



USAID
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PUBLIC OPINION RESEARCH: DEMOCRACY, GEOPOLITICS, DISINFORMATION

North Macedonia

August 2021

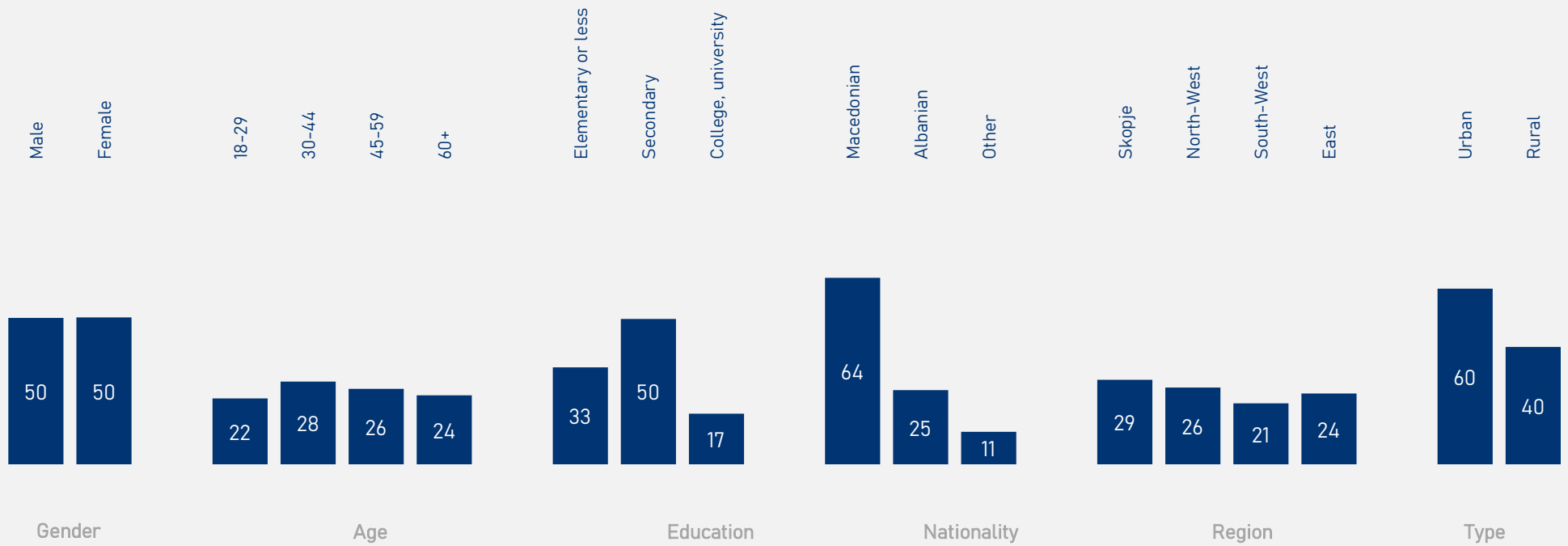
NORTH MACEDONIA: RESEARCH METHODOLOGY

Data collection method National	Telephone and online interviews– CAPI (Computer Assisted Personal Interviewing) and CAWI (Computer Assisted Web Interviewing)
Duration of the questionnaire	20 minutes
Period of fieldwork	March 2021
Sample universe	Population of North Macedonia 18+
Sampling frame	Data from the Telephone Directory (Electronic), the 2002 Population Census and Statistical Estimates of the Population for year 2015 (for telephone survey) and IPSOS on-line panel database (for online survey)
Strata allocation	Proportional to Census 2011 data and estimated population dynamics
Sample Size	2410

This research is made possible by the generous support of the American People through the United States Agency for International Development (USAID).

The contents of this research are the sole responsibility of CEPPS/NDI and do not necessarily reflect the views of USAID or the United States Government.

NORTH MACEDONIA: BREAKDOWN OF THE NATIONAL SAMPLE

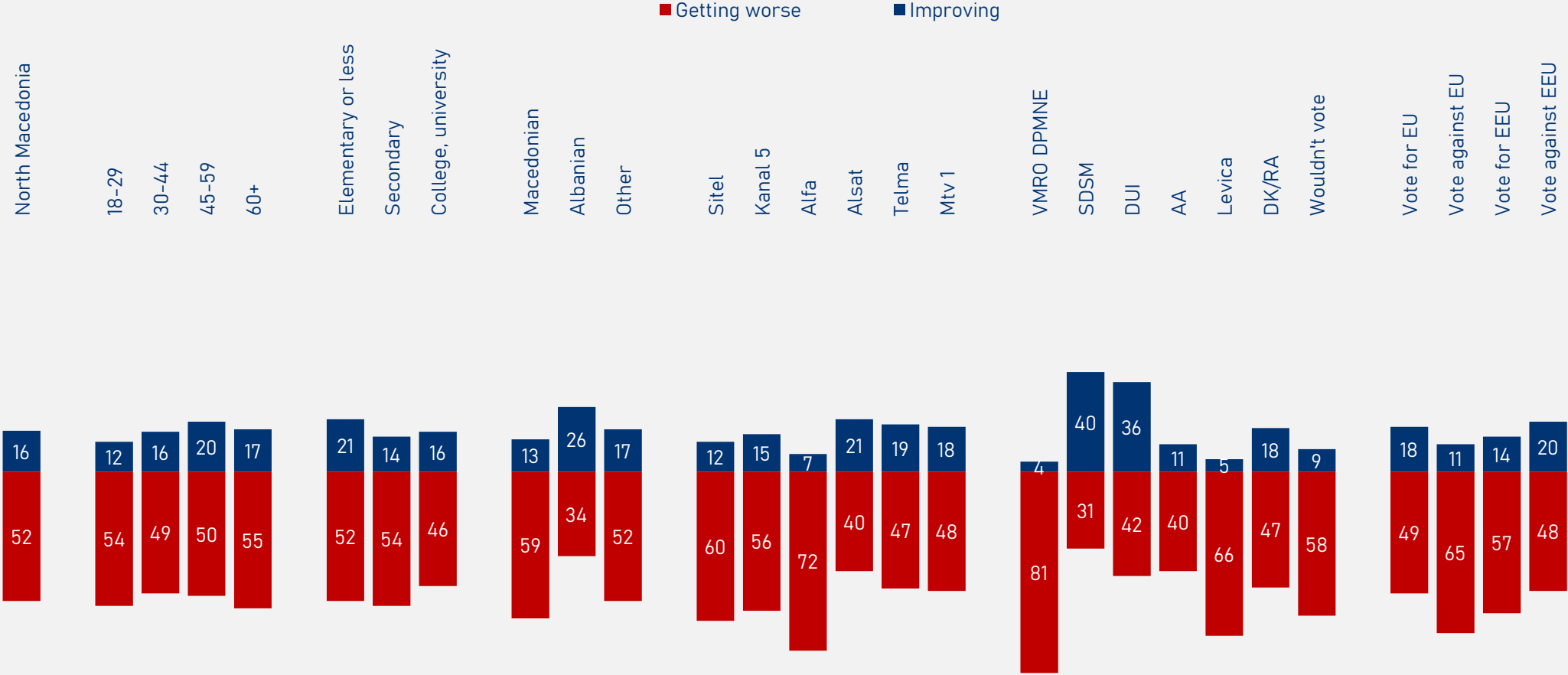


BASE: Total target population; SOURCE: NDI April 2021. NOTE: Numbers on the slide represent percentages

PUBLIC ATTITUDES ON DEMOCRACY

NORTH MACEDONIA: EXCEPT FOR THE RULING COALITION VOTERS, PEOPLE SEE REGRESS OF DEMOCRACY

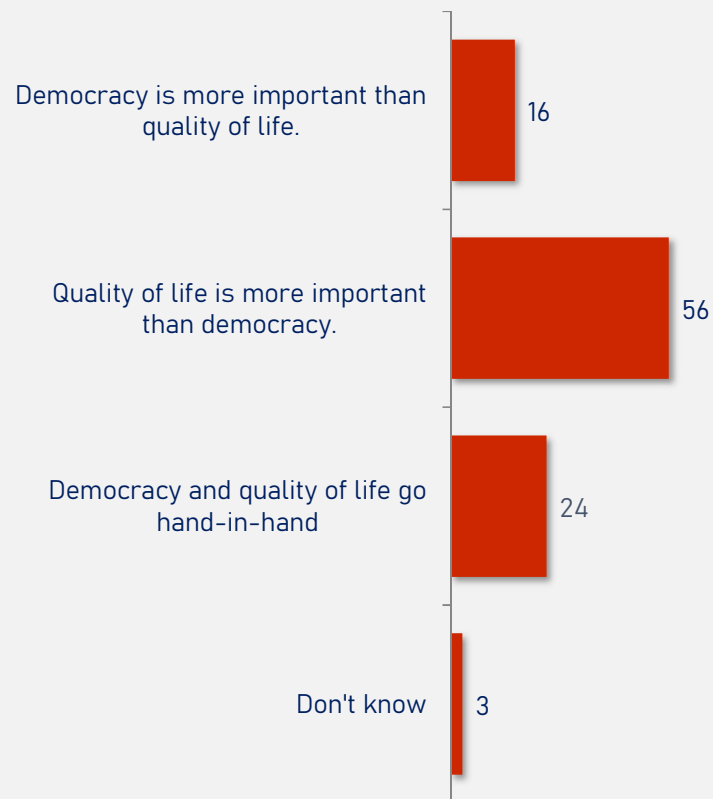
Do you think the level of democracy in your country is getting worse, staying the same, or improving?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: CITIZENS FAVOR QUALITY OF LIFE OVER DEMOCRACY

Which statement do you agree with the most?

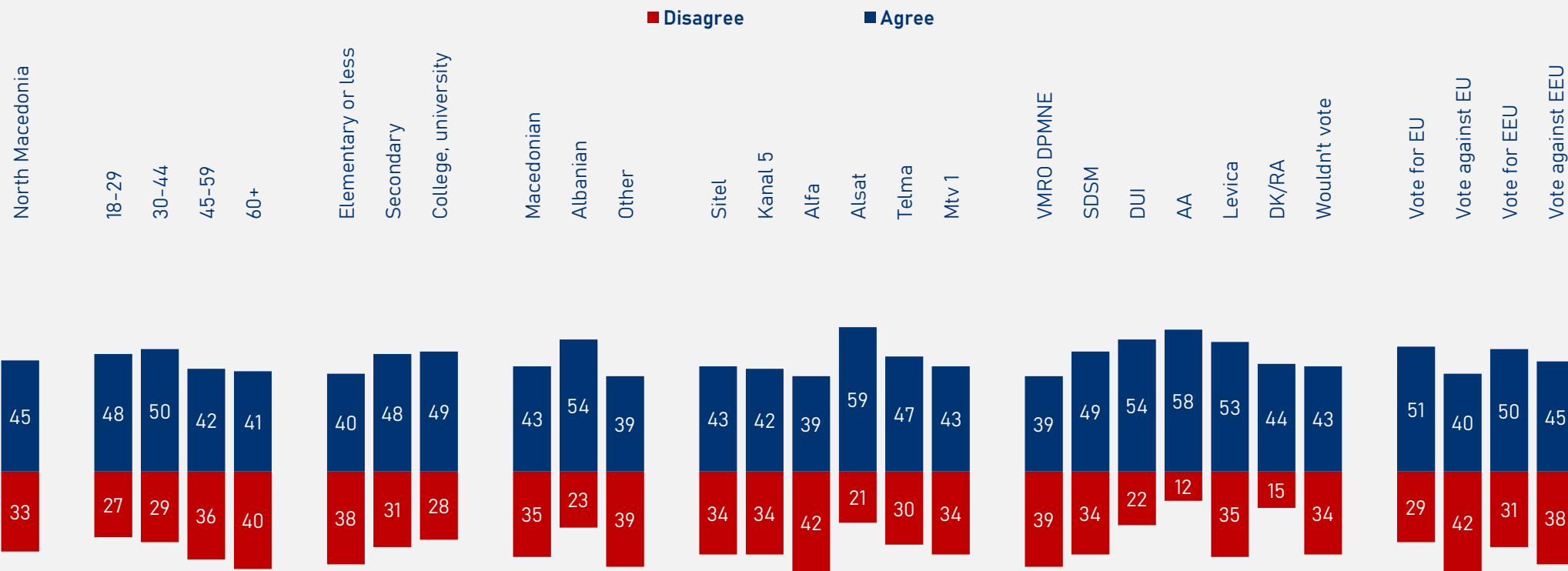


Democracy is more than average important than quality of life for less educated Albanians, consumers of Alsat and TV24, voters of DUI.

Democracy and quality of life go hand-in-hand more than average preferred statement for highly educated Macedonians from Skopje, consumers of Sloboden Pecat, voters of Politicka Partija Levica.

NORTH MACEDONIA: CITIZENS BELIEVE THAT WESTERN DEMOCRACY IS NOT APPLICABLE IN THEIR SOCIETY ACROSS DEMOGRAPHICS

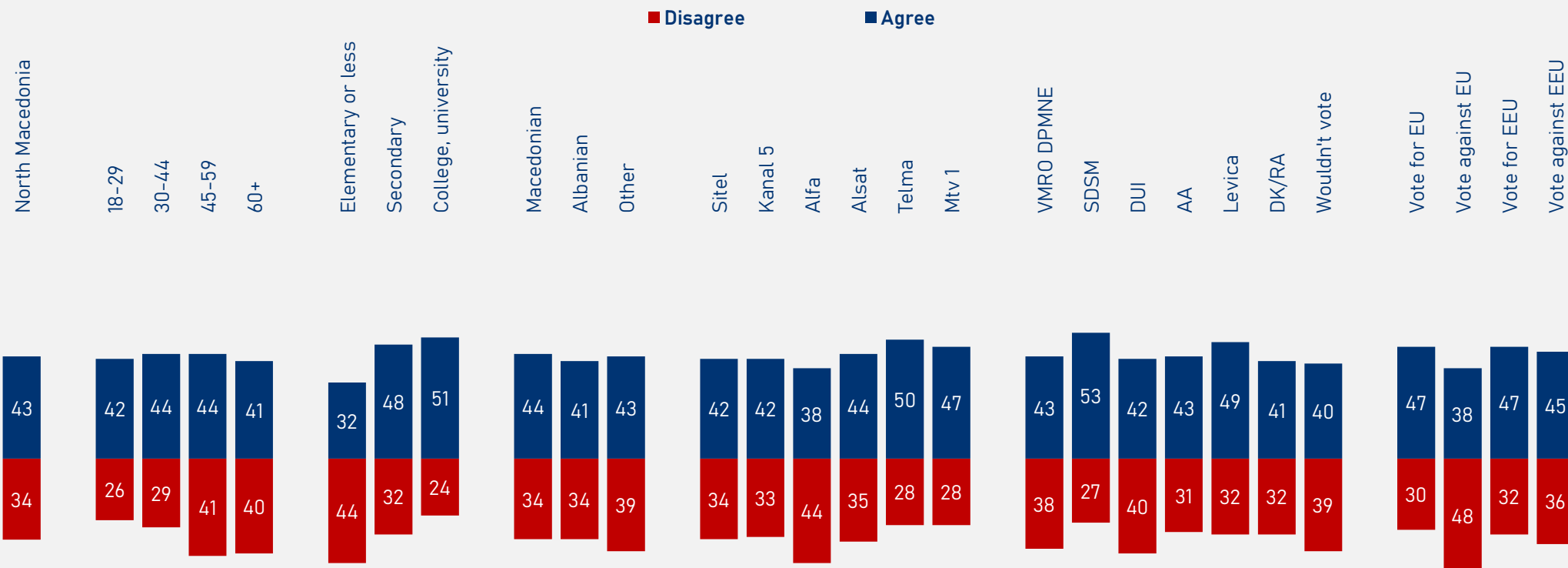
To what extent do you agree that western democracies which assume acceptance of diversities and inclusion (minority rights, LGBTI rights, migrants' right and similar) is not possible to function in your society?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: OPINION THAT DEMOCRACY IS A FAILED GOVERNING SYSTEM IS NOT UNANIMOUS ACROSS THE DEMOGRAPHICS

To what extent do you believe that democracy is a failed governing system used by the West to impose on countries in transition certain values aimed to masquerade their geopolitical interests?



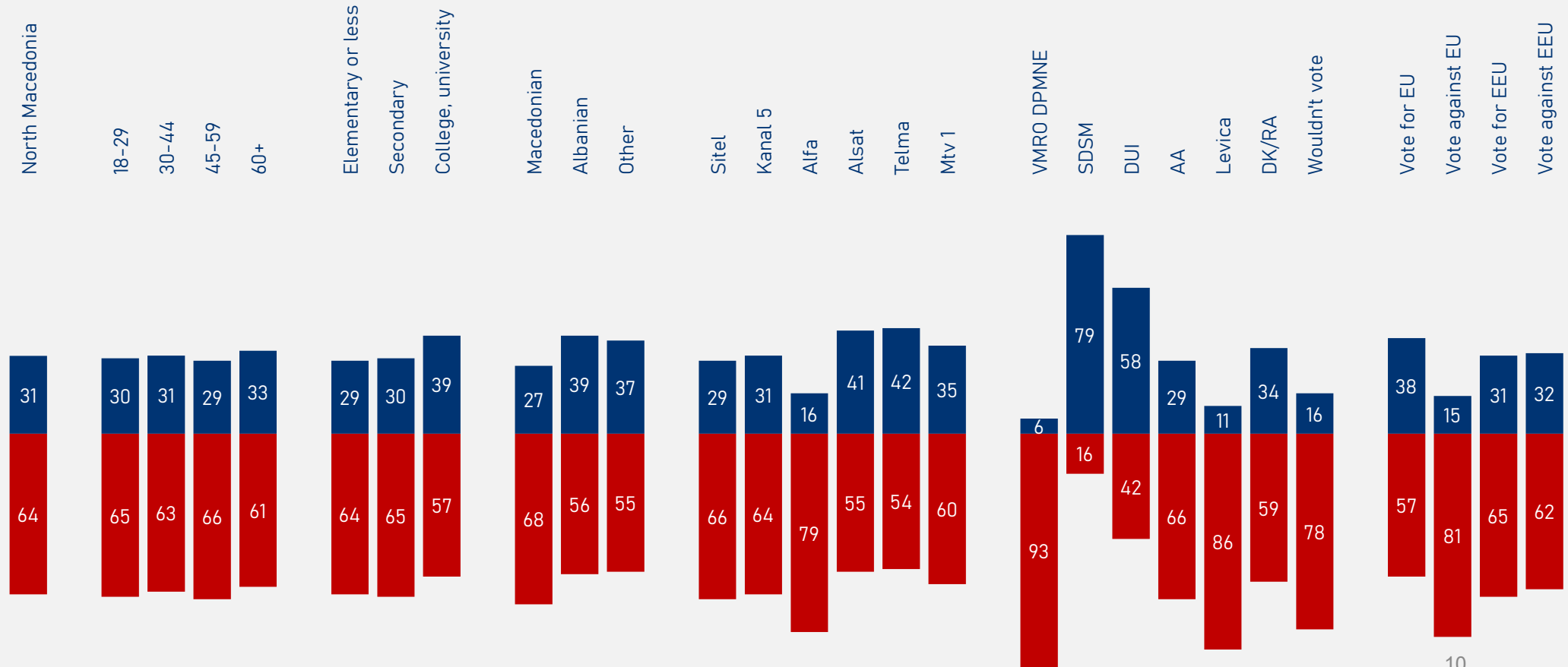
BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

PUBLIC ATTITUDES ON GOVERNANCE

NORTH MACEDONIA: VOTERS OF THE RULING COALITION ARE THE MOST OPTIMISTIC

In your opinion in what direction is your country moving?

■ Wrong direction ■ Right direction

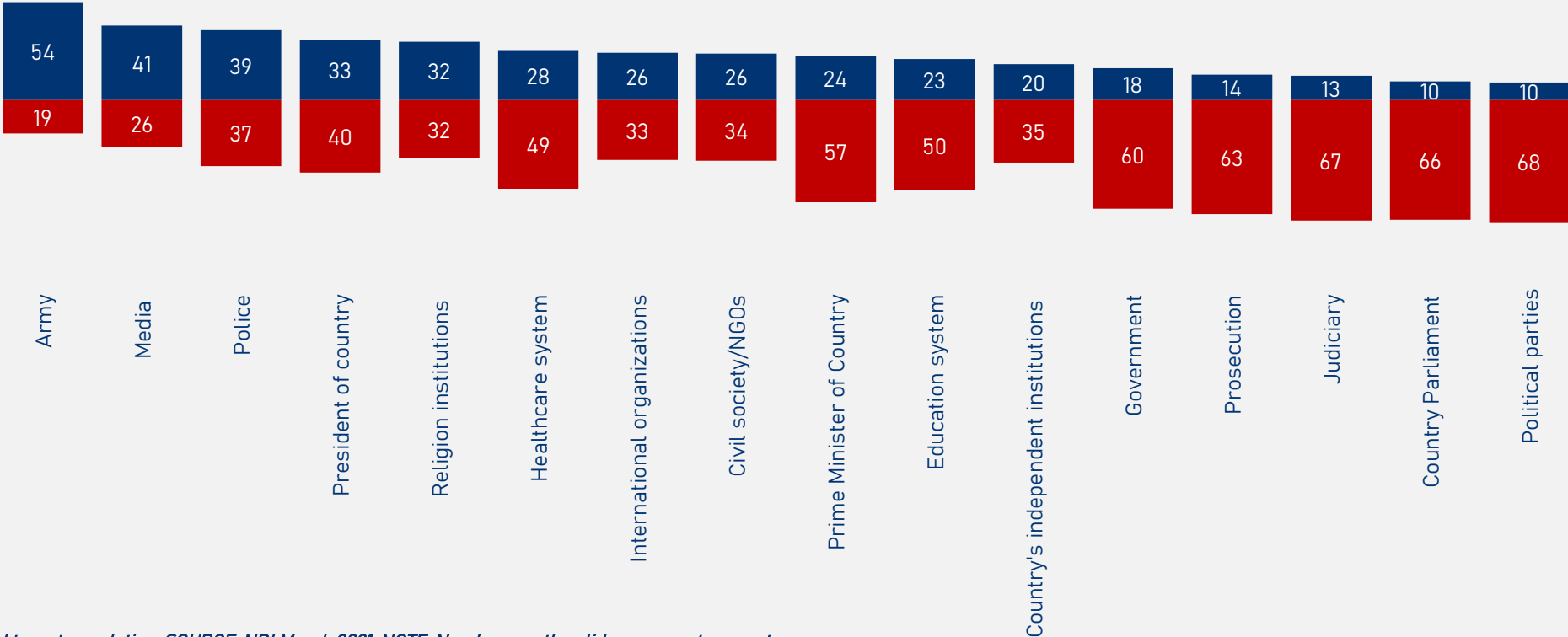


10

BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

CITIZENS ARE LARGELY DISSATISFIED WITH REPRESENTATIVE INSTITUTIONS

To what extent are you satisfied with the work of the following institutions?

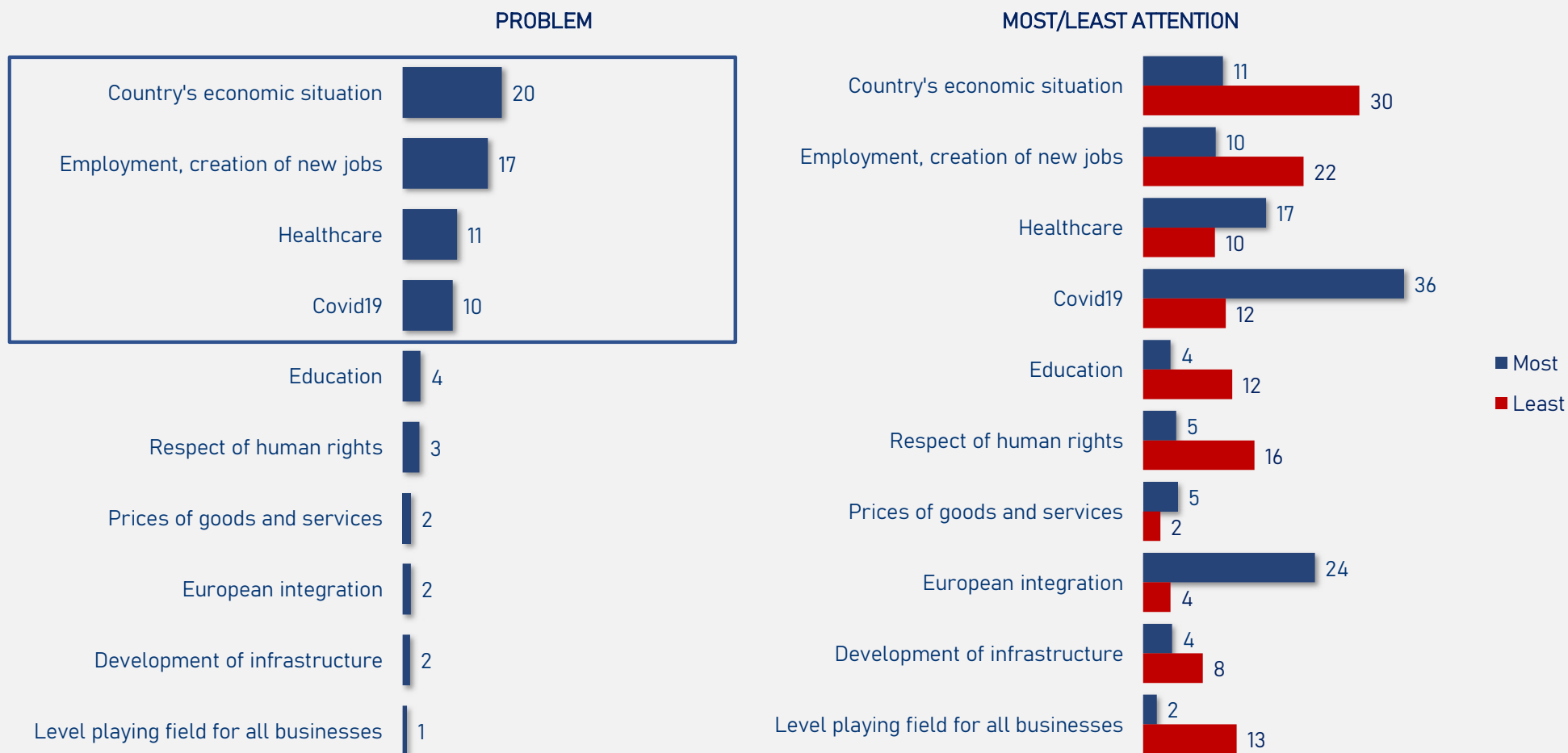


BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

ISSUES AND POLICIES

N. MACEDONIA 2021: CITIZENS PERCEIVE LACK OF ATTENTION TO THE ECONOMY AND EMPLOYMENT

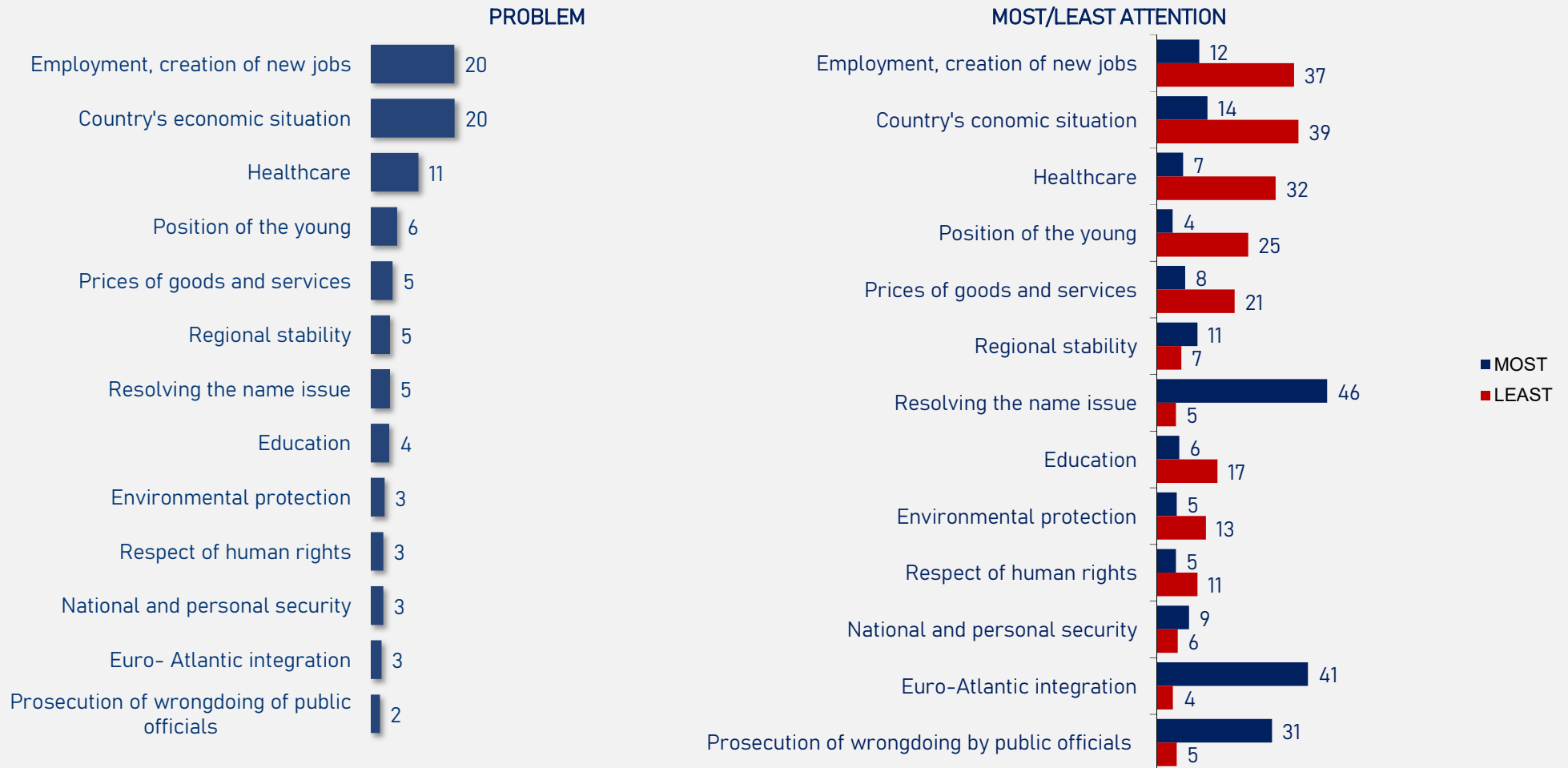
Which are the three problems in that are most important to you personally? In your opinion, which are the three areas that the Government of the country most and least pays attention to? – UP TO THREE ANSWERS



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

MACEDONIA 2018: 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? – UP TO THREE ANSWERS

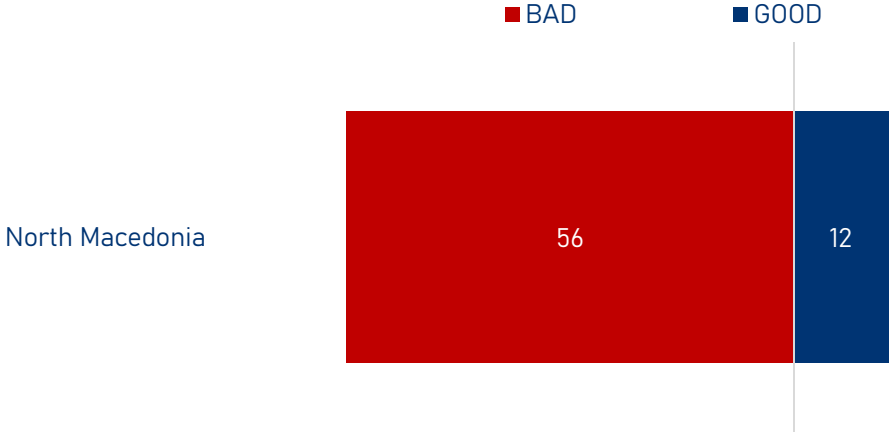


BASE: Total target population; SOURCE: NDI 2017, 2018. NOTE: Numbers on the slide represent percentages

**PUBLIC ATTITUDES
ON THE COVID-19
PANDEMIC**

NORTH MACEDONIA: PARLIAMENT RATED POORLY DURING COVID-19 CRISIS

How do you rate the Parliament's role and work during the COVID-19 crisis?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: OPPOSITION'S PERFORMANCE DURING COVID-19 CRISIS IS POORLY RATED

How would you evaluate the work of the opposition during the COVID-19 crisis?

N. MACEDONIA

I did not hear anything from the opposition



24

The opposition did not provide alternative solutions



26

I liked that the opposition supported the government in these difficult times



10

The opposition provided alternative solutions to the crisis which were more interesting to me



9

The opposition provided ideas for how should be after the crisis

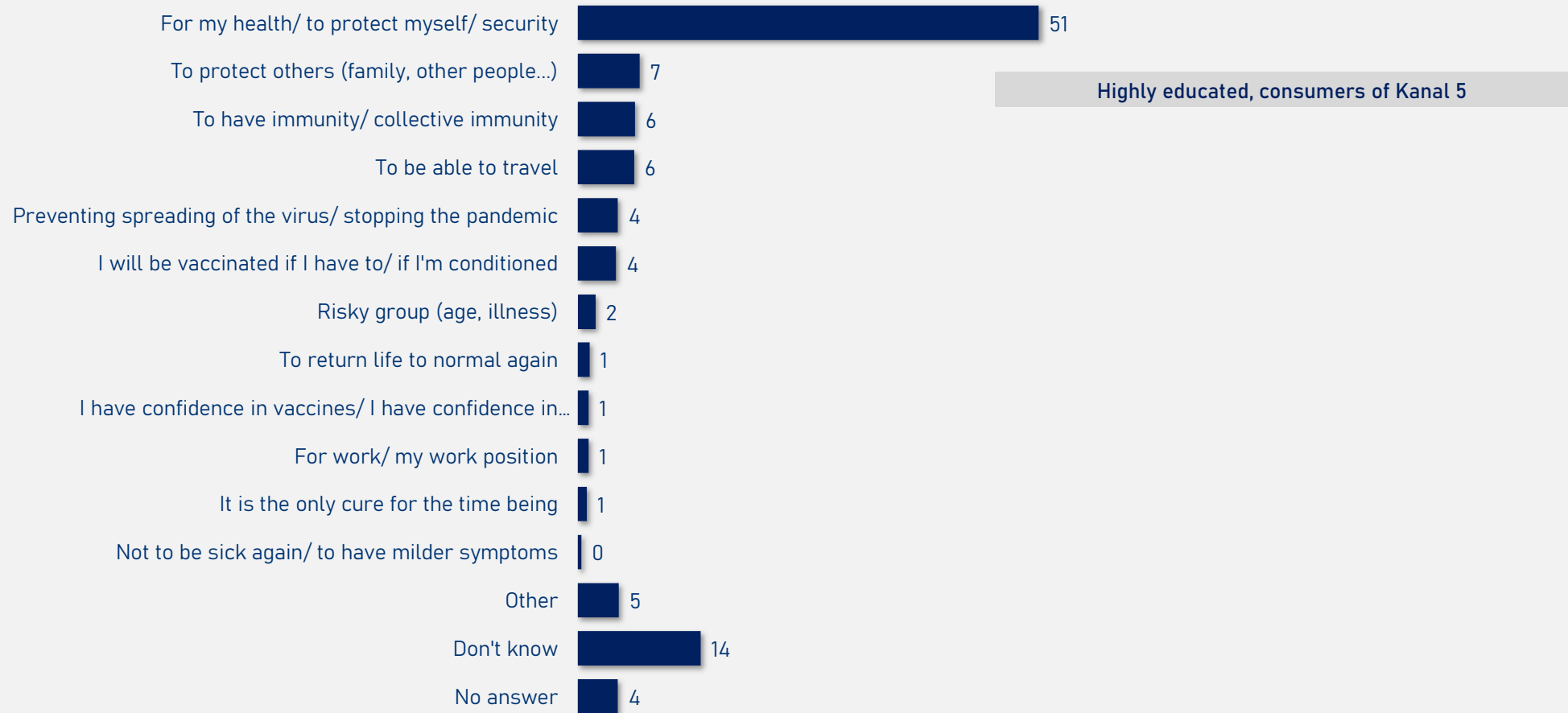


9

BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: CONCERNS FOR HEALTH IS KEY REASON FOR VACCINATION

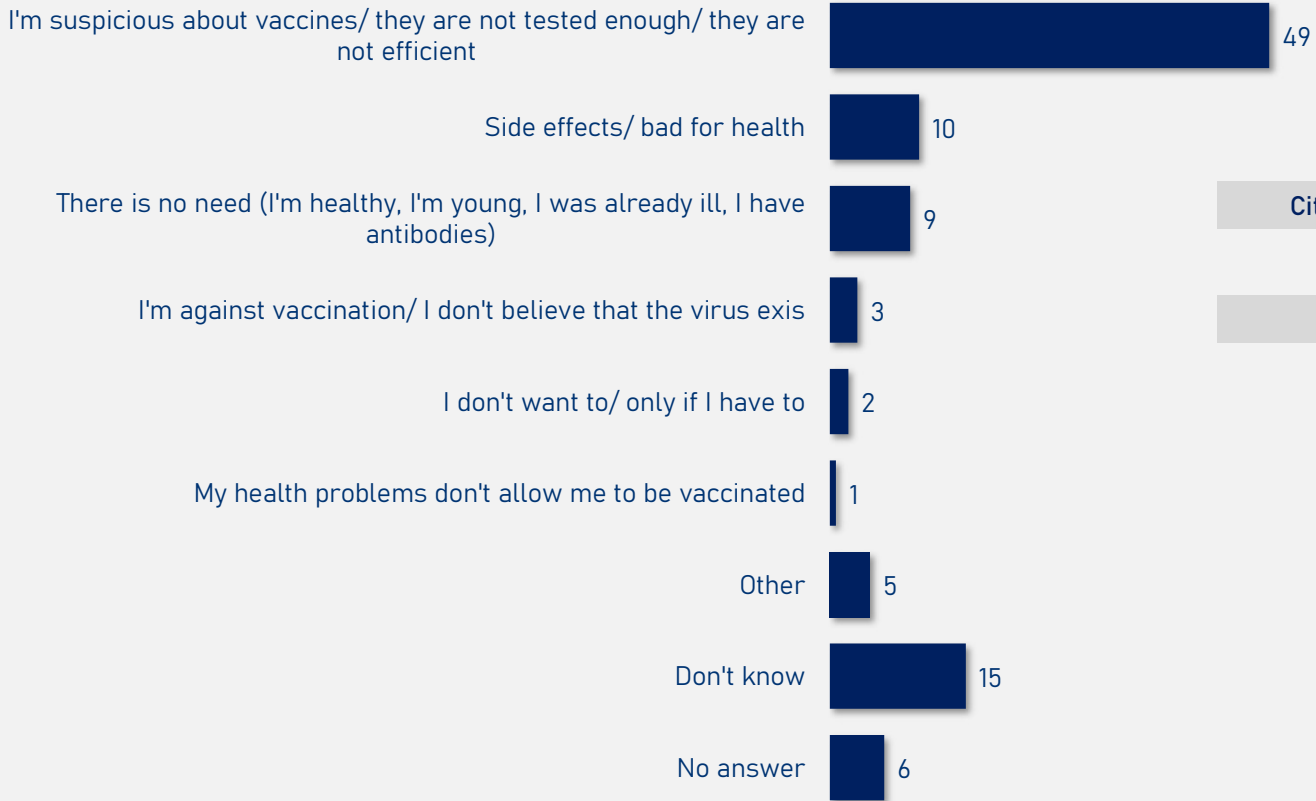
Why are you open to take the vaccine? – MULTIPLE ANSWERS



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: LACK OF CONFIDENCE IN VACCINES IS A KEY REASON NOT TO BE VACCINATED

Why are you NOT open to take the vaccine?



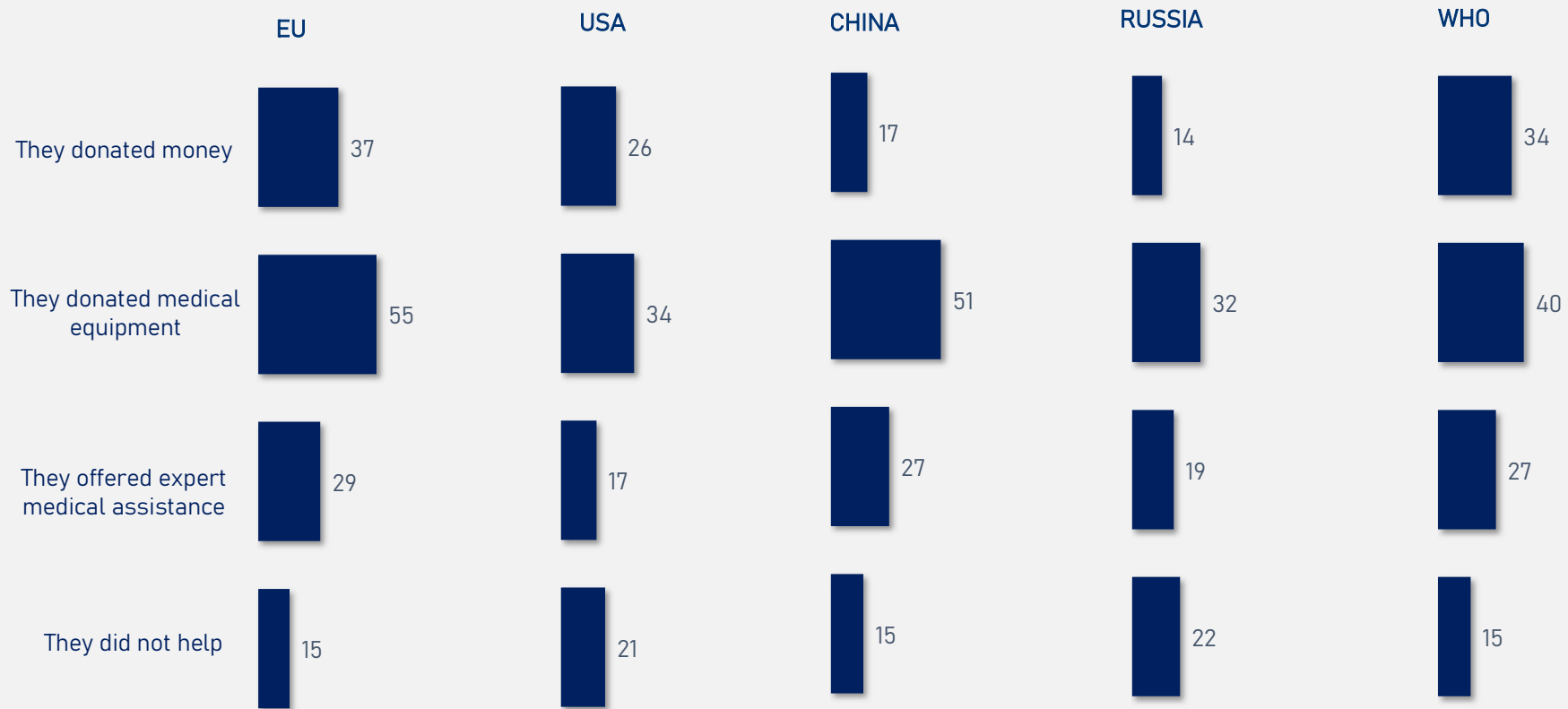
Citizens 18-29 y.o. Albanians, consumers of Alsat

Less educated, Albanians,

BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: PEOPLE BELIEVE THAT HELP RELATED TO COVID-19 CAME FROM THE WEST AND CHINA

Can you indicate for the following international institutions or countries how they helped N. Macedonia fight the new Coronavirus?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

VOTING INTENTIONS

NORTH MACEDONIA: HIGHEST NUMBER OF VOTERS ARE UNDECIDED, WITH AN ADVANTAGE FOR THE OPPOSITION PARTIES

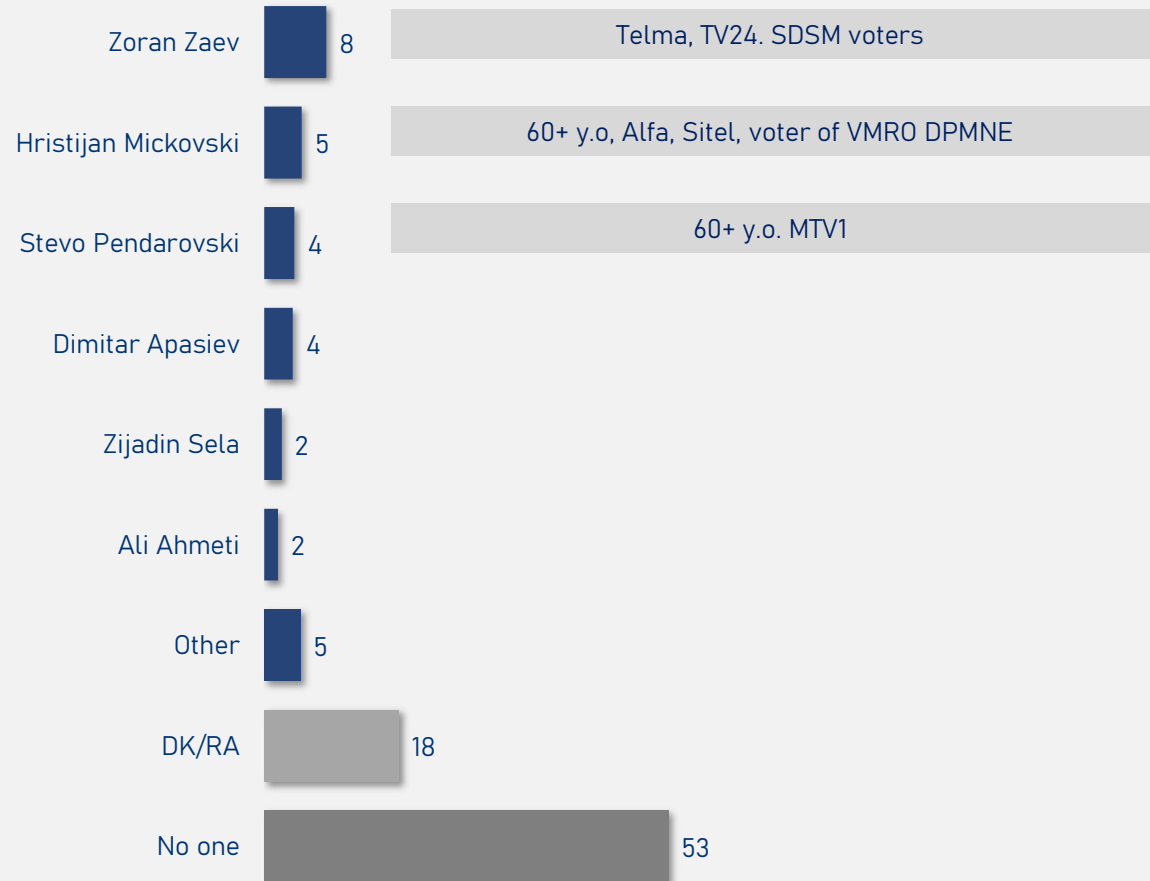
If parties not coalitions would run for those elections, which party would you vote for?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: MOST PEOPLE LACK TRUST IN POLITICIANS

Which politician do you trust the most?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

PUBLIC ATTITUDES ON FOREIGN ACTORS

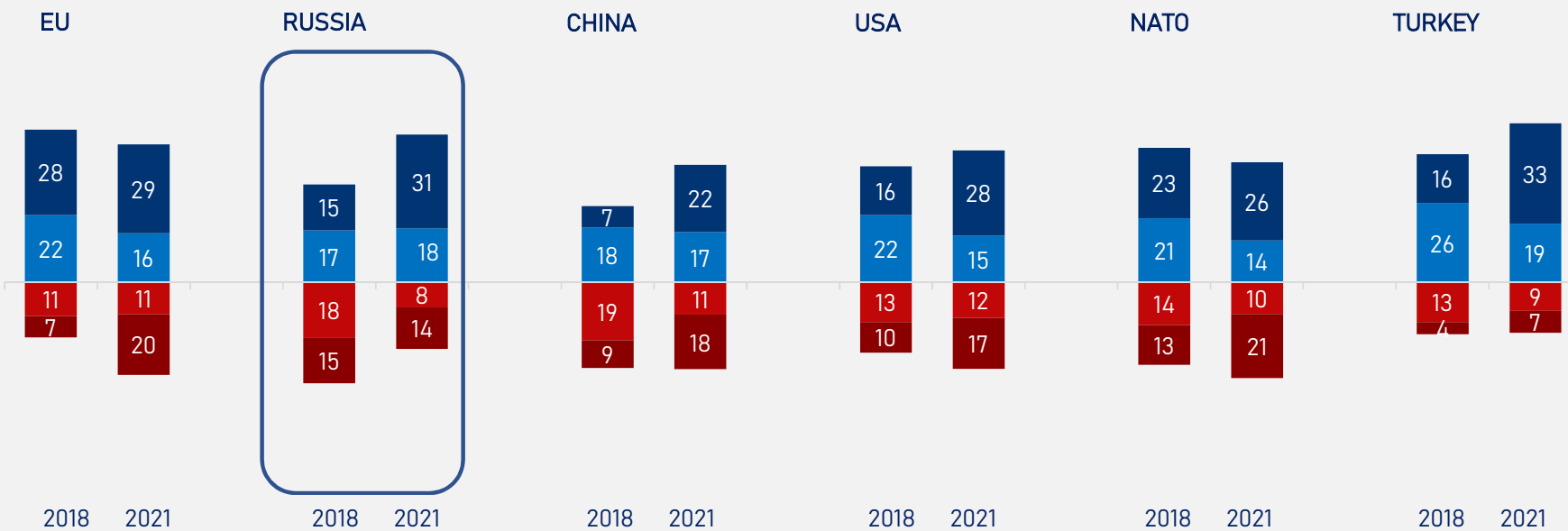
NORTH MACEDONIA

FAVORABILITY RATINGS IMPROVE FROM 2018 TO 2021, EXCEPT FOR EU AND NATO

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

Total: Favorable

Total: Unfavorable



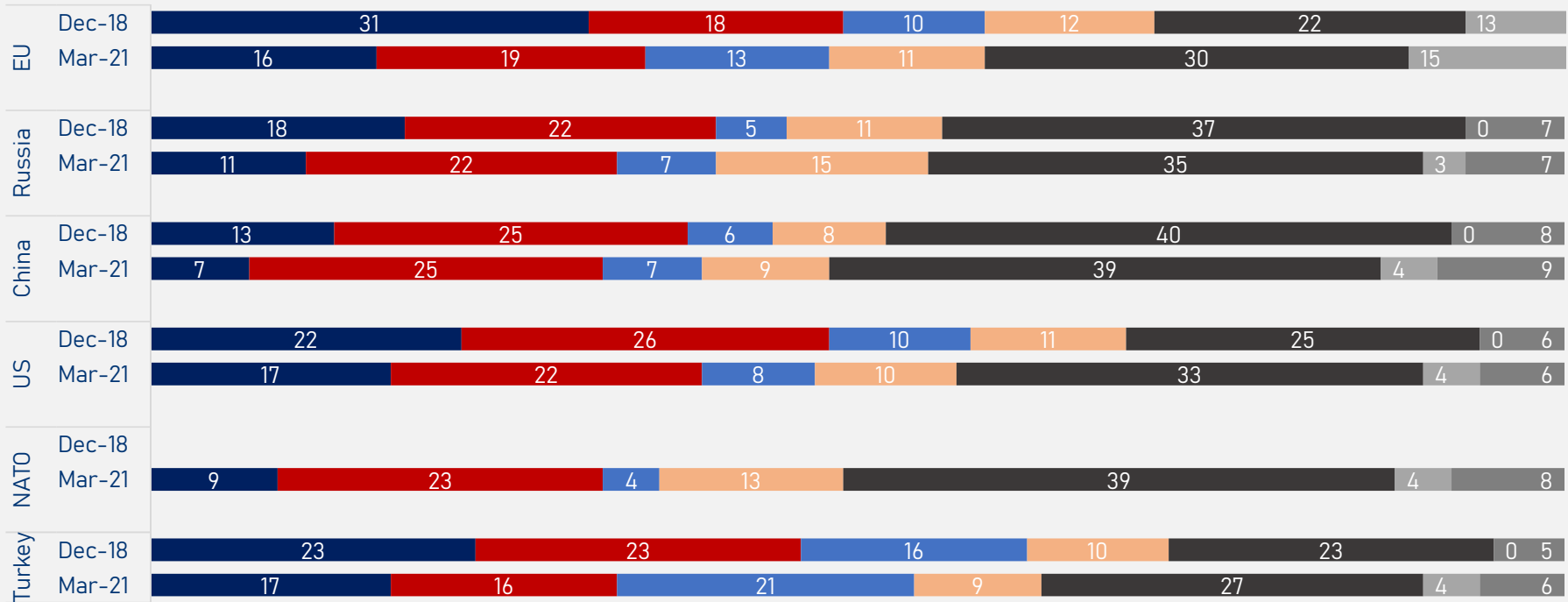
EU, U.S., NATO relative favorability:
18-29 y.o., Albanians, North-West,
rural, consumers of Alsat, MTV2,
voters of DUI, Alijansa za Albancite

Russia/China relative favorability:
ethnic Macedonians, secondary
educated, Eastern part, consumers of
Alfa, Sitel, Kanal 5, VMRO DPMNE voters

NORTH MACEDONIA: MOST CITIZENS REPORT NO EXTERNAL INFLUENCE ON OPINION FORMATION

What influenced your opinion about the following states the most?

■ Microenvironment ■ Media ■ Travel ■ Opinion Makers ■ No one ■ Other ■ DK/RA

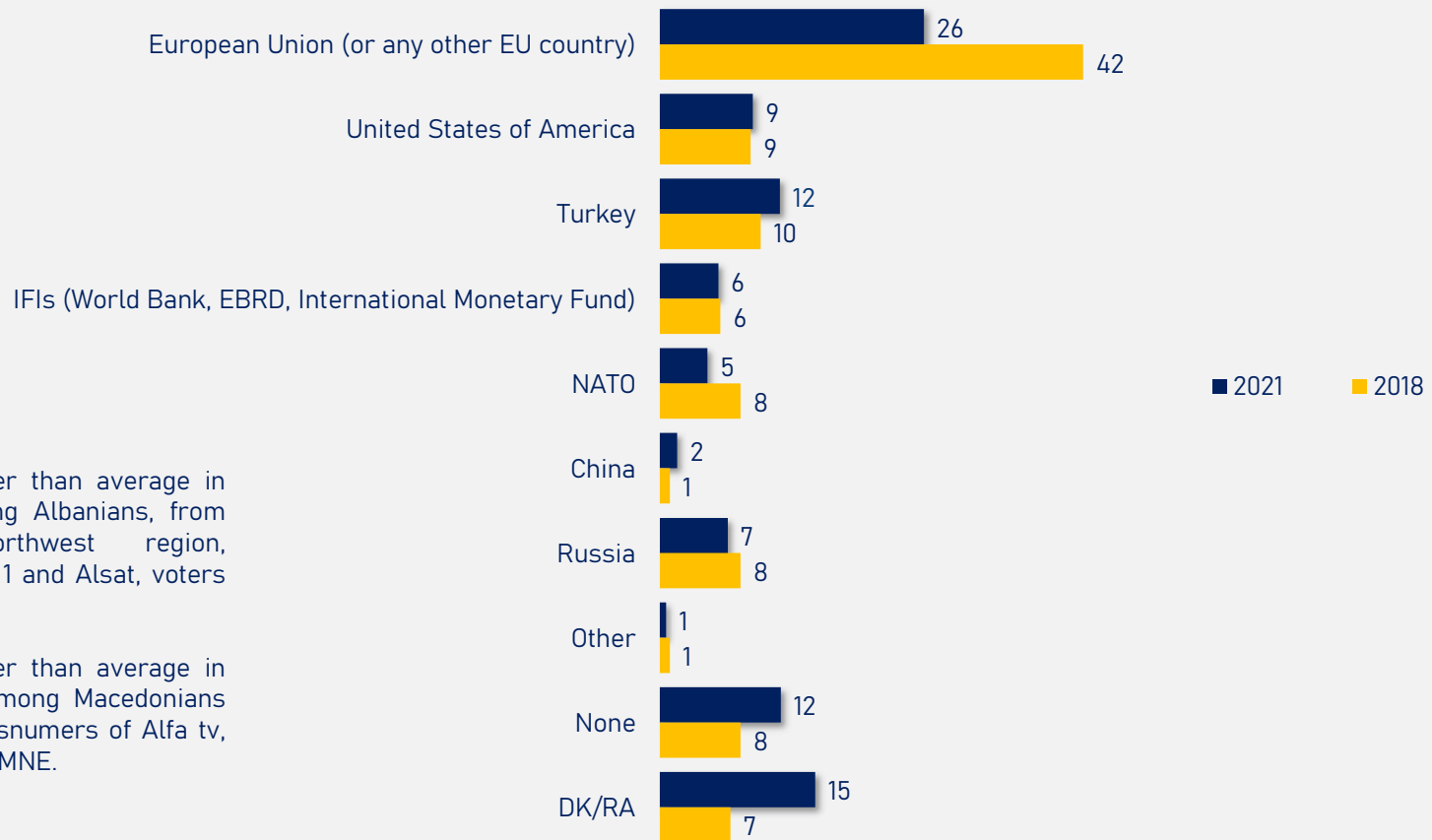


BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA

SIGNIFICANT DROP IN PERCEPTION OF THE EU AS MOST SUPPORTIVE

In your opinion, which state or international institution supports your country the most?

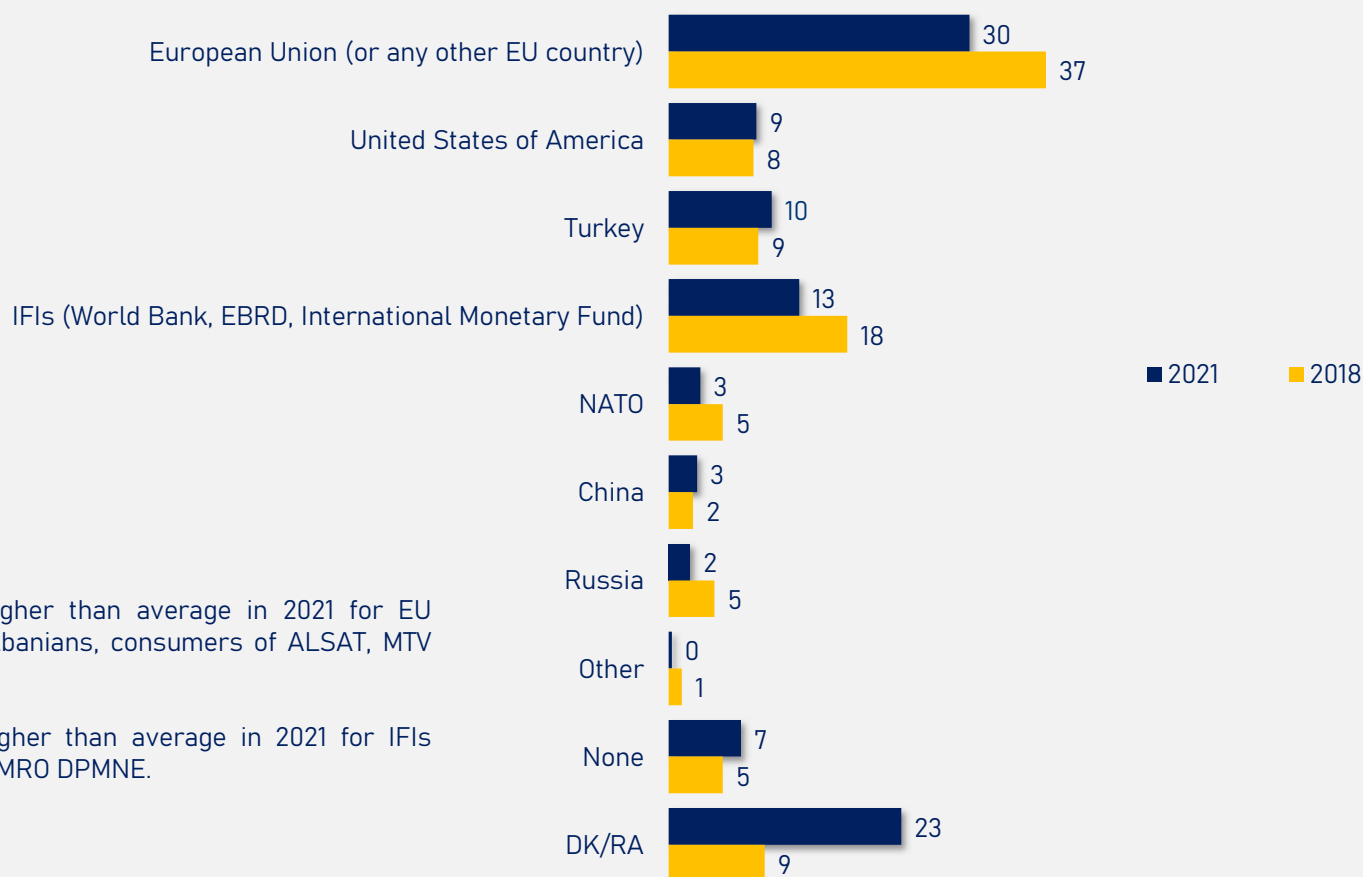


Favorable is higher than average in 2021 for EU among Albanians, from the rural Northwest region, consumers of Mtv 1 and Alsat, voters of SDSM.

Favorable is higher than average in 2021 for Russia among Macedonians from the East, consumers of Alfa tv, voters of VMRO DPMNE.

NORTH MACEDONIA: SIGNIFICANT DROP IN PERCEPTION OF THE EU AS THE STRONGEST FINANCIAL SUPPORTER

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

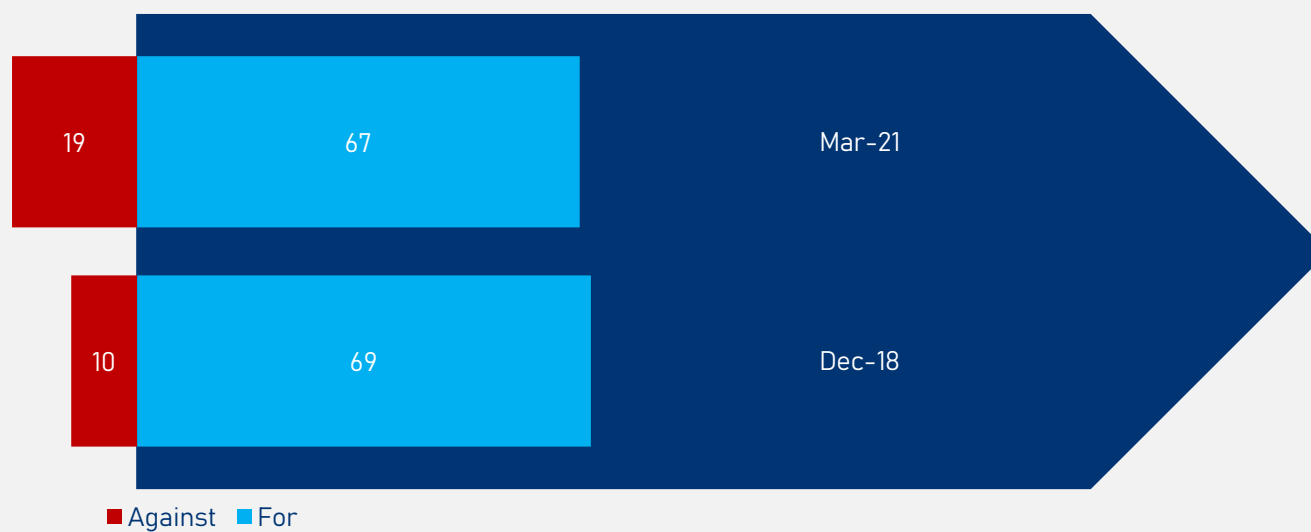


Favorable is higher than average in 2021 for EU among male, Albanians, consumers of ALSAT, MTV 2.

Favorable is higher than average in 2021 for IFIs among MTV 2, VMRO DPMNE.

NORTH MACEDONIA: INCREASE OF OPPOSITION TO EU MEMBERSHIP

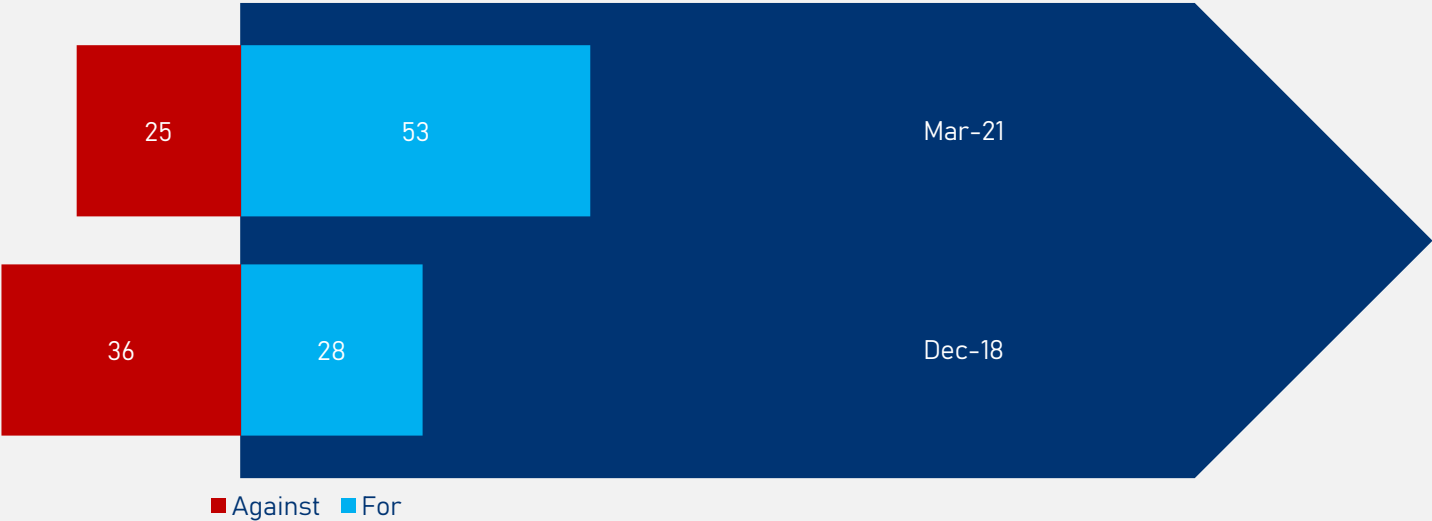
If the referendum for EU membership was held this Sunday, how would you vote?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: SIGNIFICANT INCREASE IN FAVORING EEU MEMBERSHIP

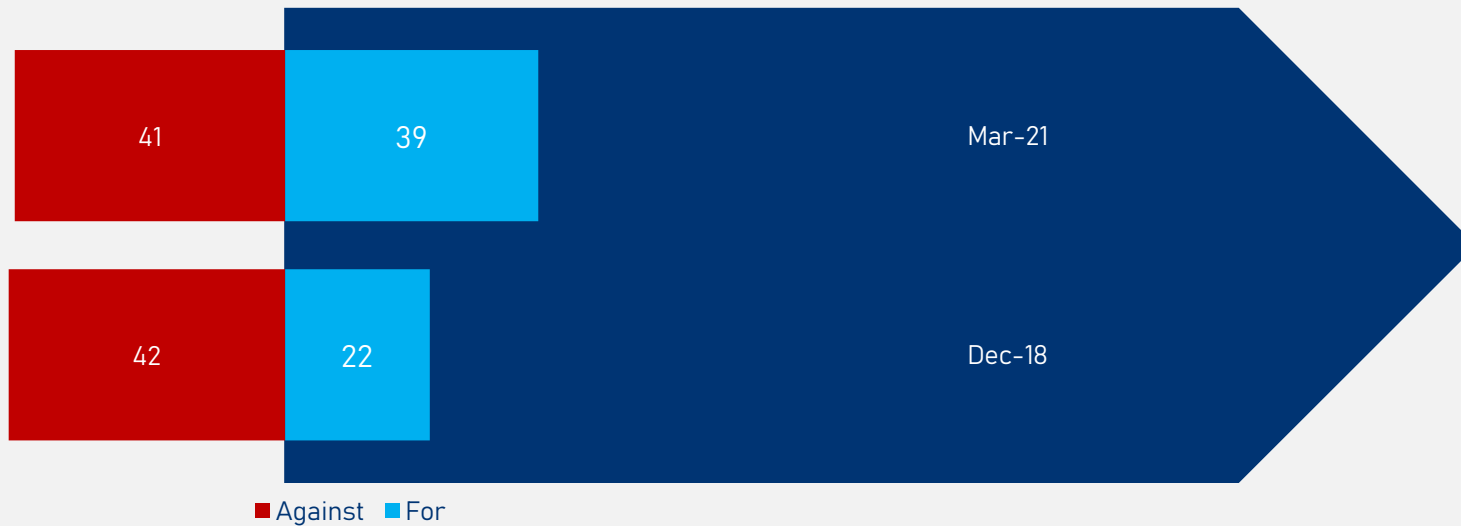
If the referendum for membership in Eurasian Economic Union (political and economic association led by Russia) were held this Sunday, how would you vote?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: INCREASED PREFERENCE OF SUPPORT FOR EEU MEMBERSHIP OVER RELATIONS WITH THE EU

If the referendum for the membership in Eurasian Economic Union (political and economic association led by Russia) were held this Sunday, but joining Eurasian Economic Union also means spoiling/ruining relationship with the EU, how would you vote?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: EU PATH STILL PREFERRED OVER GOOD RELATIONS WITH RUSSIA

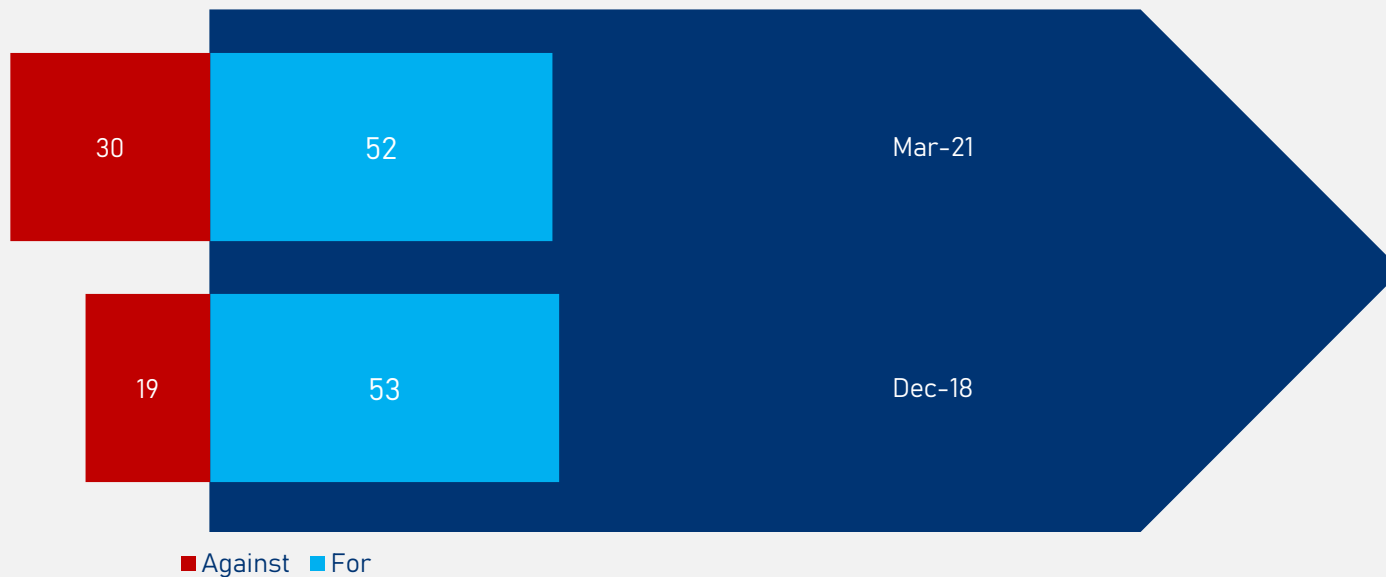
Which of the following two options is more acceptable to you personally?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: INCREASED OPPOSITION TO EU MEMBERSHIP OVER SPOILING RELATIONS WITH RUSSIA

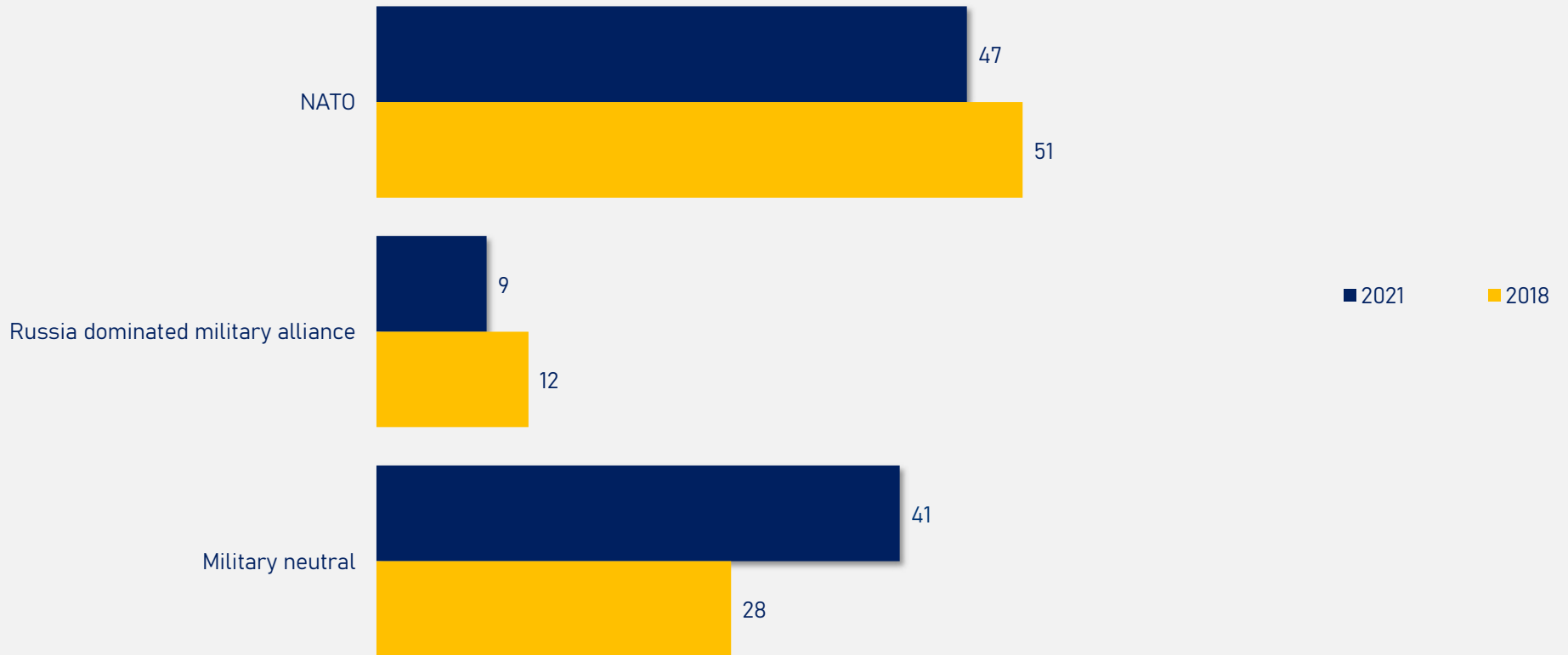
If the referendum for EU membership were held this Sunday, but joining the EU means also spoiling/ruining the relationship with Russia, how would you vote?



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NORTH MACEDONIA: PREFERENCE FOR MILITARY NEUTRALITY INCREASED

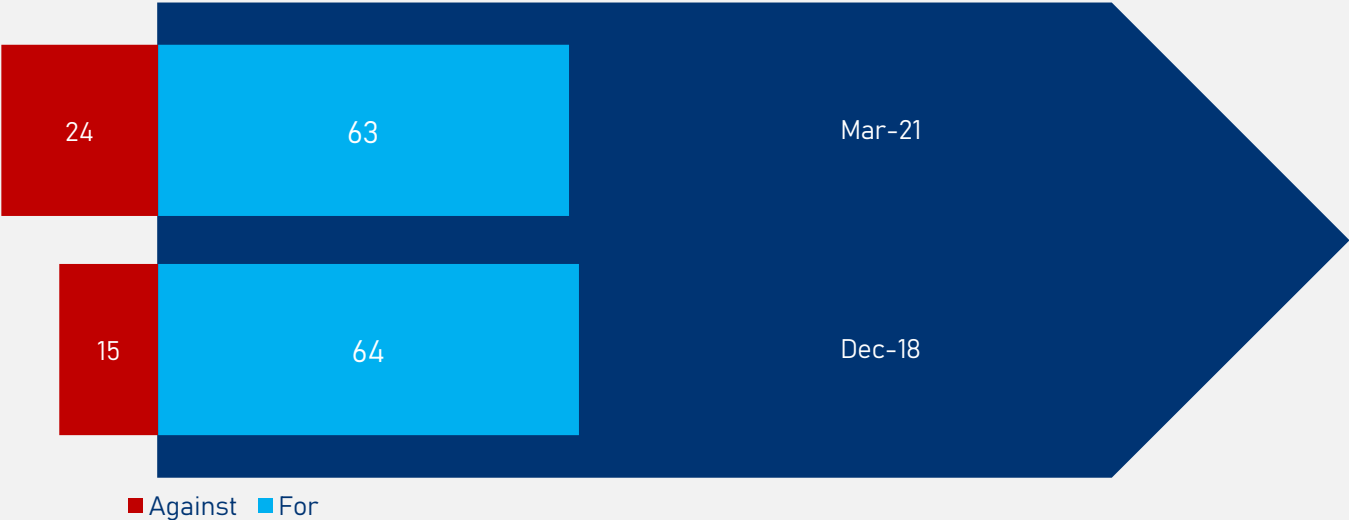
Where do you see country being part of?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: INCREASE OF OPPOSITION TO NATO MEMBERSHIP

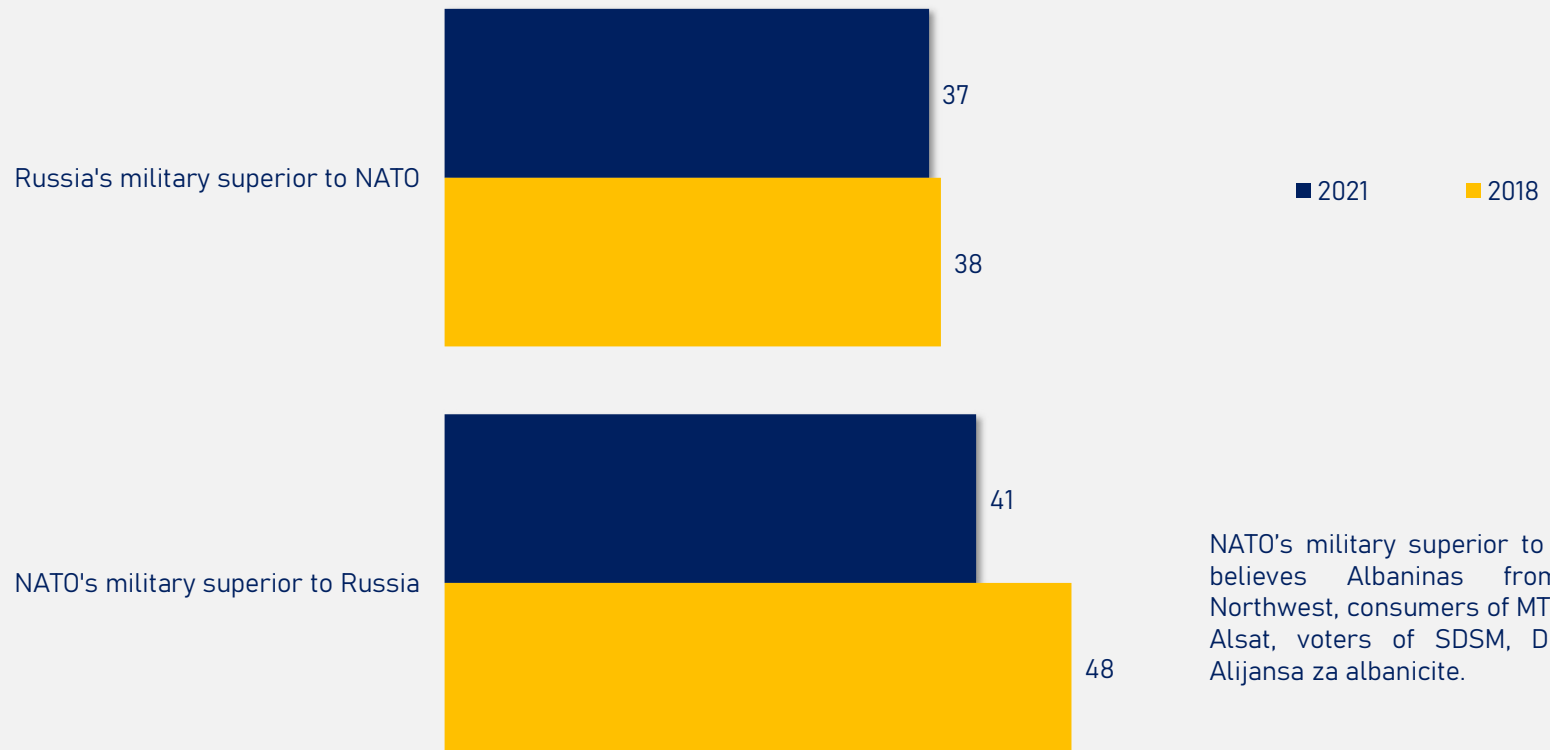
Despite the fact that your country is already a member of NATO, if the referendum for NATO membership were held this Sunday, how would you vote?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: PERCEPTION OF NATO'S MILITARY SUPERIORITY OVER RUSSIA DECREASED

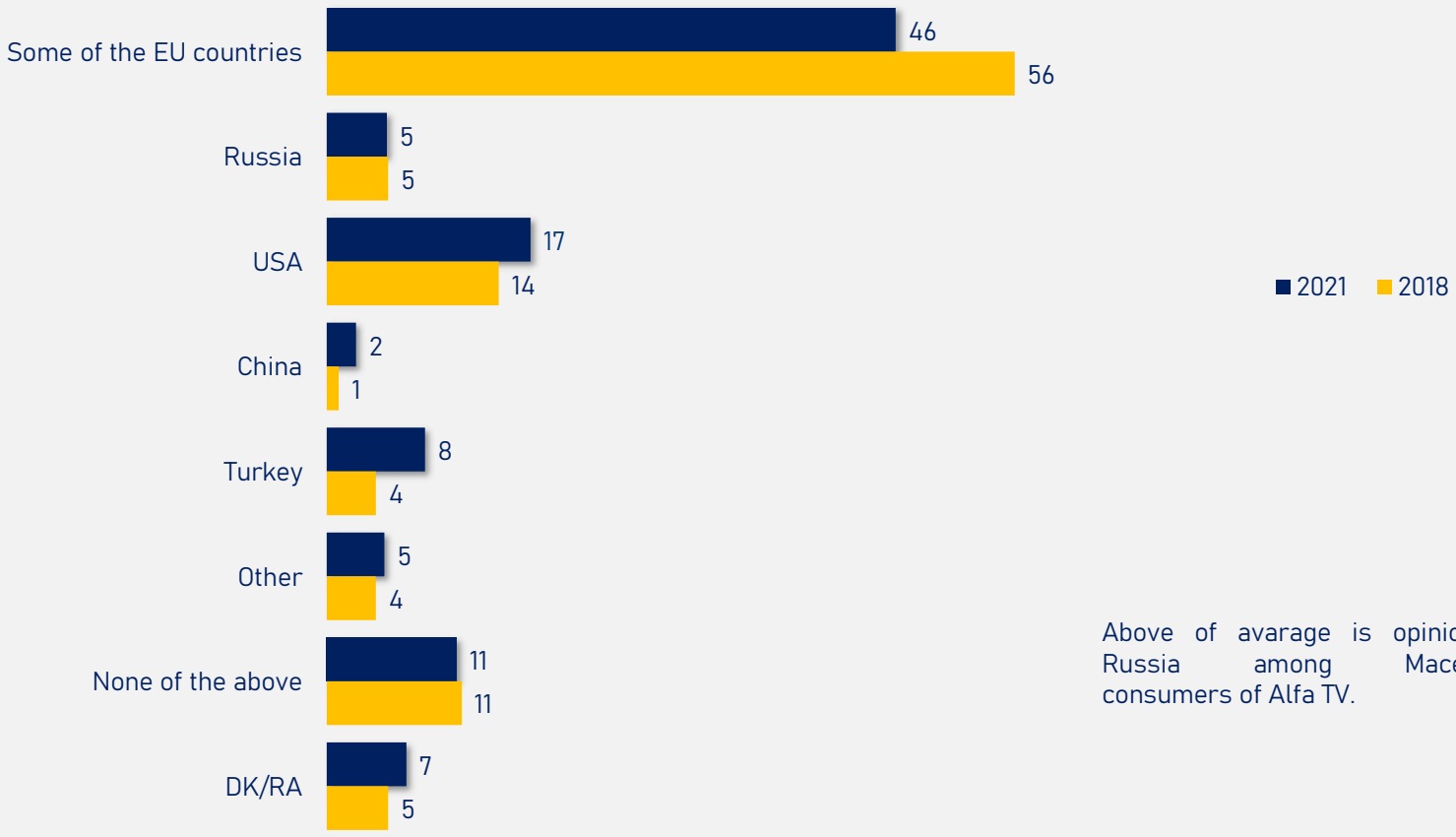
To what extent do you agree with the following statements?



NATO's military superior to Russia believes Albanians from the Northwest, consumers of MTV 2 and Alsat, voters of SDSM, DUI and Alijansa za albanicite.

NORTH MACEDONIA: CITIZENS STILL SEE THE FUTURE OF THEIR CHILDREN IN THE WEST

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

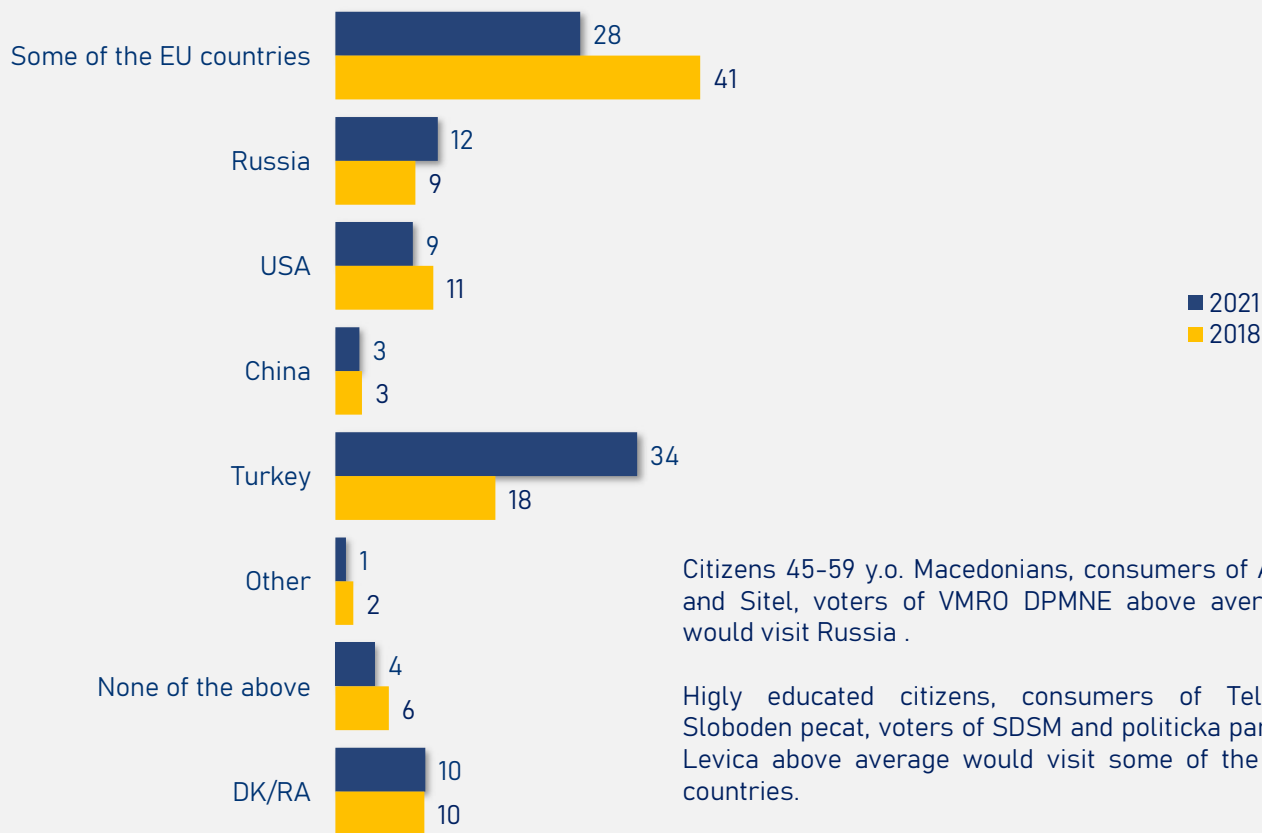


Above of average is opinion about Russia among Macedonians, consumers of Alfa TV.

BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: PREFERENCE OF THE WEST FOR THE MEDICAL TREATMENT DROPPED

Assuming you don't want to stay in your own country, If you or your family member needed a medical treatment or a surgery, which of these countries would you visit first?



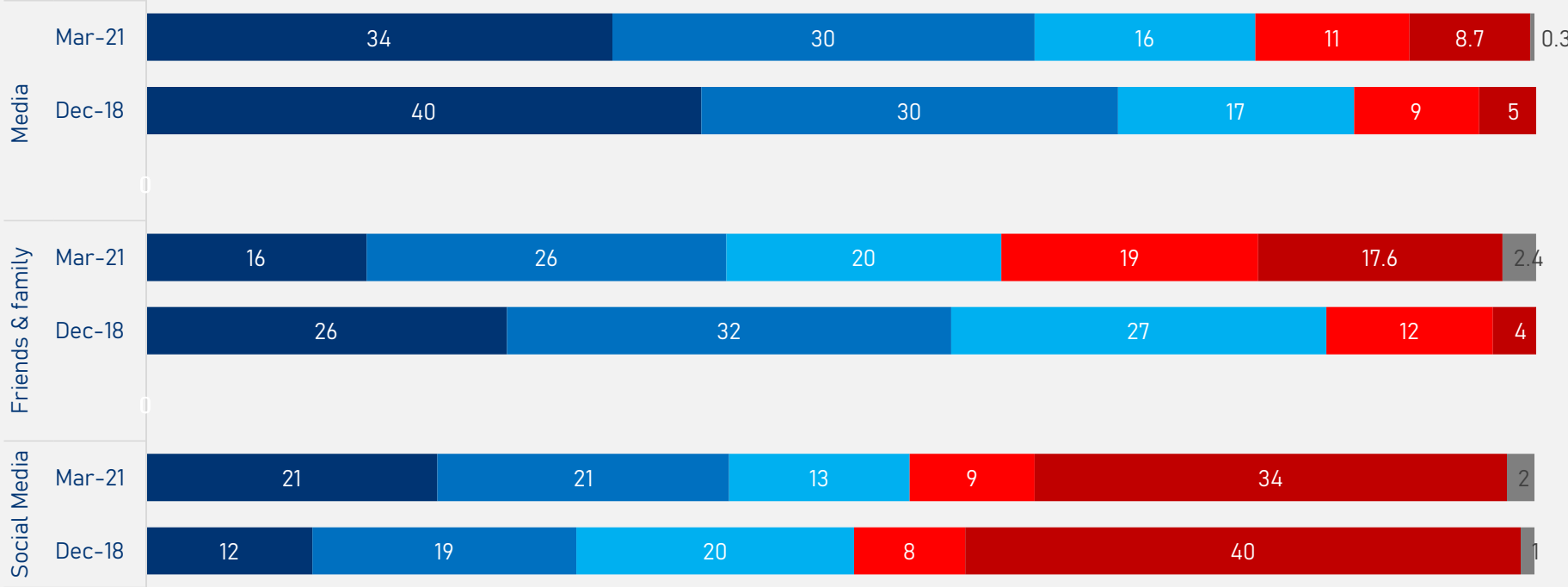
BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

MEDIA AND INFORMATION

NORTH MACEDONIA: FRIENDS AND FAMILY ARE VERY IMPORTANT NEWS SOURCE ALTHOUGH NEGATIVELY IMPACTED BY COVID-19

How often do you get your news from the following sources?

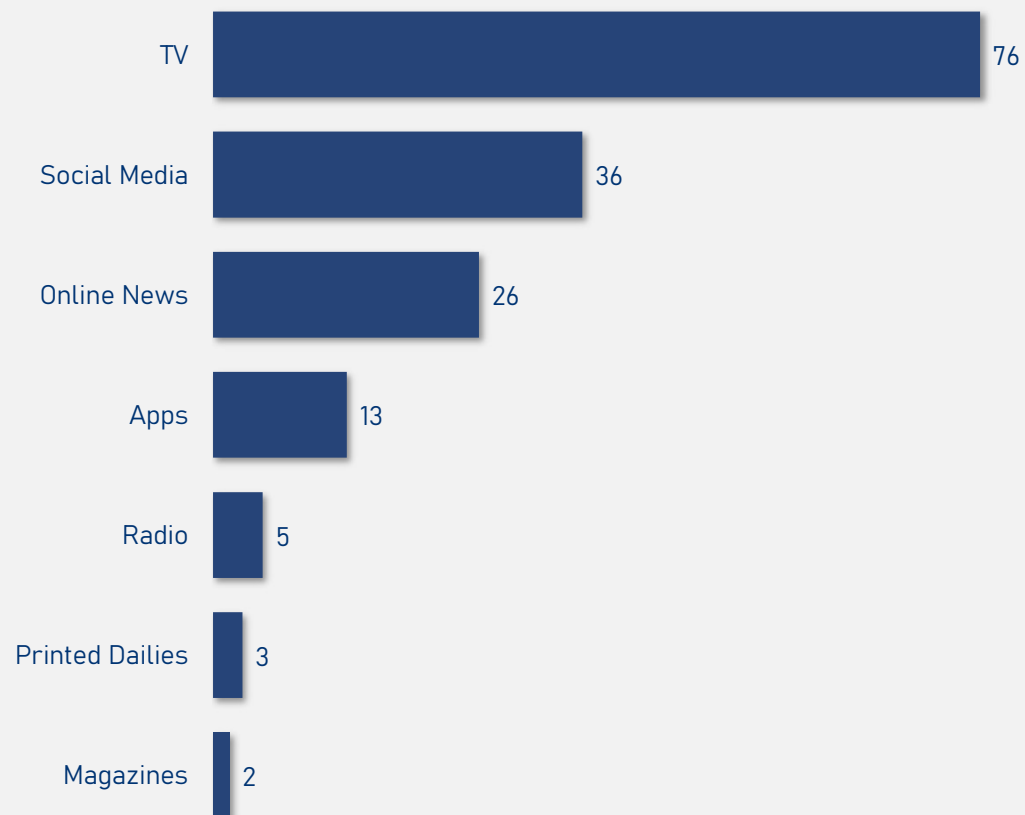
Legend: Usually (Dark Blue), Often (Medium Blue), Sometimes (Light Blue), Rarely (Red), Never (Dark Red), DK (Grey)



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: TV IS THE DOMINANT MEDIUM

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

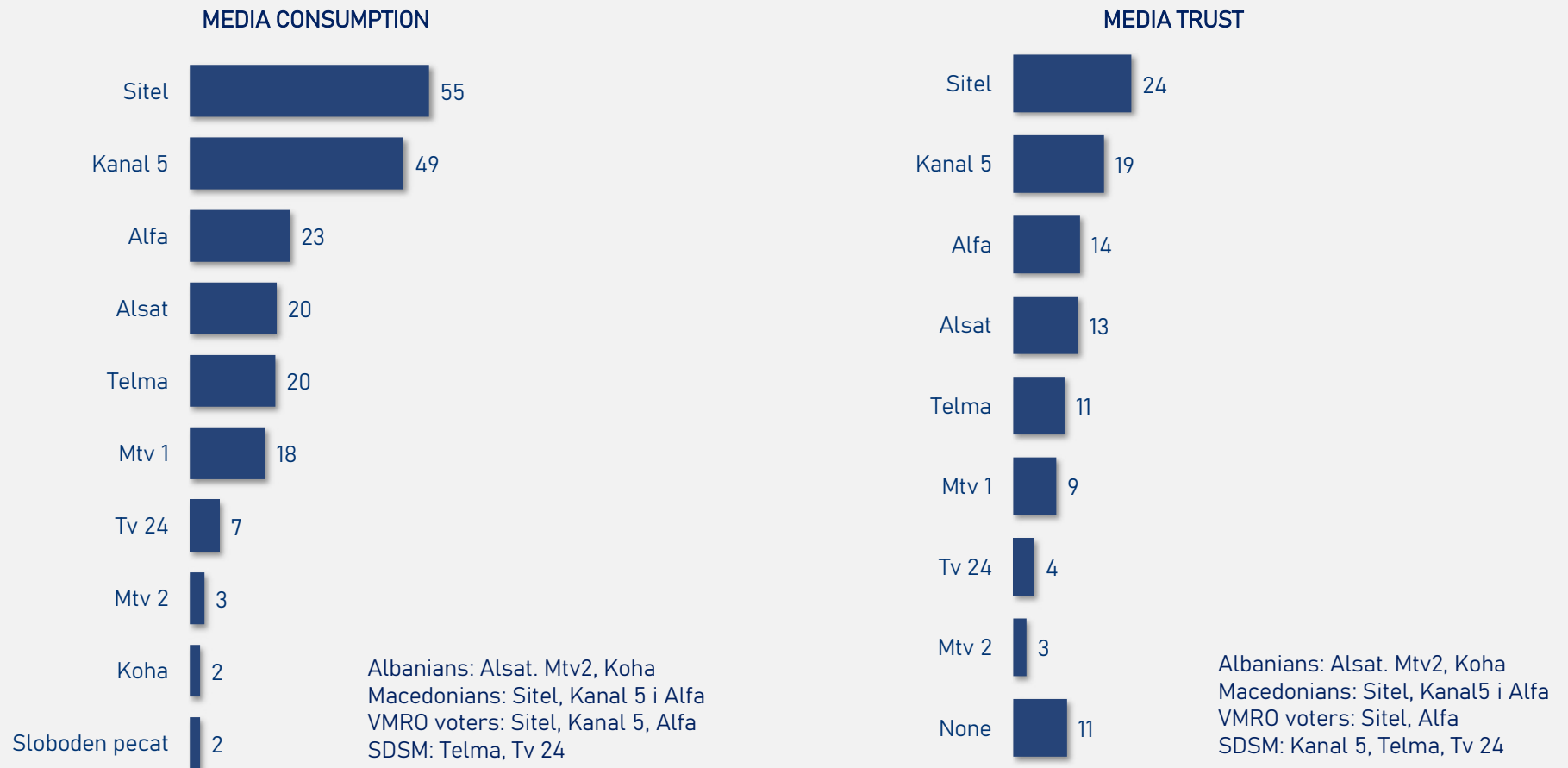


Analysis

TV is most important news source for 60+ (94%).

NORTH MACEDONIA: GAP BETWEEN CONSUMPTION AND TRUST

What are the first three media you consume to get informed about social, political, economic and other similar local and global topics? Which media do you trust the most?
UP TO THREE ANSWERS



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: DOMESTIC POLITICS, ECONOMY AND SPORTS ARE THE TOPICS OF CITIZENS' INTEREST

Which of the following topics would most likely to attract your attention?



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NORTH MACEDONIA: MOST PEOPLE DISCUSS NEWS OF THEIR INTEREST WITH THEIR MICROENVIRONMENT

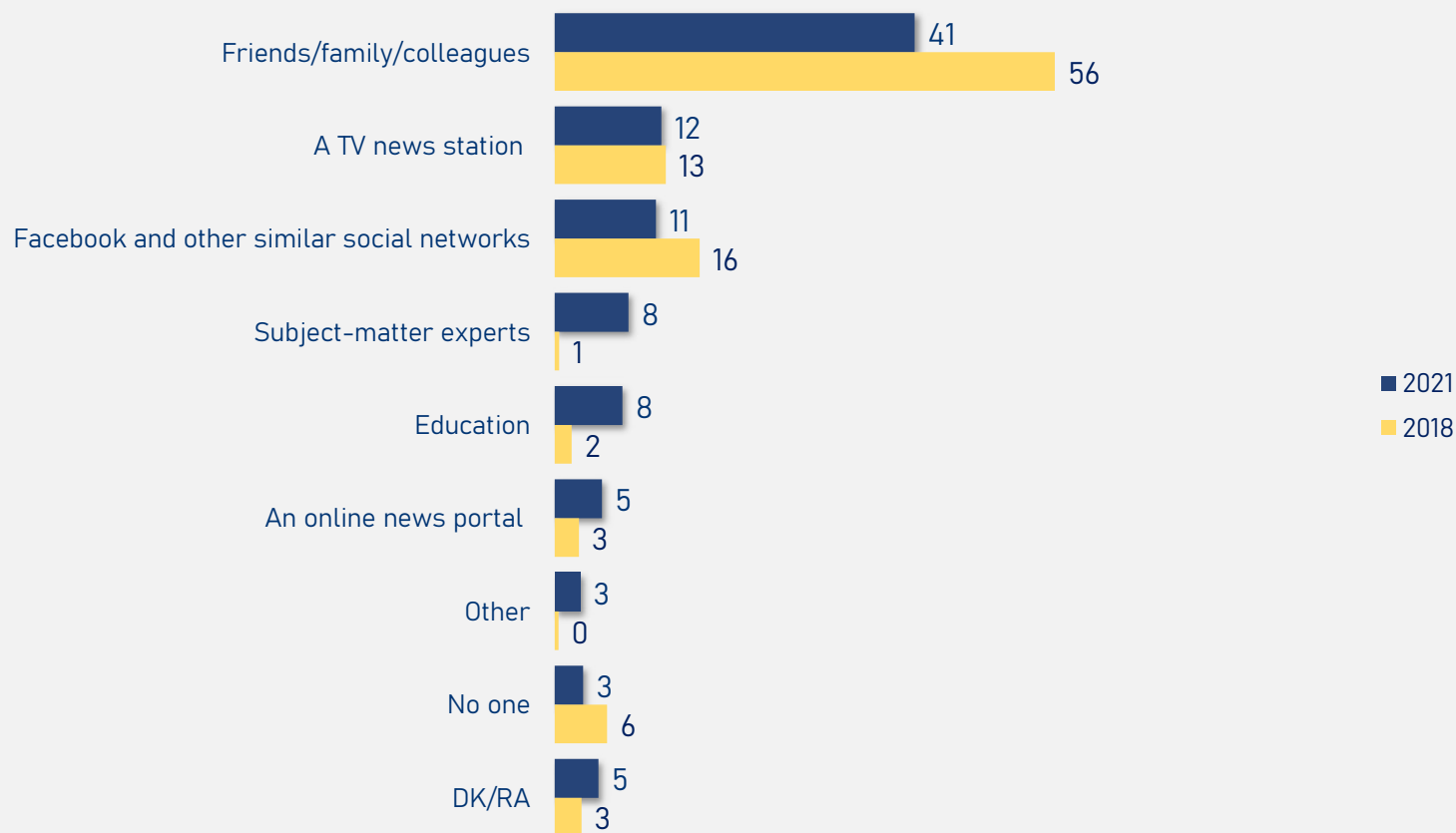
When you read some news that is of interest to you, do you follow up on this news by taking any of the listed actions?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: MICROENVIRONMENT REMAINS THE MOST USED INFORMATION VERIFICATION CHANNEL

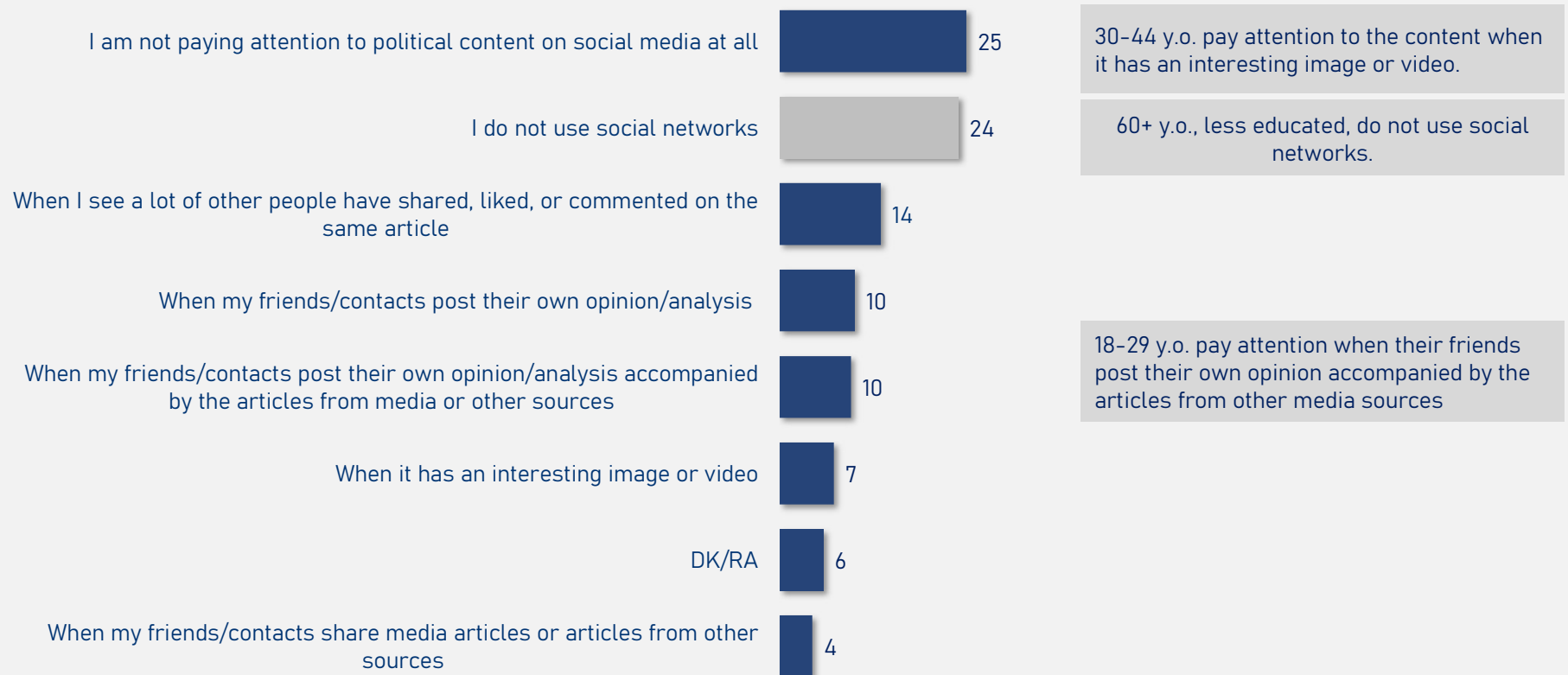
If you heard something important to you happened, where would you go first to try to find out if it was true?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: MICROENVIRONMENTS ACTIVITY ON SOCIAL MEDIA GRABS THE MOST ATTENTION

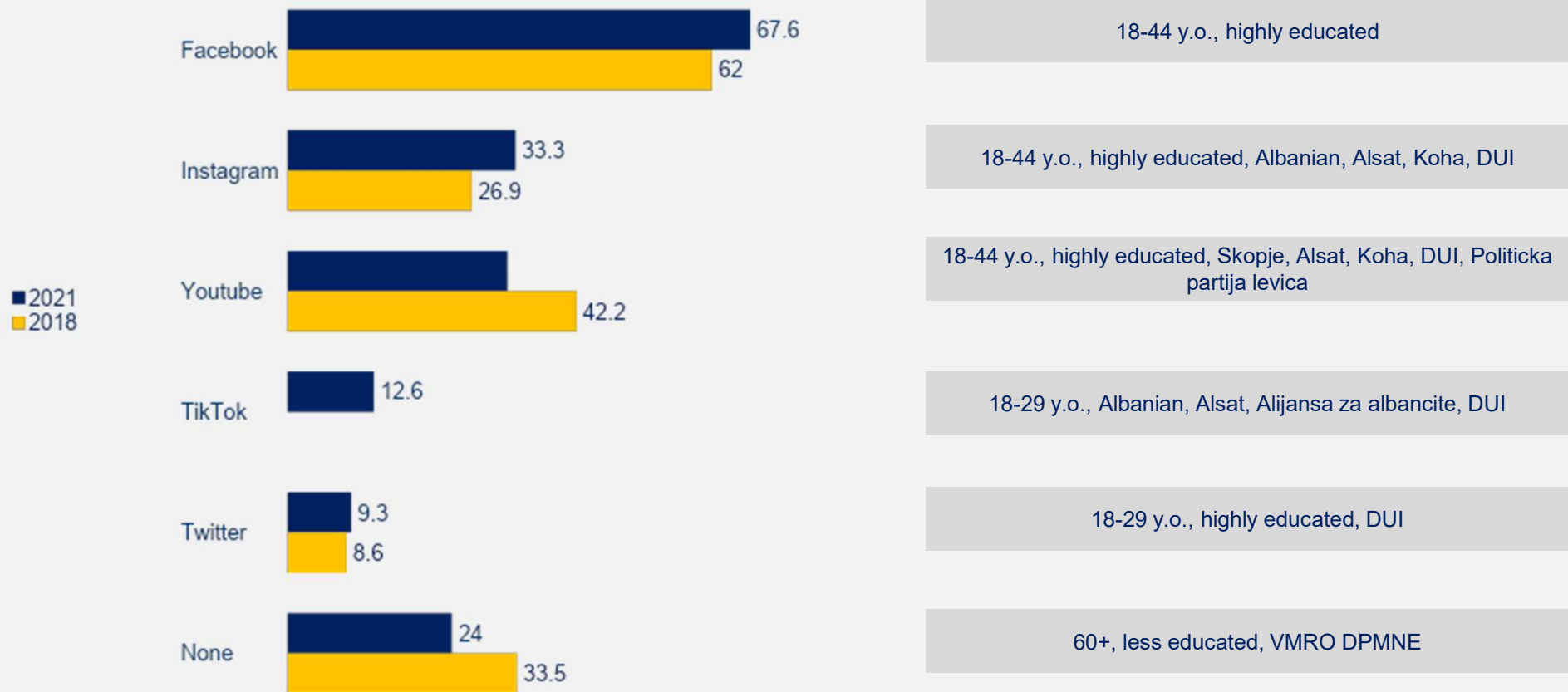
What is more likely to grab your attention on social networks?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: FACEBOOK, INSTAGRAM AND YOUTUBE ARE THE MOST USED SOCIAL MEDIA PLATFORMS

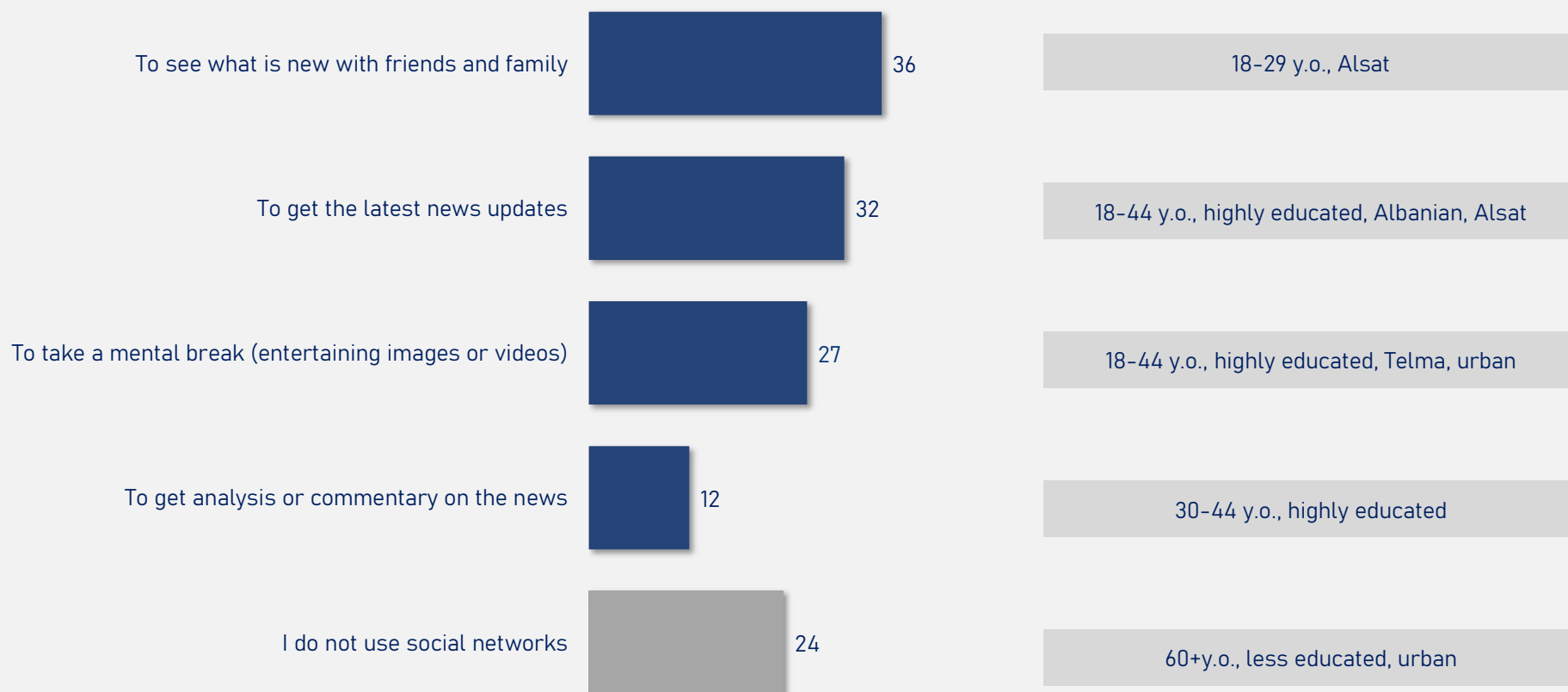
Which social media you use? –MULTIPLE ANSWERS



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NORTH MACEDONIA: SOCIAL MEDIA IS USED FOR VARIETY OF PURPOSES

For which purposes you normally use (check? log in to?) social networks for? – MULTIPLE ANSWERS



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages



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PUBLIC OPINION RESEARCH: DEMOCRACY, GEOPOLITICS, DISINFORMATION

North Macedonia

August 2021