

# SOCIO-POLITICAL OPINION RESEARCH REPORT

JUNE 2020

CONDUCTED BY  
THE NATIONAL DEMOCRATIC INSTITUTE – NORTH MACEDONIA  
TEAM INSTITUTE AND STARR OPINION RESEARCH



THIS RESEARCH REPORT WAS PREPARED BY THE NATIONAL DEMOCRATIC INSTITUTE – NORTH MACEDONIA (NDI), TEAM INSTITUTE AND STARR OPINION RESEARCH. THE VIEWS EXPRESSED IN THIS REPORT DO NOT NECESSARILY REFLECT THE VIEWS OF NDI.



# EXECUTIVE SUMMARY

## ✓ **The public mood has turned pessimistic.**

A sizable segment of voters shifted their outlook for North Macedonia from neutral to pessimistic. In March, 30% said the country was headed in the right direction, 35% were neutral and 33% said North Macedonia was headed in the wrong direction. In June, 29% indicated right direction, 26% were neutral (loss of nine percentage points) and 44% wrong direction (increase in 11 percentage points).

## ✓ **Economic concerns are top-of-mind.**

After three months of withstanding the pandemic, citizens' primary concerns are now focused on the economy and, to a lesser degree, governance (i.e. Rule of Law, Justice), at levels similar to before the pandemic. Compared to March, more citizens' surveyed report that people's lives have gotten worse in the past three years. Nearly four in ten (38%) feel lives in North Macedonia have gotten worse, a 14-point increase from March; 21% say it has gotten a lot worse, a 10-point jump from March. Among ethnic Albanians, the percentage feeling things are worse tripled, from 13% in March to 36% in June.

# EXECUTIVE SUMMARY

## ✓ **Little substantial political movement. The elections remain competitive.**

Traditional indicators of levels of trust in institutions and favorability of political parties and politicians have generally not changed from their previous low March levels. The parliamentary ballot tests remain competitive between the two coalitions. This is consistent with the high levels that said in March they would not change their selection.

More than eight in ten who selected a party (82%) said they were certain with their vote, and 13% said they might change their mind. Among the most supported parties, 83% of VMRO supporters were firm in their decision, 87% for the SDSM BESA coalition, 85% for DUI and 82% for Alliance for Albanians and Alternativa.

## ✓ **Political participation remains high, but trust in the electoral process has waned.**

Nearly seven in ten citizens (69%) plan to vote in the elections, despite the health concerns, with 40% saying they will definitely vote. However, fewer than half of citizens (46%) are confident the upcoming election will be free and fair, a drop in six points from 52% in March. Four in ten (42%) lack confidence, with nearly one in four (23%) not confident at all. Of those who lack confidence in the election, three in ten (29%) cited pressures, manipulations and forgery as the reason.

# EXECUTIVE SUMMARY

## ✓ **Disinformation remains a concern for voters.**

Broad concern (57%, similar to the 54% in March) remains that disinformation can impact the election. Eighteen (18%) are very concerned, similar to the 15% who felt this way in March.

Nine in ten citizens (90%) reported being exposed to disinformation, similar to the rate reported in March. Television remains the leading source (68% said they were exposed to it). Since March, there has been an increase in social media, from 45% to 53%, and web sites, from 21% to 28%.

## ✓ **Support for Euroatlantic integration remains strong.**

Support for joining NATO remains strong with 74% supportive and 18% opposed. More than eight in ten adult citizens of North Macedonia (84%) were aware the country joined NATO. Of the 84% aware of the news, 69% said it made them more hopeful for the country and 13% said it made them less hopeful.

Citizens remain strongly supportive of North Macedonia joining the EU. Eight in ten citizens of North Macedonia (79%) support joining the EU, and 57% strongly support this move. Citizens are most drawn to the future *economic* benefits of joining the EU.

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# **I. RESEARCH METHODOLOGY**

# RESEARCH METHODOLOGY – TRACKING STUDY

## QUANTITATIVE RESEARCH: SURVEY OF REPRESENTATIVE SAMEPLE OF 1,213 RESPONDENTS

RESEARCH METHODOLOGY	QUANTITATIVE: Face to Face (F2F) Computer-Aided Personal Interviewing (CAPI)	QUANTITATIVE: Face to Face (F2F) Computer-Aided Personal Interviewing (CAPI)
Time Frame	February 26 to March 5, 2020	June 12 to June 21, 2020
Population	Citizens of the Republic of North Macedonia, aged 18 years and older	Citizens of the Republic of North Macedonia, aged 18 years and older
Sample Design	Nationally representative, multistage stratified sample of 1,212 respondents aged 18+. Households are distributed proportionally in urban and rural areas and by ethnicity in all eight regions of the country.	Nationally representative, multistage stratified sample of 1,213 respondents aged 18+. Households are distributed proportionally in urban and rural areas and by ethnicity in all eight regions of the country.
Sample Size	1,212 respondents Estimated margin of error of $\pm 2.81$ percentage points at the 95% level of confidence	1,213 respondents Estimated margin of error of $\pm 2.81$ percentage points at the 95% level of confidence
Research Team	Interviewer network of 45 interviewers and 10 regional supervisors	Interviewer network of 50 interviewers and 10 regional supervisors
Average Length of Interview	25 minutes	18 minutes
Special Procedures		All the interviewers were given a protocol with safety measures to employ to conduct research during COVID-19.
Weighting	Data is weighted according to 4 variables: gender, age, ethnicity and statistical regions, SSO, 2013	Data is weighted according to 4 variables: gender, age, ethnicity and statistical regions, SSO, 2013



# NOTES

- ✓ The **estimated margin of sampling error** for the survey is  $\pm 2.81$  percentage points at the 95% confidence interval.
  - Meaning: If the same survey is conducted **100 times**, we expect that in **95** of those surveys the responses would **fall somewhere within our margin of sampling error**.
  - **The margin of error will be larger among subgroups of respondents**, such as among ethnic Macedonians and ethnic Albanians.
  - In looking at voting preference between the two parties, **an advantage within 5.6 percentage point is still "within the margin of error"** and therefore the party ahead may actually be behind, or tied, or may have a greater lead.
- ✓ The research provides **opinions in a point in time** and changes over time.
- ✓ All sample surveys and polls may be subject to **multiple sources of error**, including, but not limited to sampling error, coverage error, and measurement error.
- ✓ Due to the **rounding of numbers**, the sum of the percentages may not always be 100.

# OBJECTIVES OF THE PROGRAM

- ✓ The goal of this program is to promote citizens' input into the development of political party electoral strategies and platforms ahead of the 2020 parliamentary elections
- ✓ The objective of the survey is to identify and track broader social and political trends of all citizens of North Macedonia

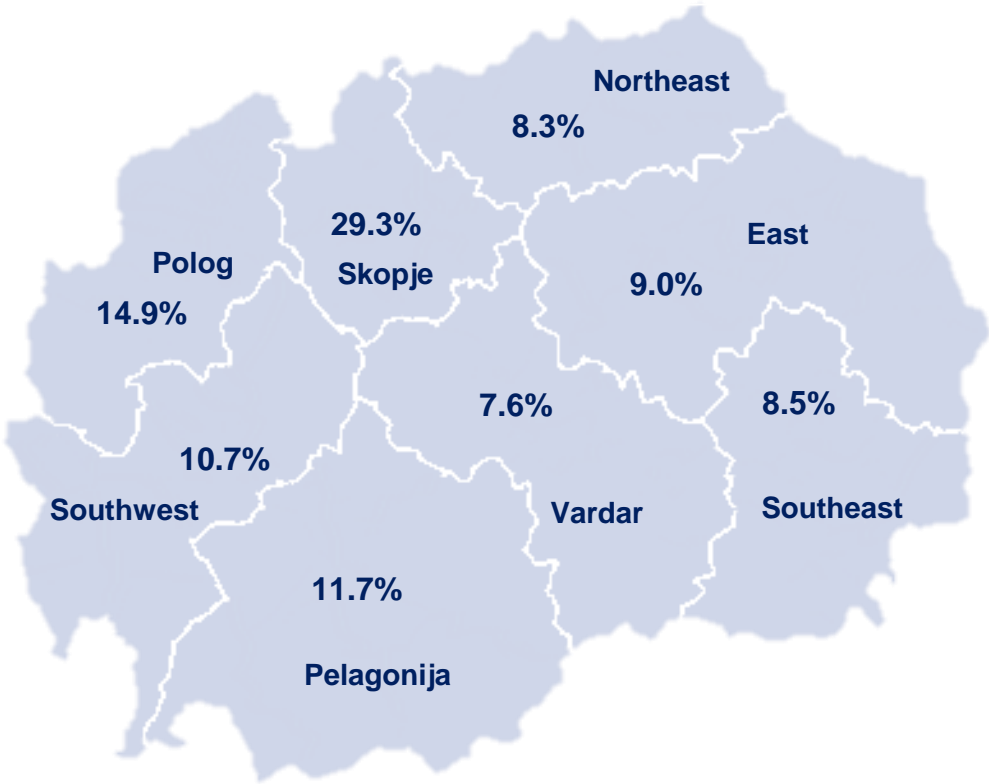
# POLITICAL CONTEXT

- **26 February:** First case of COVID-19 confirmed in the Republic of North Macedonia.
- **18 March:** The President of North Macedonia proclaimed a state of emergency, the first time since its independence.
- **22 March:** Parliamentary elections scheduled for April 12 are officially postponed by a governmental decree.
- **25 March:** The European Council decided to take the next step in opening EU accession negotiations with North Macedonia.
- **27 March:** North Macedonia joined NATO as its 30<sup>th</sup> member.
- **10 June:** DUI's President Ali Ahmeti announced that they are proposing a concept for a first Albanian Prime Minister.
- **15 June:** The President of the Republic of North Macedonia Stevo Pendarovski proclaimed a state of emergency for eight days, i.e. until 22 June, after the political parties reached an agreement to hold elections on July 15. Proclaimed Election Day will be a non-working day for all citizens of the Republic of North Macedonia.
- **18 June:** Verdicts were reached in the "Extortion" (racket) case, with Bojan Jovanovski sentenced to 9 years in prison, and Katica Janeva to 7 years.
- **24 June:** Official start of the parliamentary election campaign.

## **II. DEMOGRAPHICS OF RESPONDENTS**

# DEMOGRAPHICS OF RESPONDENTS

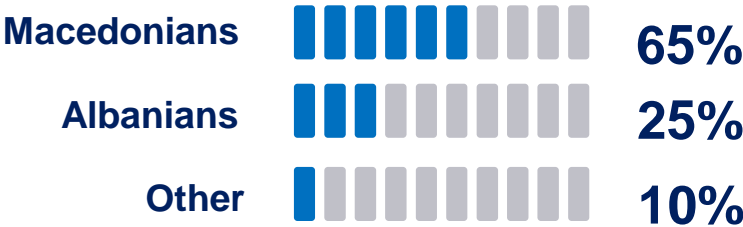
Survey Distribution by Statistical Regions



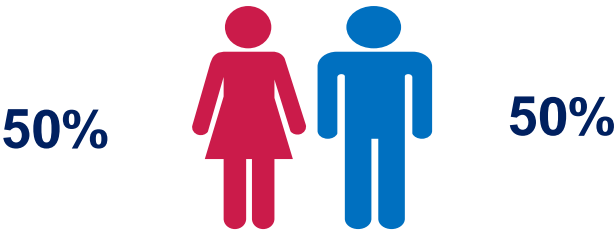
Survey Distribution by Settlement



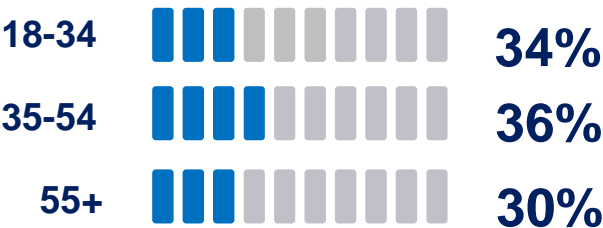
Survey Distribution by Ethnicity



Survey Distribution by Gender



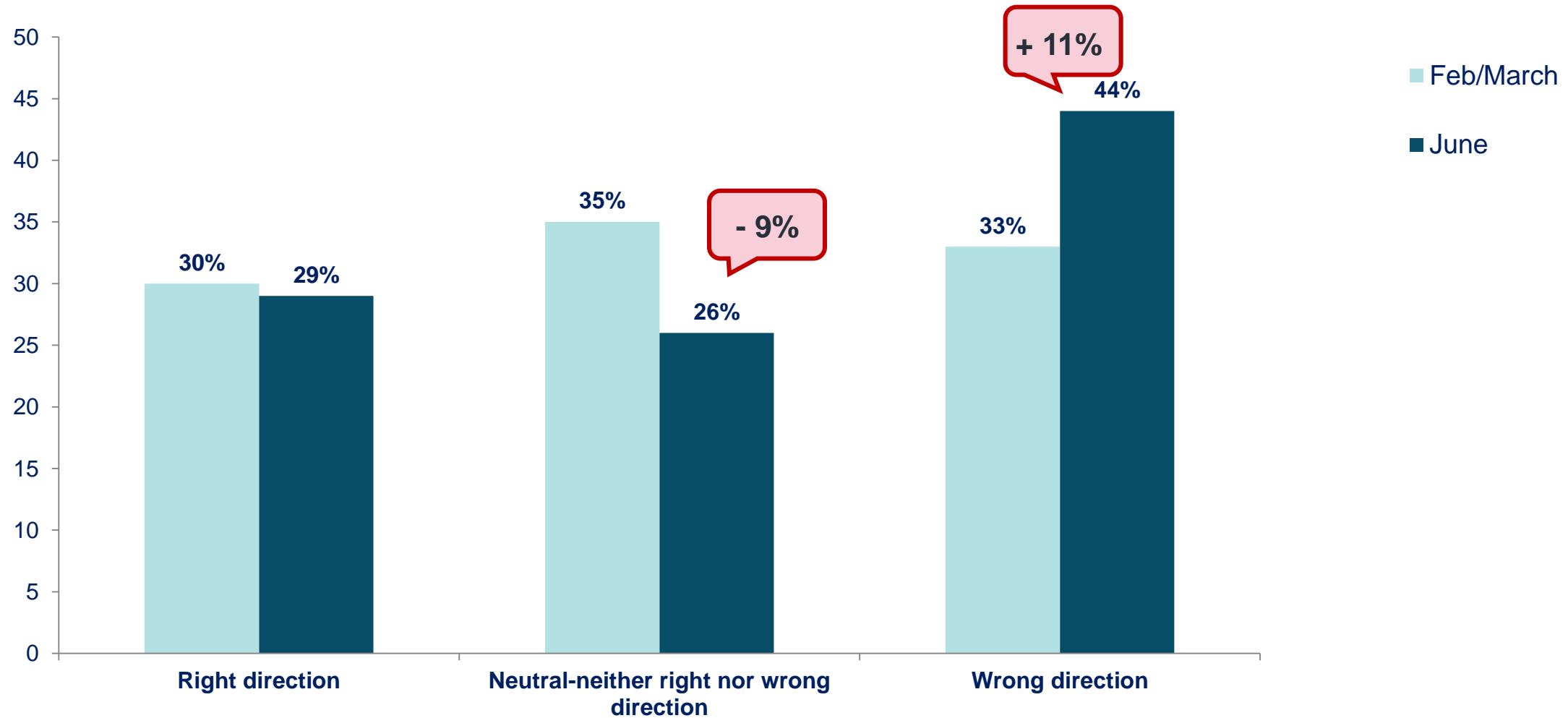
Survey Distribution by Age Groups



### **III. GENERAL OUTLOOK**

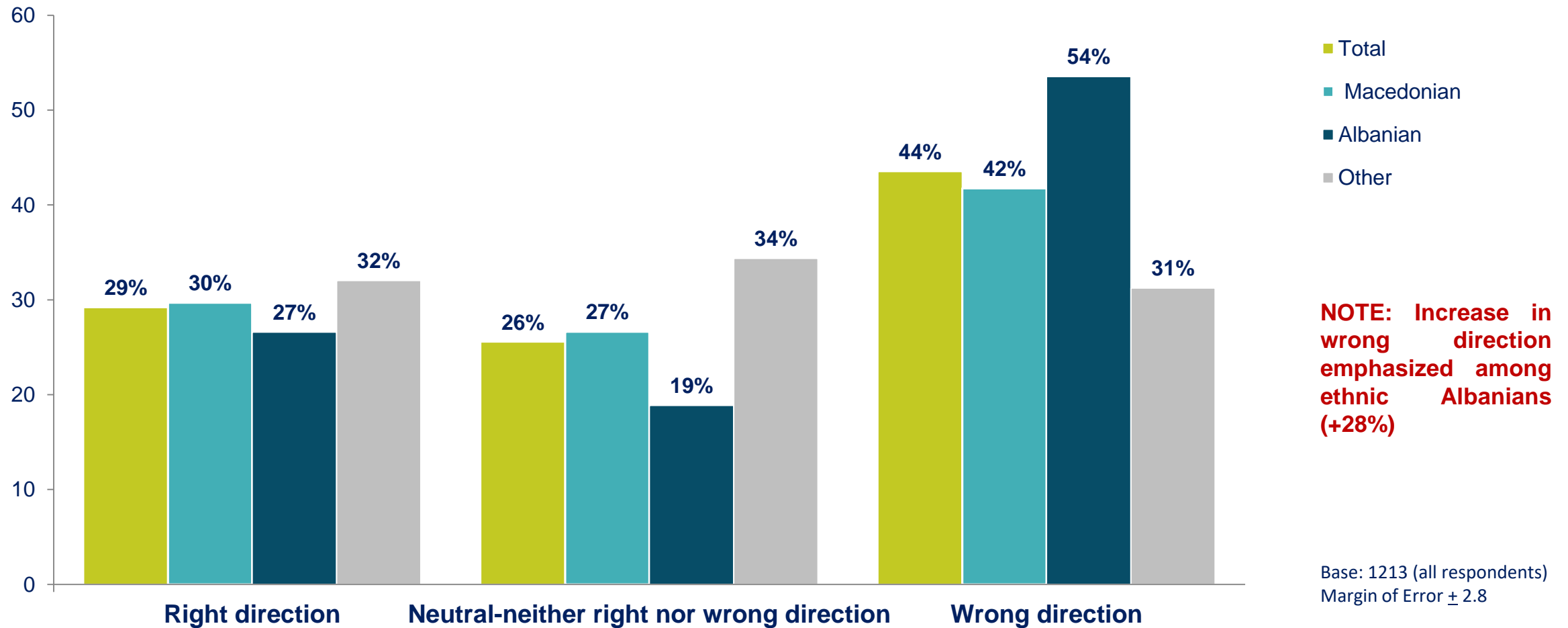
# TREND: GENERAL OUTLOOK

Overall, is the country moving in the right or wrong direction?



# GENERAL OUTLOOK

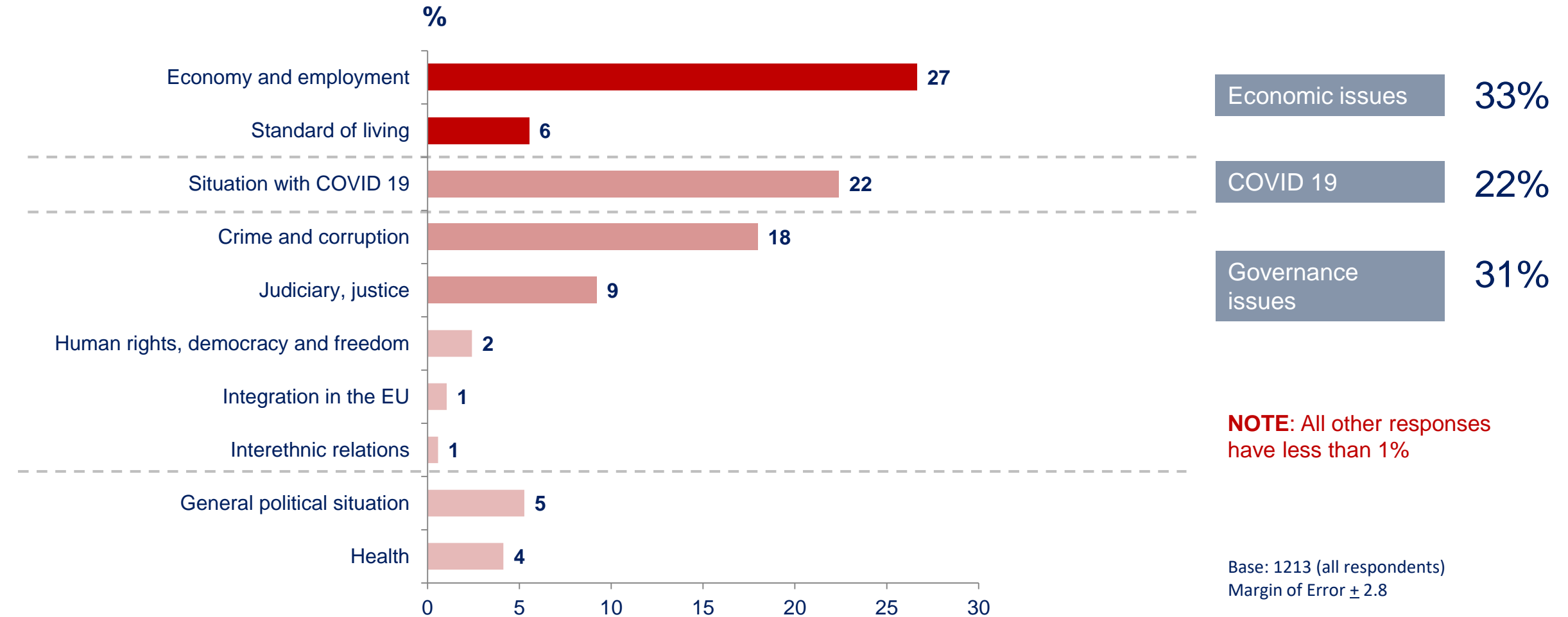
Overall, is the country moving in the right or wrong direction?





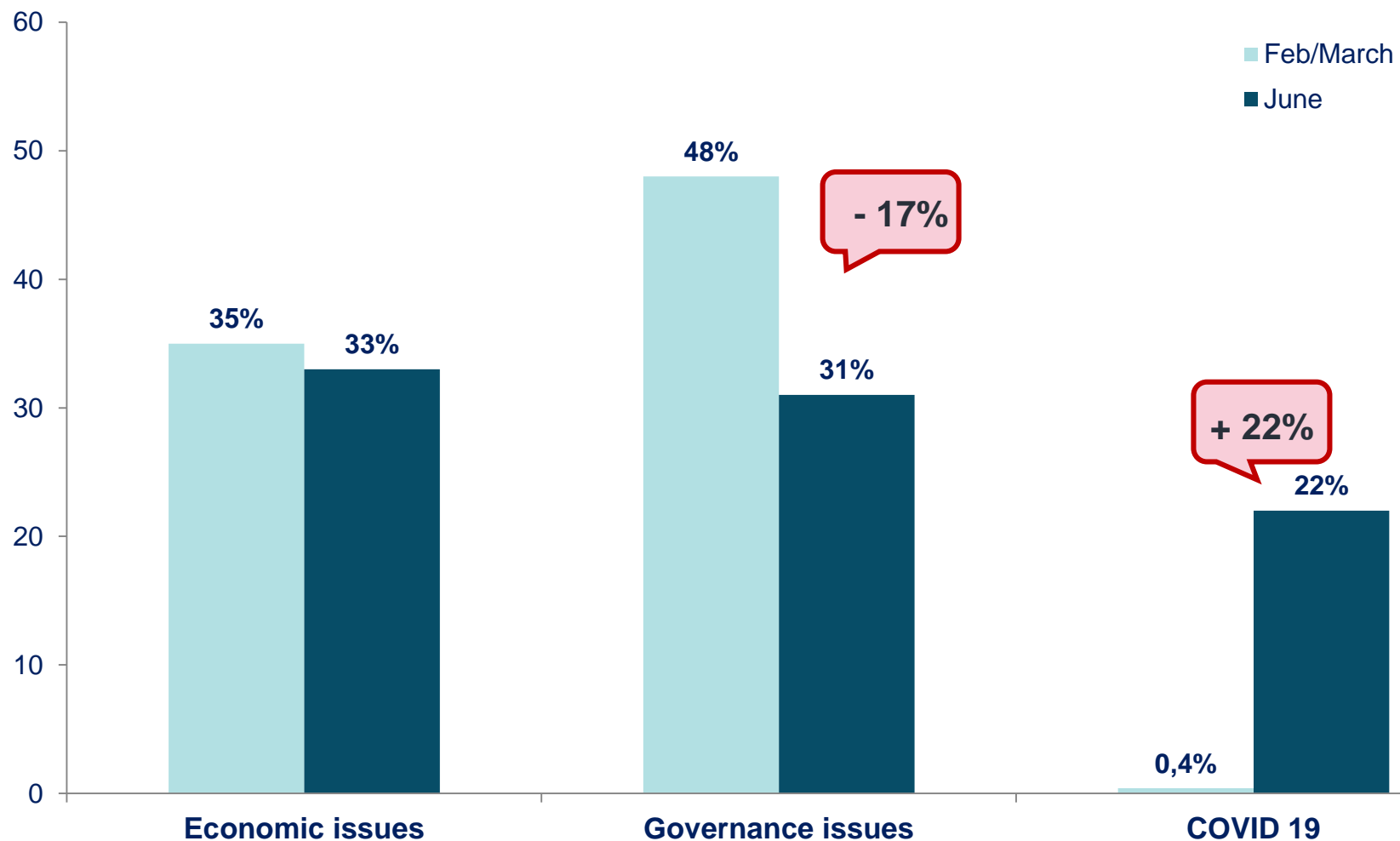
# TOP ISSUE

In your opinion, what is the MOST serious problem facing the country today?



# TREND: TOP ISSUE

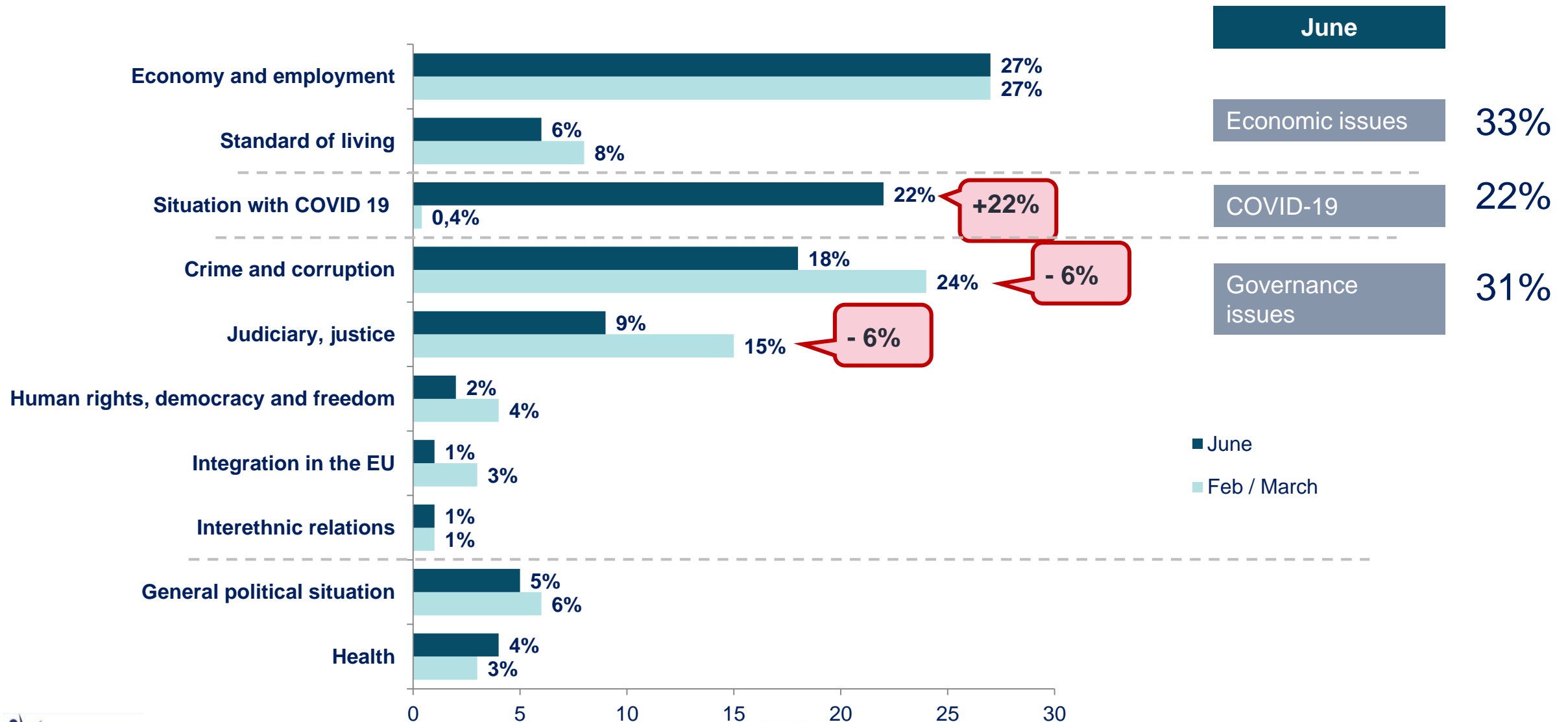
In your opinion, what is the MOST serious problem facing the country today?



**NOTE: Decrease in governance issues emphasized among ethnic Albanians**

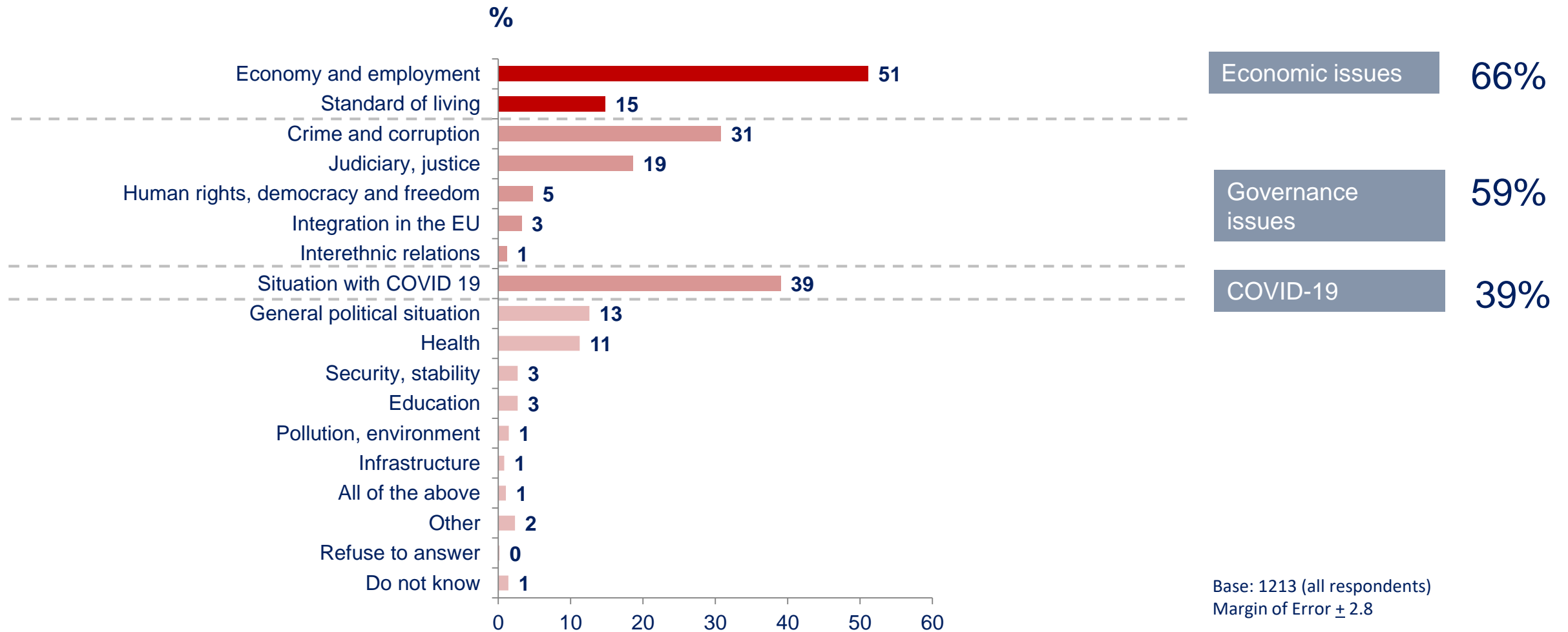
# TREND: TOP ISSUE

In your opinion, what is the MOST serious problem facing the country today?



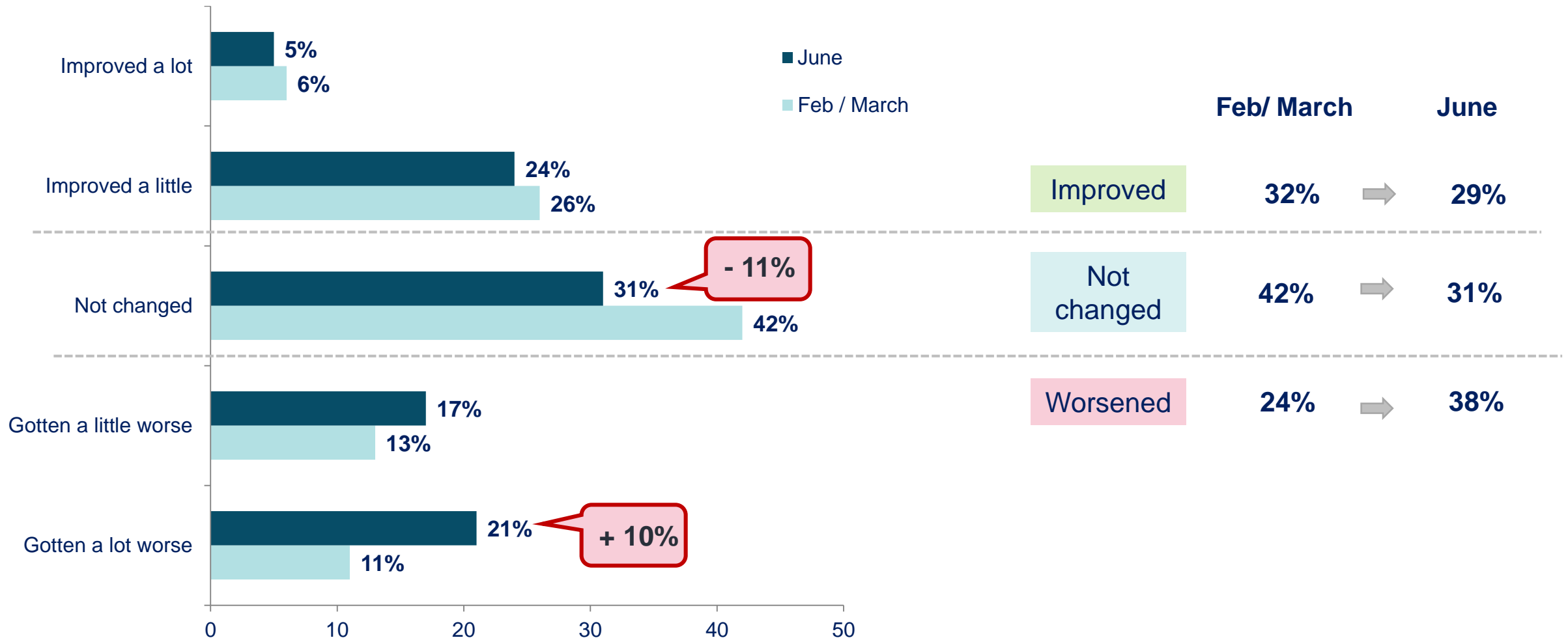
# TOP TWO ISSUES

In your opinion, what are the TWO MOST serious problems facing the country today?



# TREND: CURRENT SITUATION, AS COMPARED TO 2017

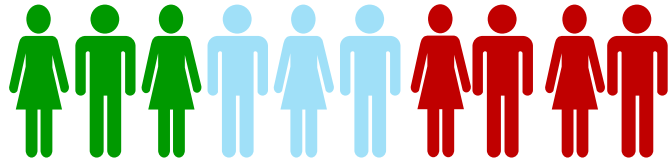
Thinking about the past three years, do you think people's lives in our country have...?



# CURRENT SITUATION, AS COMPARED TO 2017

Thinking about the past three years, do you think people's lives in our country have...?

## AMONG ETHNIC MACEDONIANS



28%

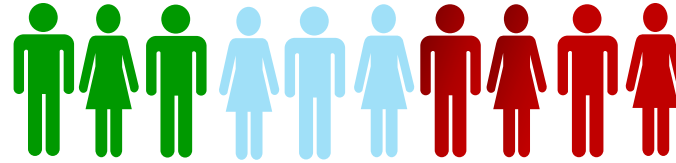
38%

Base: 788

+ 8%

**NOTE:** 8% increase for people's lives have gotten worse among ethnic Macedonians

## AMONG ETHNIC ALBANIANS



30%

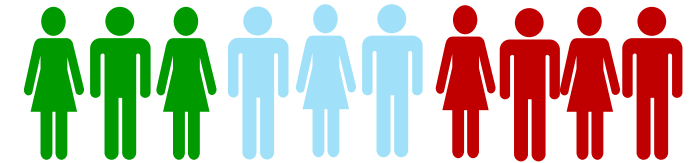
36%

Base: 298

+ 24%

**NOTE:** 24% increase for people's lives have gotten worse among ethnic Albanians

## AMONG OTHER ETHNICITIES



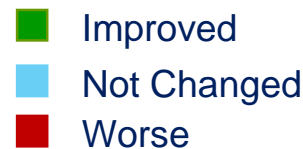
29%

39%

Base: 127

+ 21%

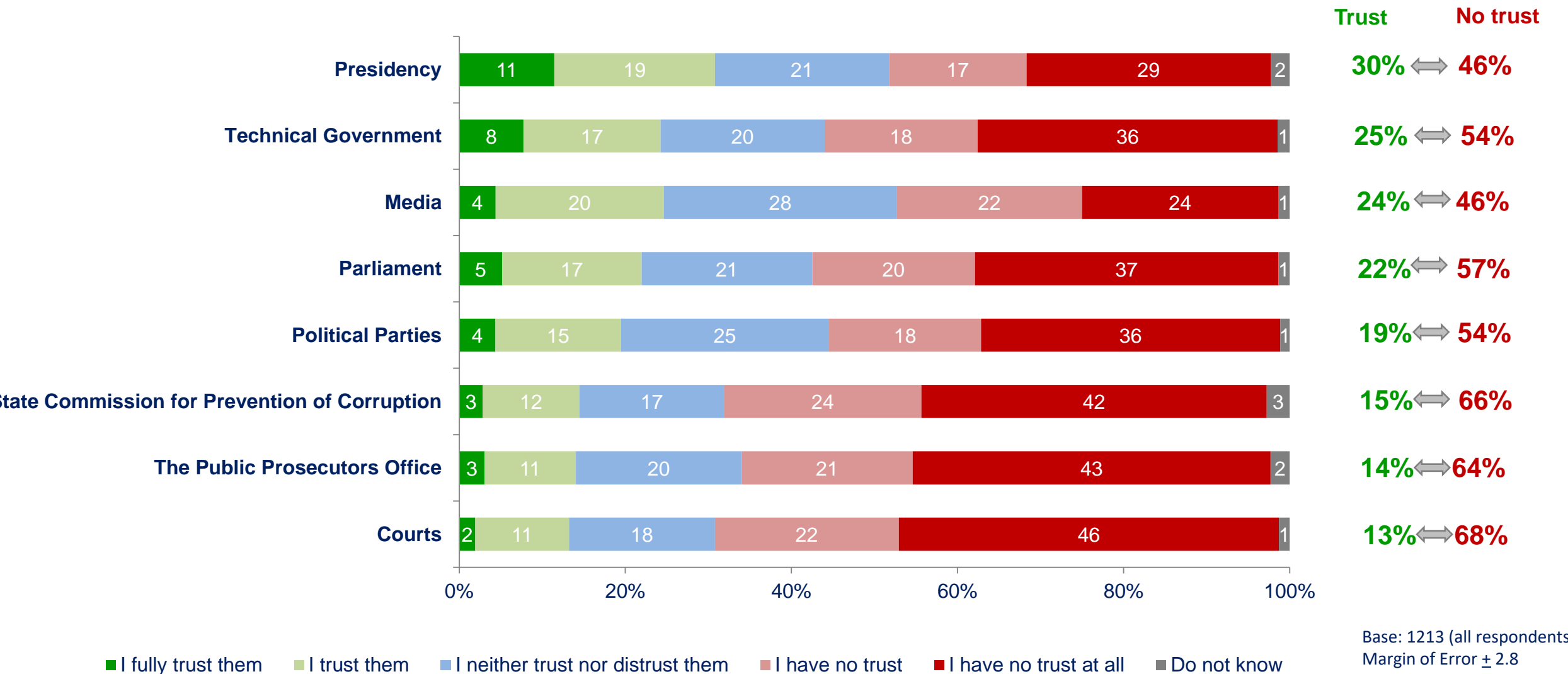
**NOTE:** 21% increase for people's lives have gotten worse among other ethnicities



## **IV. INSTITUTIONAL TRUST AND JOB APPROVAL**

# INSTITUTIONAL TRUST

To what degree do you trust or not trust the following?

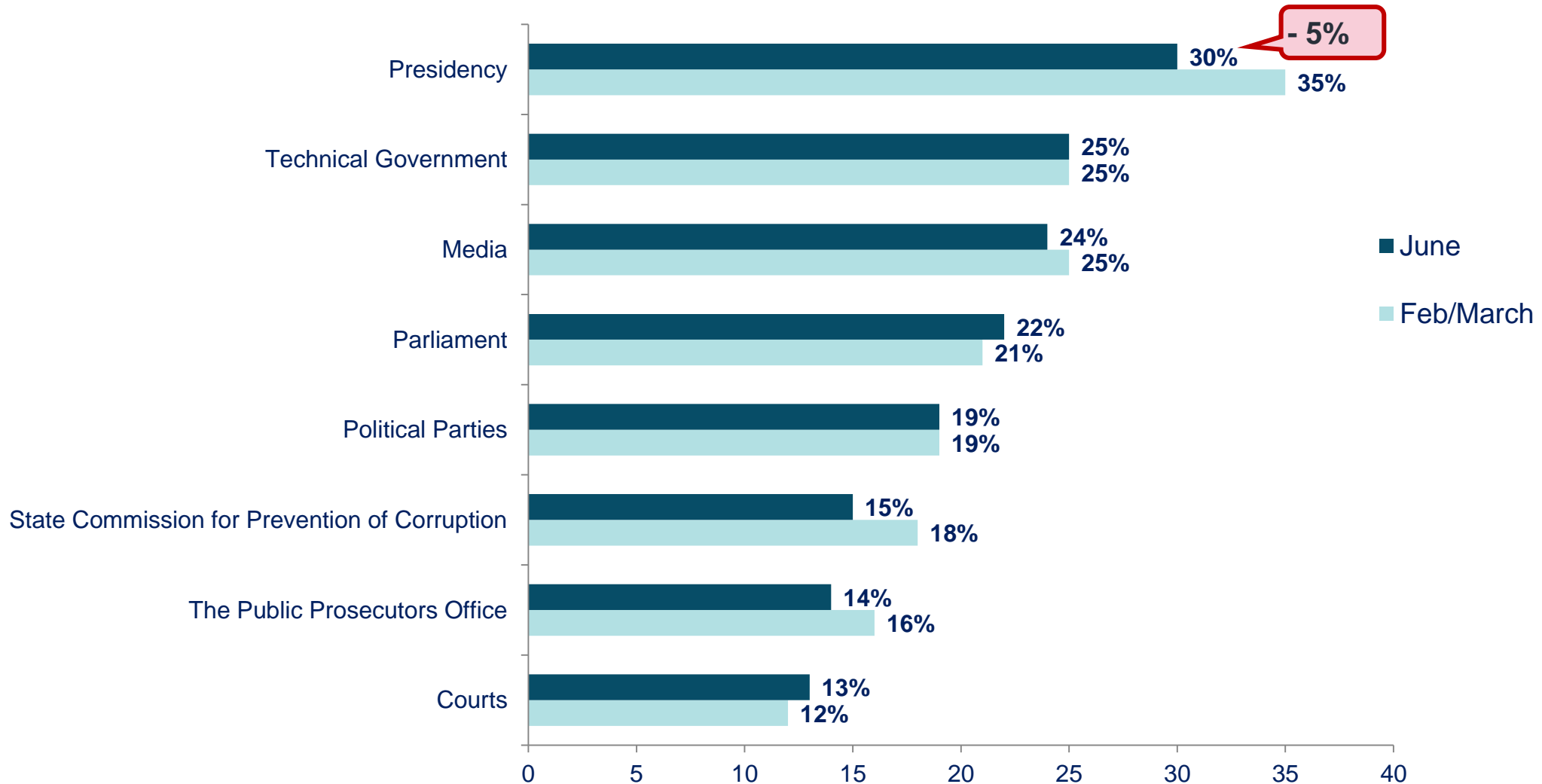




# TREND: INSTITUTIONAL TRUST

To what degree do you trust or not trust the following?

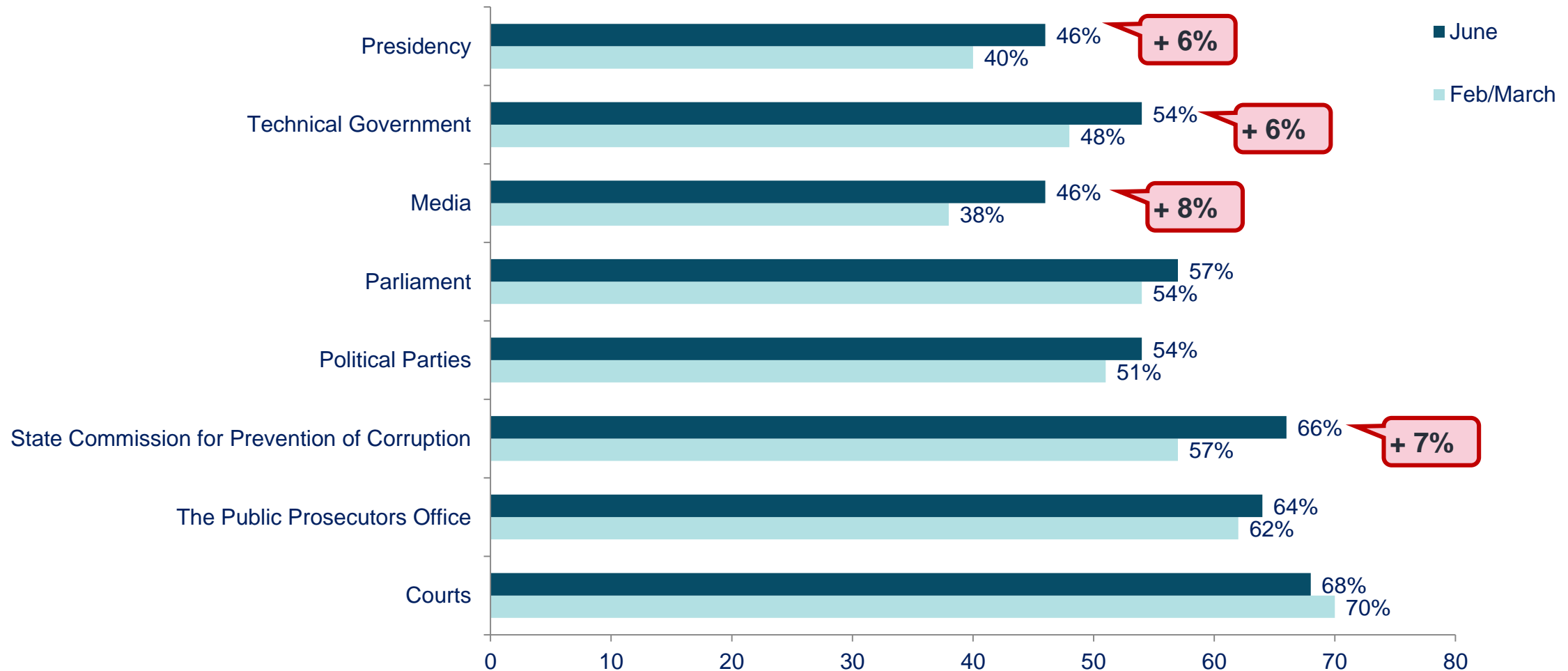
% that said “I fully trust them” or “I trust them”



# TREND: INSTITUTIONAL TRUST

To what degree do you trust or not trust the following?

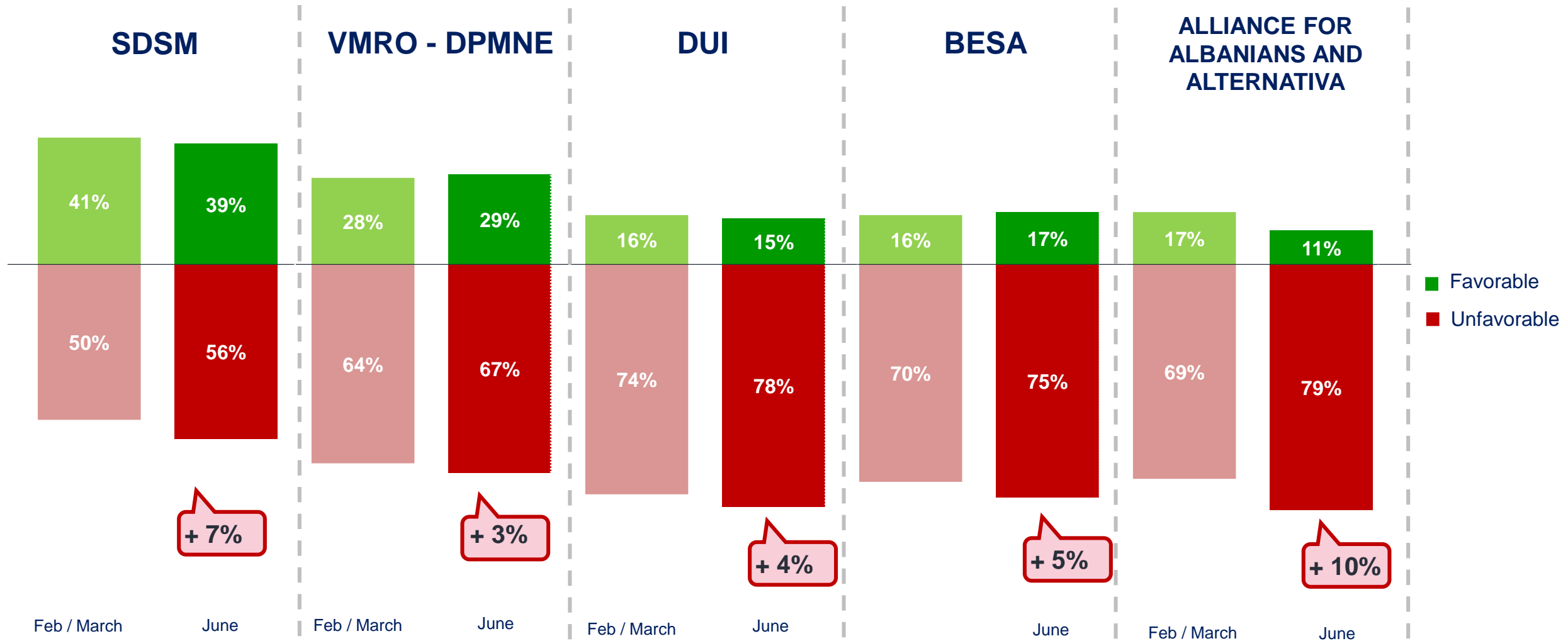
% that said “I have no trust” or “I have no trust at all”



## **V. FAVORABILITY OF POLITICAL PARTIES AND LEADERS**

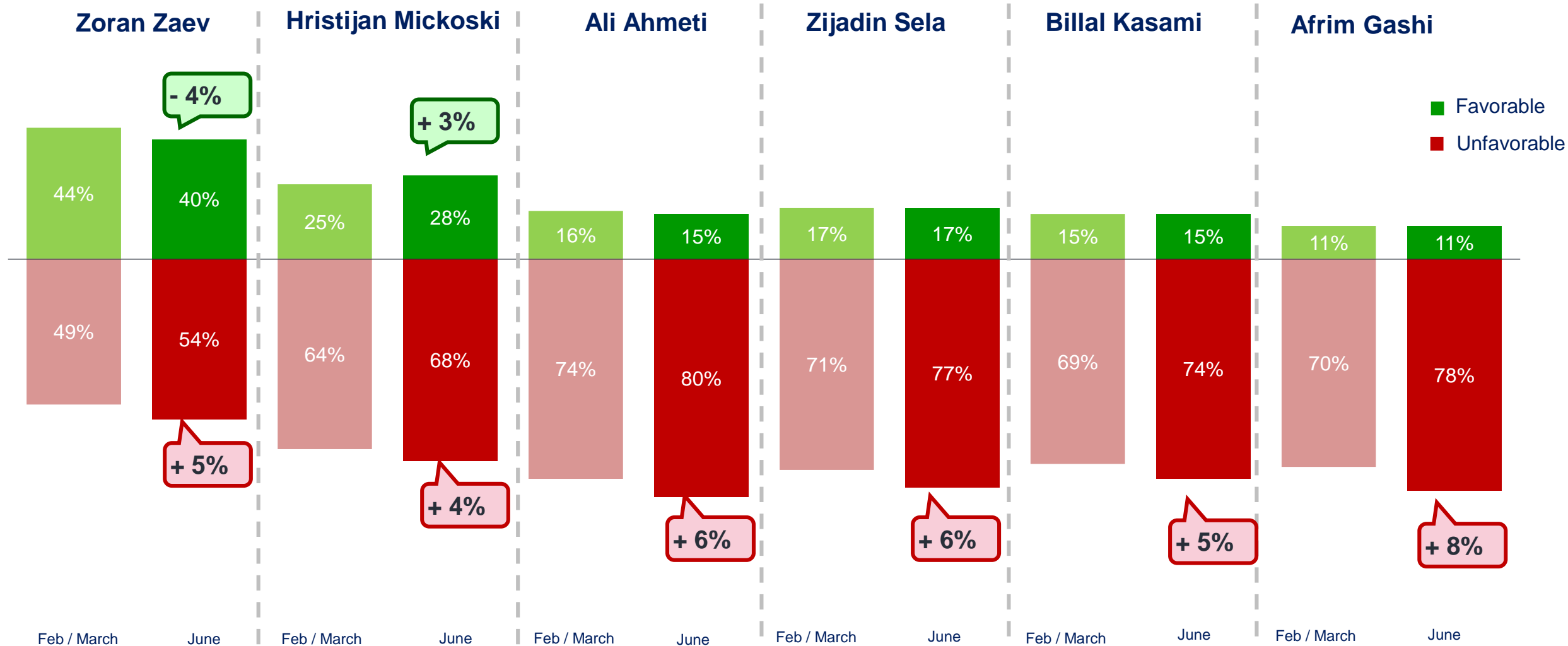
# TREND: FAVORABILITY OF POLITICAL PARTIES

Please tell me if you have a very favorable view, somewhat favorable view, somewhat unfavorable view or very unfavorable view of each political party.



# TREND: FAVORABILITY OF POLITICIANS

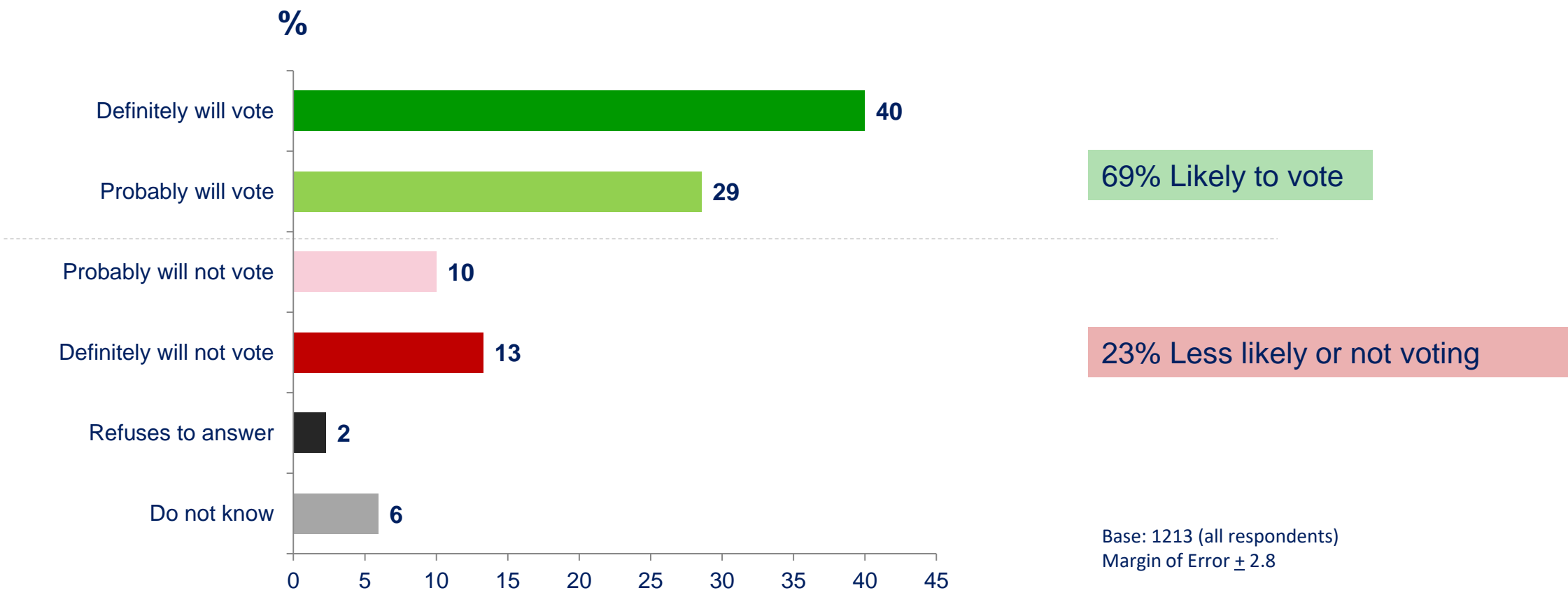
Please tell me if you have a very favorable view, somewhat favorable view, somewhat unfavorable view or very unfavorable view of the following individuals.



## **VI. PARLIAMENTARY ELECTIONS AND PARTY PREFERENCES**

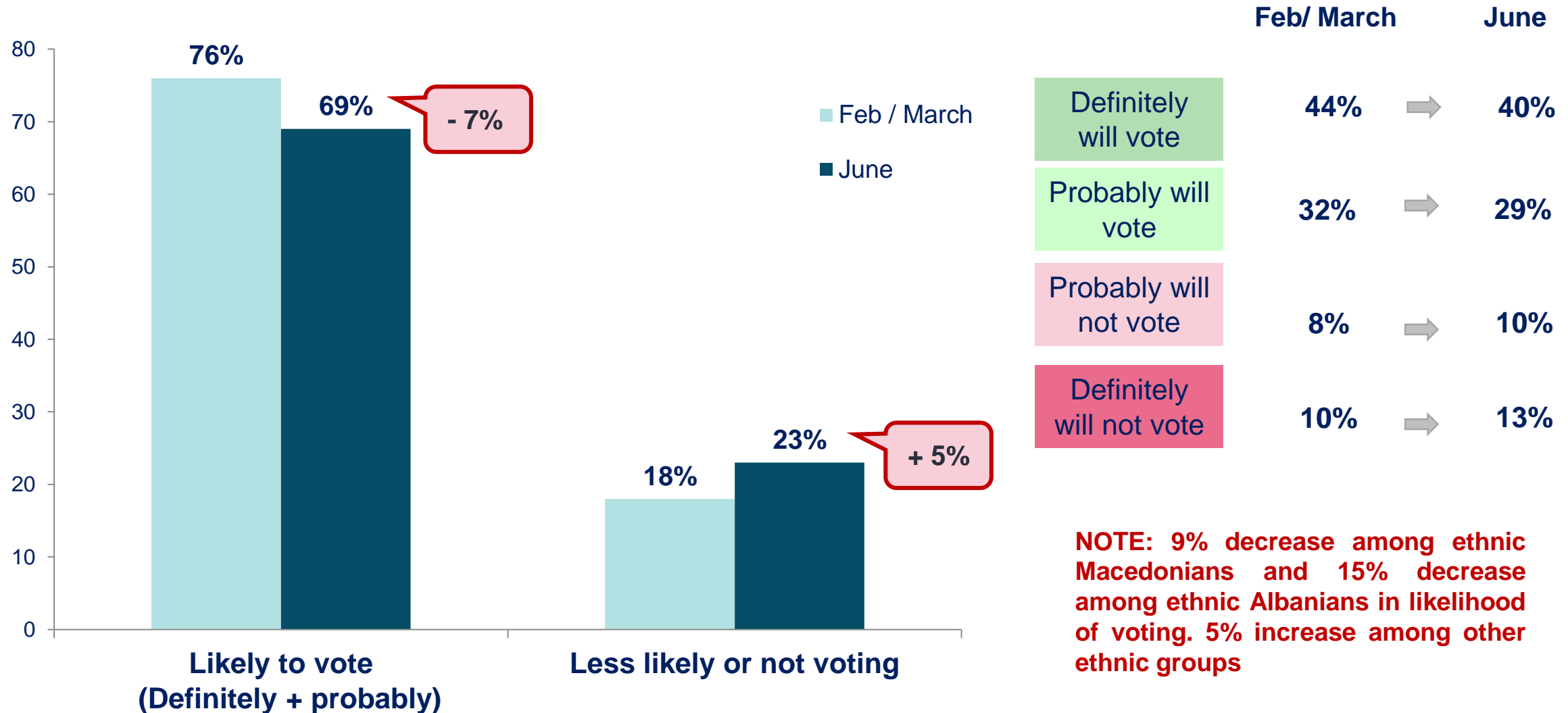
# LIKELIHOOD OF VOTING

How likely are you to vote in the parliamentary elections if they are held in July 2020?



# TREND: LIKELIHOOD OF VOTING

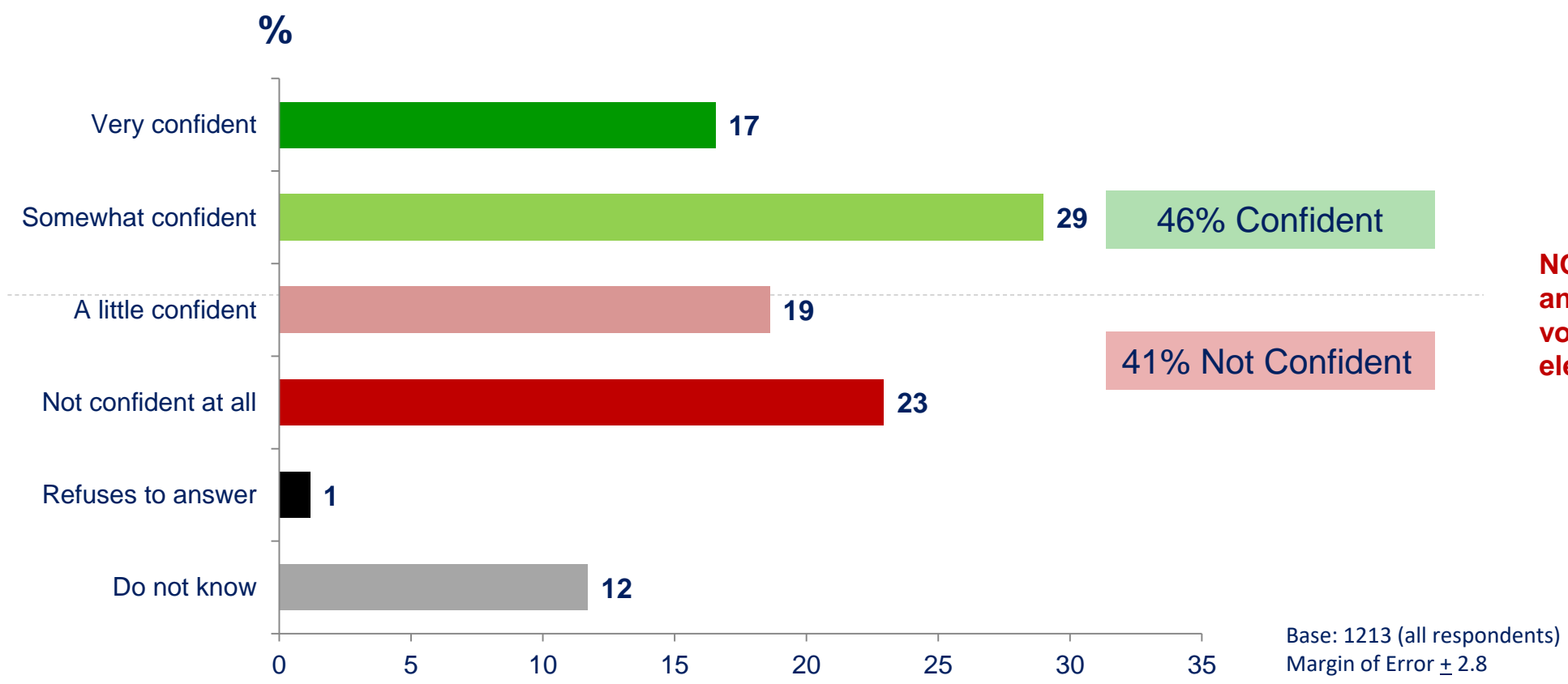
How likely are you to vote in the parliamentary elections if they are held in April/July 2020?





# CONFIDENCE IN THE ELECTION PROCESS

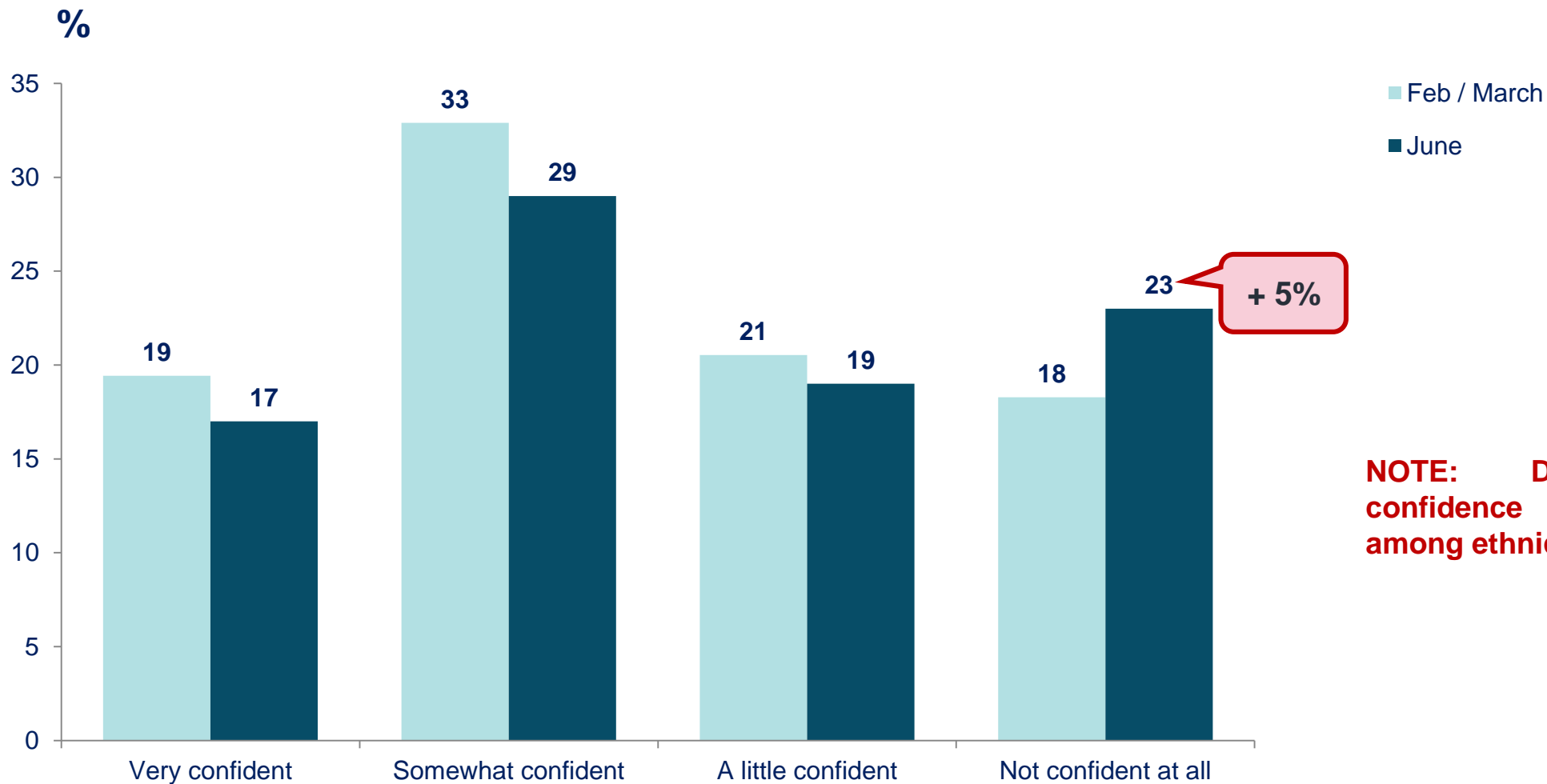
How confident are you that the parliamentary elections will be conducted free and fairly?



**NOTE: 91% of SDSM Coalition and 27% of VMRO-DPMNE voters are confident the elections will be free and fair**

# TREND: CONFIDENCE IN THE ELECTION PROCESS

How confident are you that the parliamentary elections will be conducted free and fairly?

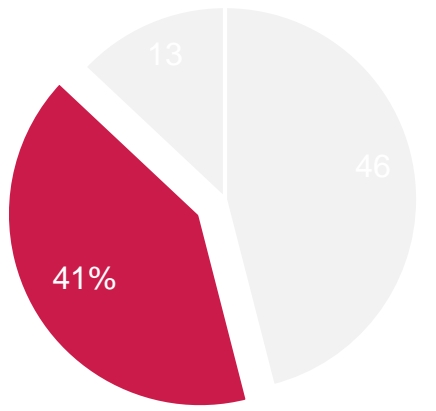


**NOTE:** Decrease in confidence highlighted among ethnic Albanians

# CONFIDENCE IN THE ELECTION PROCESS

IF NOT CONFIDENT IN THE ELECTION SYSTEM: What are the reasons you are not confident elections will be free and fair?

## AMONG THE 41% OF PEOPLE WHO ARE NOT CONFIDENT IN THE ELECTION PROCESS



■ Little or not confident at all

Base: 504 respondents

# HISTORY OF POLITICAL PRESSURE

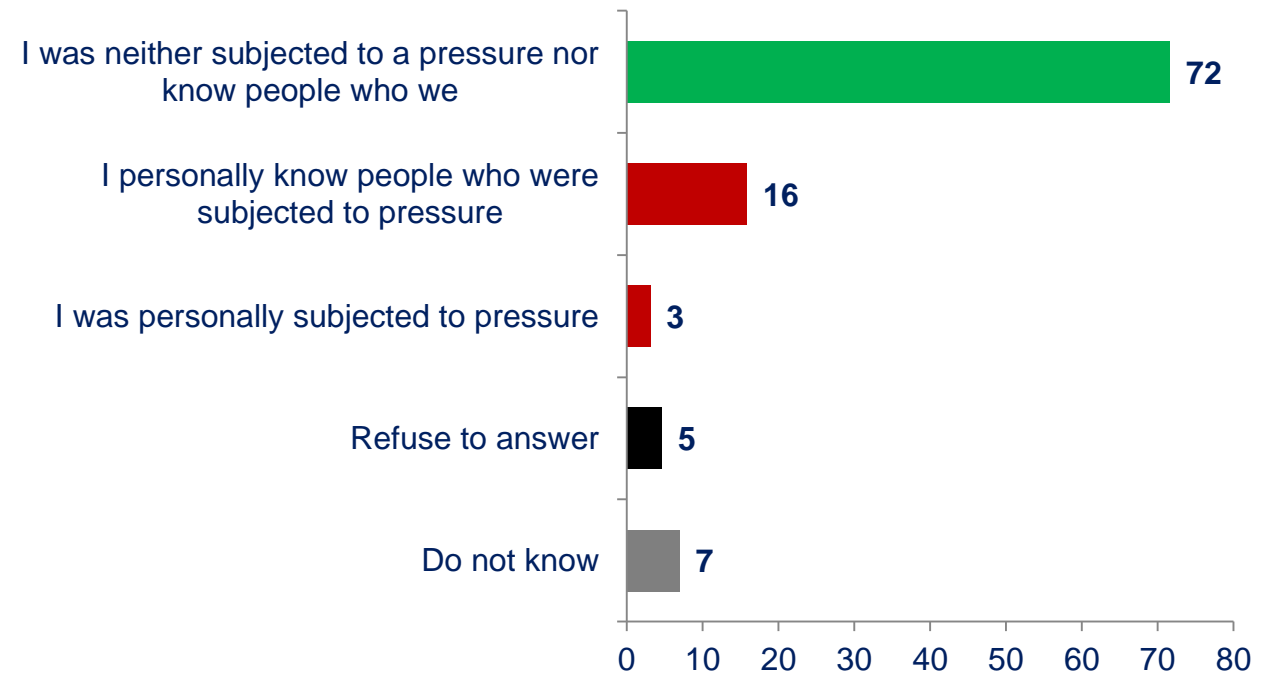
In the last three years, were you, a member of your family, a relative or someone you personally know subjected to pressure such as force, threats, vote-buying or other illegal means, to vote in a particular way?

**EXPOSED TO PRESSURE**  
(Know someone or  
personally pressured)



**18%**

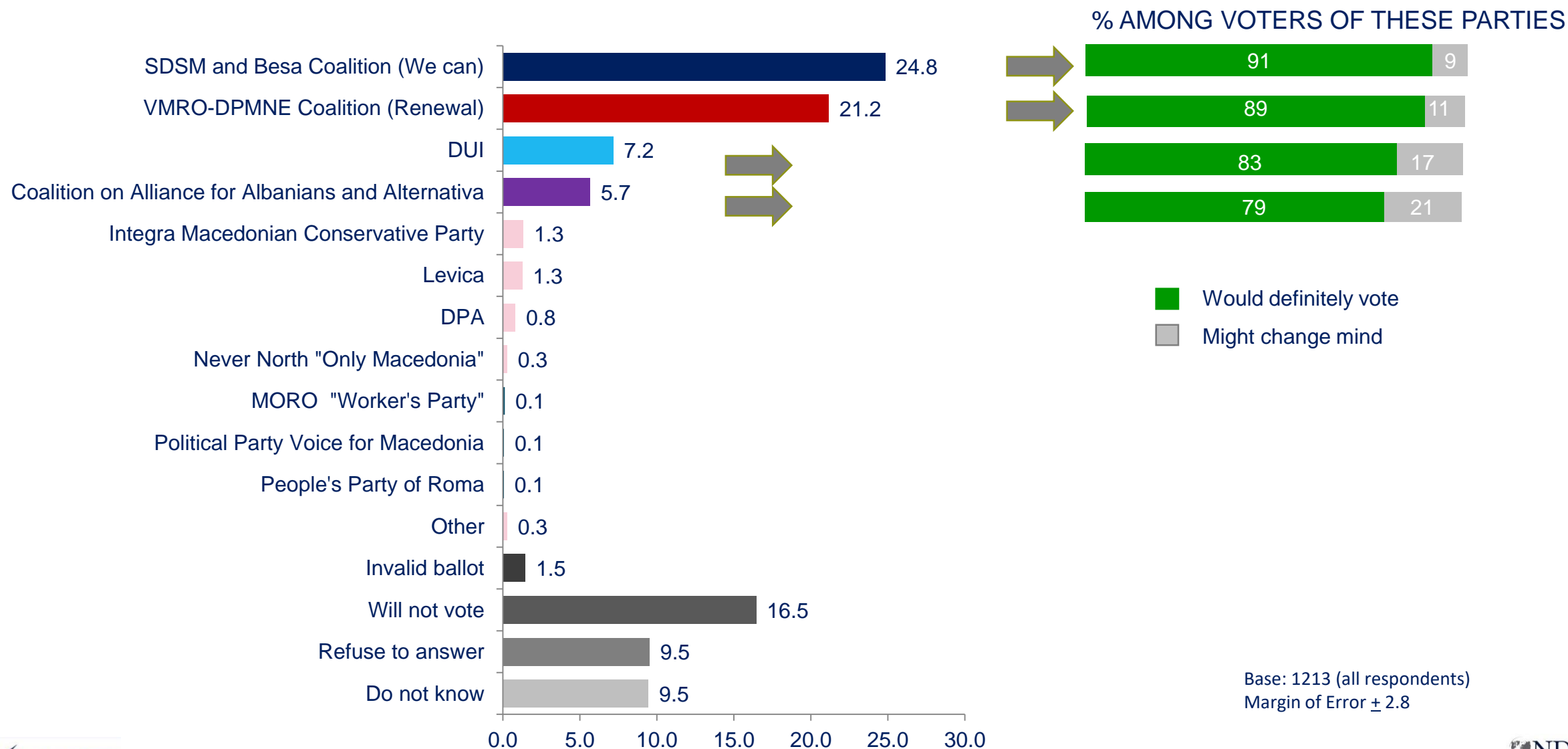
## MULTIPLE ANSWERS



Base: 1213 (all respondents)  
Margin of Error  $\pm$  2.8

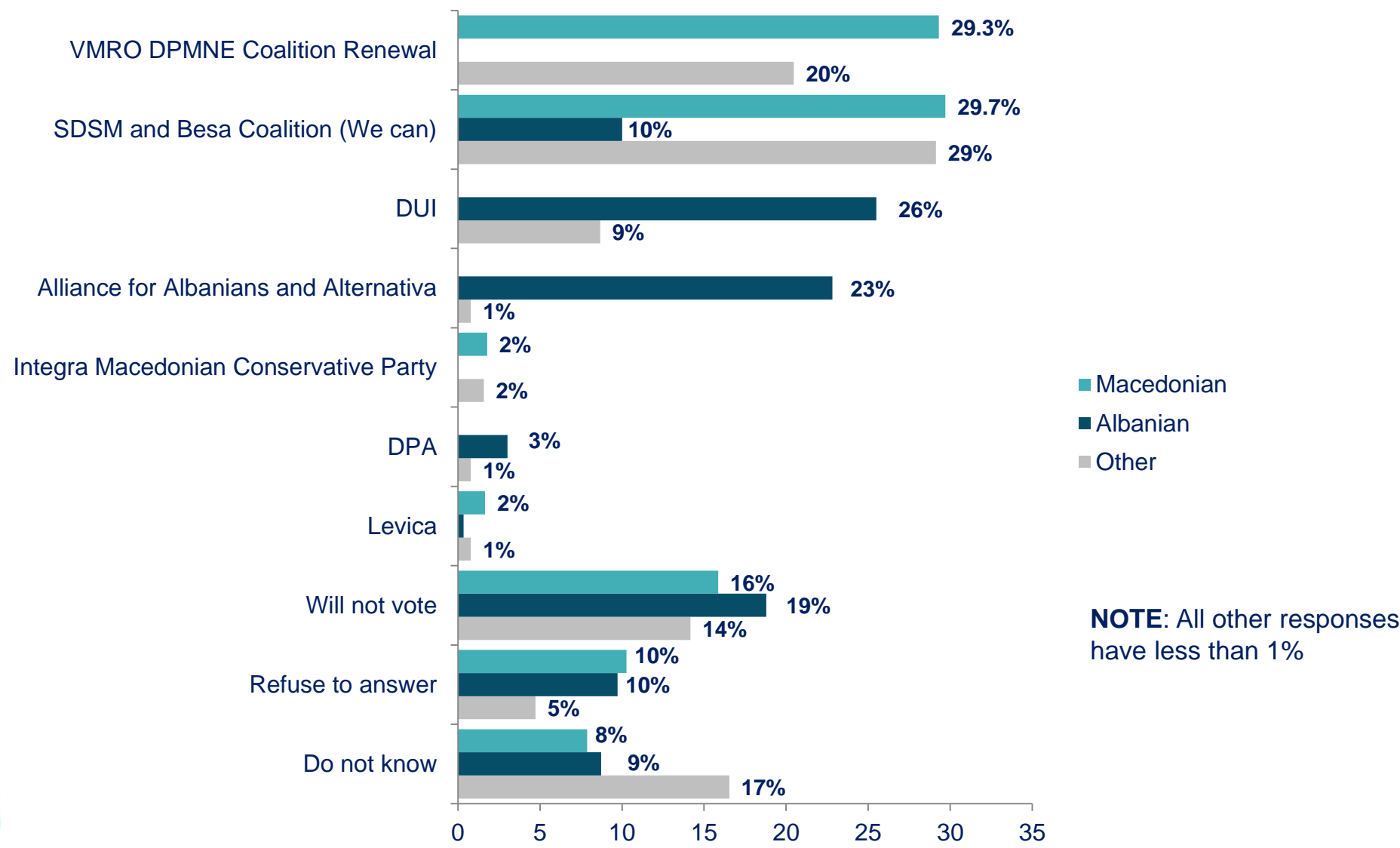
# PARLIAMENTARY ELECTIONS

If the parliamentary elections were held today, which party would you vote for?  
Would you say you are definitely voting for this party or you might change your mind?



# PARLIAMENTARY ELECTIONS

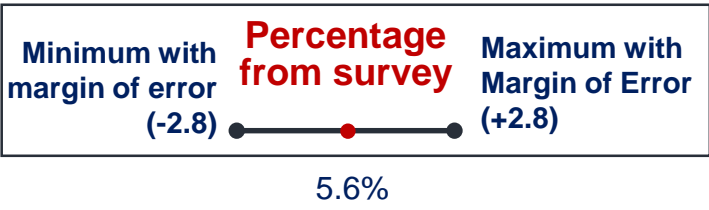
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# PARLIAMENTARY ELECTIONS

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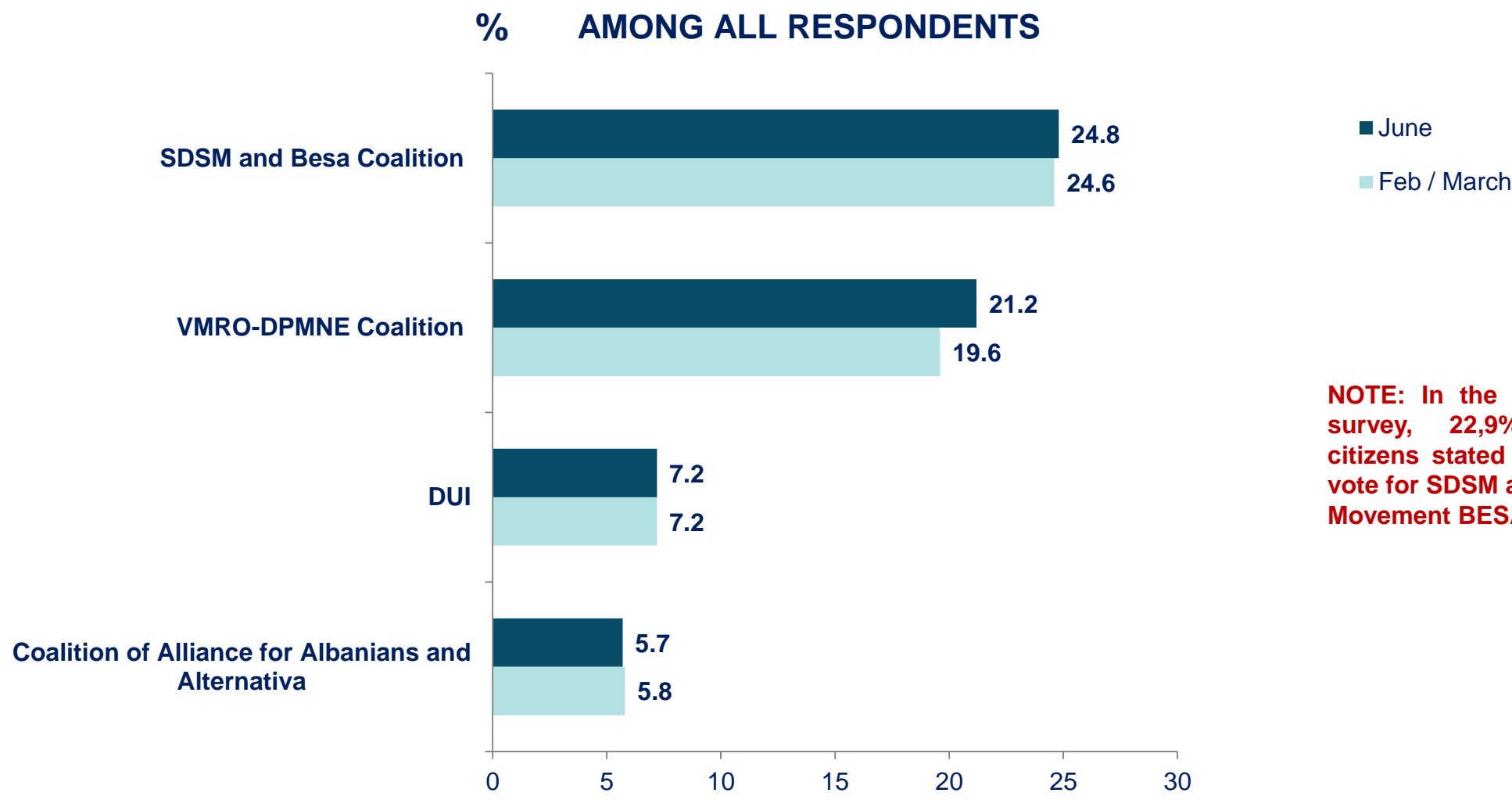
## AMONG ALL



Base: 1,213 (all respondents)  
Margin of Error:  $\pm$  2.8 points at 95% confidence interval

# TREND: PARLIAMENTARY ELECTIONS

If the parliamentary elections were held today, which party would you vote for?



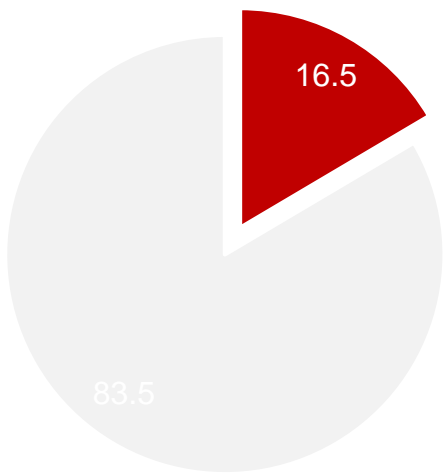
**NOTE:** In the Feb/ March survey, 22,9% of the citizens stated they would vote for SDSM and 1,7% for Movement BESA



# PARLIAMENTARY ELECTIONS

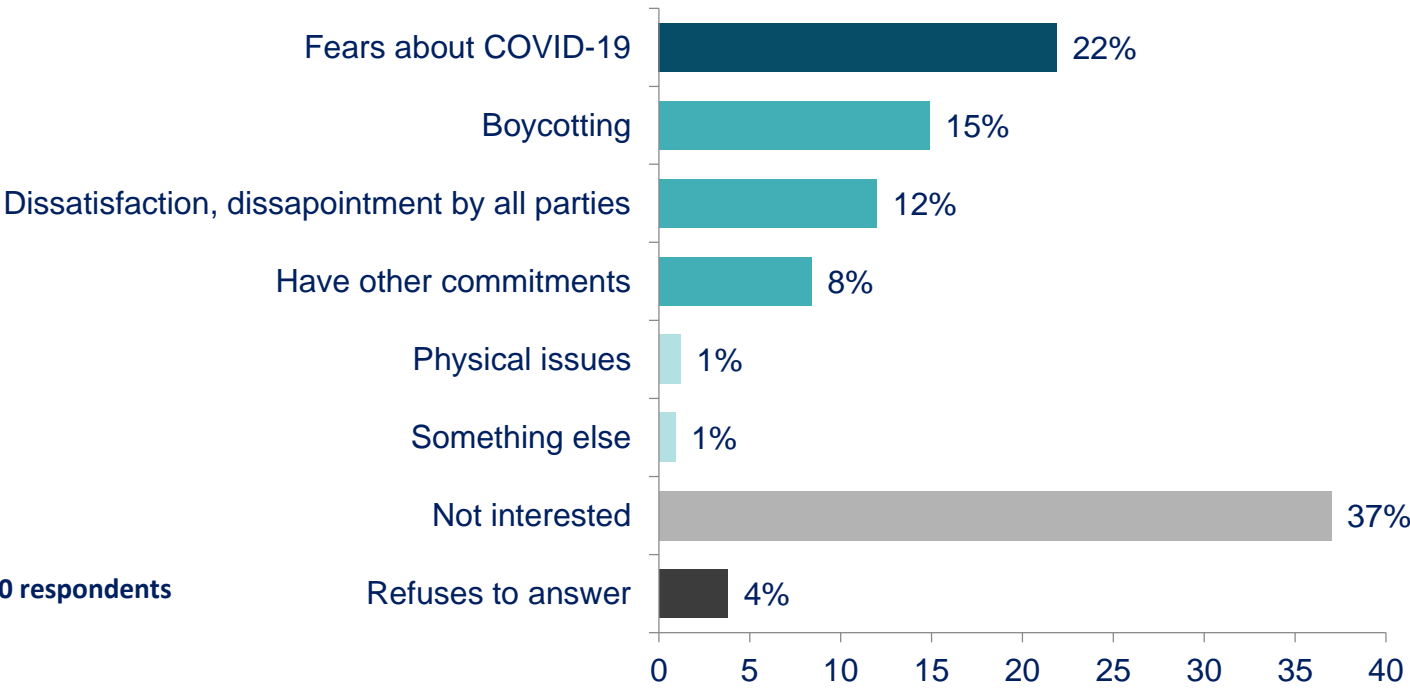
IF NOT VOTING IN THE PARLIAMENTARY ELECTIONS: What are the reasons you might not vote in the parliamentary election?

AMONG THE 16% OF PEOPLE WHO ARE NOT VOTING IN THE PARLIAMENTARY ELECTIONS



Will not vote

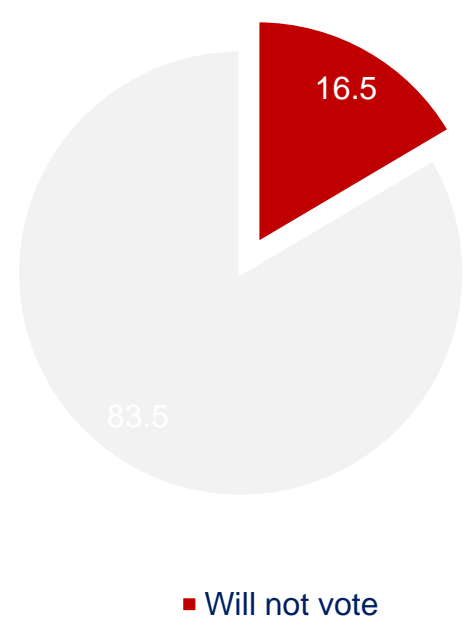
Base: 200 respondents



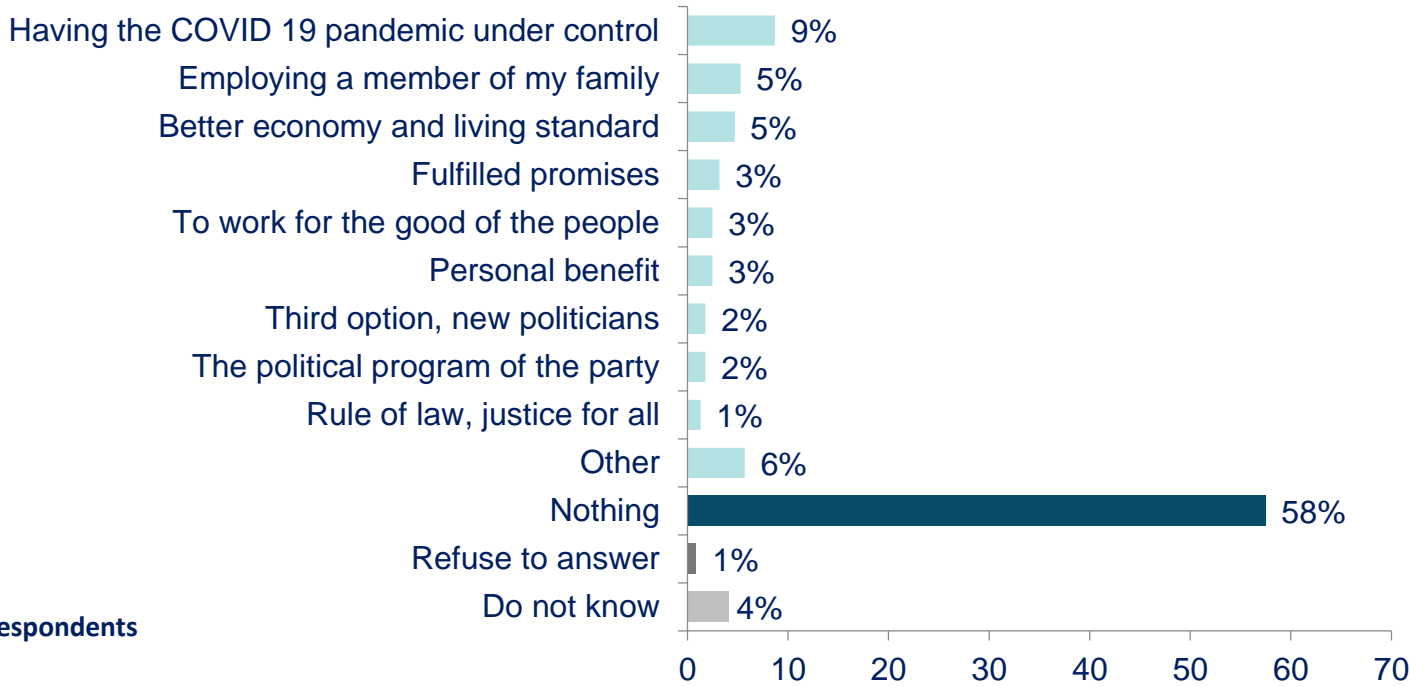
# PARLIAMENTARY ELECTIONS

IF NOT VOTING IN THE PARLIAMENTARY ELECTIONS: What is something that could be said or done that would make you change your mind about voting in the elections?

AMONG THE 16% OF PEOPLE WHO ARE NOT VOTING IN THE PARLIAMENTARY ELECTIONS

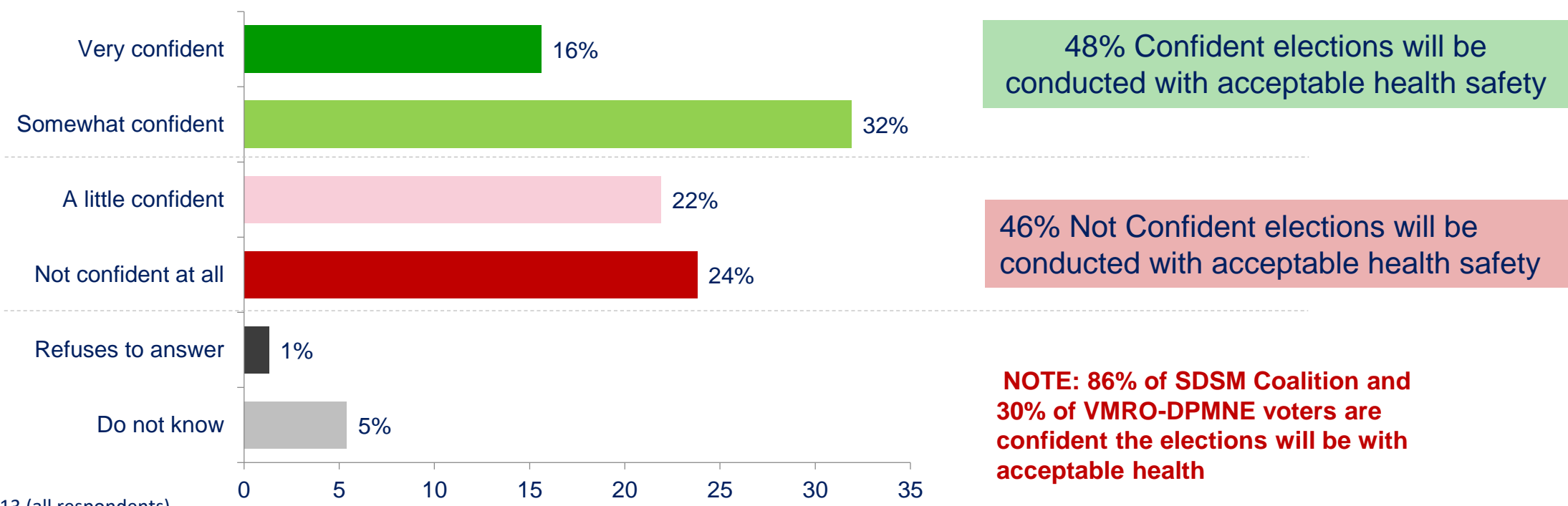


Base: 200 respondents



# PARLIAMENTARY ELECTIONS

The Ministry of Health, with Venko Filipche, and the Commission for Infectious Diseases will require all voters, organizers and observers to wear protective equipment, use hand sanitizer and keep a two-meter distance from each other. Given this, how confident are you that the July parliamentary election will be conducted with acceptable safety measures? Are you...?

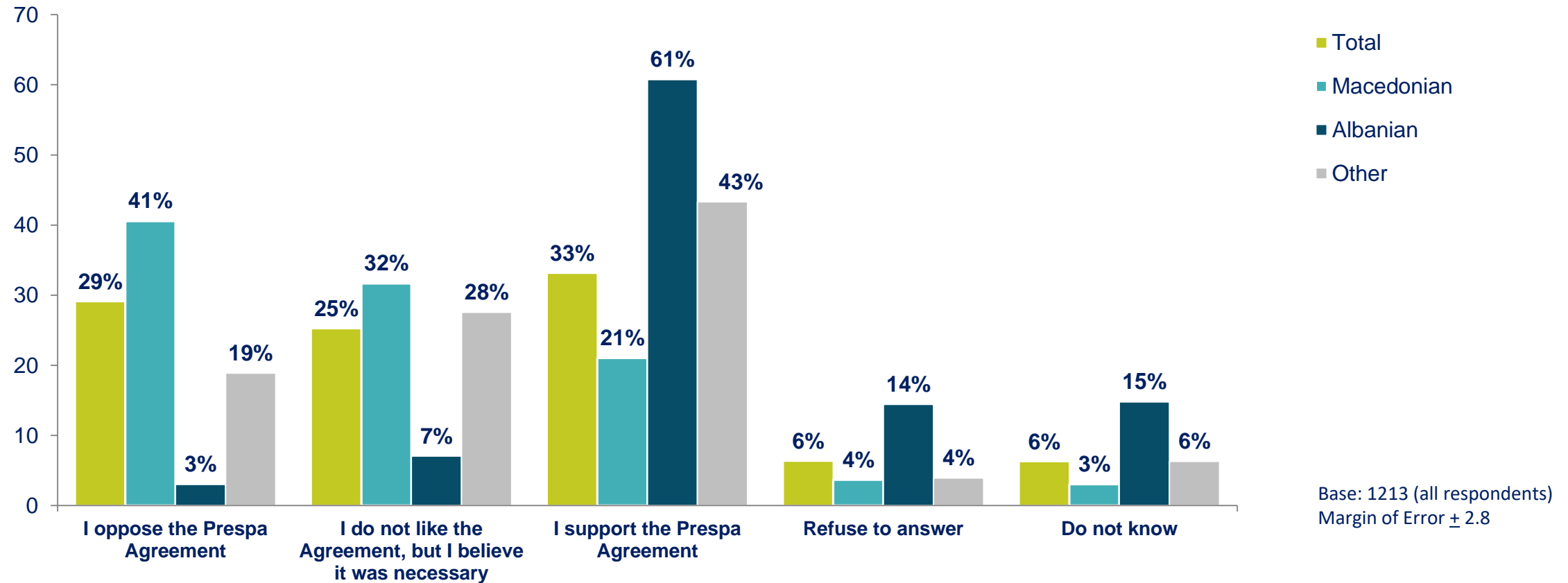


Base: 1213 (all respondents)  
Margin of Error ± 2.8

## **VII. GOOD NEIGHBORLY RELATIONS**

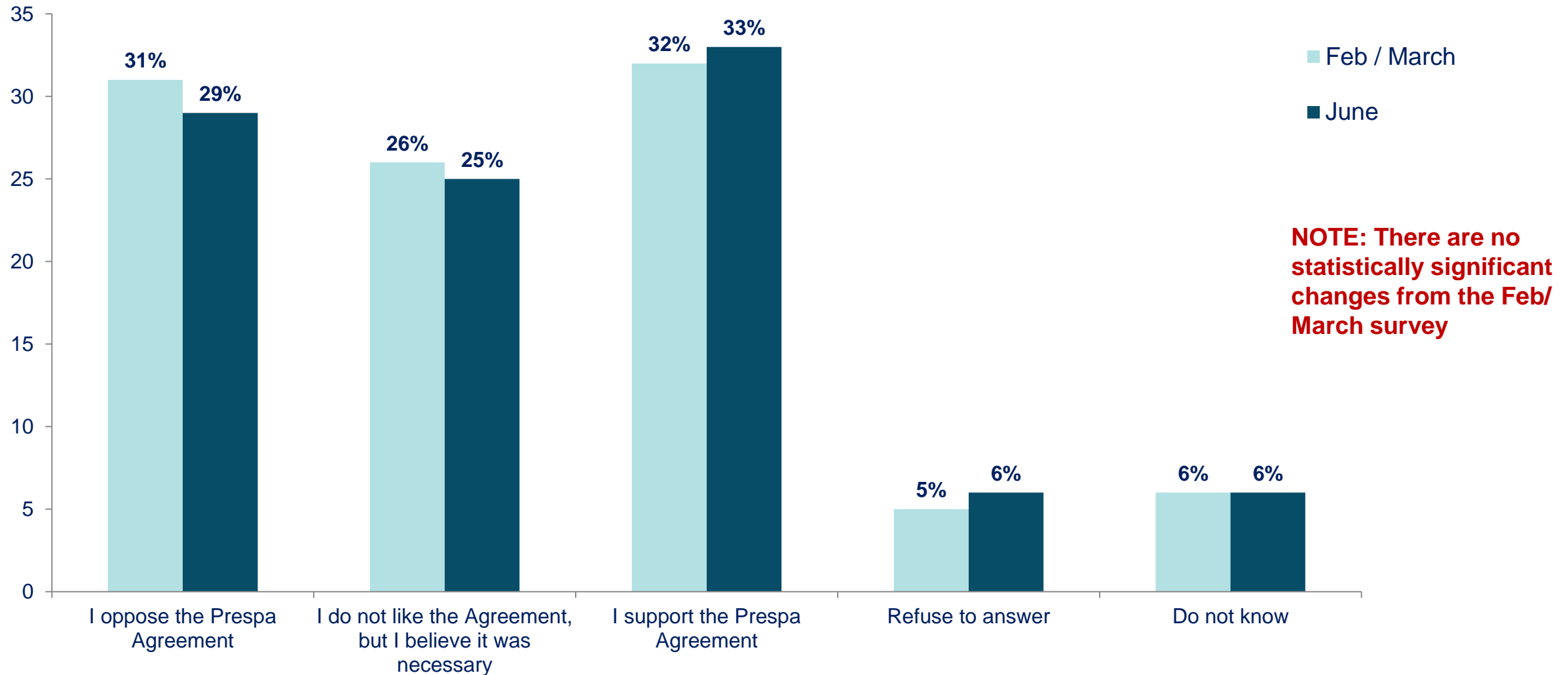
# THE PRESPA AGREEMENT

Which of the following is closest to your opinion today about the Prespa Agreement?



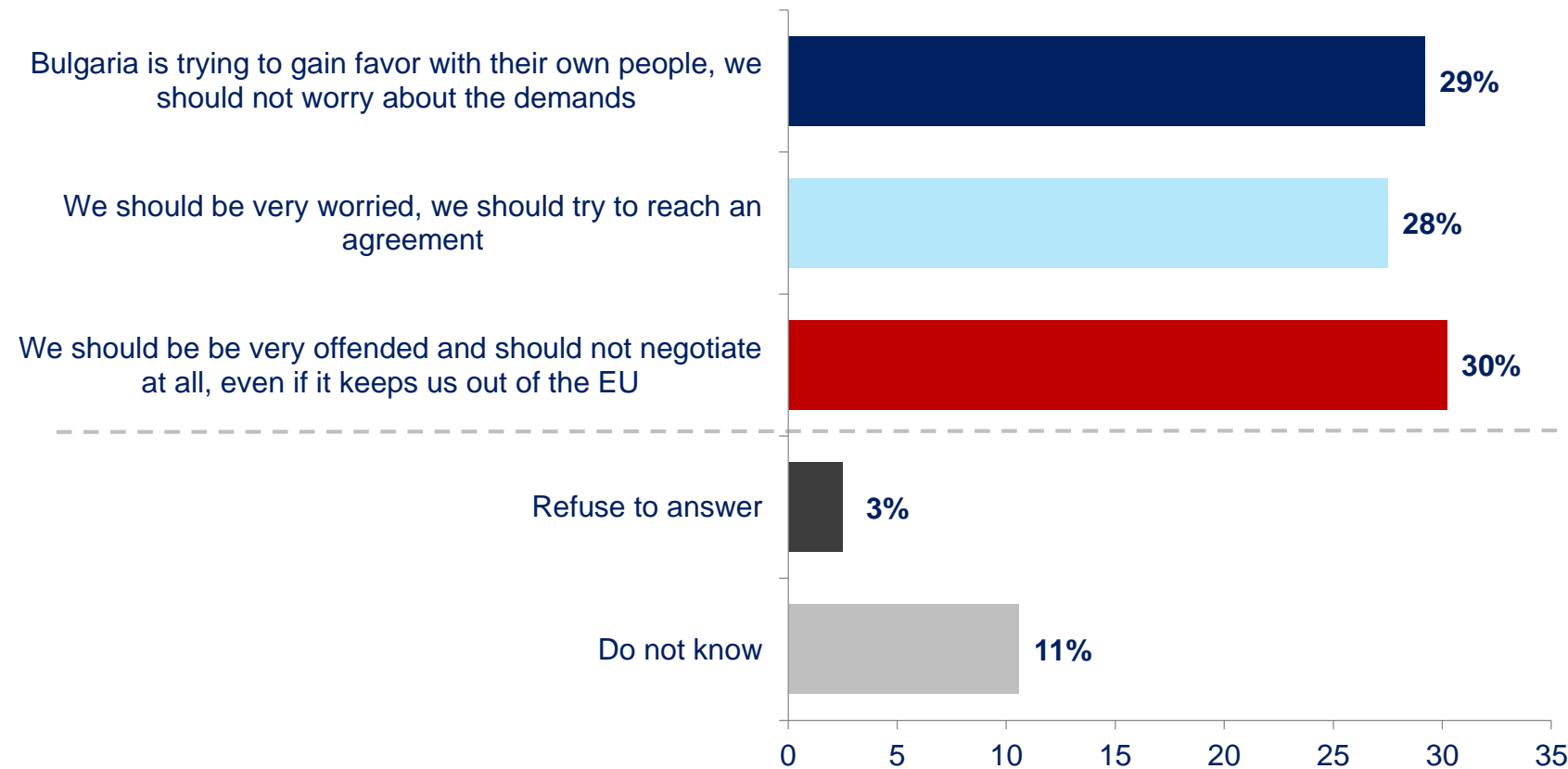
# TREND: THE PRESPA AGREEMENT

Which of the following is closest to your opinion today about the Prespa Agreement?



# RELATIONS BETWEEN NORTH MACEDONIA AND BULGARIA

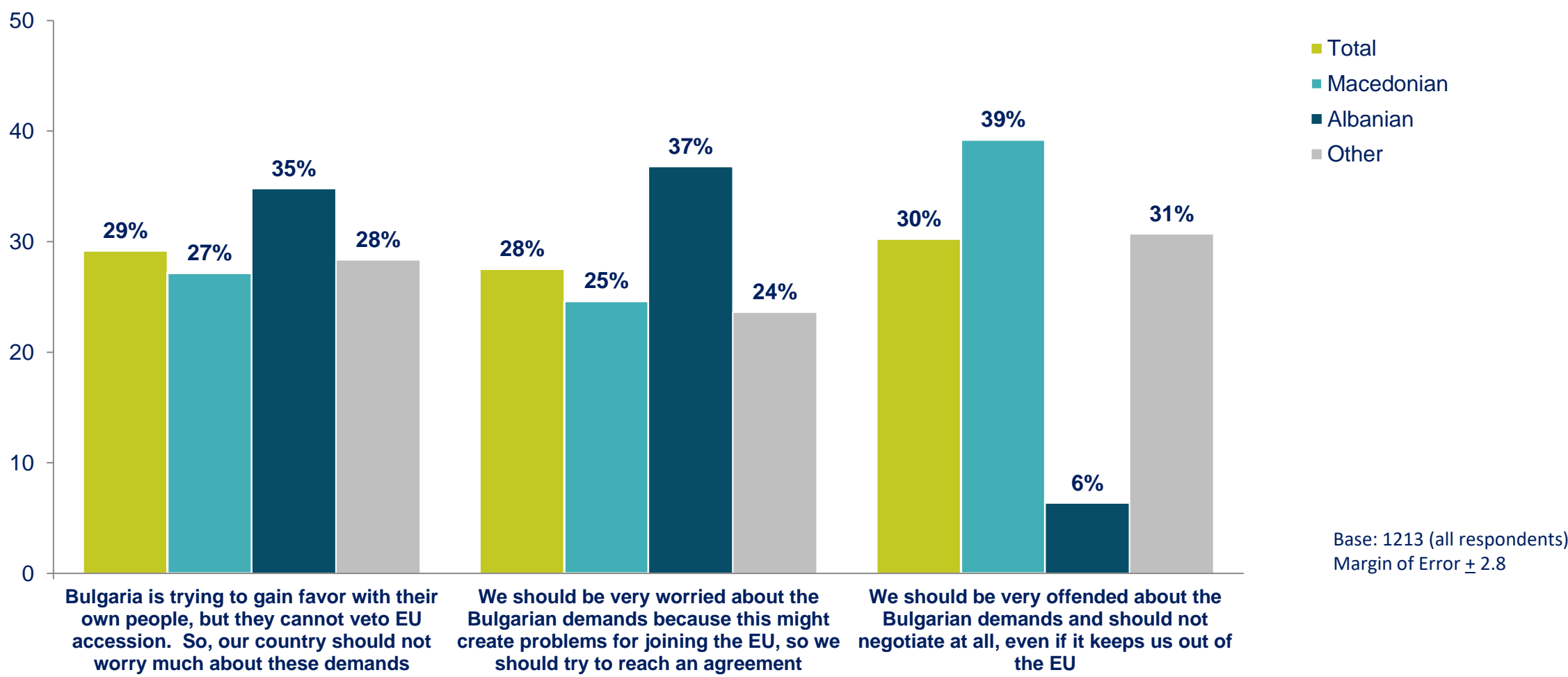
Bulgaria and our country signed a friendship agreement in 2017. And Bulgaria did not veto the start of our accession talks with the EU. However, Bulgaria has demanded we make changes regarding our country's language and history before entering the EU. Which of the following positions is closer to your view?



Base: 1213 (all respondents)  
Margin of Error ± 2.8

# RELATIONS BETWEEN NORTH MACEDONIA AND BULGARIA

Bulgaria and our country signed a friendship agreement in 2017. And, Bulgaria did not veto the start of our accession talks with the EU. However, Bulgaria has demanded we make changes regarding our country's language and history before entering the EU. Which of the following positions is closer to your view?

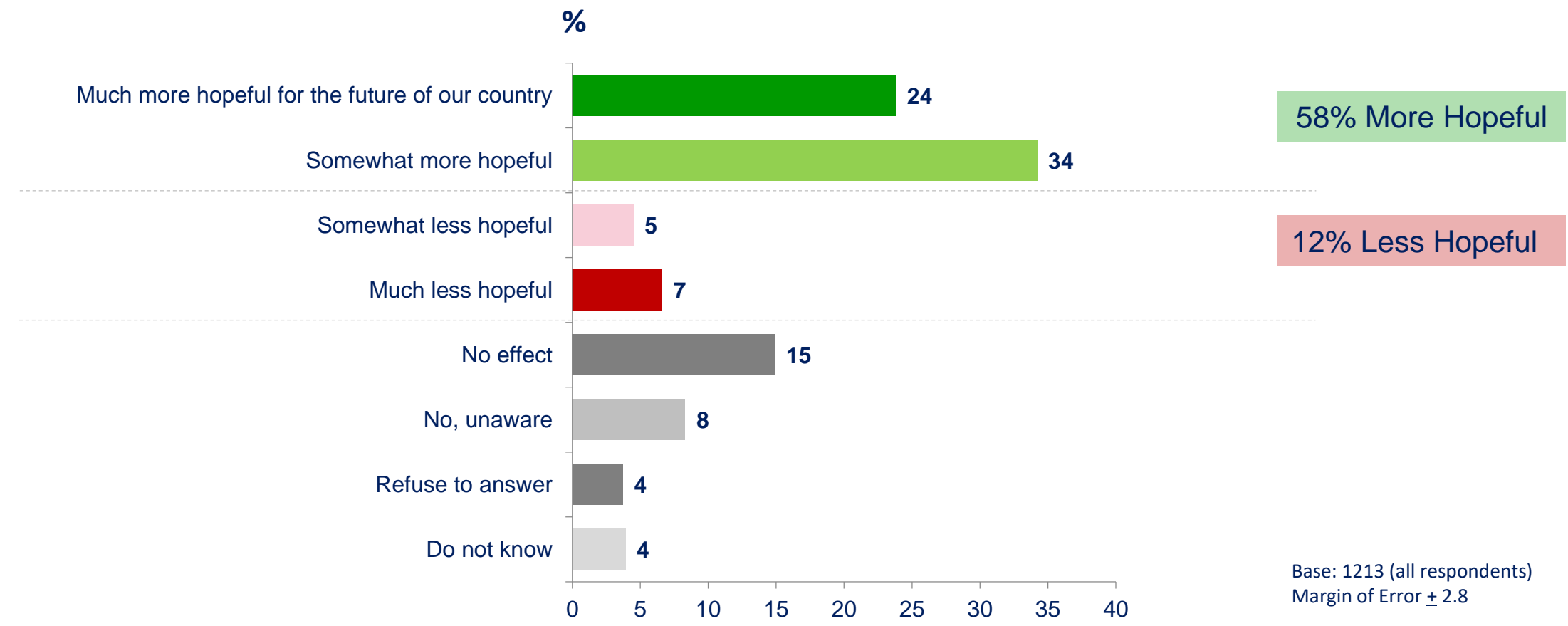




## **VIII. EU AND NATO ACCESSION**

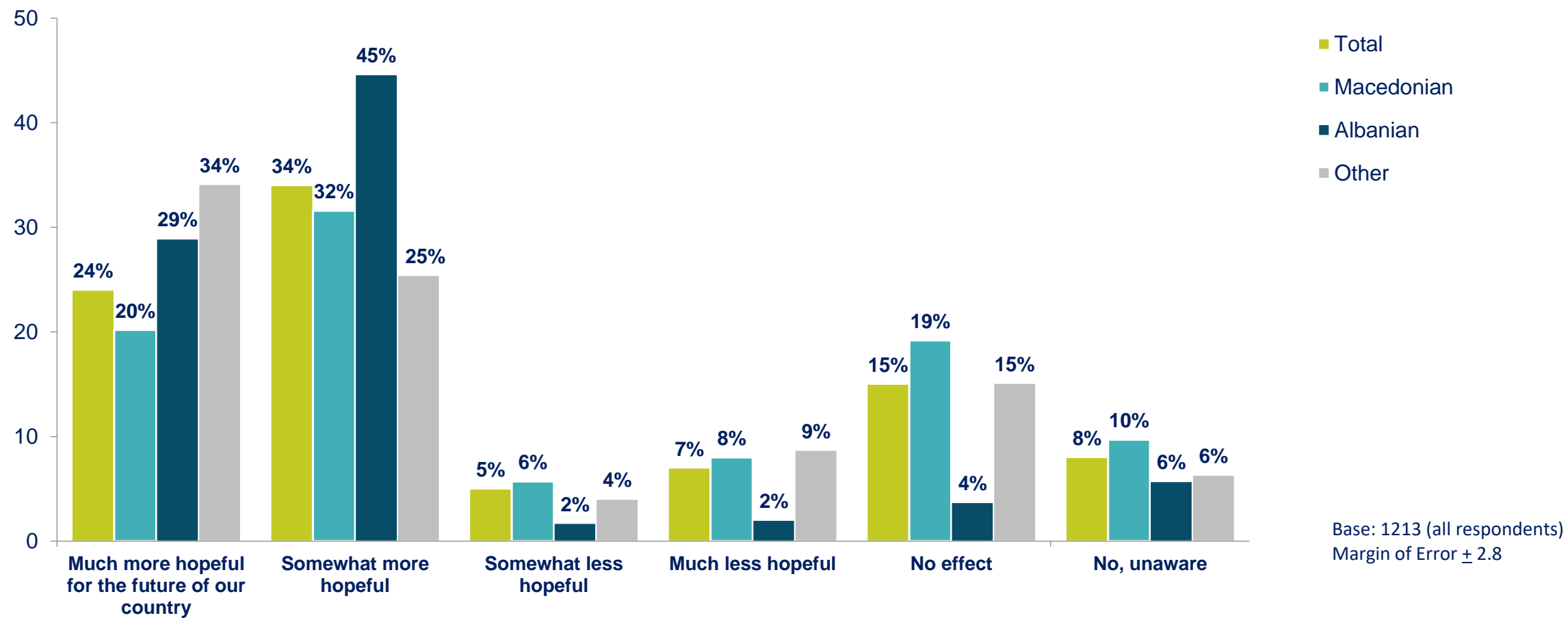
# NATO ACCESSION

Have you personally seen, read, or heard anything about our country joining NATO? IF YES: Did this make you feel....



# NATO ACCESSION

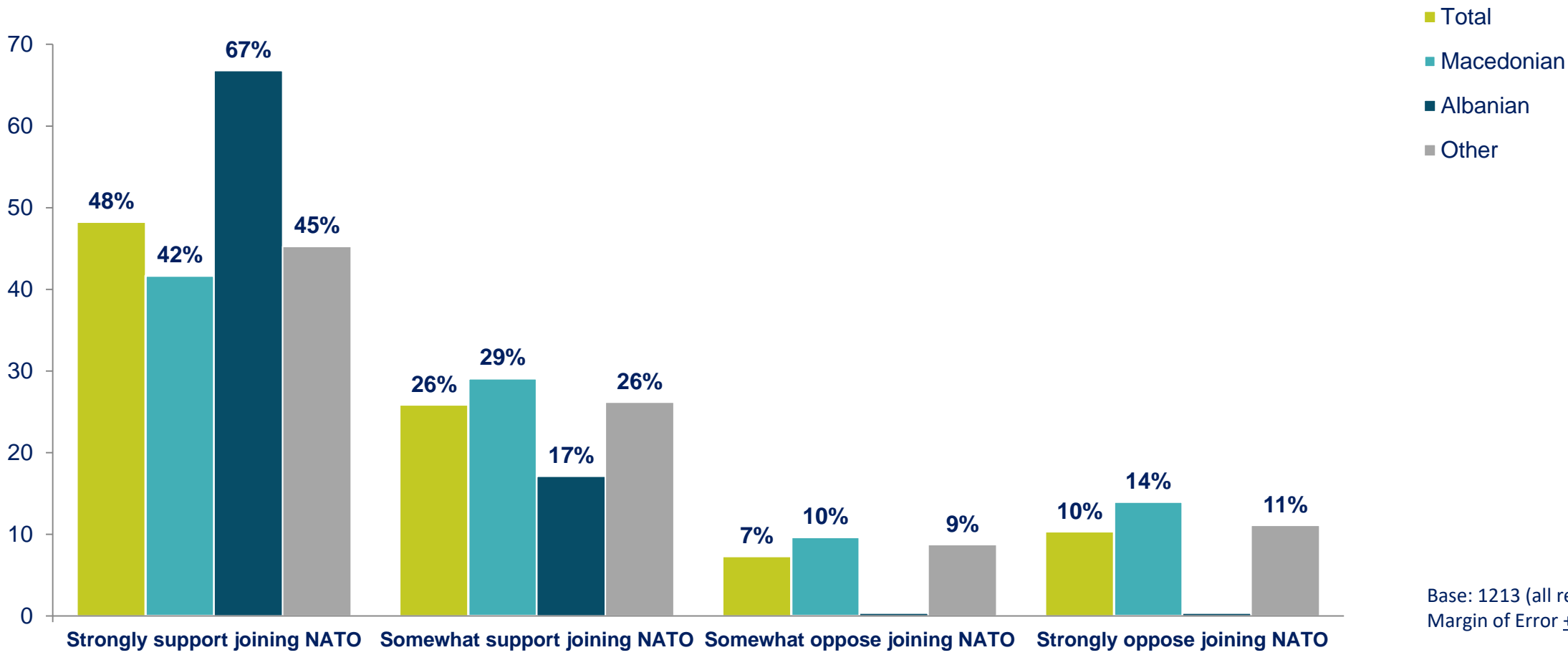
Have you personally seen, read, or heard anything about our country joining NATO? IF YES: Did this make you feel....



# NATO ACCESSION

Our country joined NATO in March 2020. Do you...

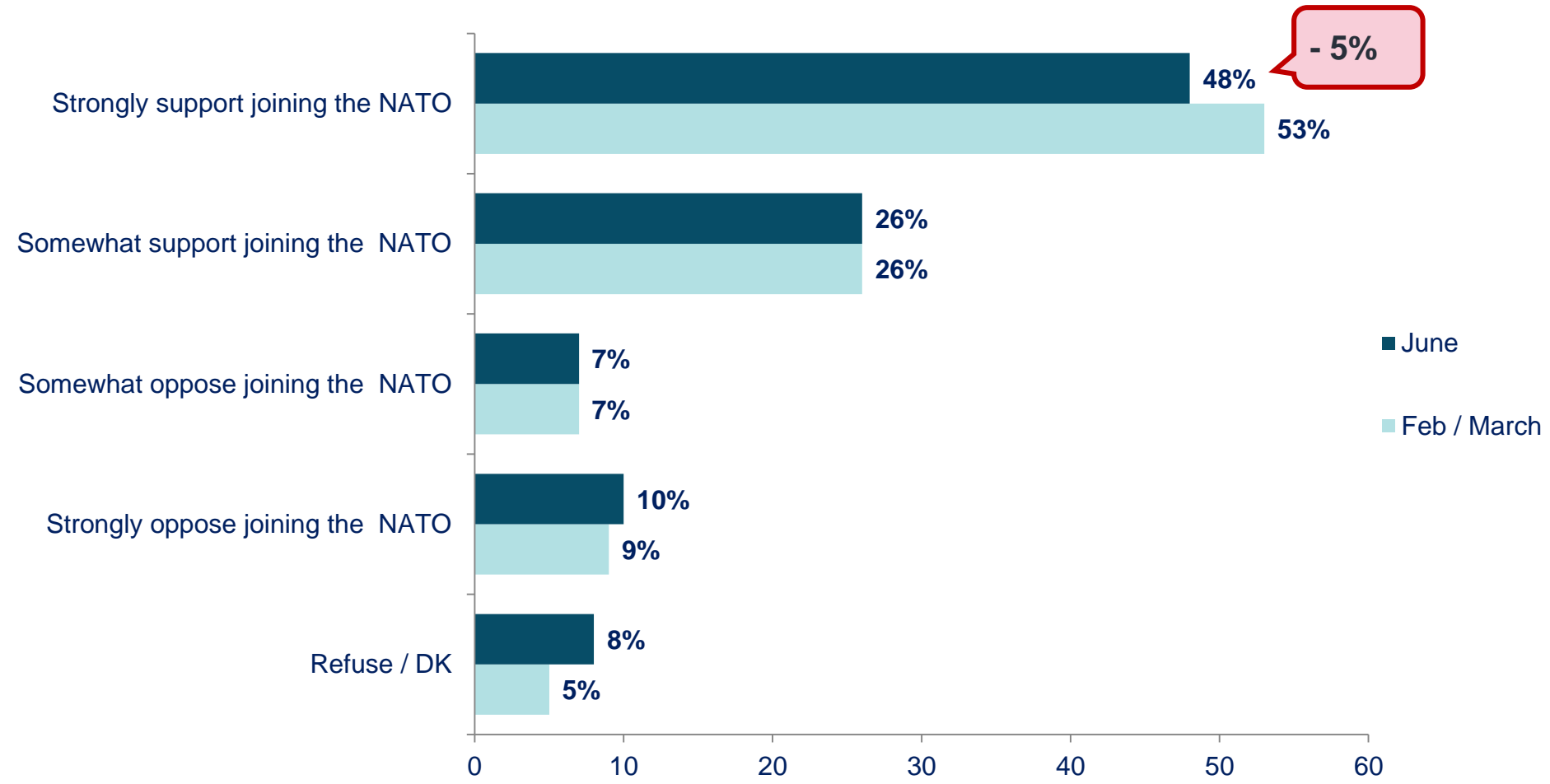
74% Total Support to join NATO



Base: 1213 (all respondents)  
Margin of Error ± 2.81

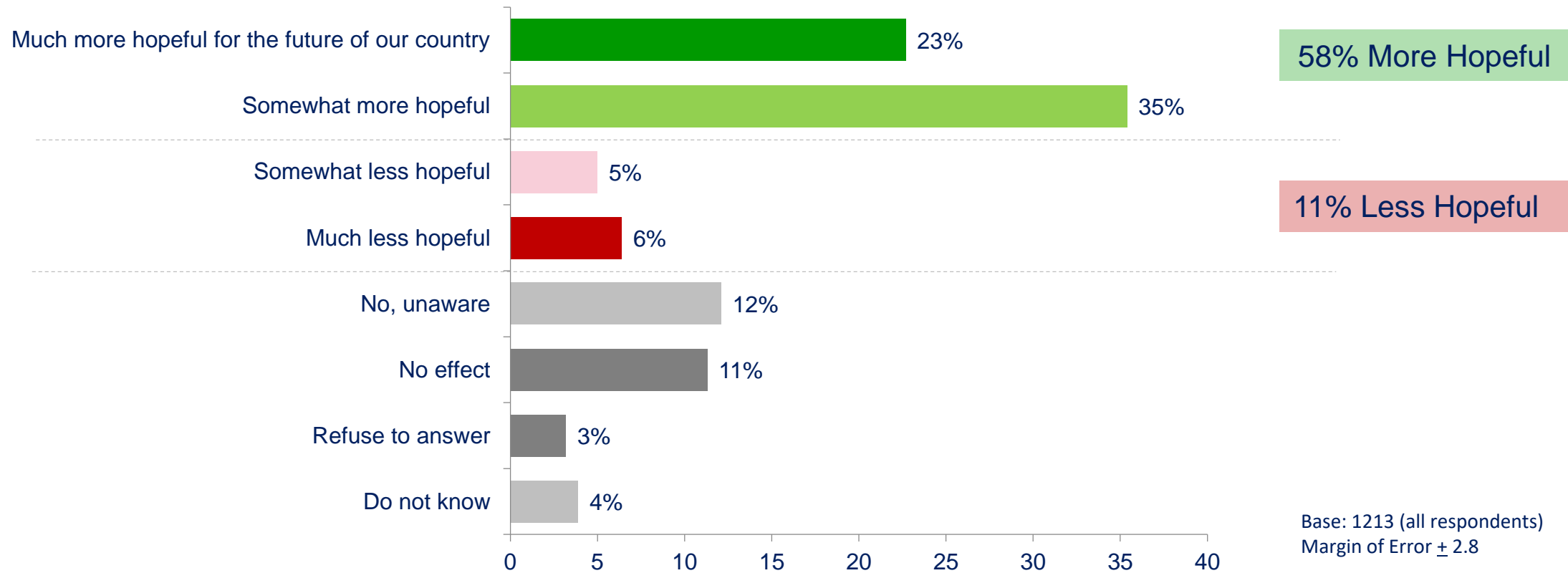
# TREND: NATO ACCESSION

Our country will likely be joining NATO soon/Our country joined NATO in March 2020. Do you...



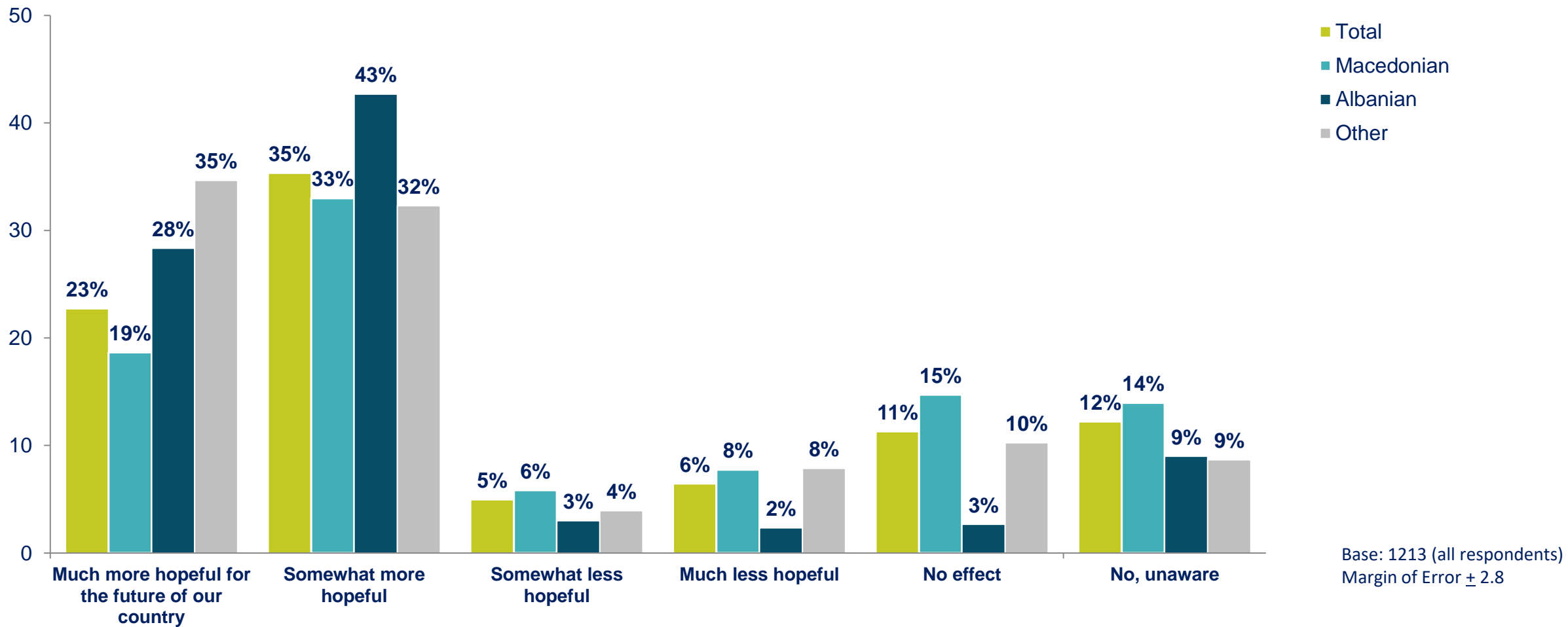
# EU ACCESSION

Have you personally seen, read, or heard anything about the European Union approving the start of final negotiations for our country to join the EU? IF YES: Did this make you feel....?



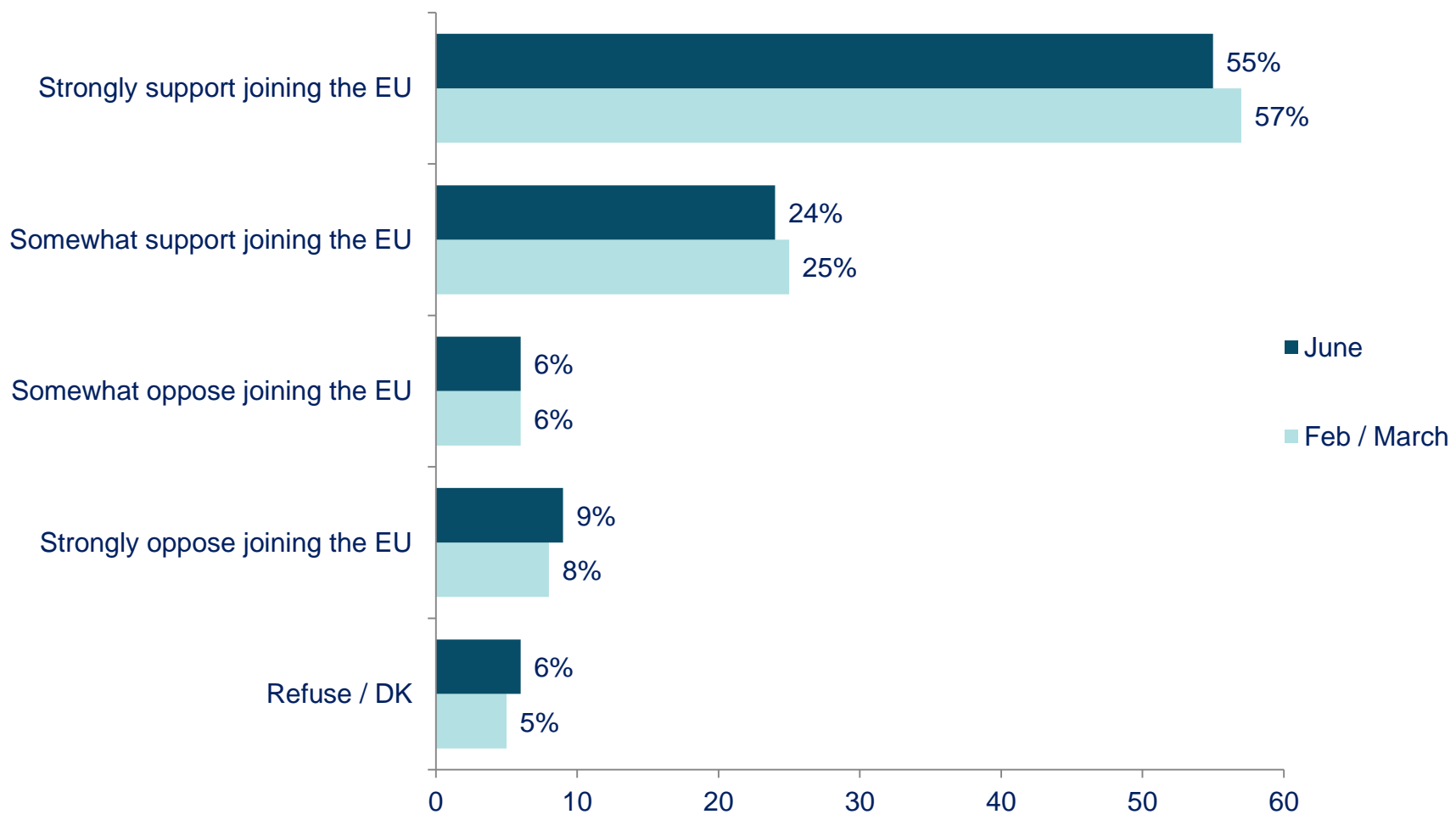
# EU ACCESSION

Have you personally seen, read, or heard anything about the European Union approving the start of final negotiations for our country to join the EU? IF YES: Did this make you feel....?



# TREND: EU ACCESSION

Our country is moving toward negotiations to join the EU. Do you...



**NOTE: There are no statistically significant changes from the Feb/ March survey**

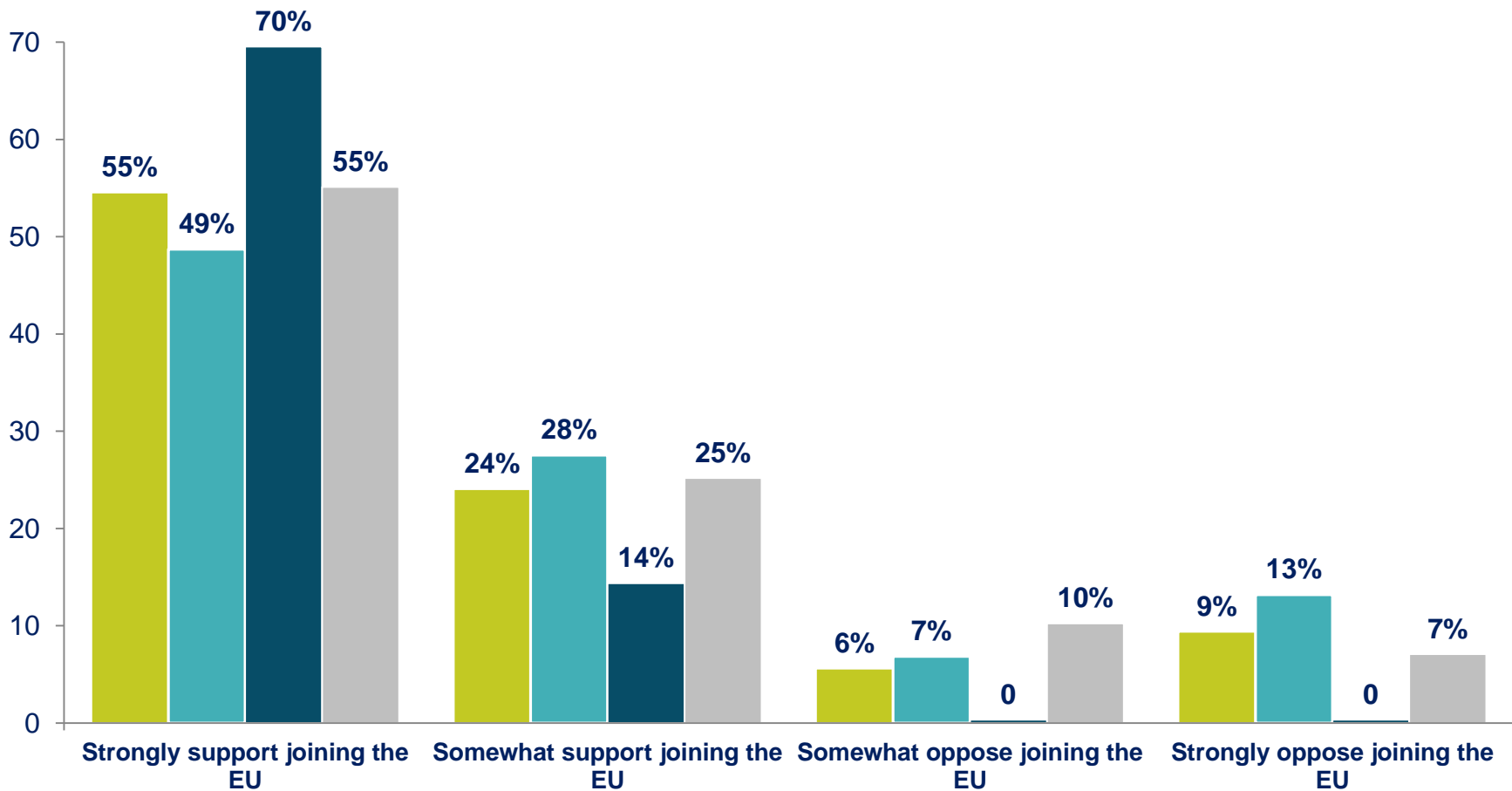
Base: 1213 (all respondents)  
Margin of Error ± 2.8



# EU ACCESSION

Our country is moving toward negotiations to join the EU. Do you...

79% Total Support joining EU



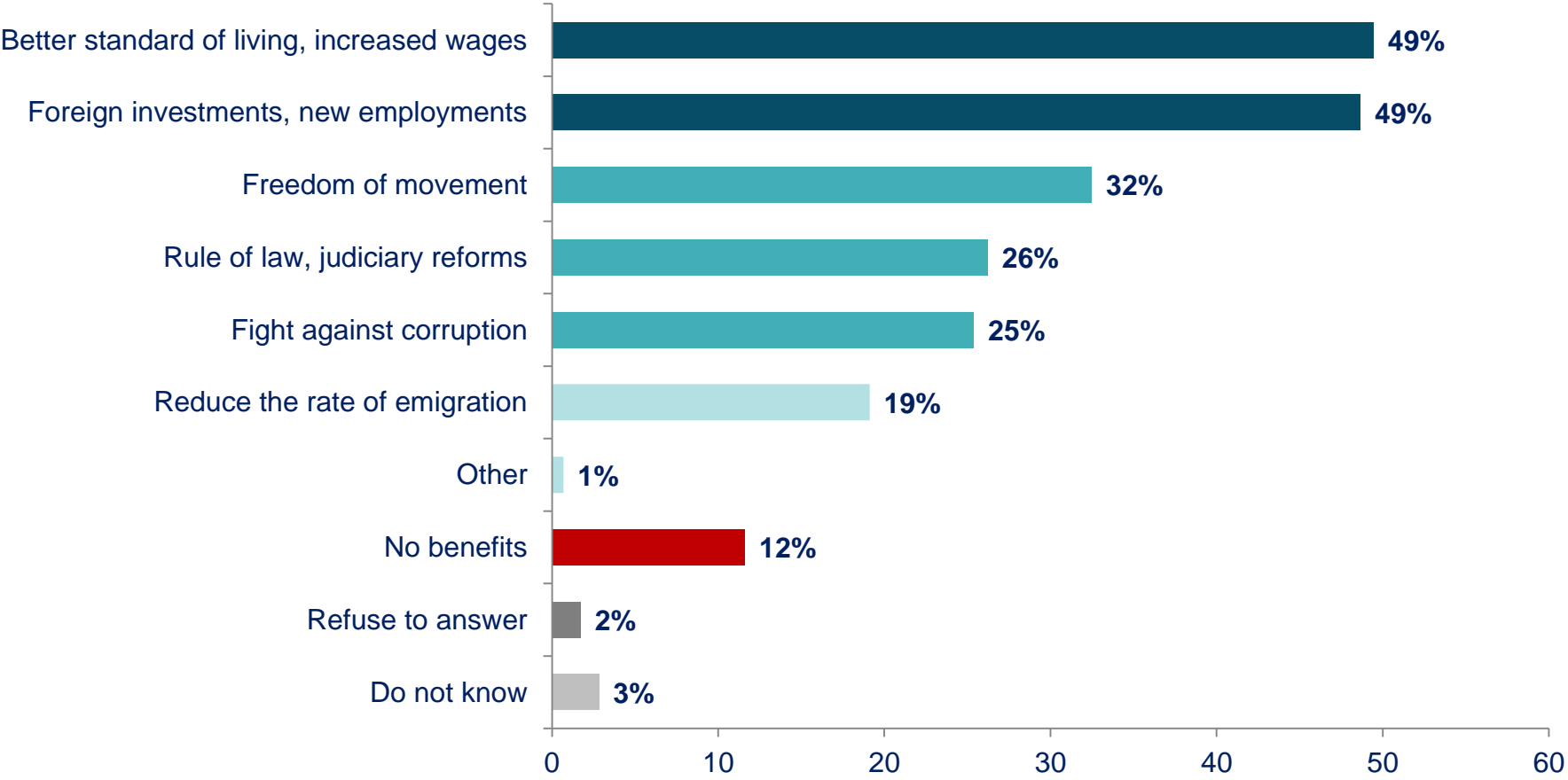
- Total
- Macedonian
- Albanian
- Other

Base: 1213 (all respondents)  
Margin of Error  $\pm 2.8$

# EU ACCESSION

Whether or not you support joining the EU, which benefits do you think will SIGNIFICANTLY help our country?

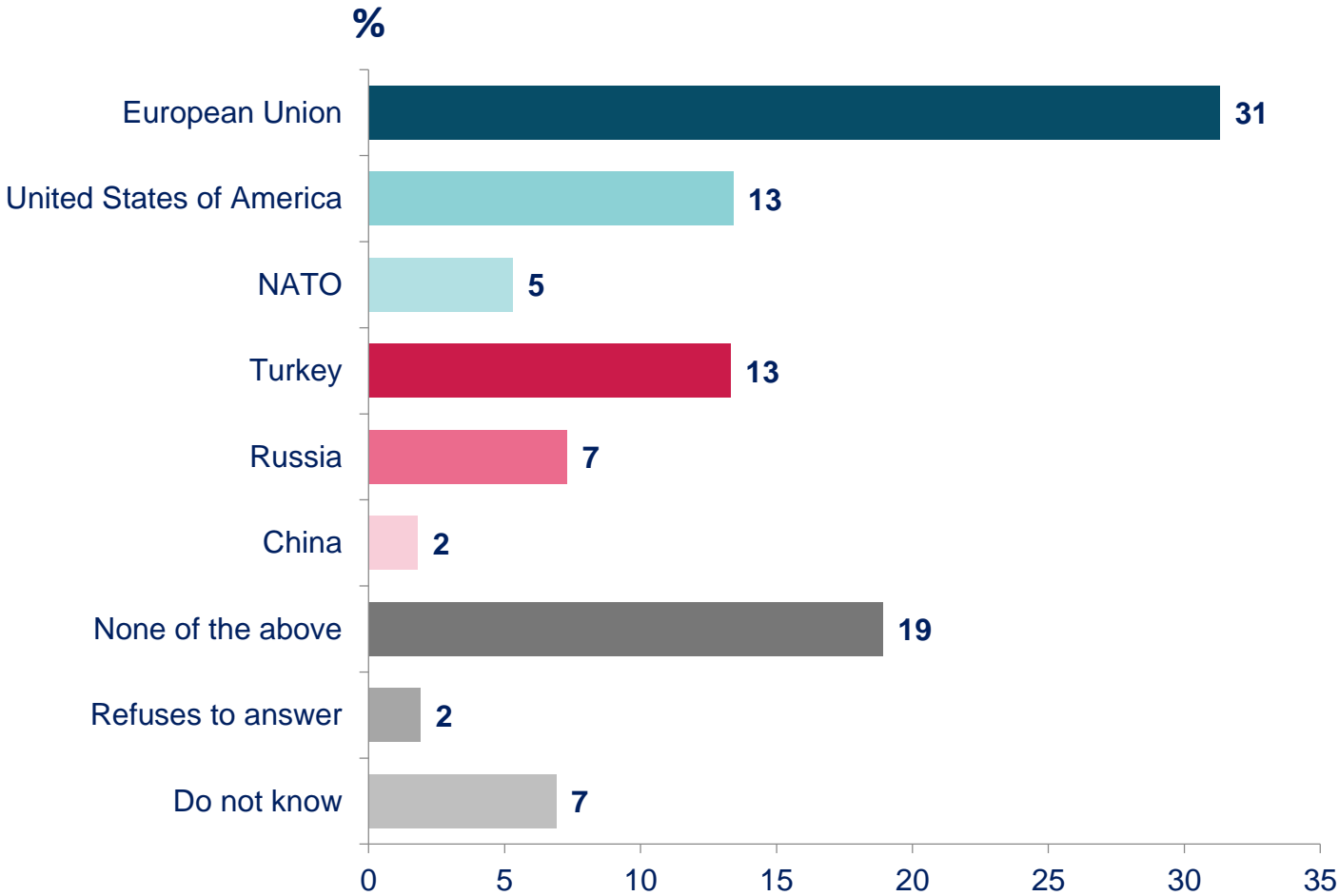
## MULTIPLE RESPONSE



Base: 1213 (all respondents)  
Margin of Error  $\pm 2.8$

# EXTERNAL SUPPORT

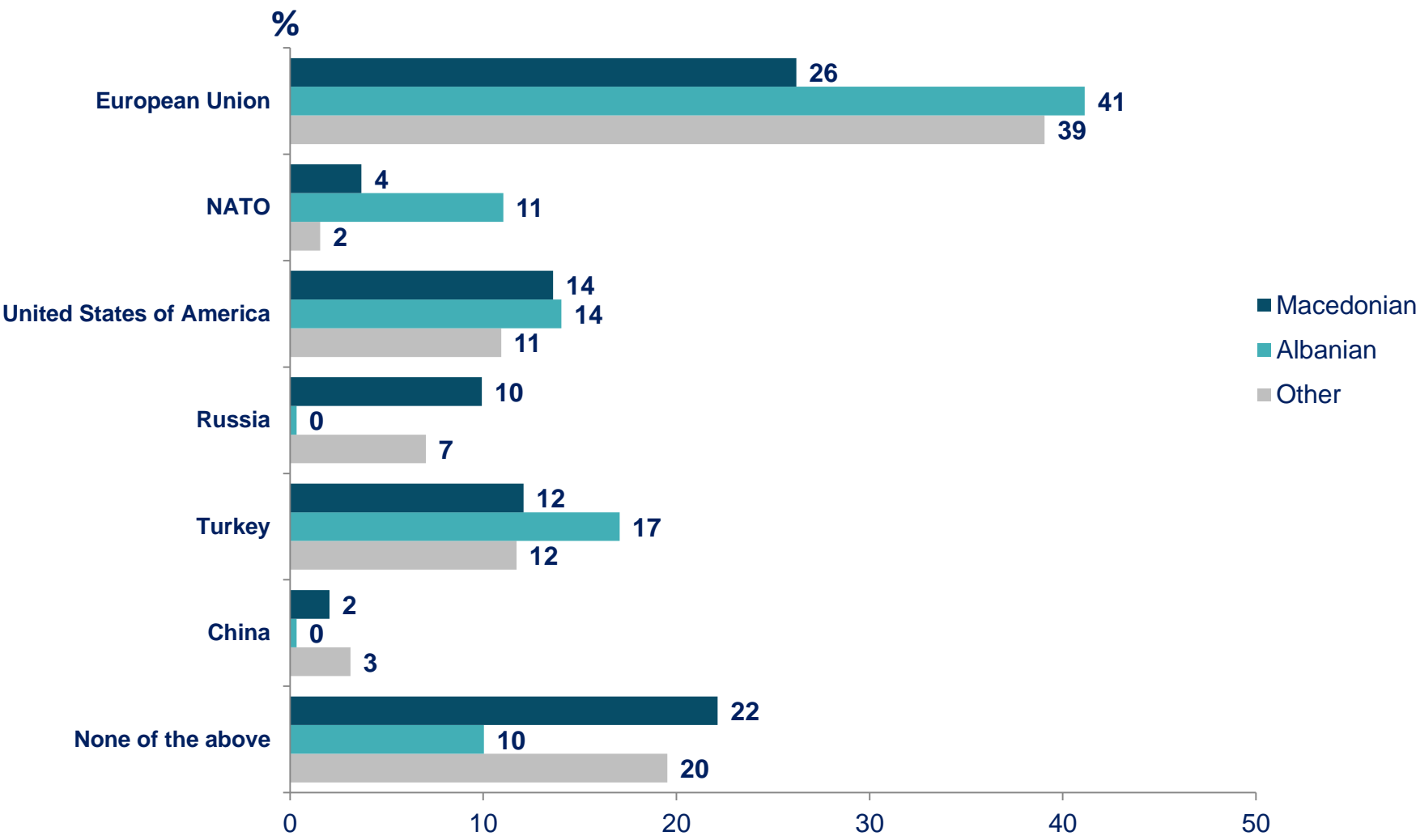
According to you, which one of these countries or organizations helps our country's national interests the most?



Base: 1213 (all respondents)  
Margin of Error  $\pm$  2.8

# EXTERNAL SUPPORT

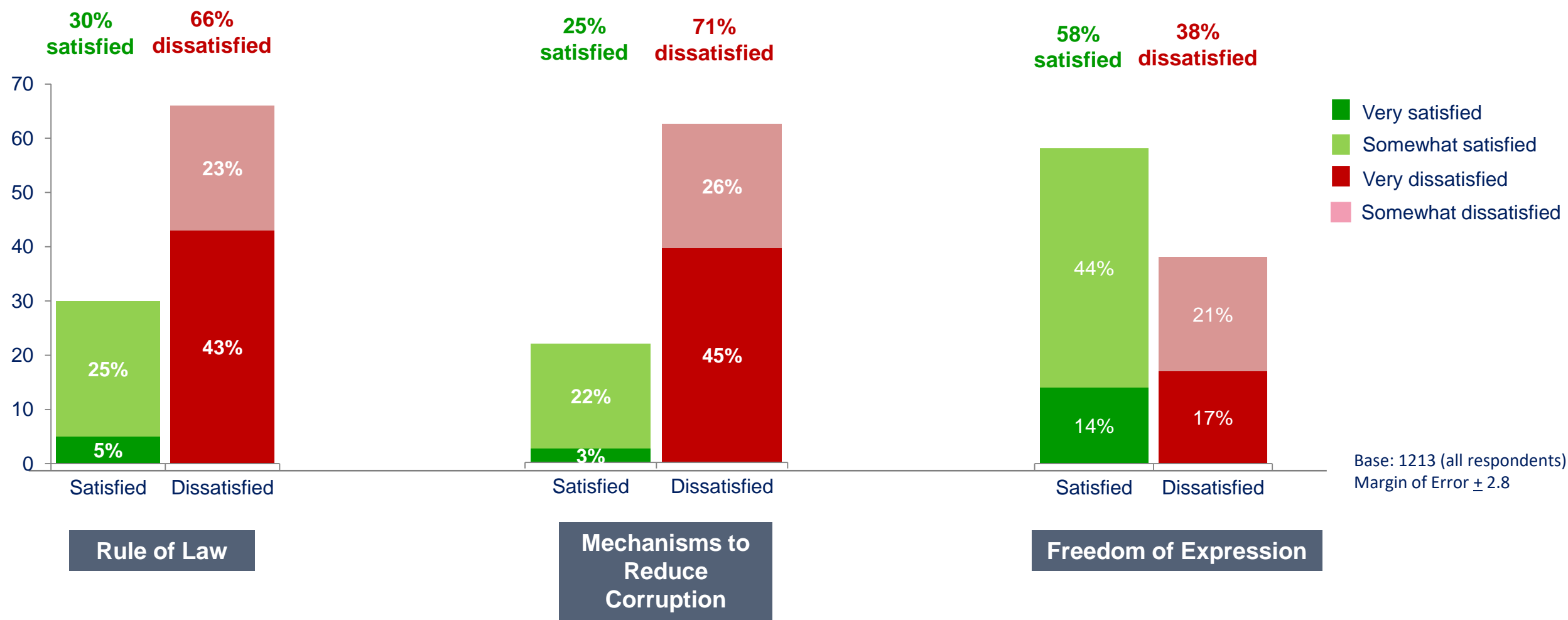
According to you, which one of these countries or organizations helps our country's national interests the most?



Base: 1213 (all respondents)  
Margin of Error  $\pm$  2.8

## **IX. KEY REFORMS**

# SATISFACTION RELATED TO KEY REFORMS

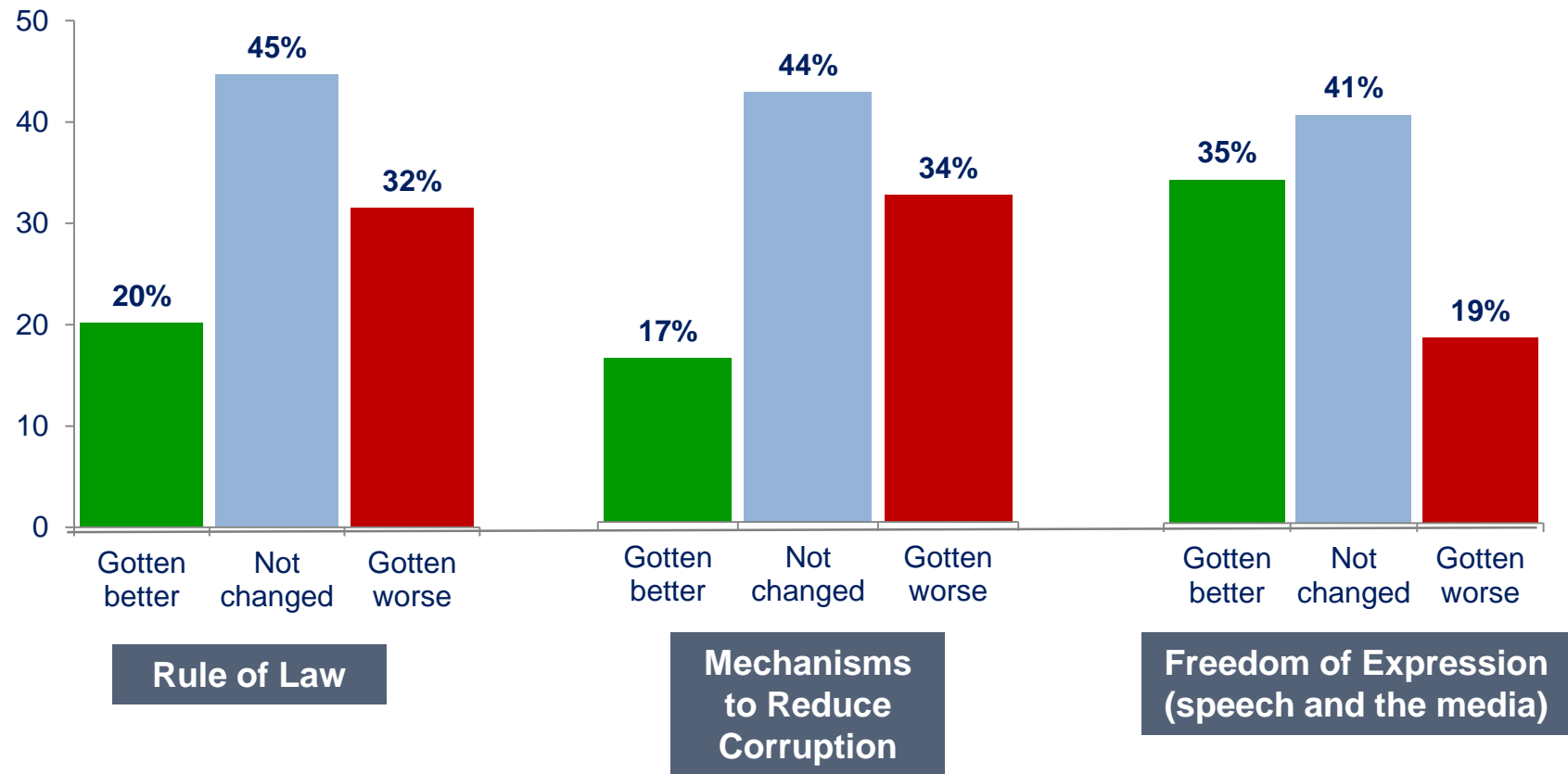


# TREND: SATISFACTION RELATED TO KEY REFORMS

	Dissatisfaction related to key reforms		
	Feb/ March	June	Change
Rule of Law	65%	66%	+1%
Mechanisms to reduce corruption	70%	71%	+1%
Freedom of expression	30%	38%	+8%

# PERCEIVED TRENDS IN KEY REFORMS

Compared to three years ago, do you think the...





# TREND: SATISFACTION RELATED TO KEY REFORMS

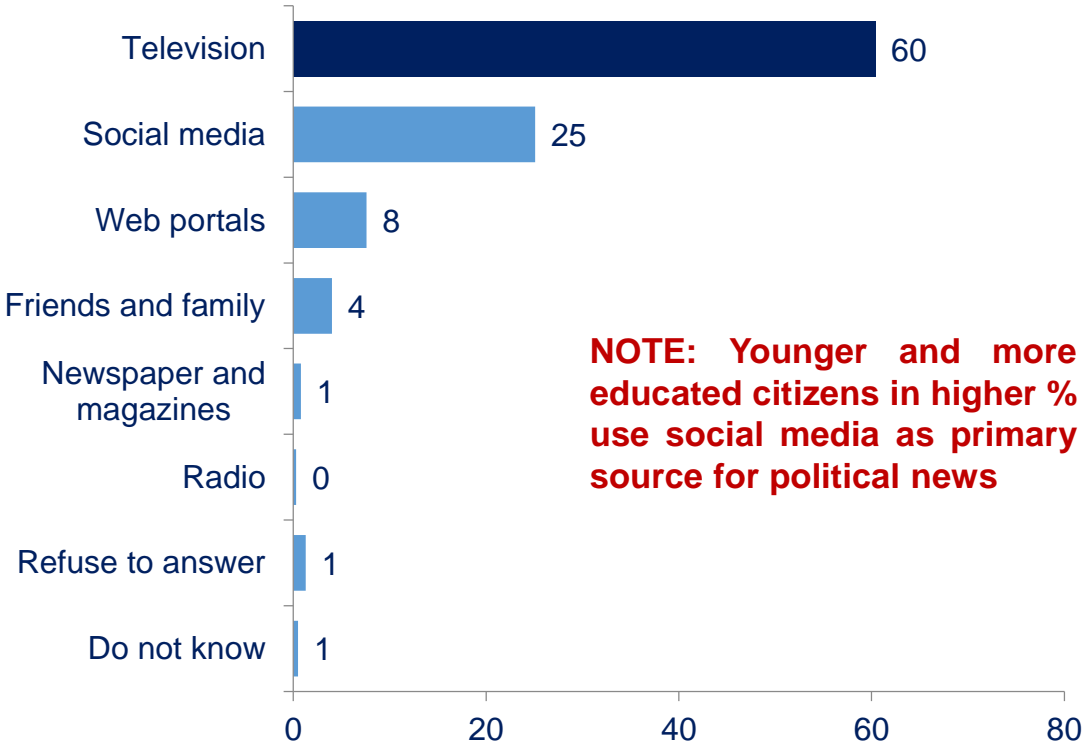
	Gotten better		Not changed		Gotten worse	
	Feb/March	June	Feb/ March	June	Feb/ March	June
Rule of Law	20%	20%	48%	45%	27%	32%
Mechanisms to reduce corruption	18%	17%	48%	44%	30%	34%
Freedom of expression	39%	35%	42%	41%	12%	19%

## **X. MEDIA USAGE AND DISINFORMATION**

# MEDIA USAGE

What is your primary source of political news?  
Which media do you trust the most as a source for political news?

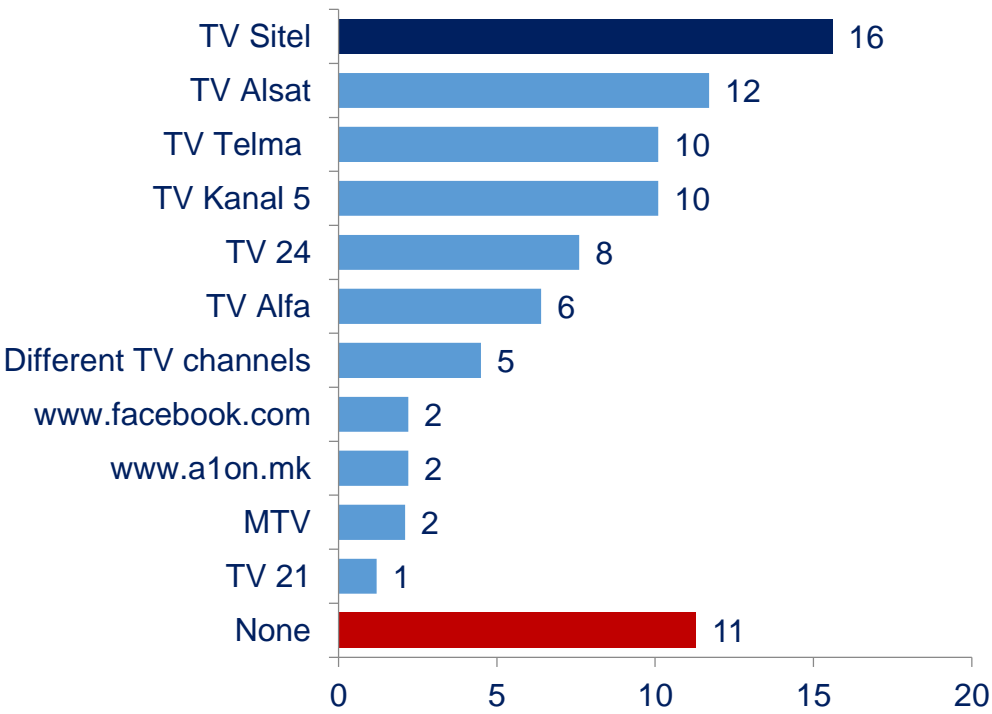
Primary source of political news (%)



**NOTE: Younger and more educated citizens in higher % use social media as primary source for political news**

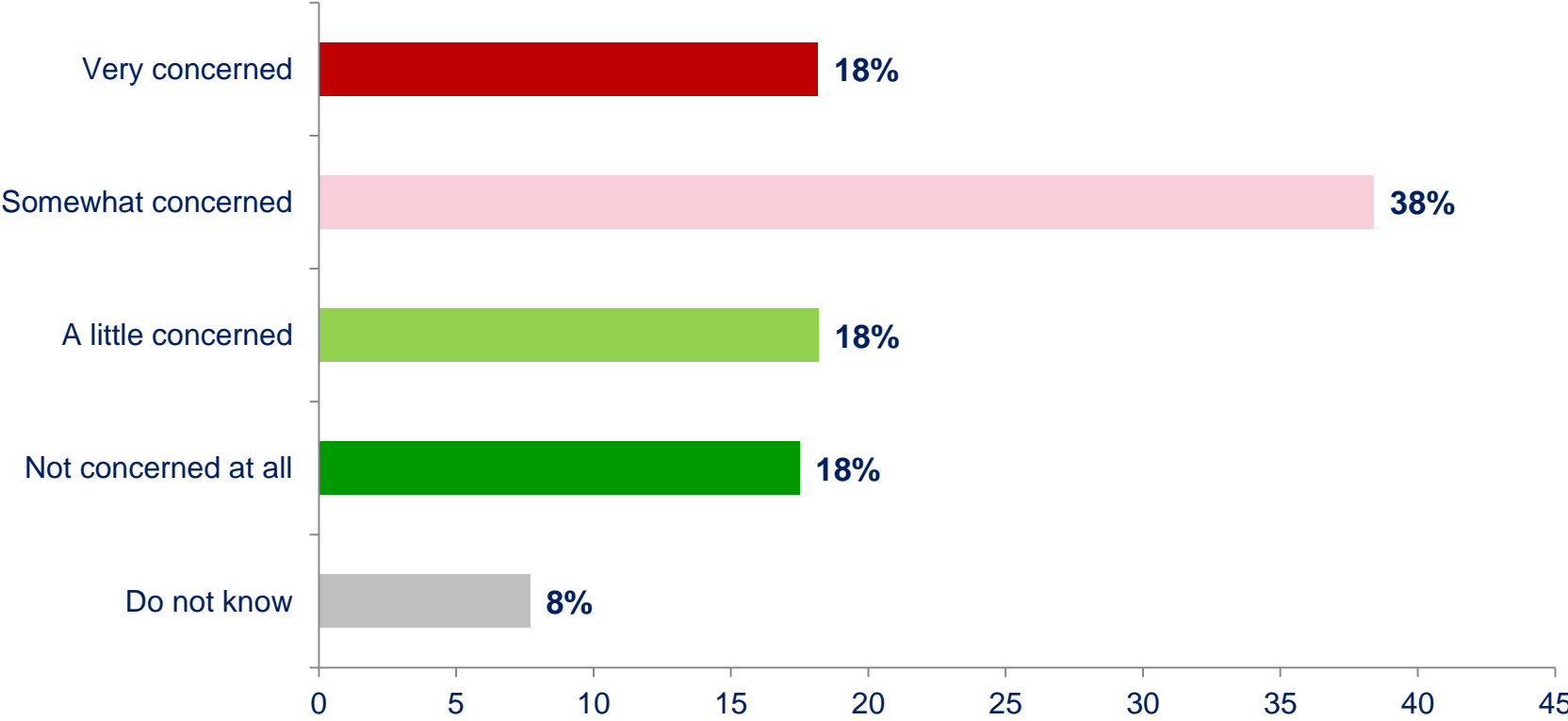
Base: 1213 (all respondents)  
Margin of Error ± 2.8

Most trusted source (%)



# CONCERN ABOUT DISINFORMATION

Some have suggested that disinformation related to COVID-19 and the election has been spreading in our country. Disinformation is false information that is shared with an intent to cause harm. How concerned are you that disinformation might influence enough voters to impact the results of the parliamentary elections? Are you...



**NOTE: There are no statistically significant changes from the Feb/ March survey**

Base: 1213 (all respondents)  
Margin of Error  $\pm$  2.8

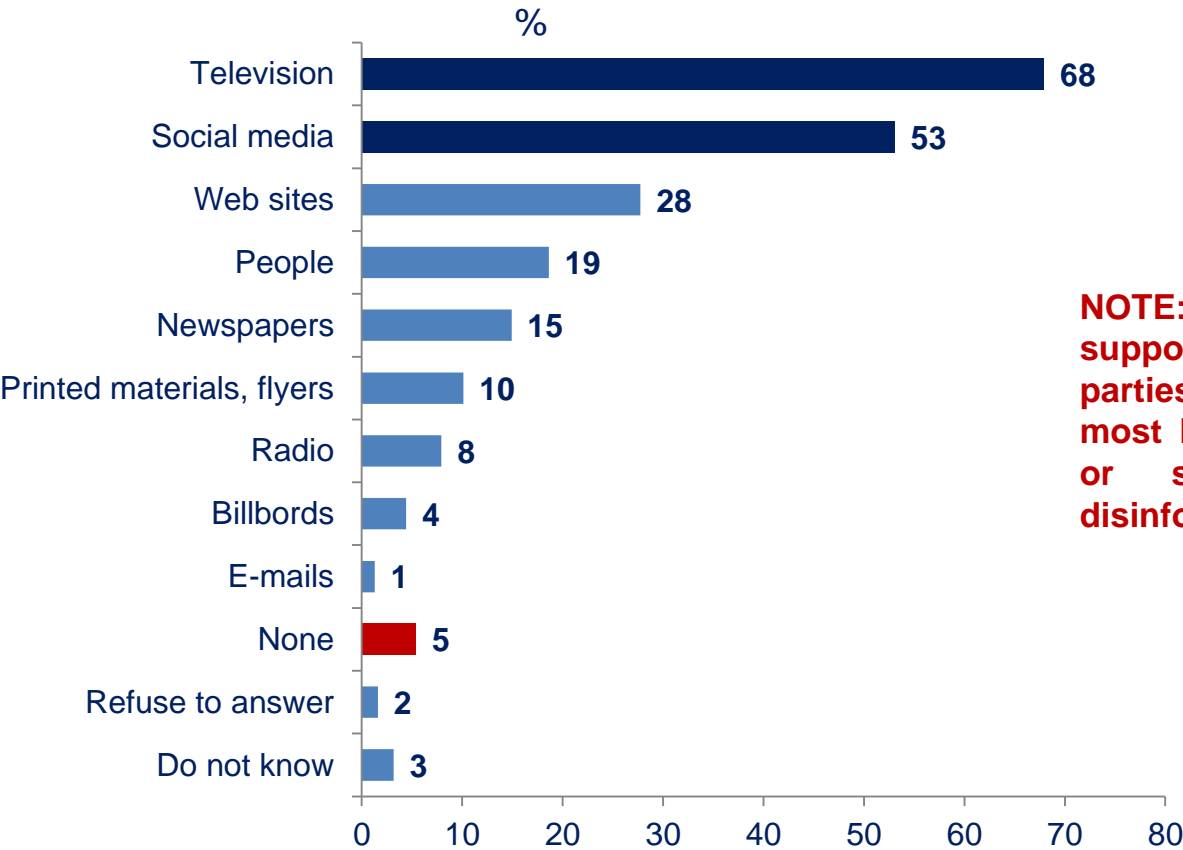
# INCIDENTS AND LOCATION OF DISINFORMATION

Please tell me if you have been exposed to disinformation in these sources of information?

## VOTERS EXPOSED TO DISINFORMATION



90%



**NOTE:** Political parties, supporters of political parties and media are most likely to be creating or spreading election disinformation

Base: 1213 (all respondents)  
Margin of Error  $\pm$  2.8

## **XI. MIGRATION**

# MIGRATION

Is there any member of your household who has emigrated to live and/or work abroad?  
Is there any member of your household who will likely emigrate to live and/or work abroad in the next year?

