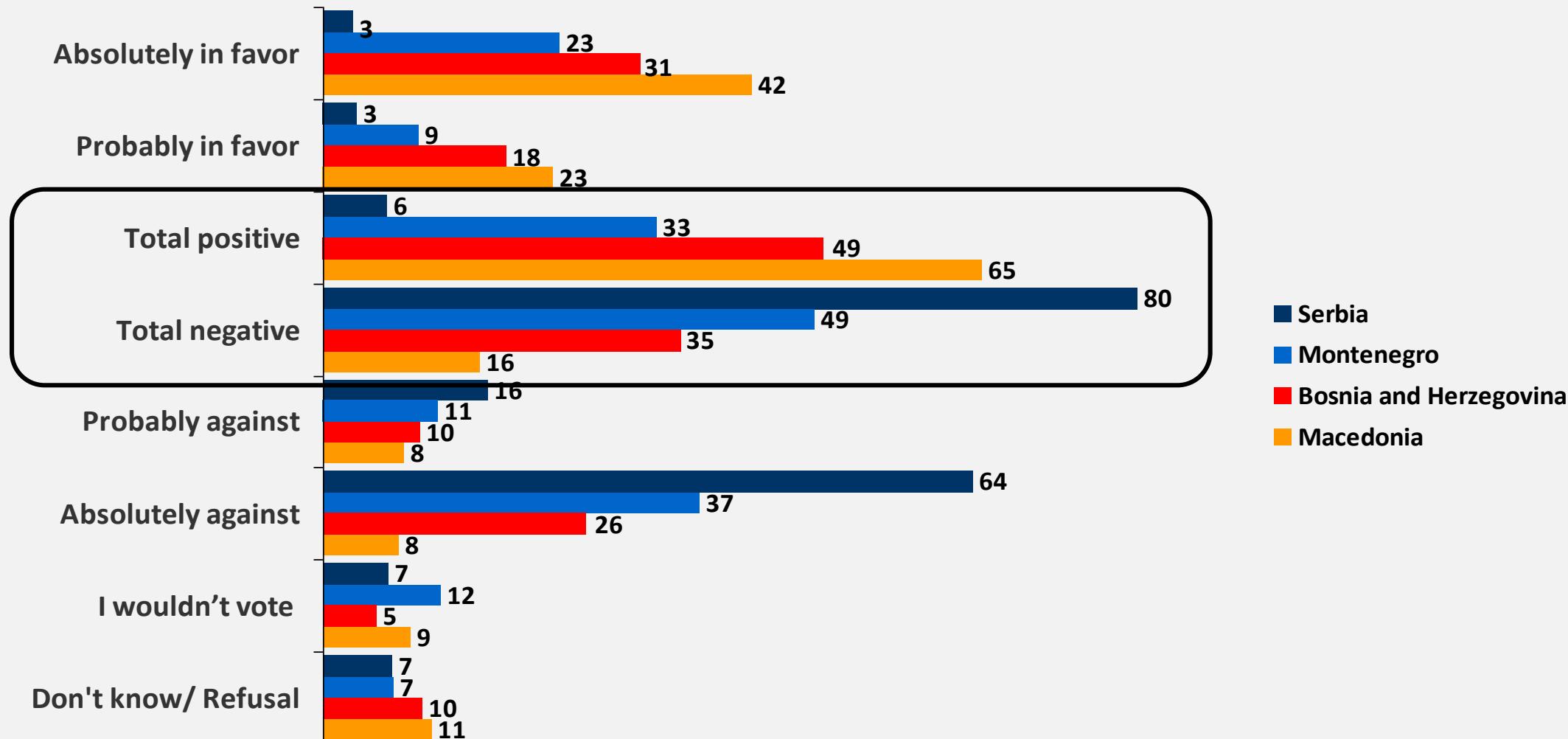
Which of these two statements is more similar to your opinion?



MONTENEGRO AND SERBIA DO NOT FAVOR NATO MEMBERSHIP IF PUT TO REFERENDUM

If a referendum for NATO membership of your country were held this Sunday, how would you vote?

Montenegro: Despite the fact that Montenegro is already member of NATO, if a referendum for NATO membership were held this Sunday, how would you vote?

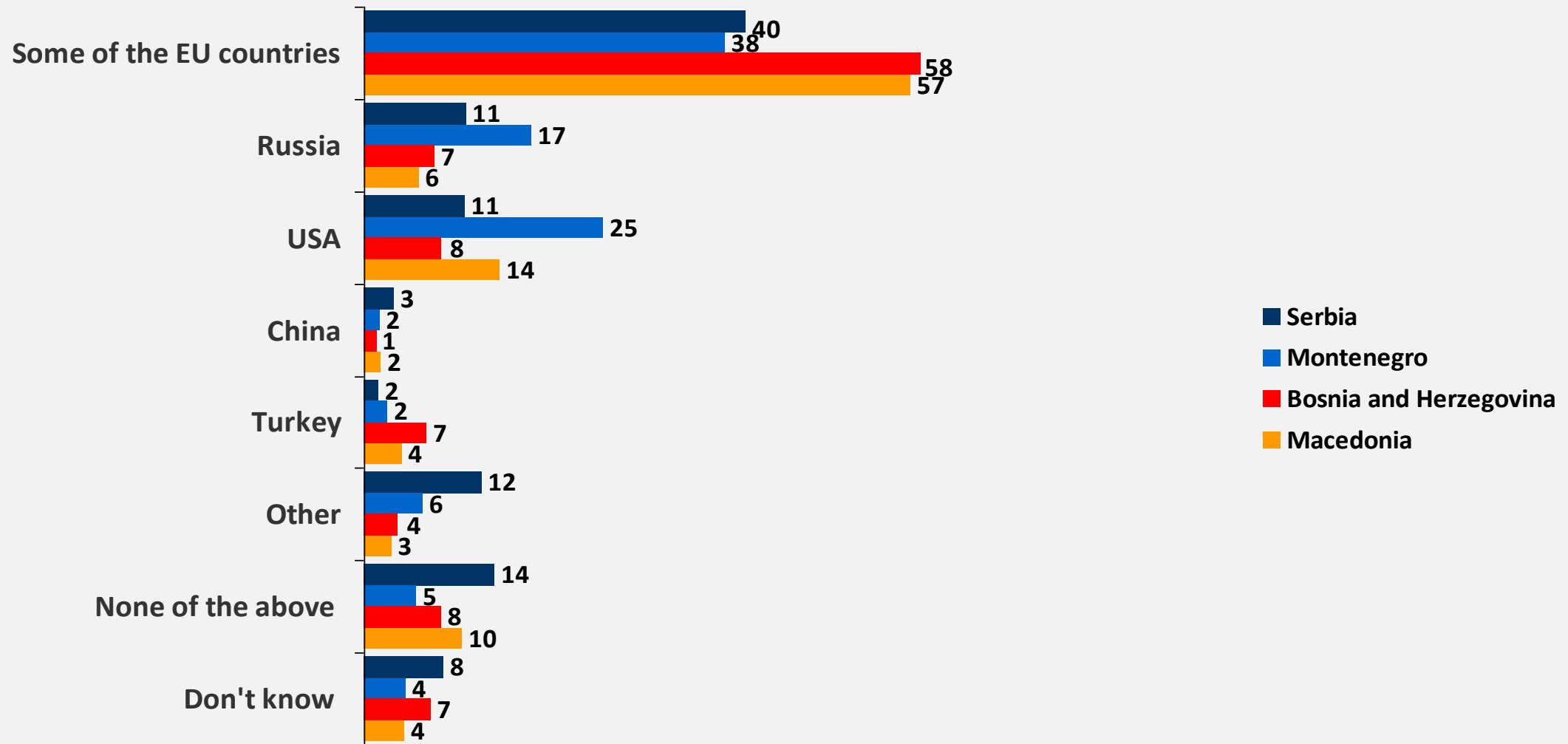


MIXED VIEWS ON FOREIGN ACTORS ACROSS THE WESTERN BALKANS

- A public referendum on EU membership would likely pass in all four countries. However, more citizens in Serbia view the EU negatively than positively; public support for EU membership is at the lowest point in the past decade.
- Russia's favorability in Serbia has increased more than 20 percent since 2013. Along with Russia, China is viewed more positively than the EU and U.S.
- Montenegro citizen sentiment is similar to that in Serbia. The EU is closer to Russian and Chinese favorability levels, and the U.S. faring slightly better than in Serbia. Despite NATO membership, a large majority of respondents sees NATO negatively.
- Bosnia-Herzegovina's citizens share a pro-EU orientation, but there are sharp divides between ethnic Serbs on the one hand, and ethnic Bosniak and Croats on the other concerning support for both Russia and NATO.
- Macedonia's citizens show a clear preference for a Euroatlantic path.

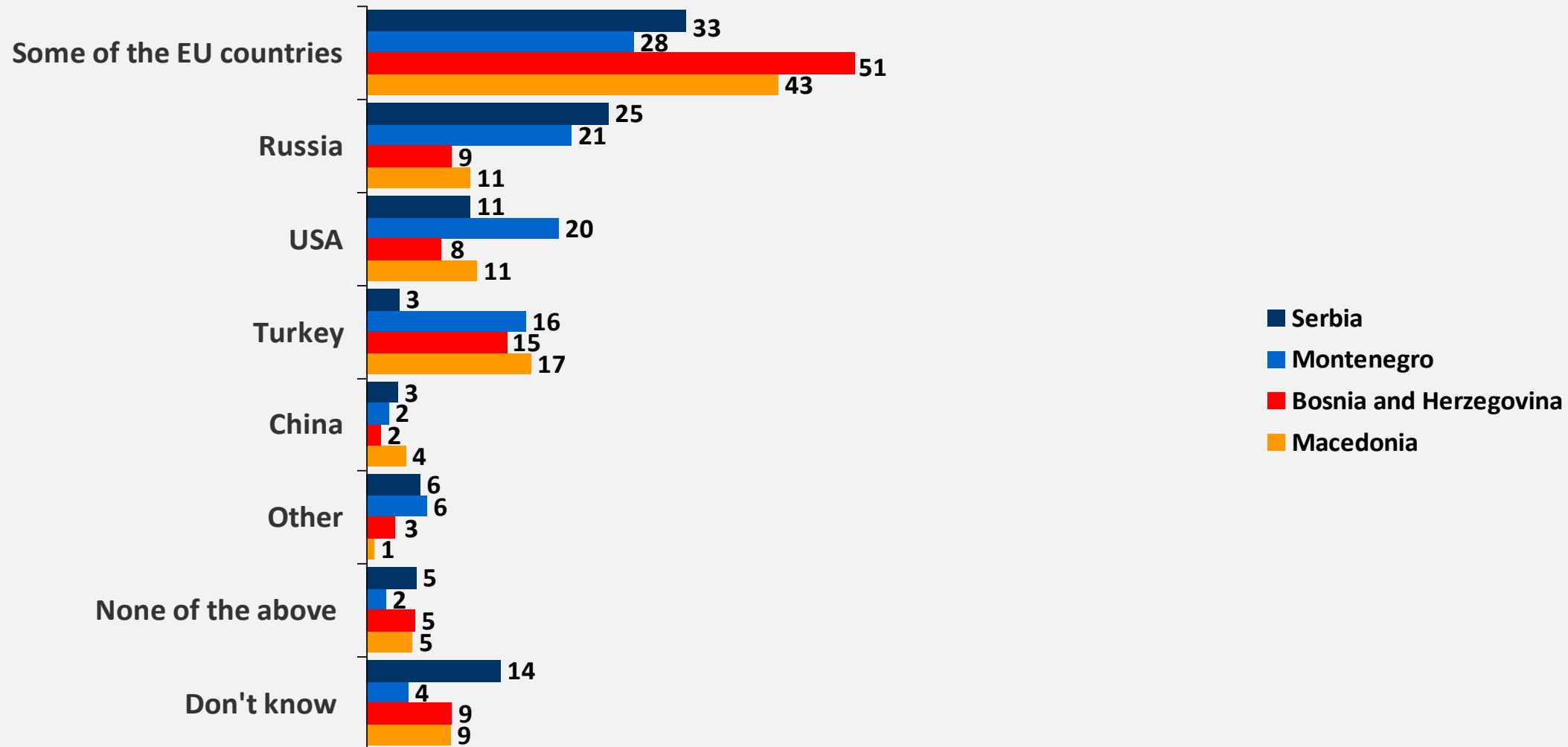
A SIGNIFICANT NUMBER PREFERS THEIR CHILDREN TO TAKE OPPORTUNITIES IN THE EU

If your children had the opportunity to be educated, work, or live abroad, which of these would you prefer they go to?



A MAJORITY PREFERENCES MEDICAL TREATMENT IN THE WEST

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



WEST TOP CHOICE FOR OPPORTUNITY AND MEDICAL TREATMENT

Citizens in all four countries prefer their children to seek opportunity in the West – the EU or the U.S.

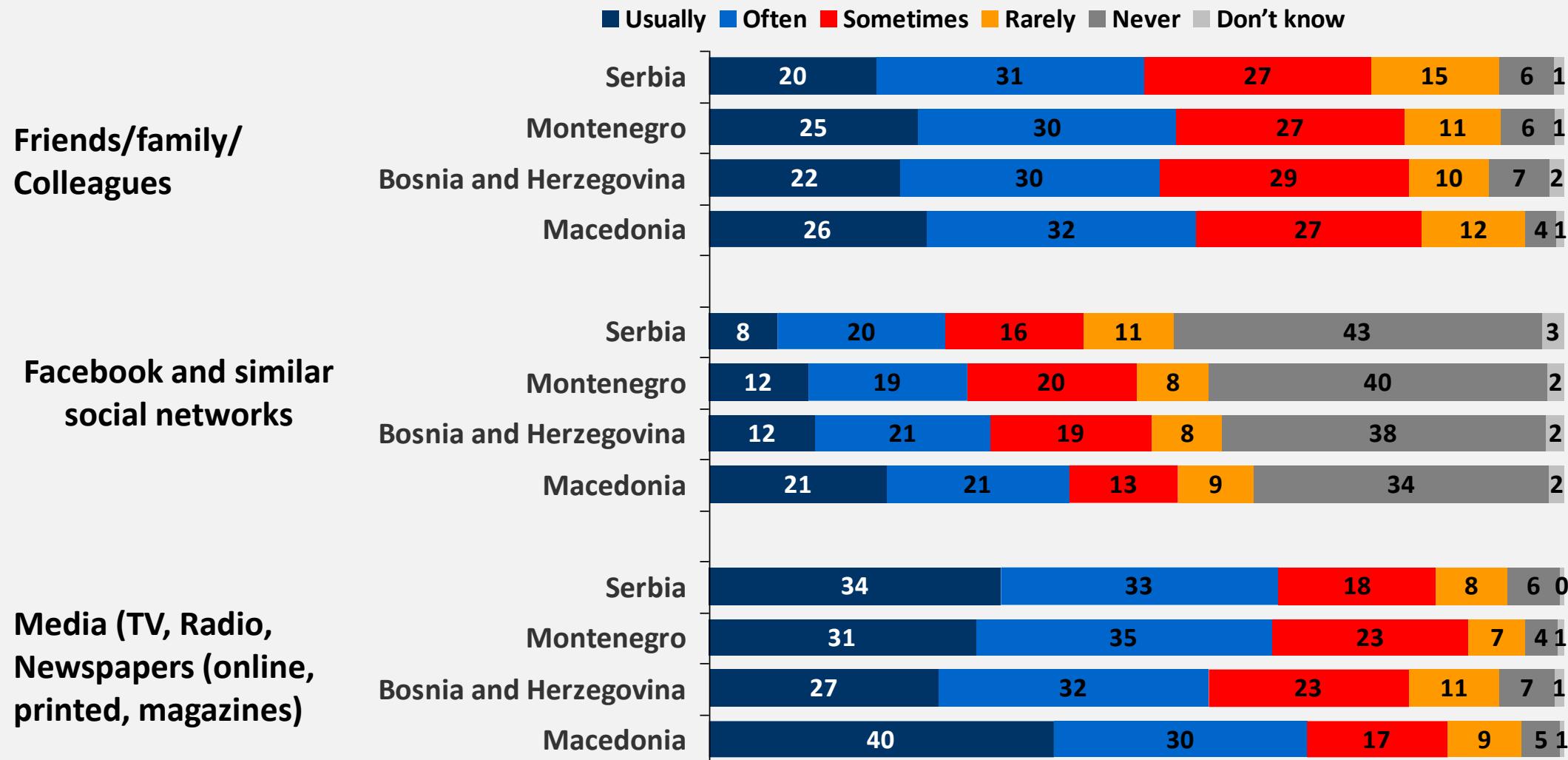
In Serbia, Russia is a preferred destination for citizens supporting anti-western political parties. This is also true, albeit to a lesser extent, in Montenegro.

Given the choice of where to seek medical treatment, most would choose European countries, but this is a less resounding choice in the four countries. For all countries except Serbia, Turkey is another top choice for medical treatment.

MEDIA & INFORMATION

MAINSTREAM MEDIA, FAMILY, FRIENDS ARE MOST COMMON SOURCES OF NEWS

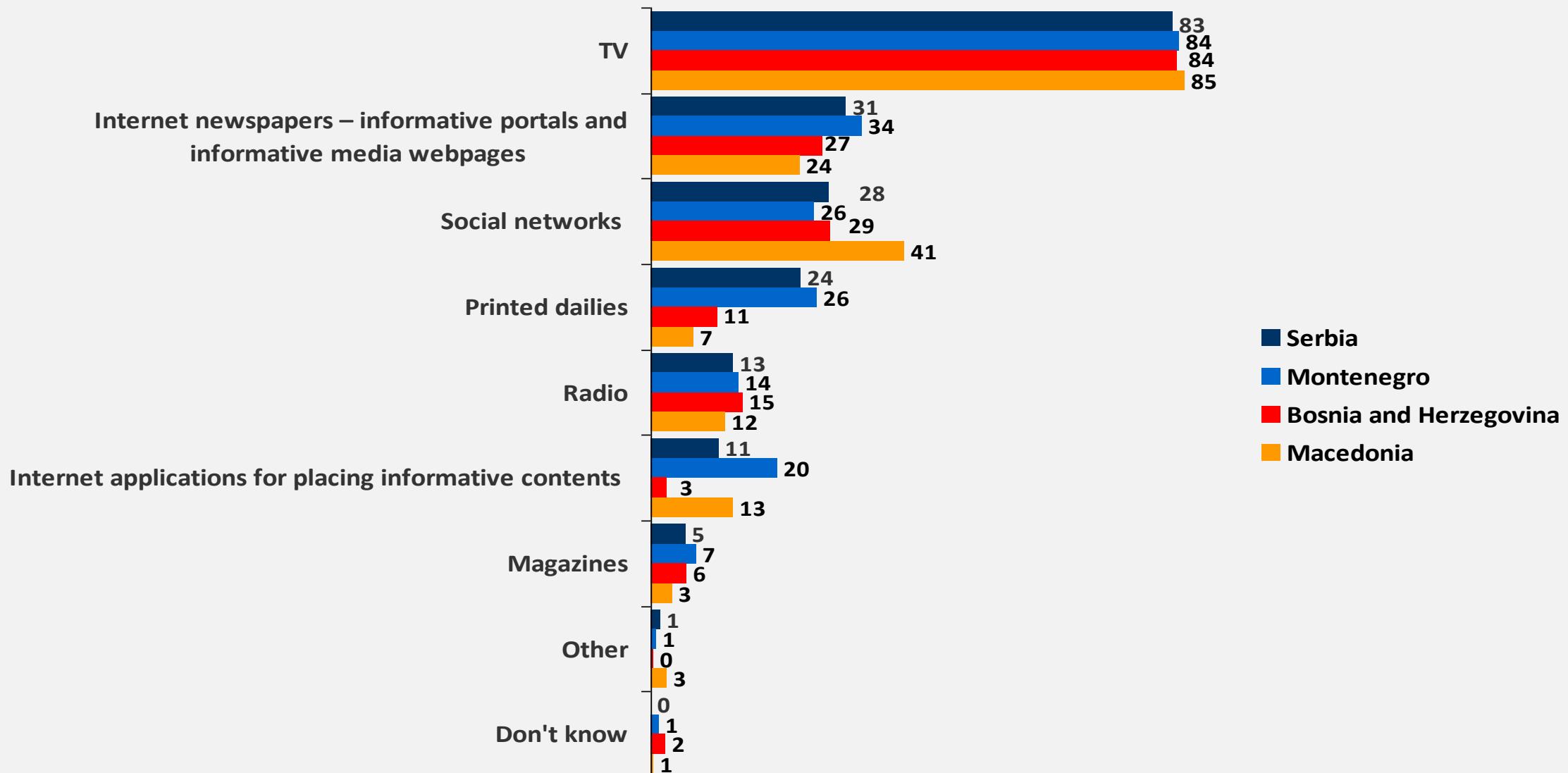
Where do you get your news from?



BASE: Total target population

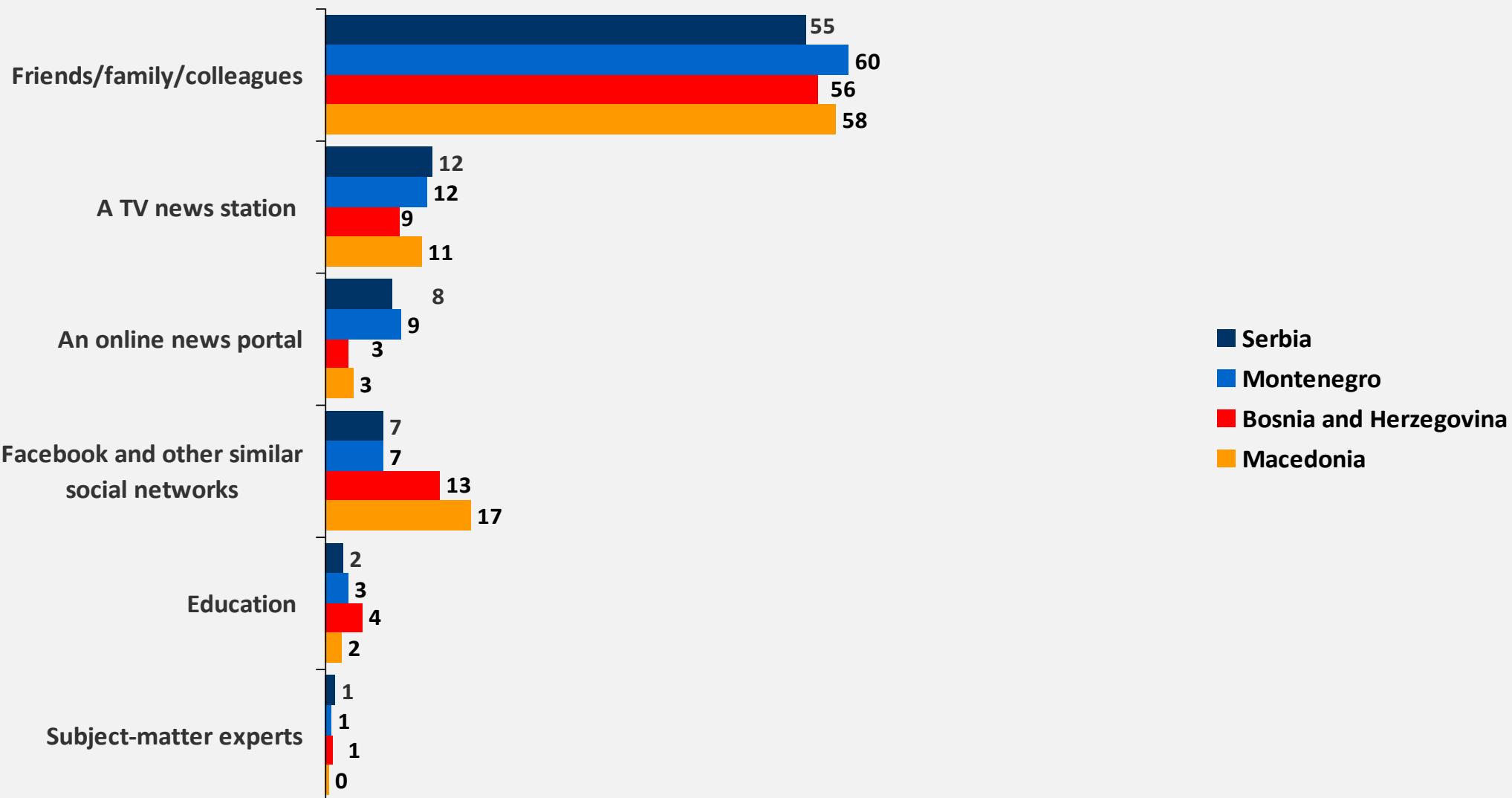
TV IS THE MOST COMMON SOURCE OF INFORMATION

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



FAMILY/FRIENDS ARE USED TO VERIFY INFORMATION MORE THAN OTHER SOURCES

If you heard something important to you, where would you go first to verify it?



MAINSTREAM MEDIA, FAMILY, FRIENDS ARE MOST COMMON SOURCES OF NEWS

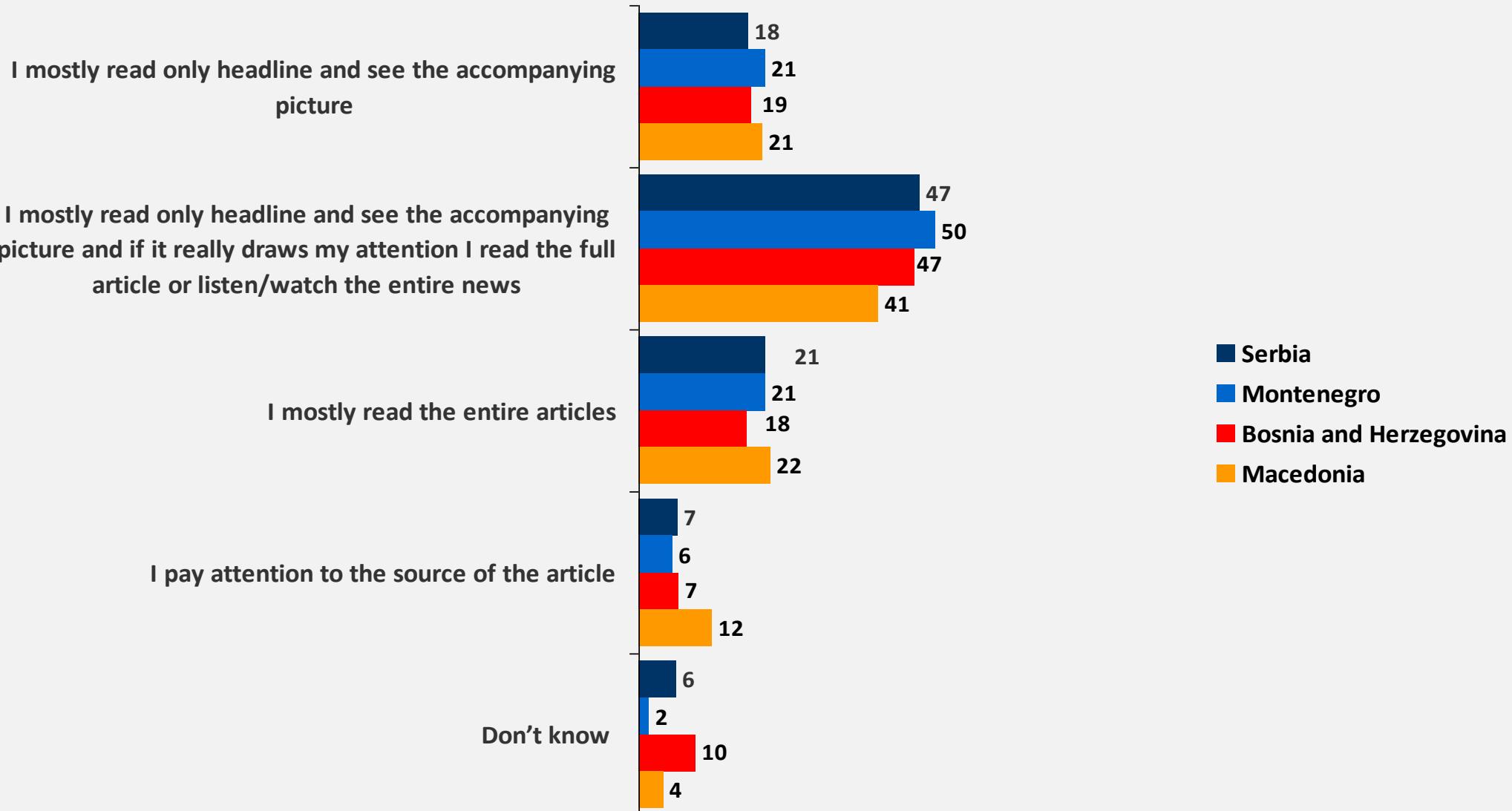
Nearly 90 percent of citizens in all four countries rely principally on mainstream media as their information source.

The next source for news consumption (and verification), at 75 percent, is microenvironment—friends, family, and colleagues.

Between 30 and 40 percent report using social networks for news information. They are more often a source for younger, well-educated, urban citizens. These citizens are, on average, statistically less likely to vote than other segments of the population.

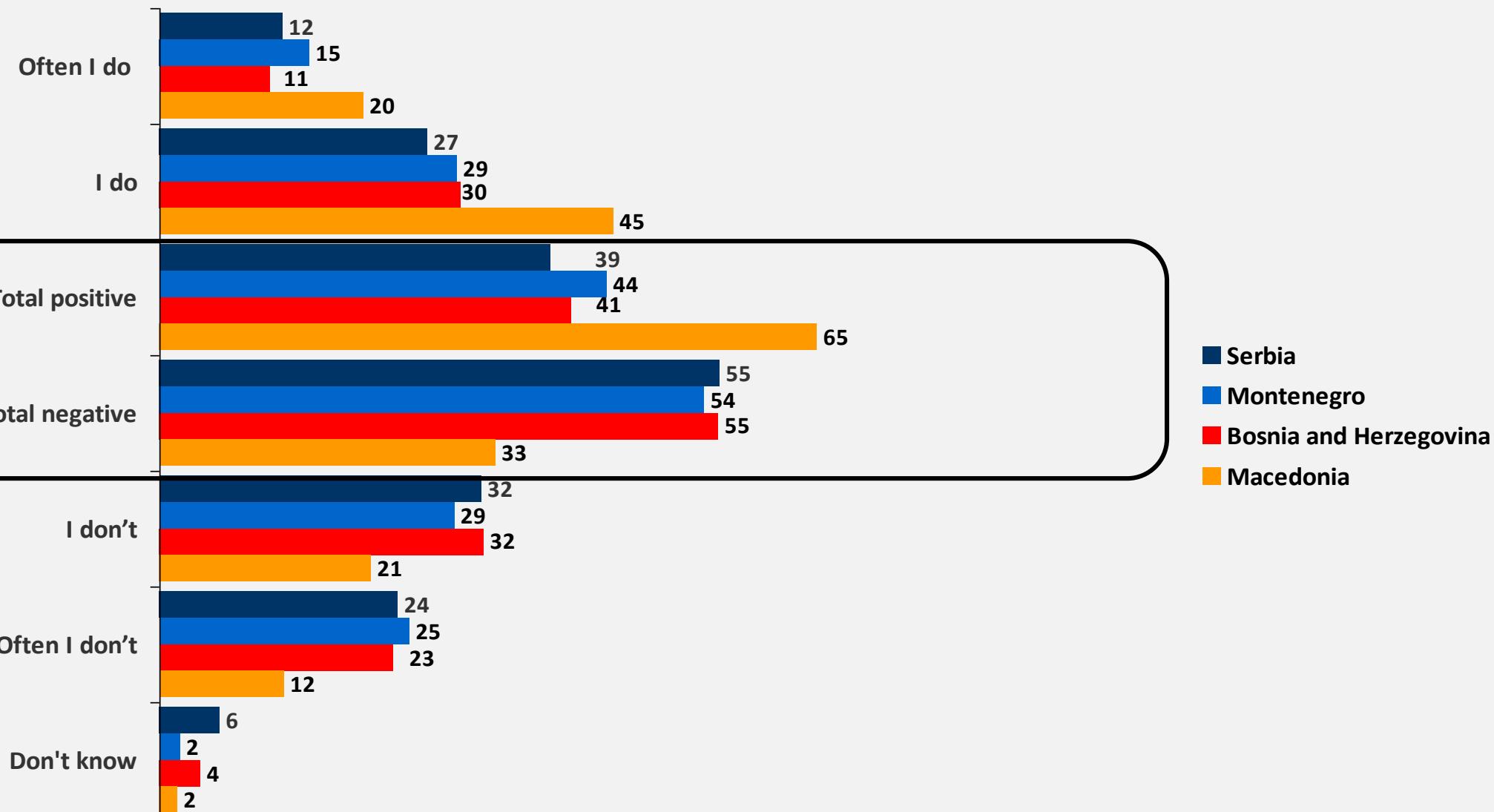
MOST DECIDE WHETHER TO READ A FULL ARTICLE BASED ON THE HEADLINE AND IMAGE

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



MOST DO NOT PAY ATTENTION TO NEWS SOURCES

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



MOST DECIDE WHETHER TO READ A FULL ARTICLE BASED ON THE HEADLINE AND IMAGE

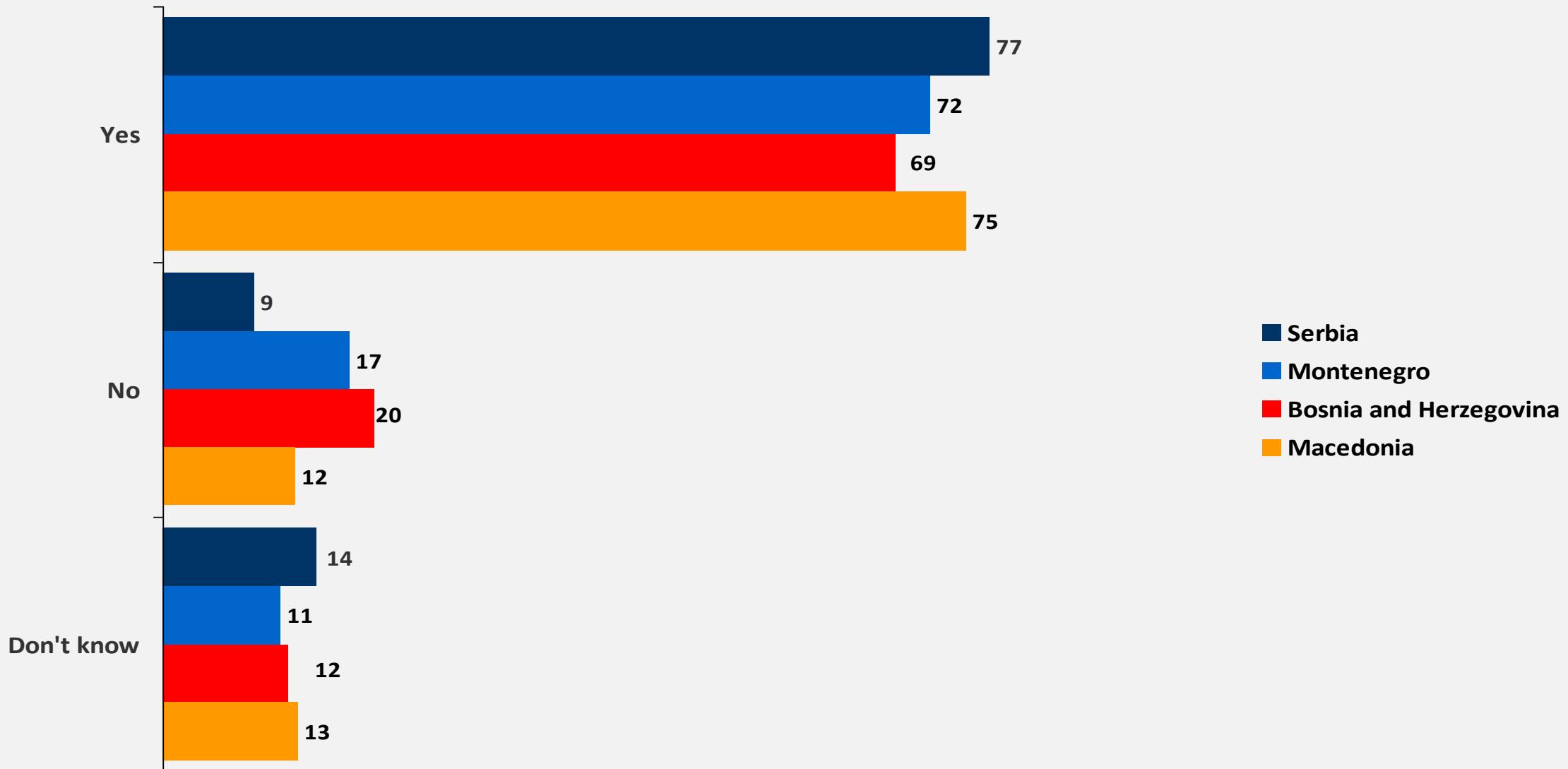
Opinion research across the four countries indicates that citizens tend to pay attention to pictures and headlines of news items.

Media analysis reveals that pictures and headlines often do not accurately depict the content of articles.

This suggests that the public's understanding of news is not necessarily formed through sufficient exposure to factual information.

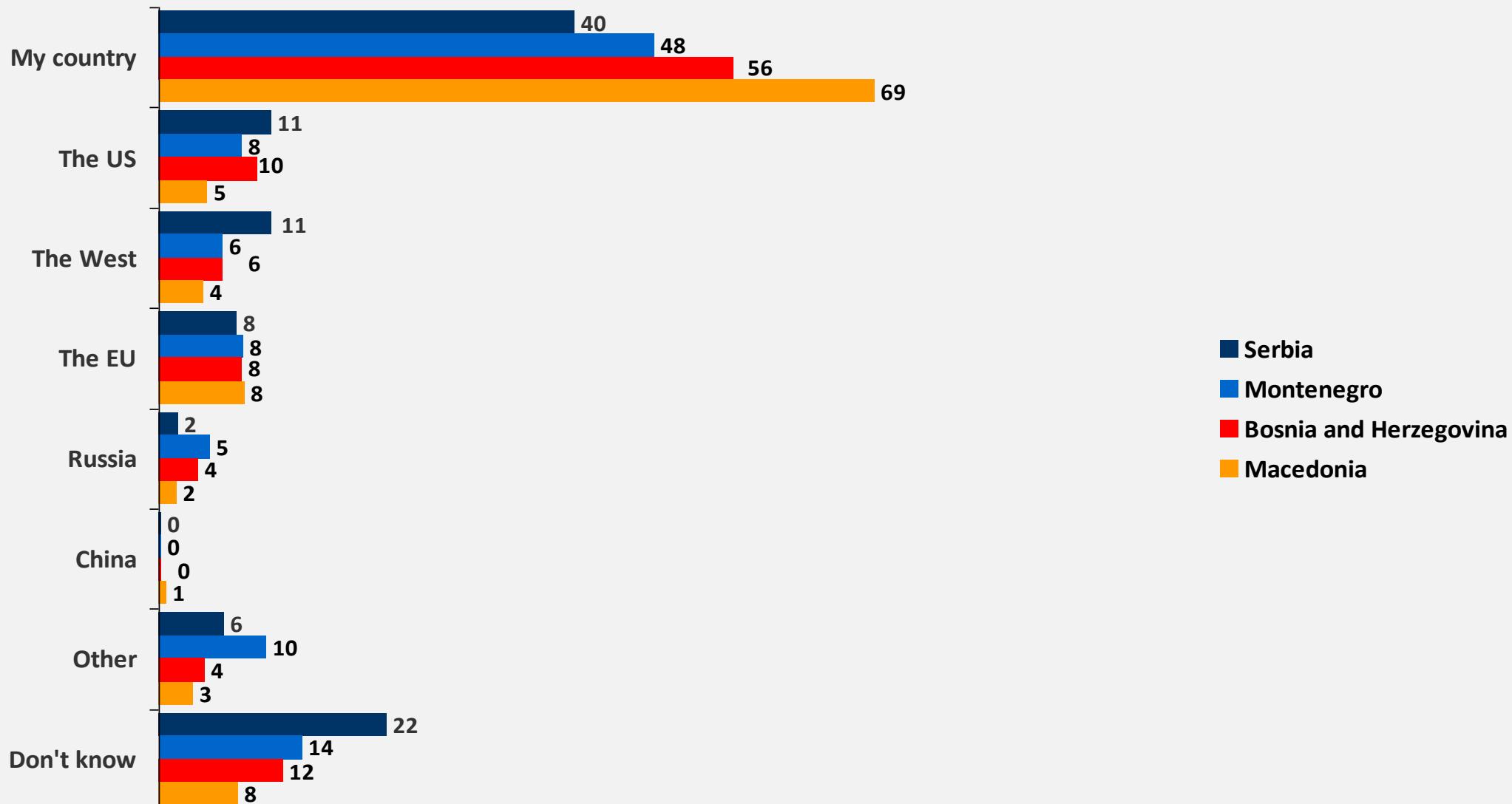
A MAJORITY BELIEVES THAT FALSE NEWS IS PRESENT IN THEIR COUNTRIES

Do you believe there is “false news” in your country’s media?



CITIZENS ACROSS THE COUNTRIES BELIEVE THAT SOURCES OF FALSE NEWS ARE DOMESTIC

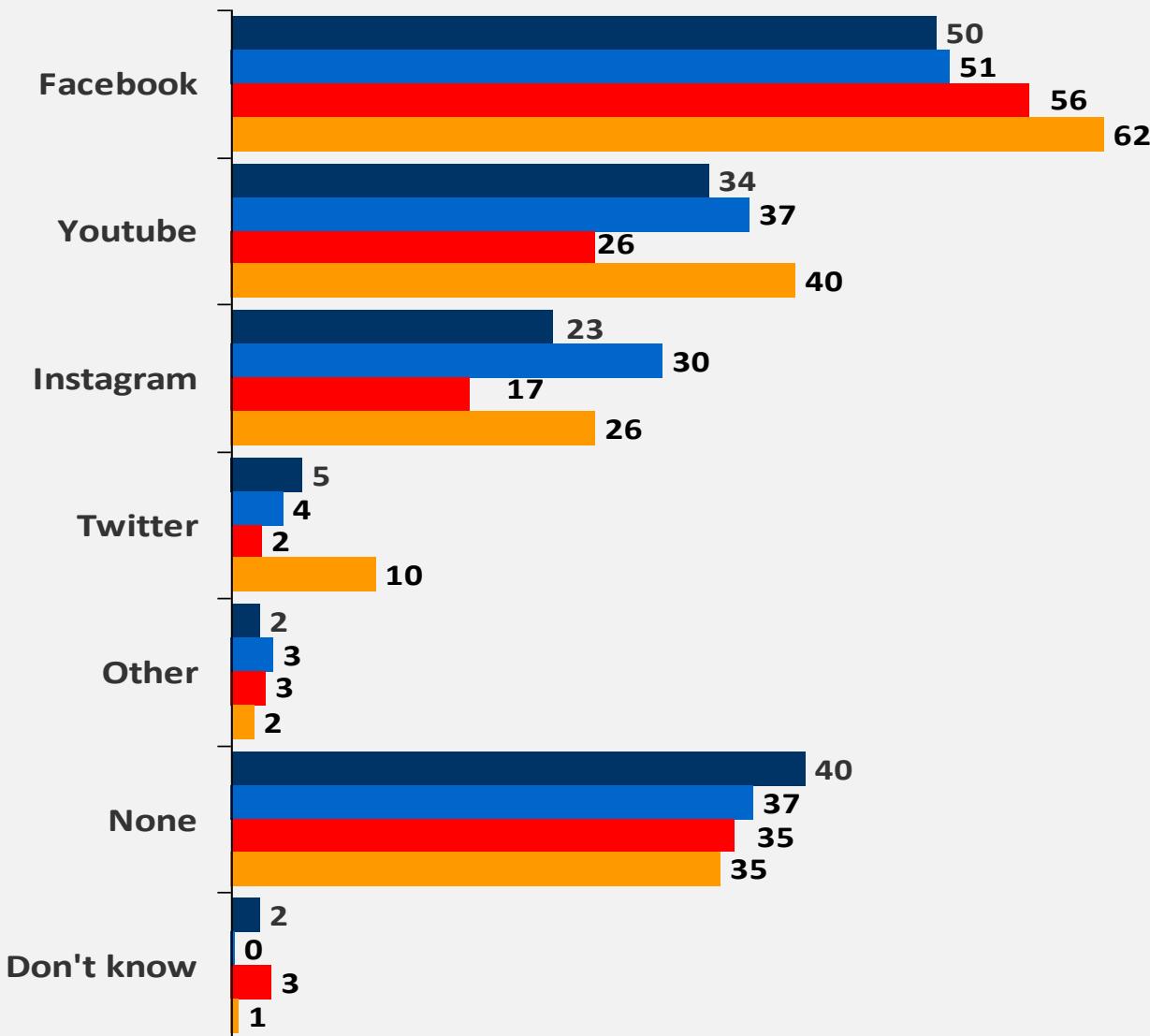
Do you believe the sources you just named are based in....



BASE: those who mentioned outlets they believe transmit 'fake news' in your country media

AROUND 60 % USE SOCIAL MEDIA, MAINLY FACEBOOK

Which social media sites do you use?



Use of social media for news/analysis is 30% in Montenegro, Serbia and Bosnia-Herzegovina, and 40% in Macedonia

- Serbia
- Montenegro
- Bosnia and Herzegovina
- Macedonia

MEDIA ANALYSIS

MEDIA ANALYSIS

NDI partnered with the following nongovernmental organization in each country to conduct media analysis to test potential correlation between what and how the media covers news, and public sentiment as registered in NDI polling.

- Centers for Civic Initiatives/*Pod Lupom* coalition (Bosnia-Herzegovina)
- Citizens' Association MOST (Macedonia)
- Center for Democratic Transition—CDT (Montenegro)
- Center for Research Transparency, and Accountability—CRTA (Serbia)

Each organization monitored the top media outlets in their countries to assess tone, orientation, and potential presence of false news items, using a structured reporting protocol that examines word choice and visual representation to assign pieces as predominantly positive, neutral or negative.



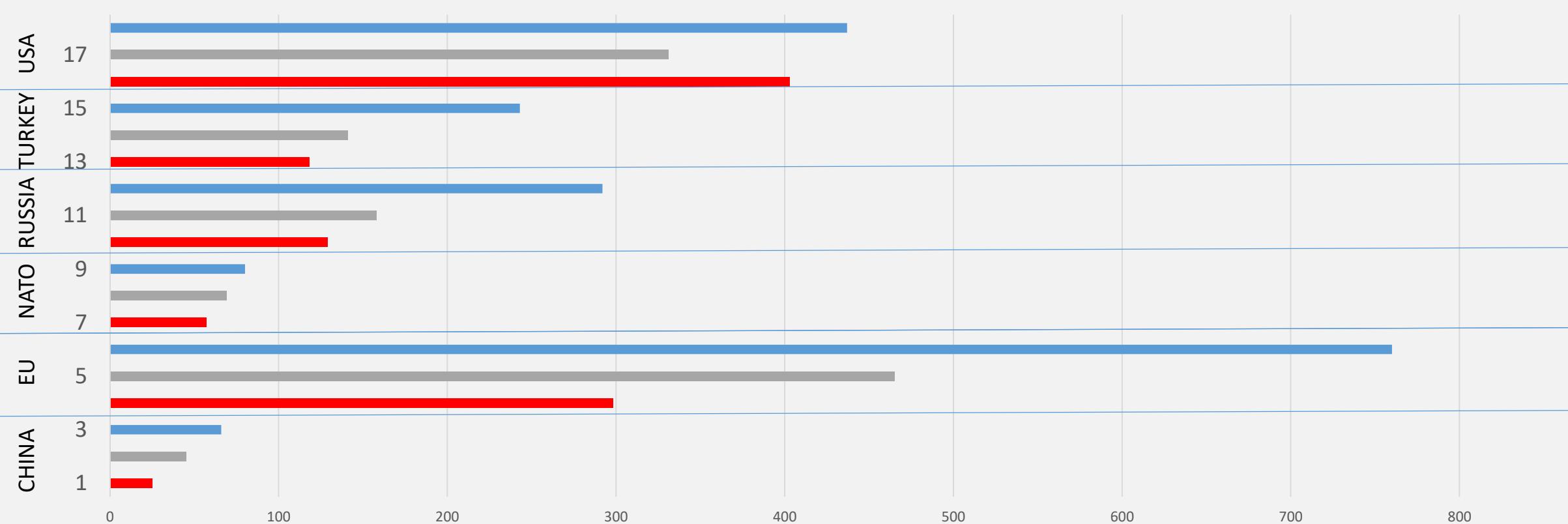
FOREIGN RELATIONS IN BOSNIA-HERZEGOVINA

MEDIA ANALYSIS

October - November 2018

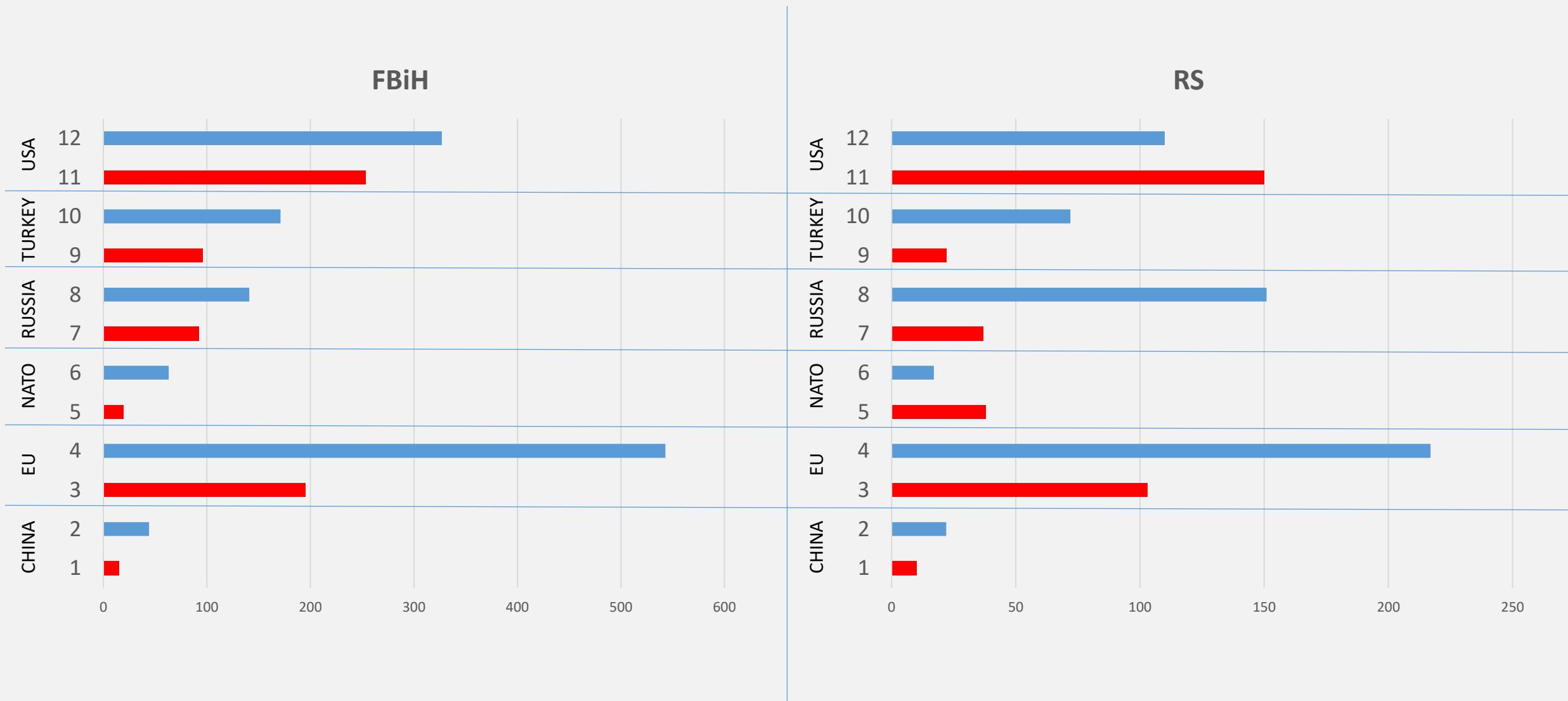
NEWS ITEMS ON MAJOR FOREIGN ACTORS TREND POSITIVE, WITH VARIATION AMONG SPECIFIC ACTORS.

Overall Orientation



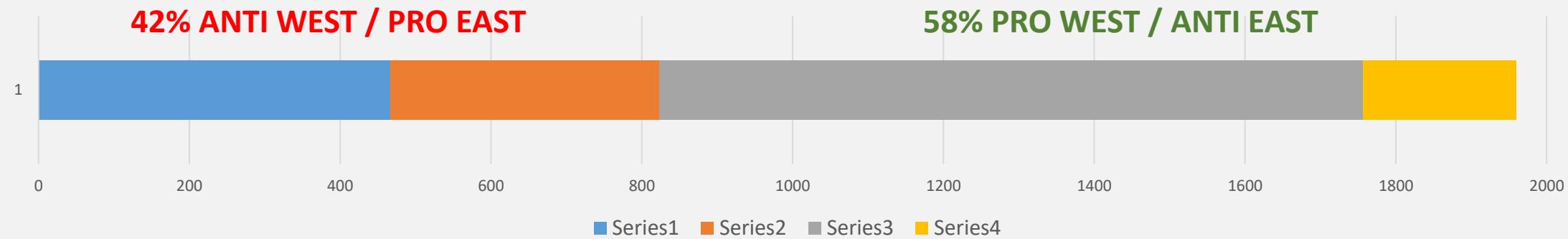
FBIH – ALL PRO

RS – USA AND NATO NEGATIVE

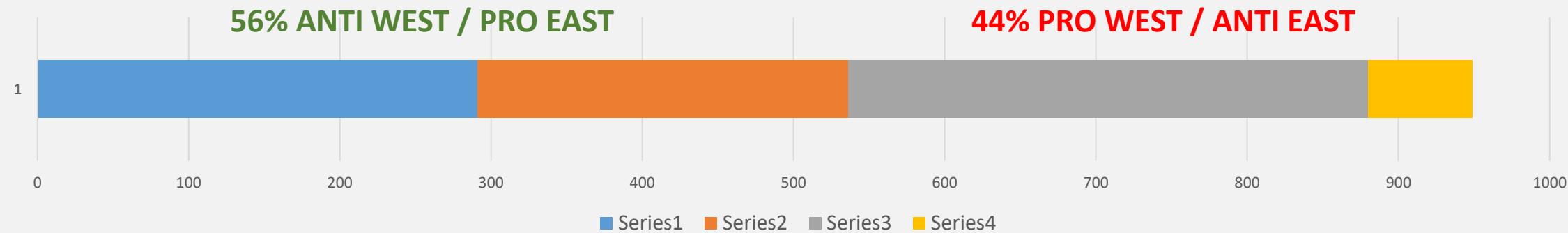


THE RATIO OF PRO-WEST AND PRO-EAST NEWS IS INVERTED BETWEEN THE FEDERATION OF BOSNIA-HERZEGOVINA AND REPUBLIKA SRPSKA

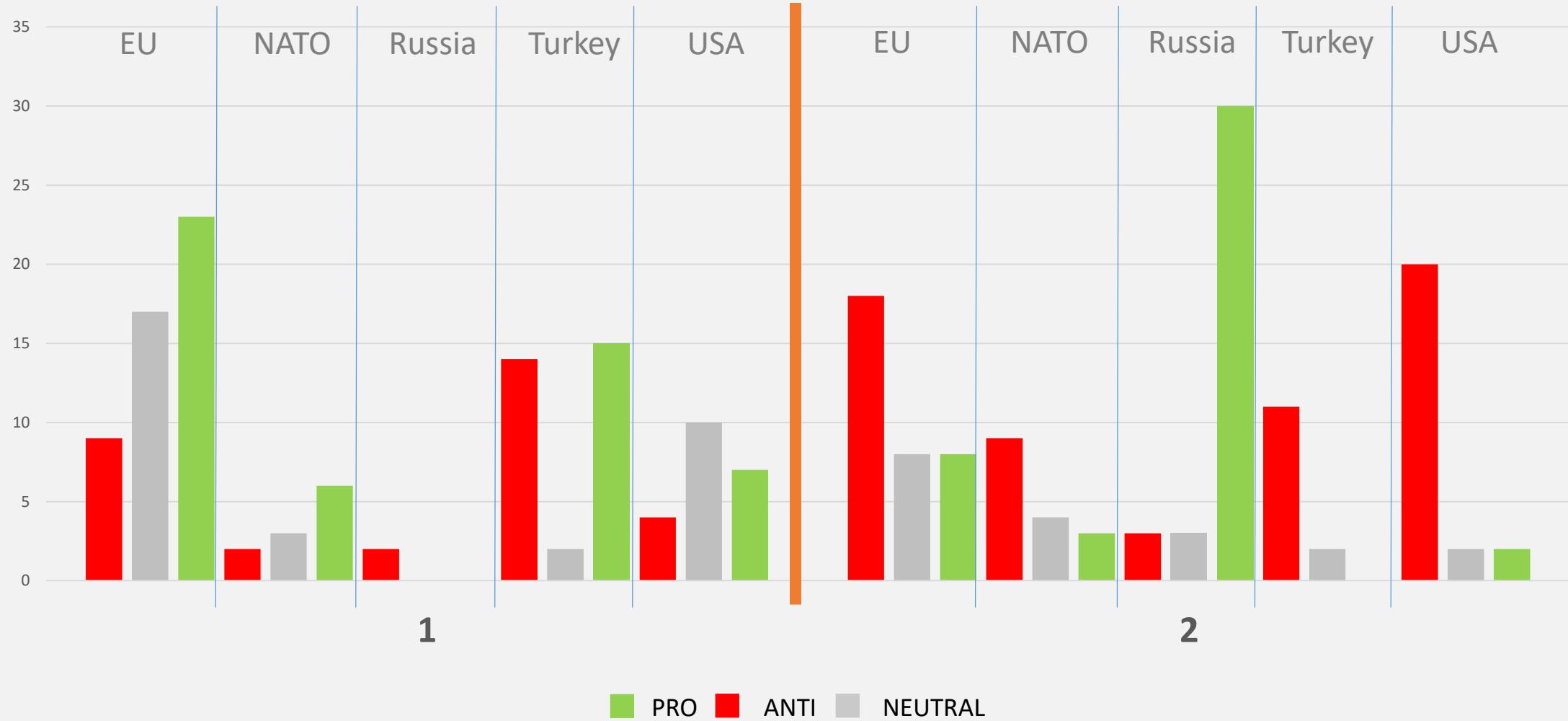
FBiH - PRO vs ANTI



RS - PRO vs ANTI



IZETBEGOVIC QUOTED MOSTLY IN EU, TURKEY COVERAGE DODIK MOSTLY QUOTED RUSSIA, US, AND ANTI EU COVERAGE



BOSNIA-HERZEGOVINA MEDIA COVERAGE DIFFERS BY ENTITY, CORRELATES WITH PUBLIC OPINION

The EU and U.S. are the two most prominent foreign actors in BiH media. EU-related content is typically positive or neutral. U.S.-focused content is negative nearly as often as it is positive.

Media coverage in the Federation of Bosnia-Herzegovina is similar to country averages. In Republika Srpska, an EU-positive tone is evident, Russia is the next most prominently portrayed foreign actor, and the U.S. and NATO are characterized negatively.

There is an apparent link between the ratio of positive and negative news items and public opinion about a foreign actor. A more even ratio of coverage correlates with divided or negative opinion. Predominantly positive or neutral articles correlates with positive opinions.

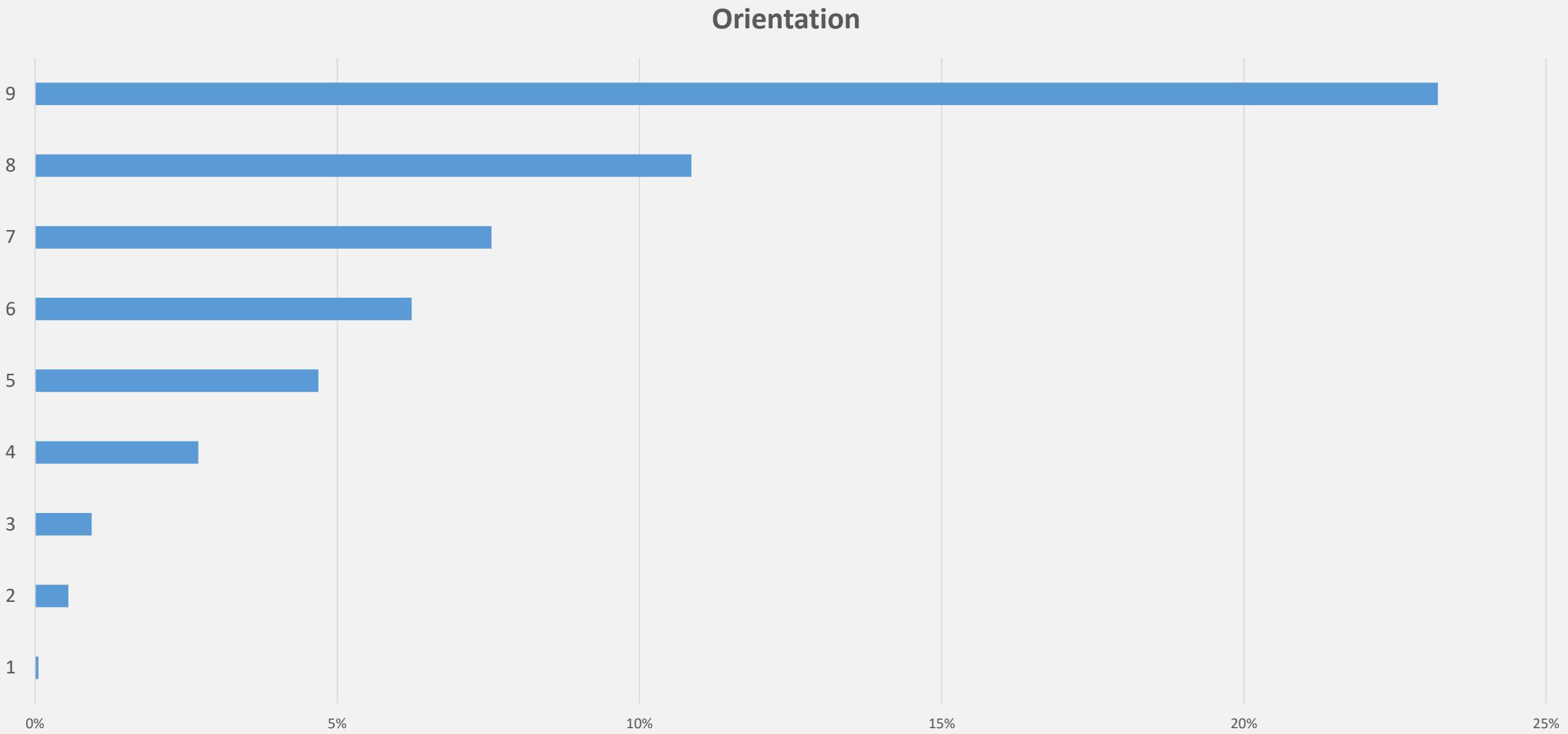


FOREIGN RELATIONS IN MACEDONIA

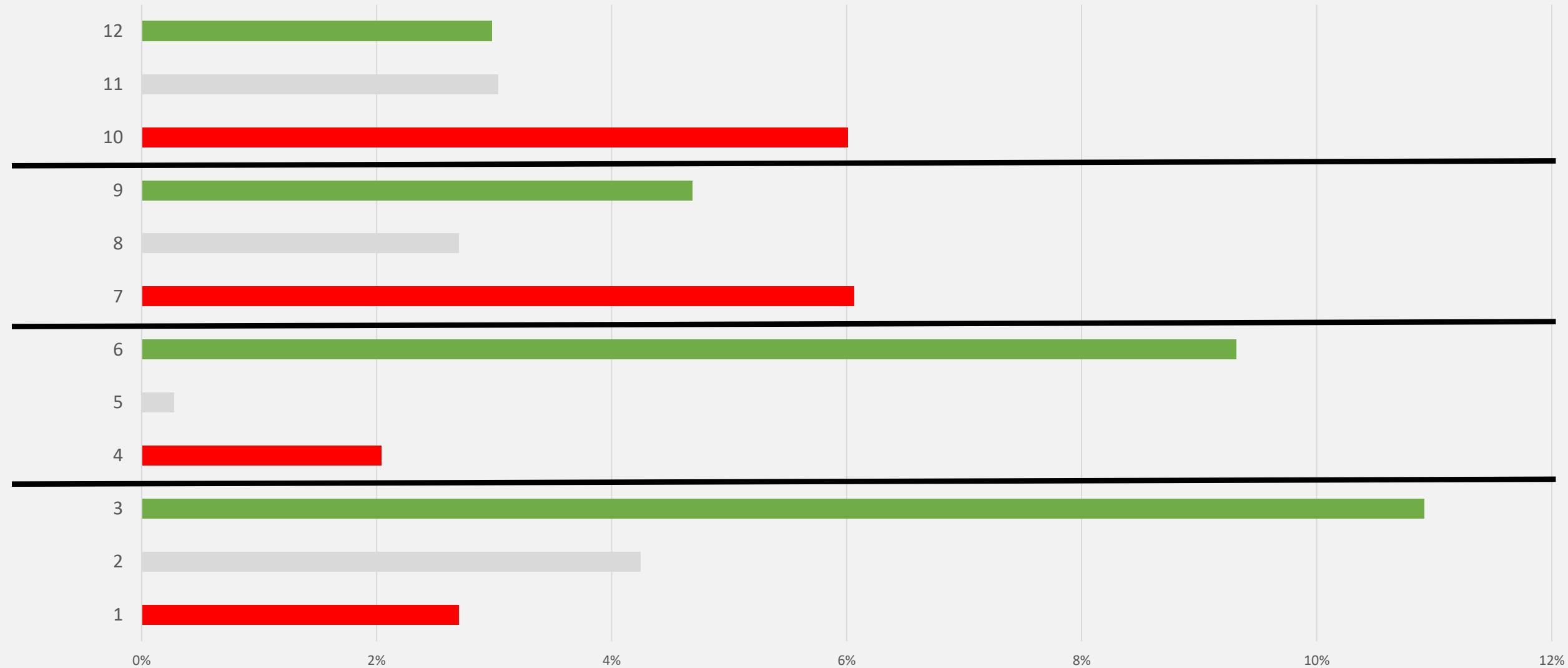
MEDIA ANALYSIS

September – November 2018

MACEDONIA MAINSTREAM MEDIA HAVE A PRO-WEST ORIENTATION



EU AND NATO COVERAGE MOST POSITIVE



EU AND NATO COVERAGE MOST POSITIVE

The two international institutions monitored—the EU and NATO—have the most positive coverage, and the least negative coverage.

Coverage of the U.S. and Russia has a different pattern. Both have more negative than positive coverage, with neutral coverage near or equal to positive coverage.

The tone of news items corresponds with overall public perception of foreign actors.

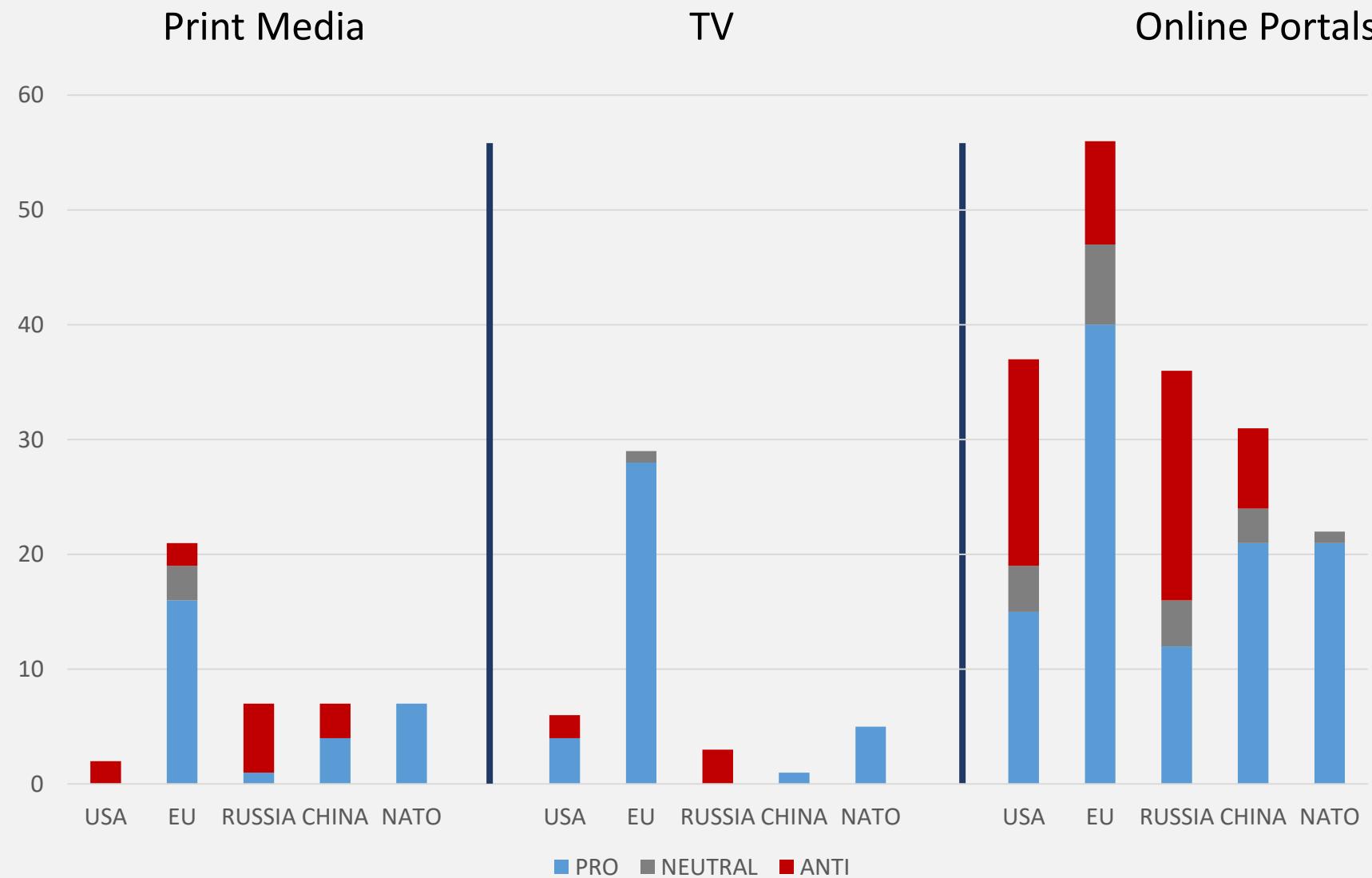


FOREIGN RELATIONS IN MONTENEGRO

MEDIA ANALYSIS

October – December 2018

POSITIVE TONE TOWARD THE WEST AND CHINA. NEGATIVE TOWARD RUSSIA



MEDIA COVERAGE AND PUBLIC OPINION DO NOT ENTIRELY CORRELATE

News items on foreign policy topics manifest online rather than in television or print media.

News items on foreign policy topics are predominantly positive.

Televised news items are most likely to be positive and least likely to be neutral.

Positive news pieces about China increased by approximately 10 percent in the period monitored.

Public opinion does not appear to strictly follow the ratio of positive and negative news items.



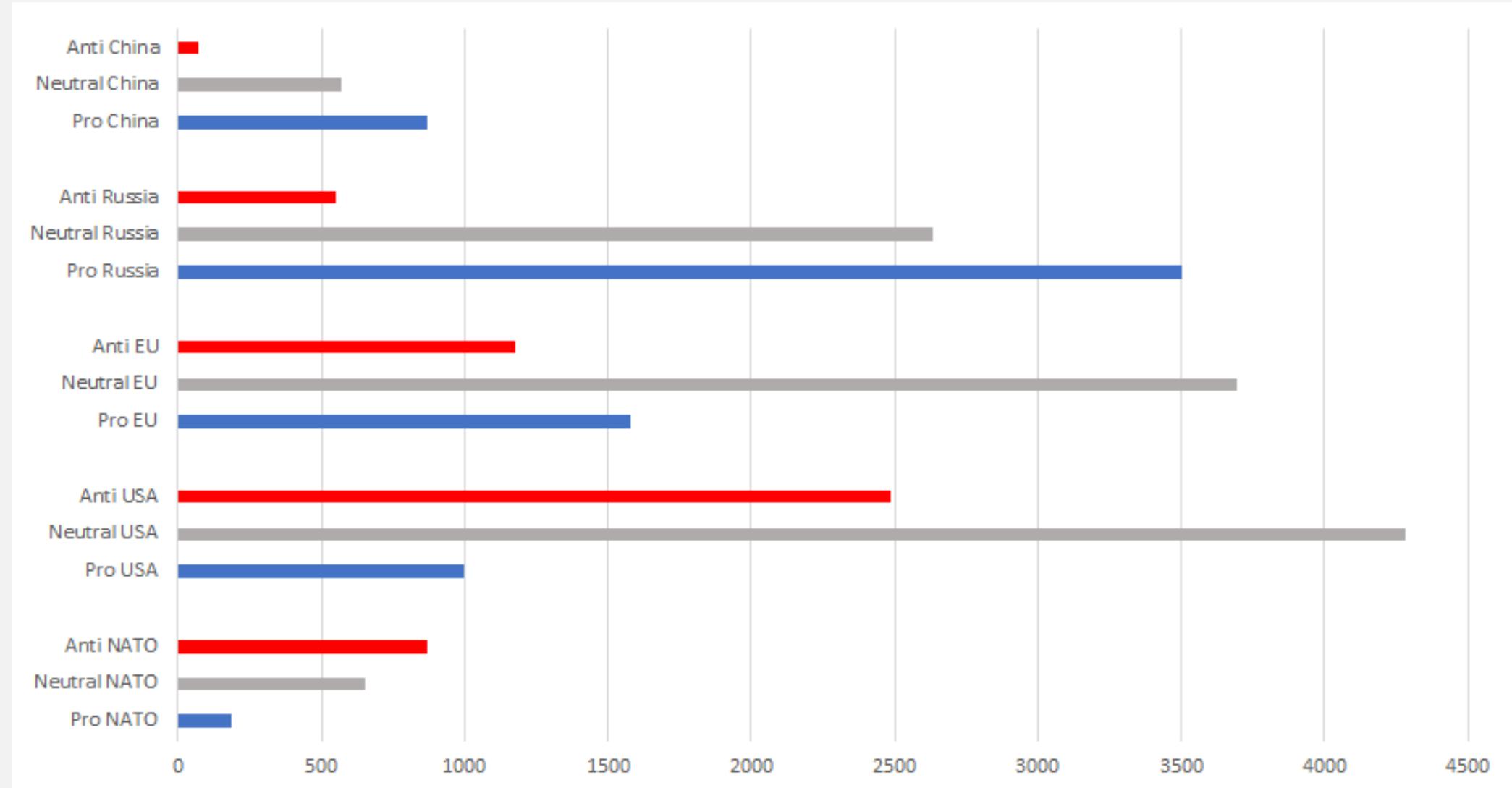
CENTER FOR REASERCH
TRANSPARENCY AND
ACCOUNTABILITY

FOREIGN RELATIONS IN SERBIA

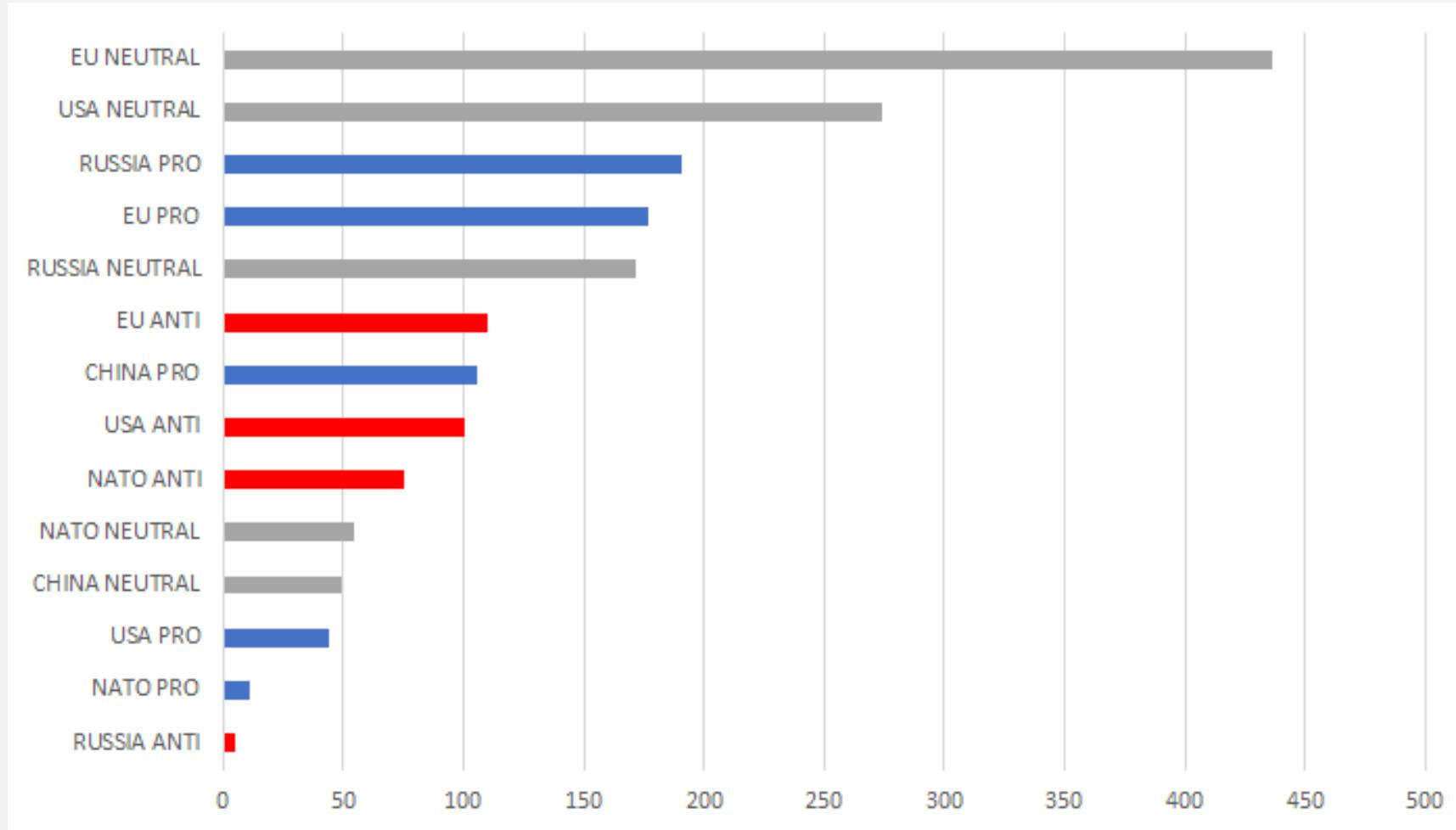
MEDIA ANALYSIS

June 2017 – November 2018

RUSSIA AND CHINA APPEAR MAINLY IN PRO MEDIA PIECES, EU AND US NEUTRAL, NATO NEGATIVE



SERBIAN PUBLIC BROADCASTER, RTS: NEUTRAL COVERAGE DOMINATES. POSITIVE COVERAGE OF EU AND RUSSIA NEARLY EQUAL.



RUSSIA AND CHINA APPEAR MAINLY IN PRO MEDIA PIECES, EU AND US NEUTRAL, NATO NEGATIVE.

Most-discussed actors in the Serbian media are the EU, US, and Russia.

Russia and China are typically portrayed with positive news items, with nearly no negative content.

The EU and US are typically portrayed with a neutral tone.

After neutral items, the EU is most frequently positively portrayed. After neutral items, the US is portrayed most frequently in negative items.

Once again, we see the link between the tone of articles and overall public perception.

CONCLUSIONS

- Euro-Atlantic integration retains popular support but public expectations about joining the EU are slackening. Many see a disconnect between their governments' pursuit of EU membership and tangible improvements in their quality of life.
- Macedonia respondents profess the strongest support for western countries and institutions, followed by Bosnia-Herzegovina. Serbia respondents, and to a lesser extent those in Montenegro, express greater support for Russia and China than for western countries and the European Union.
- Media coverage of foreign actors generally correlates with public attitudes—although, in Montenegro, generally anti-Russia media coverage does not correlate with relative pro-Russia public sentiment. Media is determinative of citizen views on foreign affairs. Citizens are conscientious of the presence of media disinformation in foreign affairs coverage and generally attribute it to domestic sources, rather than the Kremlin.
- Personal “microenvironments”—friends/family/communities/social media--also shape public opinion and present fertile ground for countering disinformation narratives about foreign actors.

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