



PUBLIC PERCEPTIONS OF THE INTERNATIONAL POSITION OF SERBIA

Opinion poll report

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I. Methodology and description of the sample

Survey performed by	Centre for Free Elections and Democracy and International Republican Institute
Fieldwork	From April 16 to April 28, 2021
Sample type and size	1,004 respondents from Serbia (excluding Kosovo and Metohija)
Survey method	Computer Assisted Telephone Interviewing (CATI)
Survey instrument	41-item questionnaire

This opinion poll, designed to assess public perceptions of global actors and their relationships with Serbia, was carried out by the **Centre for Free Elections and Democracy (CeSID)** and the **International Republican Institute (IRI)** between **April 16 and April 28, 2021** in Serbia excluding Kosovo and Metohija.

The poll involved a **41-item** questionnaire developed in partnership with the IRI that was administered to a random, nationally representative sample of 1,004 respondents aged 15 and above with registered addresses in Serbia (excluding Kosovo and Metohija).

The interviews took place using the **Computer Assisted Telephone Interviewing (CATI) method**; in each household, the respondent whose birthday came soonest after the survey date was interviewed. This 'first birthday rule' prevented interviews only with individuals who answered the phone, which ensured the sample was representative in terms of gender, educational attainment, and age.

Description of the sample

The following categories of respondents were covered based on the methodology established for the study:

Structure of respondents by gender: men, 48%; women, 52%.

Respondent age: 15 to 19, 10%; 20 to 29, 10%; 30 to 39, 15%; 40 to 49, 16%; 50 to 59, 13%; 60 to 69, 26%; 70 and above, 10%.

Average respondent age: 47.

Structure of respondents by educational attainment: elementary school or lower, 33%; two-/three-year secondary school, 14%; four-year secondary school, 34%; post-secondary/university education, 17%; school/university student, 2%.

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Region: Vojvodina, 27%; Belgrade, 21%; Western Serbia and Šumadija, 29%; Southern and Eastern Serbia, 23%.

Place of residence: city/town, 53%; rural area, 40%; suburban area, 7%.

2. Key findings and recommendations

Serbians are exceptionally interested in international relations and the country's foreign relations. **As many as 65 percent of those polled reported finding out about these issues from television; an additional one-third did so using online news sources, and a final 16 percent relied on social media.** The choice of preferred media outlet for accessing foreign policy information depended on educational attainment, age, region, and place of residence. As such, the majority of the Serbian population – those with elementary or secondary education, half of whom are rural residents – is reliant primarily on television as the key source of news in all areas of day-to-day life.

Respondents' attitudes towards potential global partners for Serbia are shaped by the impact of these actors on the country to date. The majority of those polled felt **only China and Russia had had a positive influence on Serbia in recent years.** A much larger proportion of those polled believed the United States (US), European Union (EU), and NATO had affected Serbia adversely than had a favourable view of their impact.

This is the reason why most Serbians perceived China and Russia as the countries that Serbia currently has the best relationship with. The EU came third. When the respondents were asked to cite countries that Serbia *ought to have* the closest ties with, Russia and China again topped the list, followed by neighbouring countries and the EU.

The respondents' subjective feeling of greater closeness to China and Russia than the EU and the US was corroborated by their agreement, or lack thereof, with ten statements concerning *donations and assistance to Serbia; economy and investment; and health and science.* Even when it came to donations and assistance, where the EU and the US lead the field in Serbia, the respondents were convinced that Russia and China had provided more aid. Moreover, those polled expressed confidence in Chinese investment and infrastructural projects, preferred the Chinese and Russian Covid-19 vaccines to 'Western' ones, and felt the Russian economy was equal to that of the US. Lastly, the respondents also exhibited a large degree of Euroscepticism.

Apart from the obvious demographic characteristics that determine views of West and East, clusters of pro-Eastern sentiment were found amongst viewers of **RTS** and **Pink**, visitors to **Telegraf.rs** and visitors to **Mondo.rs**, and, in some cases, readers of **Informer**.

As many as one-third of all respondents believed that China had donated the most to Serbia in grants over the past 20 years. Russia came second, cited by 19 percent of those polled, followed by the EU, at 17 percent.

The answers clearly revealed that **Serbians were pragmatic** in terms of choosing countries where they would like to live, work, receive medical treatment, and study. Their **economic opportunities make countries of the EU preferred places to live and work in.** By contrast, Russia is seen as more attractive for studying and receiving medical treatment. The respondents believed **China was the global economic leader**, with close to one-half of those polled (49 percent) reporting this answer. China was more likely to be seen as the world's most advanced economy by those with generally positive views of the East, residents of rural areas, and those living in Western Serbia and

Šumadija. Conversely, respondents based in Belgrade and Vojvodina, as well as those with pro-Western leanings, were more likely to cite the EU. **Those polled primarily saw the EU as the key global actor in terms of human rights and liberties (as reported by 40 percent), whereas Russia was viewed as dominant in foreign affairs and the geo-political arena.** The vast majority of respondents (71 percent) believed China had dealt with the Covid-19 pandemic the most effectively. **Once again, the greatest proportion of those polled (41 percent) perceived the EU as the global stakeholder with the most advanced social, economic, and labour rights.** Slightly under one-quarter (23 percent) believed Russia led the field in this regard, whilst 14 percent cited China.

Most respondents would like to see Serbia improve its **economic relations** with the EU and the US, as reported by 42 percent of those polled. Forging closer ties with these two actors in education and technology was ranked second (at 14 percent), as was greater co-operation to address the Kosovo issue (also at 14 percent). **Economic interests were the key criterion that Serbia ought to apply when choosing which actors to work and build alliances with in the international arena,** as reported by 57 percent of those surveyed.

Democracy was seen as the best form of government by fewer than one-half of all respondents (45 percent). By contrast, nearly one-quarter (24 percent) believed a non-democratic, strong-arm regime was the best option, with a final 27 percent seeing both choices as having their strengths and weaknesses. The proportion of respondents who chose non-democratic government increased with their age, whilst, by contrast, views of democracy as the best choice were more likely to be shared by the youngest cohort.

Two-fifths of those polled in this survey (39 percent) reported most commonly using the **public broadcaster (RTS)** to access information. Pink was cited as the primary source of news by 15 percent. **More than one-half of all respondents (53 percent) reported not using any of the news web sites or print media offered in the questionnaire.** One exception, however, was *Blic*, which was read by 18 percent. Nearly three-quarters of all respondents reported never following online influencers; **most of those who did claimed not doing so often (an aggregate of 24 percent, with 12 percent each claiming to do so 'rarely' and 'occasionally').**

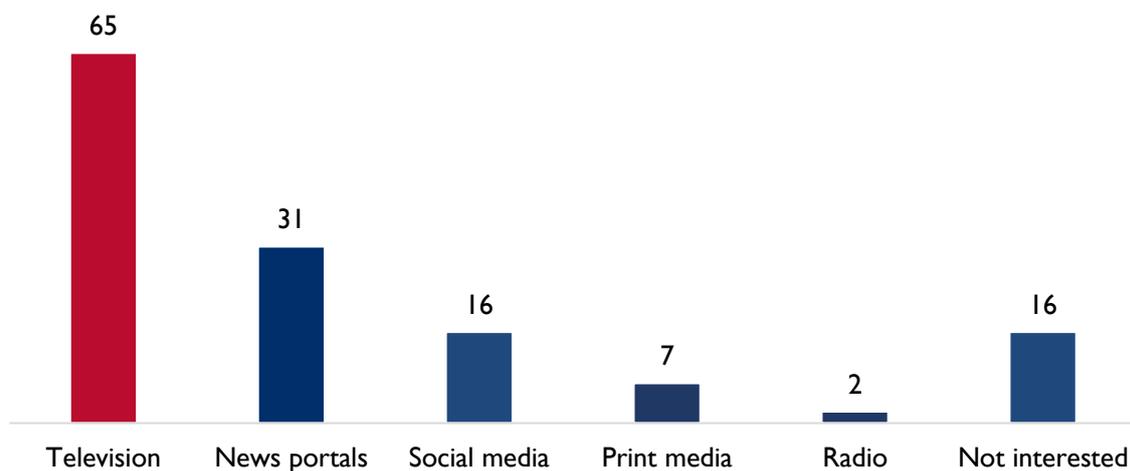
3. Accessing news about global affairs

Serbians are exceptionally interested in the country's foreign relations. **More than four-fifths of those polled (84 percent) reported an interest in this topic, with no more than 16 percent claiming to be indifferent towards global affairs.**

Interestingly, women were more likely to be prepared to learn about foreign affairs than men, as were respondents aged between 20 to 29 and those aged 70 and above, as well as residents of Belgrade.

Inhabitants of Vojvodina and the 40 to 49 cohort were statistically less likely to be interested in this subject.

Figure 3.1. Which media outlet do you use to access news about global affairs?
(Multiple answers possible) (%)



As with most other issues in the news, Serbians learn about foreign affairs primarily through television. **Two-thirds of those polled (65 percent) said television was the primary media outlet they used to access information about Serbian foreign policy and international relations.** Television was more likely to be used by women, the elderly, and residents of rural areas, mainly in Western Serbia and Šumadija.

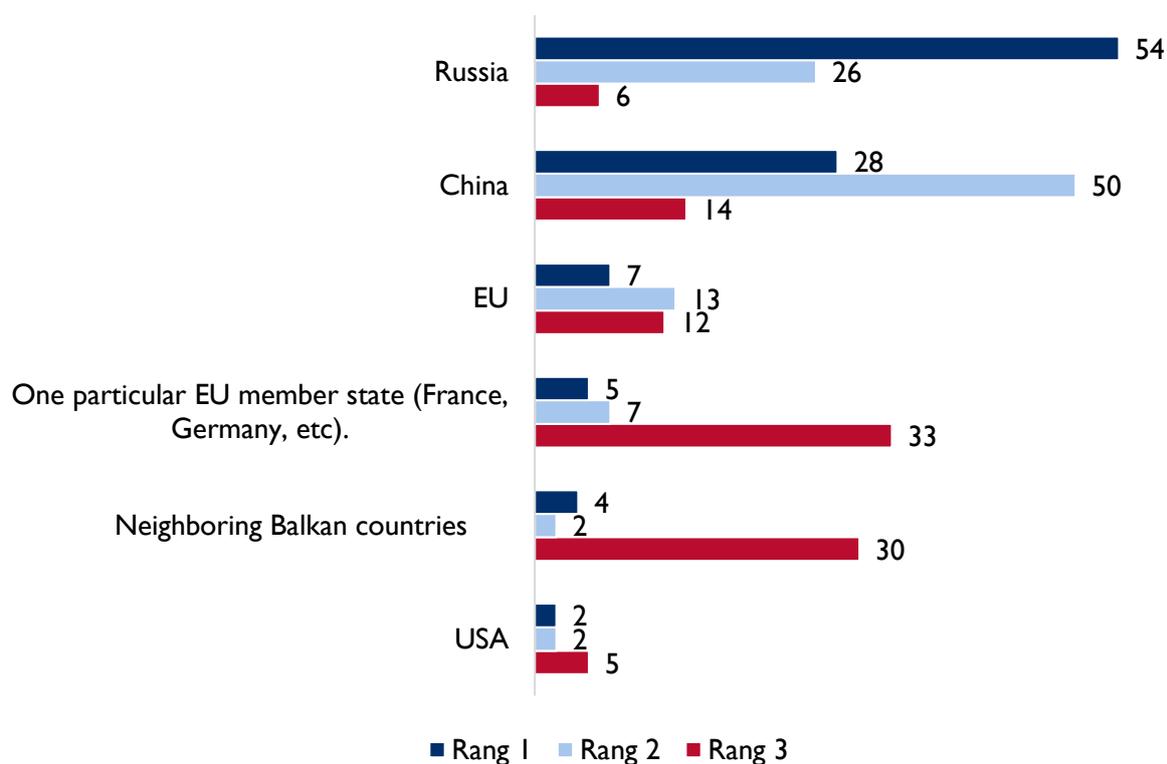
Online portals and web sites of news organisations and wire services came second. These outlets were used by one in three respondents (31 percent), with a final 16 percent relying on another online source – social media. Web sites and social outlets were more likely to be used by young, well-educated respondents living in urban areas, primarily the Belgrade conurbation and large cities in Southern and Eastern Serbia.

The decline of print media and radio is borne out by the fact that under 10 percent of those polled reported using either of the two outlets to learn about foreign affairs.

4. Foreign policy: who are, and who ought to be, Serbia's friends?

The respondents were asked to rank three states/international organisations on a scale from 1 to 3 based on the quality of Serbia's relationship with it. The greater the score, the closer to Serbia the country was perceived to be. **The findings reveal that Serbia looks to the East for friendship: Russia and China were ranked first or second by most respondents.**

Figure 4.1. Please rank three of these/countries organisations that Serbia currently has the closest relationship with (%)



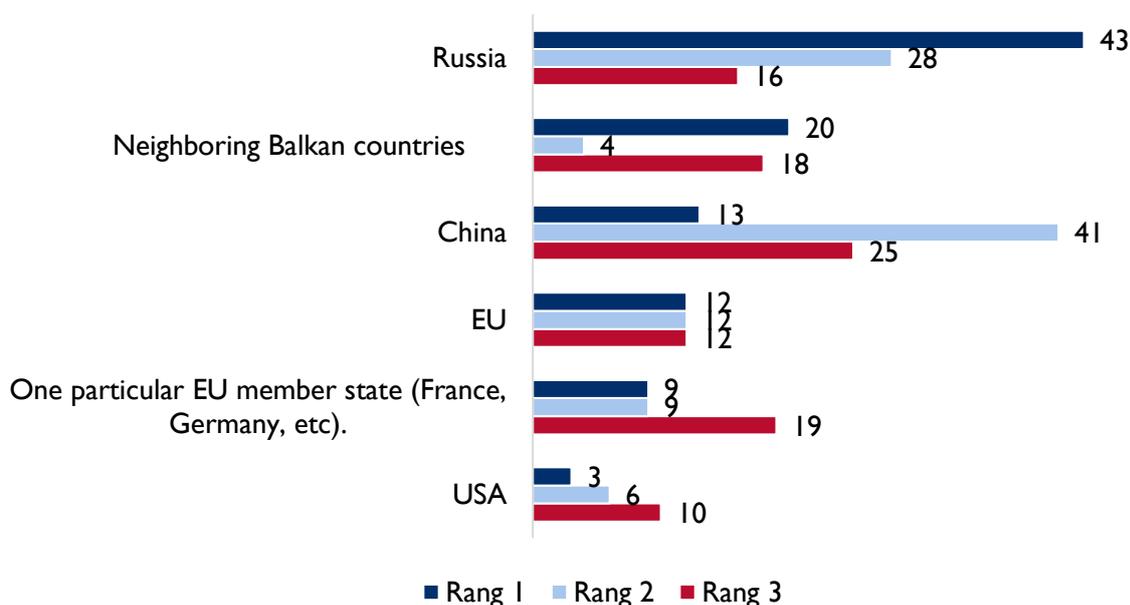
Slightly fewer than one-half of those polled (54 percent) believe Russia has the closest relationship with Serbia, whilst a little over than one-quarter (28 percent) feel China deserves pride of place in this regard. The EU was the first choice for only 7 percent of all respondents.

Respondents who believed in Serbia's 'special relationship' with Russia tended to be clustered in Belgrade and Western Serbia and Šumadija. In addition, this category were slightly more numerous in rural areas. By contrast, China was more likely to be the first choice for residents of Vojvodina, as well as the youngest cohort (those aged 15 to 19). Apart from containing 45 percent of those who prioritise China, this youngest age group also tended to include more respondents who felt the US and the EU were Serbia's closest friends (at 8 and 10 percent, respectively). The belief that Russia was the closest ally to Serbia was shared by 30 percent of those polled in this group, 24 percentage points lower than the sample average.

The same three countries/organisations top the list of second choices, and only the order differs somewhat. Here, China comes first (at 50 percent), followed by Russia (26 percent), with the EU third (13 percent).

One in three respondents (33 percent) selected particular EU member states as their third choice, followed by neighbouring countries (at 30 percent).

Figure 4.2. Please rank three of these/countries organisations that Serbia currently has the closest relationship with (%)



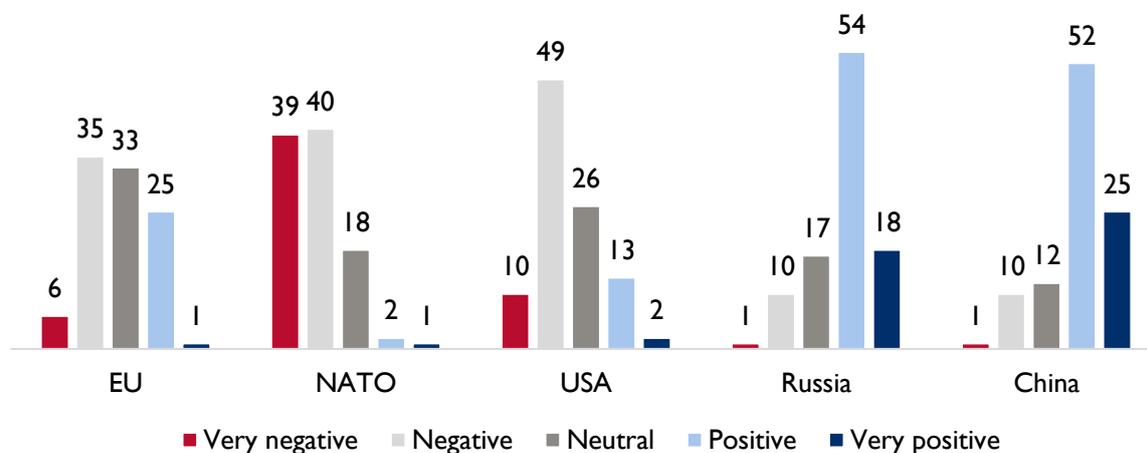
Apart from currently being perceived as Serbia's closest international ally, Russia is also seen by over two-fifths of those polled (43 percent) as the best future global partner. More than one-quarter (28 percent) felt Russia was a desirable long-term friend, with 16 percent seeing it as third choice in international relations.

Nevertheless, respondents were, notably, clear about Serbia needing friends in the immediate neighbourhood, as shown by the one-fifth (20 percent) that ranked regional countries as their first choice as foreign partners. This high percentage was likely caused by President Vučić's vaccine diplomacy and his message that Balkan countries were each other's natural allies. China and the EU occupied the following two positions, with fairly similar percentages of respondents believing Serbia could forge reliable ties with each.

The youngest cohort (15 to 19) were less likely to prioritise Russia and somewhat readier to seek allies in the region (at 29 percent) and the US (8 percent). Russia was more likely to be seen as a desirable foreign partner by respondents based in rural areas and residents of Southern and Eastern Serbia.

These views of global actors are largely driven by perceptions of their influence on Serbia to date.

Chart 4.3. Do these global actors have a positive, negative, or neutral impact on Serbia? (%)



The findings reveal that the public have an adverse perception of the impact of NATO, the US, and even the EU. By contrast, the influence of China and Russia is seen as either positive or highly so.

More than three-quarters of those polled (79 percent) felt the impact of NATO on Serbia has been either ‘negative’ or ‘very negative’; 59 percent shared the same views of the US; and two-fifths (41 percent) held identical opinions when it came to the EU. No more than one in nine respondents (11 percent) believed Russia and China have had an adverse influence on the country.

In aggregate, 77 percent felt China’s influence has been ‘positive’ and ‘very positive’, whilst only slightly fewer (72 percent) felt the same about Russia.

One in four respondents (26 percent) claimed the EU has had a ‘positive’ or ‘very positive’ influence on Serbia; 15 percent believed the same about the US; and no more than 3 percent thought NATO has had a positive impact on the country.

Male respondents were more likely to believe the US and the EU have had an adverse impact. Interestingly, university graduates and the over-70s tended to be more critical of the influence of the EU on Serbia. The influence of the US was more likely to be perceived negatively by secondary school graduates from three cohorts (20 to 29, 50 to 59, and over 70 years of age), as well as residents of Belgrade and Western Serbia and Šumadija.

University graduates were also more cautious about Russian influence in Serbia, as were residents of Southern and Eastern Serbia. The hardest core of support for Russia was found amongst those with only elementary school diplomas and residents of Belgrade and Vojvodina. These two areas were also more likely to perceive China’s influence as positive, above all in the over-60 cohort.

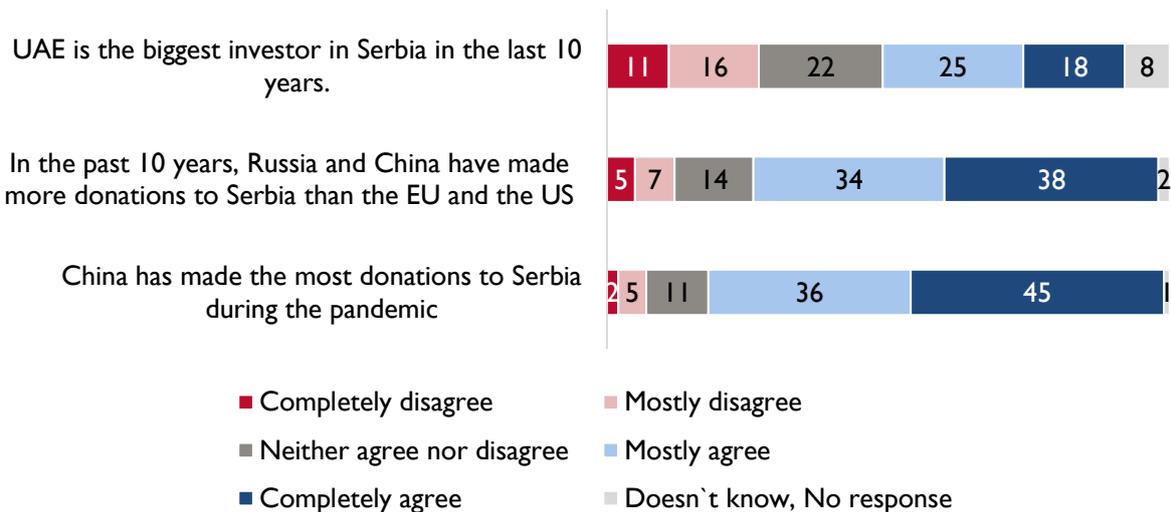
5. Attitudes of the Serbian public towards East and West

To gauge as accurately as possible the attitudes of the Serbian public towards the East (primarily Russia and China) and the West (the US and EU), the respondents were offered ten statements and asked whether they disagreed or agreed with them, which revealed their partiality for either side.

The statements were divided into four categories: a) **Donations and aid to Serbia**; b) **Economy and investment**; c) **European integration**; and d) **Healthcare and science**.

The respondents were able to score the statements on a five-point scale (where 1 meant ‘completely disagree’ and 5 meant ‘completely agree’) to show their attitudes towards the influence of Russia/China, on the one hand, and the EU/US, on the other, as well as their perceptions of how significant the four countries were globally in these four areas.

Chart 5.1. Public attitudes towards donations and donors (%)



Even though the EU has objectively been the largest provider of development aid to Serbia since 2000, with the US also topping the list of donors, the public clearly have different subjective views. Nearly three-quarters of those polled (72 percent) feel that China and Russia have donated more money to Serbia over the past decade than the EU and the US put together. No more than 12 percent of those polled disagreed with this statement, revealing a significant lack of information or communication between donors and beneficiaries. Moreover, this perception can be the result of: a) *donations and assistance in areas that the public do not see as important to their day-to-day lives*; b) *lack of donor promotion by Serbian government authorities*; and c) *poor outreach strategies employed by the donors themselves*.

The visibility of Chinese donations to Serbia has soared during the coronavirus pandemic, when the impact of aid in medical supplies to the country at that critical juncture was additionally enhanced by a vigorous campaign pursued by the authorities and highest-ranking officials. The way the Serbian Government communicated not only this aid, but also the arrival of medical equipment that Serbia actually purchased from China, made it appear that China had provided the most assistance to the

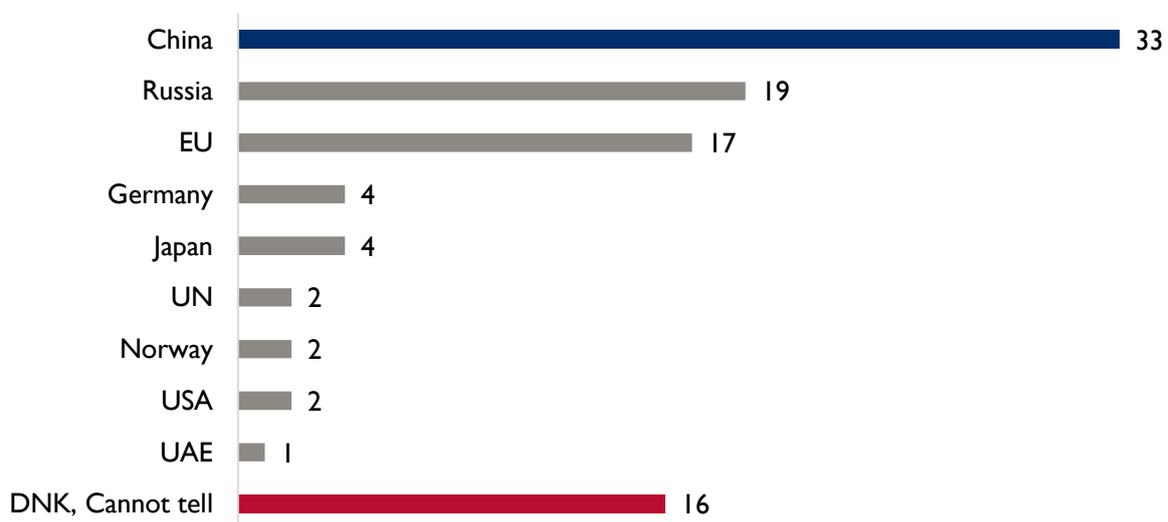
country during the coronavirus pandemic. As many as 81 percent of those surveyed agreed with this statement.

Perceptions of foreign aid are also well illustrated by the finding that two-fifths of all respondents agreed either completely or to some extent that the United Arab Emirates (UAE) was amongst the largest donors to Serbia over the past decade.

Chinese and Russian donations tended to be best received by respondents with lower educational attainment, those living in rural areas, and the over-70 cohort. Apart from these three categories, residents of Western Serbia and Šumadija were also more likely to perceive Eastern aid as greater than it actually was.

As many as one-third of those surveyed felt China had donated the most in non-repayable grants to Serbia in the past 20 years. Russia came second, as reported by 19 percent of those polled, followed by the EU, seen by as 17 percent as the largest grant donor. Germany and Japan were each mentioned by 4 percent, with 2 percent each seeing the UN, Norway, and the US as the largest sources of grants. Lastly, 1 percent felt the UAE was the largest provider of non-repayable assistance to Serbia. It ought to be noted, however, that a high 16 percent of those polled could not say which global actor it was that extended the greatest volume of grant funding.

Chart 5.2. Which of these global actors has made the most non-repayable donations to Serbia over the past 20 years? (%)

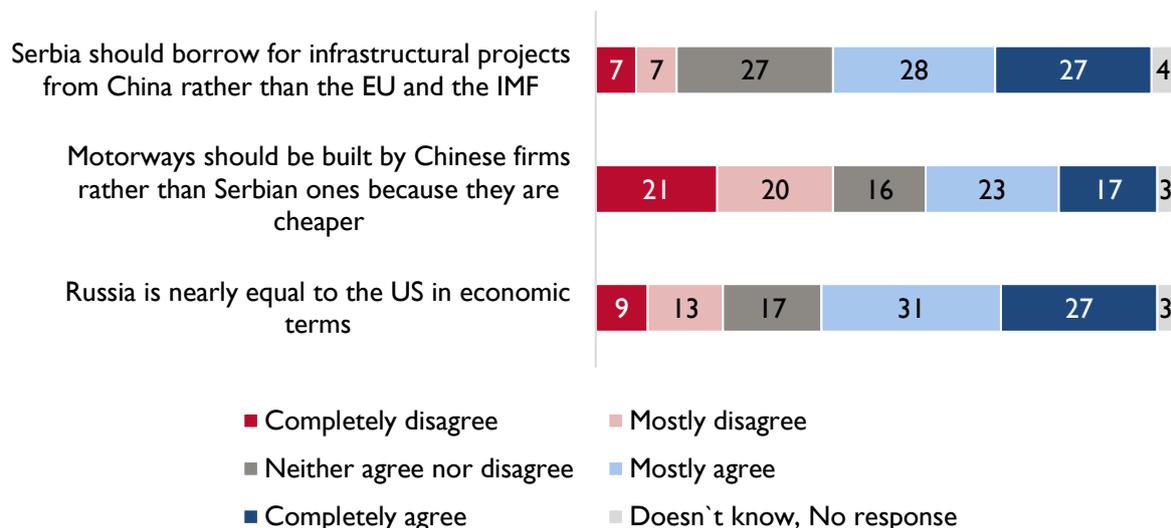


China's position at the top of this list should primarily be viewed **through the lens of the Covid-19 pandemic, as Chinese assistance to Serbia received the most media attention.** According to the Serbian Ministry of European Integration, the volume of China's donations to Serbia amounted to \$31.4 million dollars between 2000 and 2016, whilst no official information even exists for Russian aid, suggesting that the respondents significantly overestimated the actual assistance extended by these

two countries. By contrast, in the same period the EU donated €2.96 billion, whilst the US provided \$696 million in development aid.¹

The youngest cohort were more likely to believe most grants had come from China and Russia in the past. By contrast, the 30 to 39 cohort tended to see the EU as the largest donor. As expected, pro-Western respondents were more likely to cite the US and the EU, whilst those with pro-Eastern sentiments tended to mention China. Interestingly, Russia was chosen equally by pro-Eastern and pro-Western respondents. As many as 41 percent of elementary school graduates believed China was the largest source of aid. Cross-referencing these findings with media use information reveals NI viewers tended to see the EU as the greatest donor, those who watched Pink believed it was Russia, whilst respondents who got their news mainly from the public broadcaster RTS felt China was the source of most aid. Respondents who used Nova.rs and Mondo.rs web sites tended to choose the EU.

Chart 5.3. Public perceptions of the economy and investment (%)



The respondents' belief in the power of Russia and China was also revealed in their assessments of how the economies of these two countries stack up to that of the US. More than one-half of those polled (55 percent) believed it was better for Serbia to undertake large-scale public investments with Chinese assistance than the support of the EU and the IMF. No more than 14 percent of those polled disagreed.

Interestingly, even though the respondents often tended to overrate the capabilities and results of Serbian firms, nearly identical percentages (two-fifths each) both agreed and disagreed with the statement that motorways in Serbia should be built by Chinese rather than Serbian construction companies.

¹See slobodnaevropa.org/a/srbija-eu-pomoc-sad-rusija-gra%C4%91lani-neznanje/29230454.html.

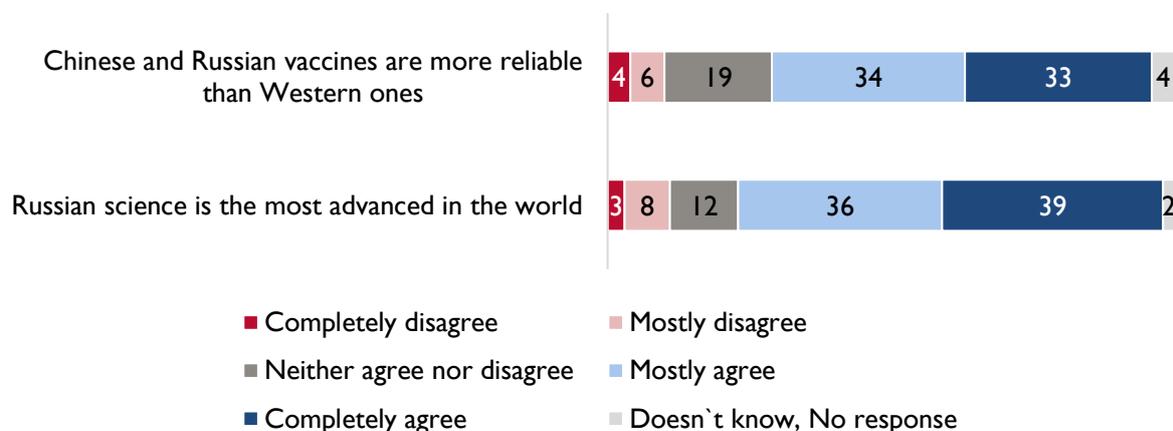
This view is certainly a consequence of positive experiences with Chinese infrastructure projects that have been promoted in the mainstream media and by the Government. It is concerning, nevertheless, to see respondents disregard the recent experiences of Montenegro with Chinese-funded motorway construction and the potential consequences of this financial arrangement.

Respondents believed the East was stronger economically than the West: 58 percent of those polled were convinced that Russia and the US were nearly equal in economic terms. Just only slightly more than one-fifth (22 percent) disagreed. Those surveyed in regions south of Belgrade (Western Serbia and Šumadija and Southern and Eastern Serbia) tended to believe Russia was close to the US level of development more than respondents in northerly areas, with rural residents primarily sharing this view.

The belief that Chinese infrastructural projects were more beneficial for Serbia than those supported by the EU and the IMF was more widely spread amongst women, residents of Belgrade and Western Serbia/Šumadija, and the over-60s.

The choice of preferred country/organisation for investment into Serbian infrastructure was largely driven by respondents' media habits. Viewers of Pink and RTS and readers of *Informer*, *Telegraf.rs* and *Mondo.rs* were more likely to view Chinese capital investments in a favourable light.

Chart 5.4. Public perceptions of healthcare and science (%)



China's and Russia's vaccine diplomacy has proven highly effective in Serbia. **More than two-thirds of those polled (67 percent) agreed that Russian and Chinese vaccines were more reliable than 'Western' ones, with no more than one in ten respondents disagreeing.**

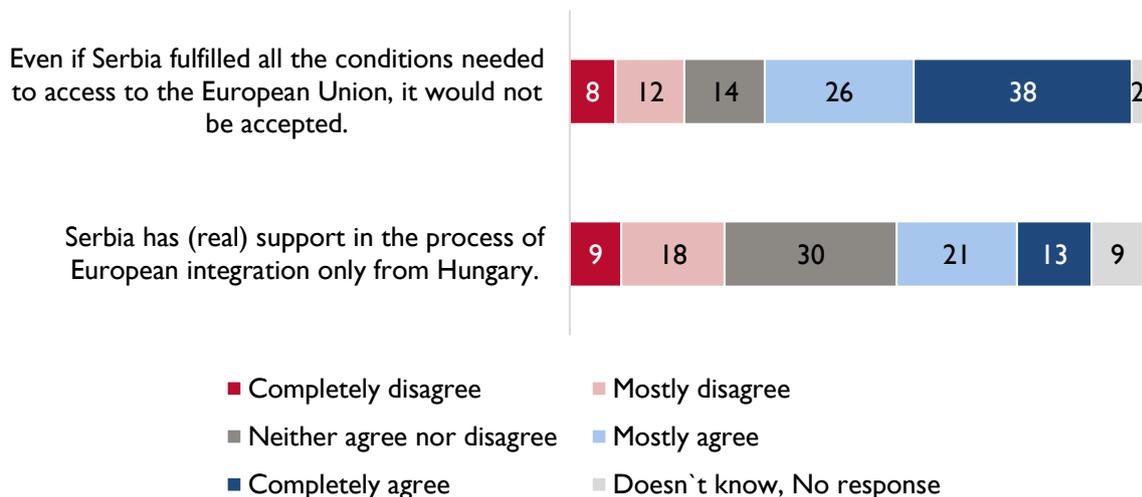
These perceptions come as no surprise given the relative speed with which Russia and China produced their vaccines and delivered them to Serbia. The views were further reinforced by the relatively few side effects of immunisation and the negligible fatality rate following vaccination with Russian and Chinese vaccines. Whilst Western vaccine makers were at each other's throats, trumpeting the side effects of one another's products and counting deaths, Eastern vaccines built a solid following in Serbia.

The success of Eastern vaccines served as an excellent foundation on which to build the narrative of advanced Russian science. More than one-half (55 percent) of those who believed Eastern vaccines were more reliable than Western ones agreed that Russian science was the most advanced in the world, a figure 16 percent higher than the average. Russian scientific achievements are seen as superior to some extent by three-quarters of Serbians.

Again, the belief in superior Russian science and the efficacy of Russian and Chinese vaccines was found to be the most widely held by viewers of RTS and Pink and readers of *Informer*, *Mondo.rs*, and *Telegraf.rs*.

Respondents' attitudes towards the EU, and, partly, the US, are largely influenced by the progress made by Serbia in its efforts to join the EU.

Chart 5.5. Attitudes towards European integration (%)

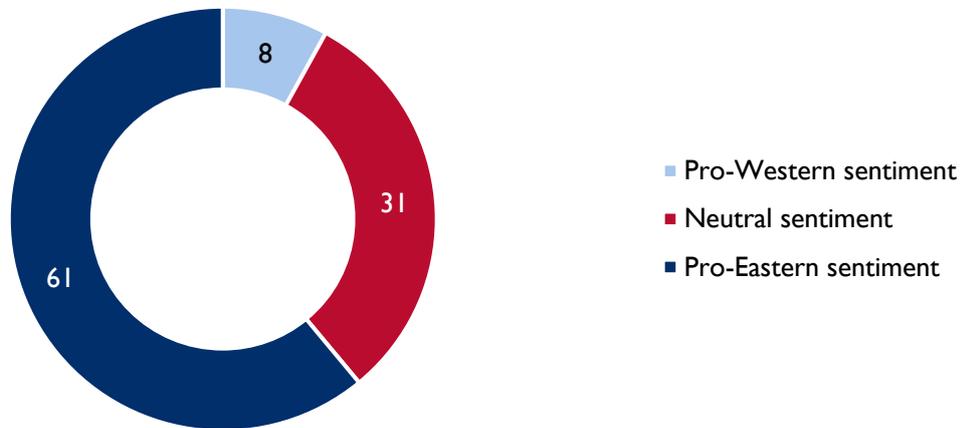


The Serbian public have largely recognised enlargement fatigue and hesitancy on the part of the EU (in spite of this being the bloc's stated policy). **This conclusion is based on the finding that nearly two-thirds of those polled (64 percent) suspected Serbia would not to be allowed to join the EU even if it met all the requirements.** One in five respondents did not agree, but this result does little to assuage disappointment with what were seen as unfair conditions for becoming an EU member.

One in three respondents (34 percent) believed Hungary was one of Serbia's few friends and the only EU member wholeheartedly supporting Serbia in its efforts to join the bloc.

Men were somewhat more sceptical of the EU than women, as were respondents with post-secondary education and residents of Belgrade and Vojvodina. Viewers of RTS, Pink, and Happy TV tended to doubt the likelihood of Serbia's joining the EU. Above-average mistrust of the bloc was also found in visitors to *Telegraf.rs*, *Mondo.rs*, and *Srbijadanas.com*.

Chart 5.6. Synthetic measures of respondents' attitudes towards East and West (%)



Cross-referencing and adding together responses to the ten statements designed to assess respondents' attitudes towards the West (EU and US), on the one hand, and East (Russia and China), on the other, permitted the development of a synthetic measure to categorise those surveyed into three groups: a) *pro-Western*; b) *neutral*; and c) *pro-Eastern*.

Currently, the findings indicate that Serbians are by and large pro-Eastern, with most respondents believing that Russia and China had assisted the country more through donations and grants, preferring Eastern to Western investments (and vaccines), and sceptical towards Serbia's European orientation. Just below two-thirds of those polled (61 percent) are pro-Eastern; fewer than one-third are neutral; and 8 percent feel closer to the EU and the US than Russia and China.

Pro-Eastern sentiments in Serbia were the most common amongst viewers of RTS (75 percent), visitors to Telegraf.rs, those with secondary education (67 percent), and residents of Western Serbia and Šumadija (67 percent), Southern and Eastern Serbia (66 percent), and rural areas (70 percent).

By contrast, pro-Western views tended to be more commonly held by viewers of NI (23 percent), readers of *Danas* (25 percent), and visitors to Nova.rs (26 percent), Mondo.rs (19 percent), Srbijadanas.com (14 percent), as well as, perhaps unexpectedly, readers of *Informer* (16 percent). Above-average pro-Western attitudes were also present in university graduates (15 percent) and residents of Vojvodina (10 percent).

6. Where would Serbians rather live, work, study, and receive medical treatment?

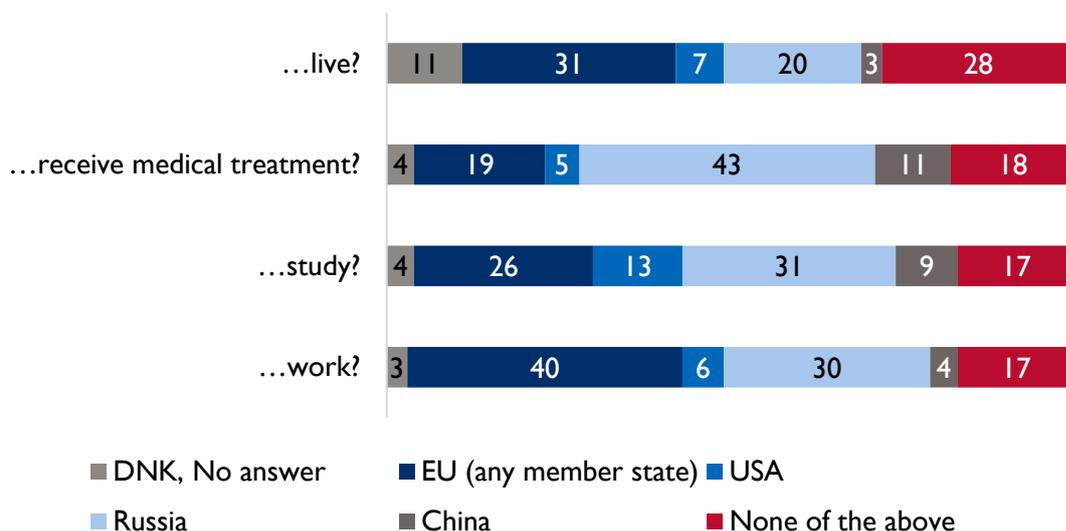
This battery of questions asked the respondents to say where they would prefer to live, receive medical treatment, study, and work outside of Serbia. The preferred place to work (excluding Serbia) for most respondents was the **EU (as reported by 40 percent)**. A large share of those surveyed, 30 percent, felt Russia would be the best place to continue their careers, with 4 and 6 percent, respectively, choosing China and the US. Nevertheless, nearly one-fifth of those polled (17 percent) did not believe any of these countries were good choices for professional development.

The youngest cohort (aged 15 to 19) was over-represented in the group that chose Russia (as many as 55 percent of all under-19s shared this view). Respondents aged 20 to 29 felt the EU was a better choice, with 46 percent of this group choosing the bloc as their preferred place to work). As expected, pro-Western respondents (according to the synthetic measure) tended to opt for the EU and the US. It is worth mentioning that the urban population was more likely to prefer the EU, as were university graduates (as many as 53 percent of those with university or postgraduate degrees opted for the EU, with 12 percent choosing the US). Cross-referencing these findings with statistical regions revealed that Russia was the preferred choice for inhabitants of Western Serbia and Šumadija, whereas residents of Belgrade and Vojvodina tended to opt for the EU to an above-average degree. Lastly, 18 percent of respondents who got their news primarily from N1 reported a preference for working in the US (as opposed to 6 percent for the entire sample), with Russia being the first choice for only 12 percent of this group (vs 30 percent in the sample). Conversely, Russia was more likely to be prioritised by viewers of Pink and RTS. Visitors to Mondo.rs and Nova.rs generally preferred the EU, users of Srbijadanas.com, Nova.rs, and *Danas* usually opted for the US, Russia was the first choice for readers of *Večernje Novosti*, and China tended to be preferred by readers of *Telegraf.rs*.

The EU may have been the preferred choice for working, but Russia fared better as the place to get an education, as reported by 31 percent. One-quarter of those polled cited an EU country, whilst 13 percent said they would rather travel to the US to study. One in ten respondents mentioned China, with a large proportion choosing none of the countries offered as a place to study.

The youngest respondents (the 15 to 19 cohort) were more likely to report the EU, US, and Russia, with 4 percent of this group claiming they would choose none of these countries. As with the previous question, pro-Western respondents tended to pick the US or the EU, whilst those whose sentiments lay with the East preferred Russia. University graduates and men were more likely to select the US or the EU. One-third of those who reported they did not use television to access news claimed an EU country would be their first choice as a place to study. Viewers of N1 tended to choose the US. By contrast, as many as 39 percent of respondents who relied on RTS for information preferred Russia, whilst China was the first choice for viewers of Happy TV. Visitors to Mondo.rs and Nova.rs were more likely to pick the EU; those who used Srbijadanas.com, Nova.rs, *Blic* and *Informer* tended to prefer the US; readers of *Večernje Novosti* and those who did not read news online were more likely to choose Russia, and, lastly, users of *Telegraf.rs* and *Danas* tended to prefer China.

Chart 6.1. Not counting Serbia, in which of these countries would you rather... (%)



Russian medicine was perceived as superior by as many as 43 percent of those polled, who claimed Russia would be their preferred location for medical treatment. Countries of the EU lagged far behind, with 19 percent, whilst China was the first choice for one-tenth of those polled (11 percent). No more than 5 percent claimed they would travel to the US for medical treatment, indicating limited awareness of US healthcare achievements. Again, a large proportion of those polled (18 percent) chose none of the above countries.

The youngest cohort of respondents once again expressed their preference for Russia: in the under-29 group, one-half of those polled claimed they would rather travel to Russia for medical treatment. It is worth noting, however, that this group expressed an above-average inclination towards the US (with a response rate of 8 percent, as opposed to the average of 5 percent for the entire sample). University graduates and those with pro-western sentiments were more likely to choose an EU country or the US as a destination for medical treatment. Interestingly, unlike with the previous question (*In which of these countries would you rather study*), where men tended to prefer the US and the EU, here women were more likely to prioritise these countries. As many as 63 percent of those for whom RTS was the primary source of news chose Russia as the place to receive medical treatment. The EU and US were more likely to be preferred by viewers of NI. Finally, respondents who tended to choose the US as the place to receive medical treatment were also more likely to report following online influencers.

The final question in this battery was designed to assess respondents' perceptions of countries where they would like to live. **As with the first question** (*In which of these countries would you rather work*), **most respondents (31 percent) selected an EU member**. Russia was preferred by one-fifth, and the US by 7 percent of those polled. No more than 3 percent said they would choose China as the place to live. Nearly one-third (28 percent) claimed they did not wish to live in any of these countries, and one-tenth (11 percent) could not answer this question.

Living in the EU was the preferred choice for respondents aged between 20 and 39. Similarly to the previous question, the youngest cohort tended to prioritise Russia (39 percent of those aged under 19 chose Russia as the place where they would like to live). As with the other questions in this section, the divide was clear here between pro-Western respondents (who preferred the EU and the US) and pro-Eastern ones (who chose Russia). Central Serbians were more likely to opt for Russia, as were those with only elementary education. More than one-half of all respondents who primarily relied on NI for news said they would rather live in the EU, whilst viewers of Pink and RTS tended to choose Russia. The readership of Mondo.rs, *Blic*, and Nova.rs tended to prefer the EU, whilst those who used Telegraf.rs and *Večernje Novosti* were more likely to opt for Russia.

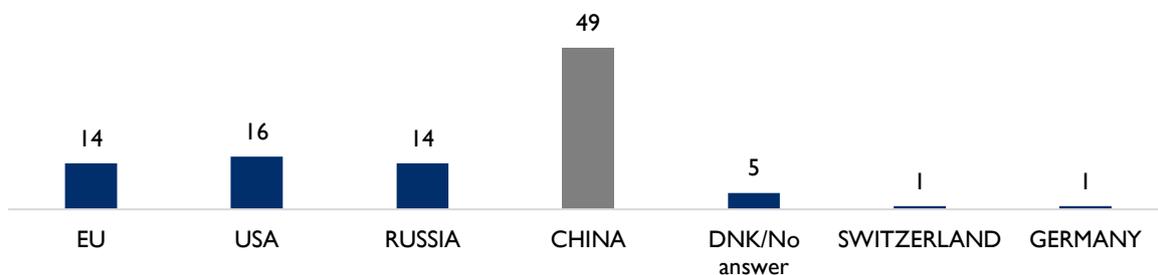
The answers to these four questions clearly reveal how **pragmatic Serbians are** when choosing foreign countries to live, work, receive medical treatment, and study in. **Countries of the EU were preferred as places for living and working due to the economic opportunities they offer.** Conversely, Russia was seen as the first choice for studying and receiving medical treatment.

7. How do the Serbian public perceive global actors?

The following set of questions sought to assess which of the countries or organisations Serbians perceived as being dominant globally in terms of the economy, human rights and freedoms, international affairs and geopolitics, tackling the Covid-19 pandemic, and social, economic, and labour rights.

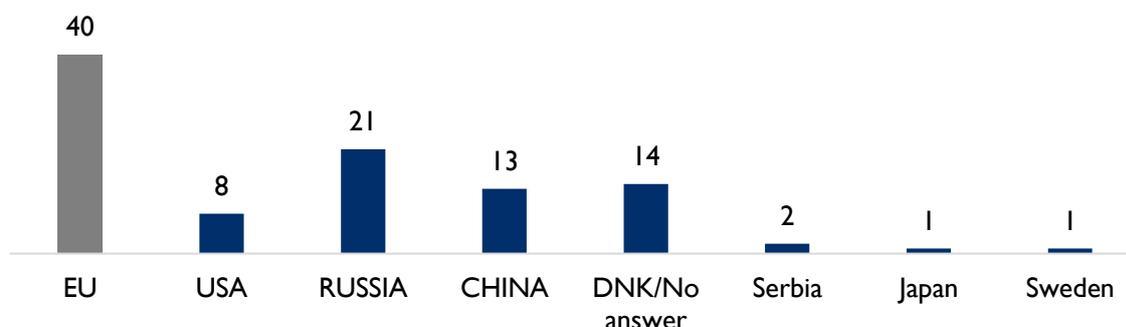
The respondents felt **China was currently the world's leading economic power**, as reported by nearly one-half of those polled (49 percent). One-sixth each cited the US (16 percent), Russia (14 percent), and the EU (14 percent), whilst one in twenty could not answer. Finally, 1 percent each mentioned Switzerland and Germany. The answers indicate the East is seen as having more robust economies. China was less likely to be perceived as dominant only by the youngest cohort of respondents, who tended to choose Russia. China was over-represented amongst pro-Eastern respondents and residents of rural areas and Western Serbia and Šumadija. By contrast, respondents based in Belgrade and Vojvodina and those with Western leanings were more likely to pick the EU. Interestingly, women were more likely to report the US (20 percent women vs 11 percent men). China was perceived as the largest economy by viewers of RTS, whilst those who chose the US generally did not watch television. NI viewers tended to believe the EU was the world's leading economy.

Chart 7.1. Which of these countries or global actors is dominant in the following fields: Economy? (%)



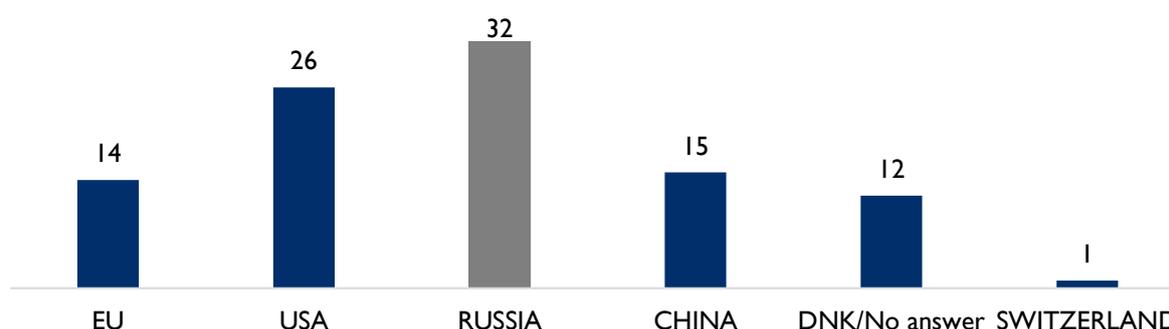
The EU is perceived as the global leader in human rights and civil liberties (as reported by 40 percent of those surveyed). One surprising finding, especially given international reports highlighting the state of human rights in Russia, is that one-fifth of those surveyed chose that country as having the best record in this area. Another 13 percent opted for China, whilst a final 8 percent believed the US led the world on human rights and liberties. A large proportion of those polled, as much as 14 percent, claimed they could not tell which global actor was dominant. Cross-referencing these findings with demographic characteristics reveals the EU was more likely to be chosen by respondents aged between 20 and 39, those living in Vojvodina, pro-Western individuals, men, university graduates, and those who get their news from NI, RTS, *Danas*, and *Nova.rs*. By contrast, Russia tended to be the first choice for the youngest cohort (under-19s), residents of Central Serbia, those with lower educational attainment, and women. These respondents rely on Pink and Happy TV for their news.

Chart 7.2. Which of these countries or global actors is dominant in the following fields: Human rights and freedoms? (%)



Russia was also seen as the dominant global actor in international affairs and geopolitics, as reported by one-third of those surveyed (32 percent). The US came a close second, chosen by one-quarter of all respondents (26 percent), whilst 15 and 14 percent, respectively, opted for China and the EU. The end of the Trump administration (which inspired a sense of rapprochement between the US and Serbia) seems to have created some insecurity amongst respondents, who remain unsure of how the new Biden administration will act on the global stage. More than one-tenth of those surveyed could not answer this question, and 1 percent each mentioned Switzerland and Japan. Less well educated respondents with Eastern leanings, those living in Western Serbia and Šumadija, and respondents watching Happy TV and RTS and reading *Večernje Novosti* were more likely to choose Russia. By contrast, university graduates, individuals with a preference for Western countries, and those living in Belgrade and using NI and Nova.rs tended to pick the US.

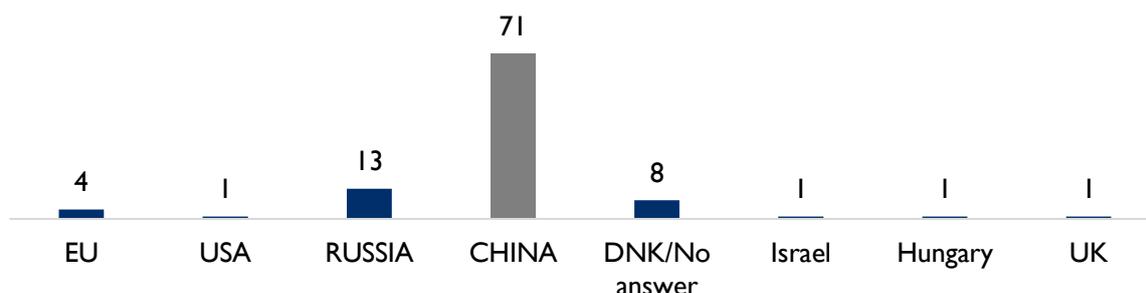
Chart 7.3. Which of these countries or global actors is dominant in the following fields: International relations and geopolitics? (%)



The vast majority of respondents felt that China was the most successful global actor in tackling the Covid-19 pandemic (as mentioned by 71 percent of those polled). The reason for this perception should be sought primarily in the large-scale promotion of China's efforts by both the Serbian authorities and the country's media. Given the media coverage of difficulties encountered by the EU and the US in trying to curb the spread of the virus, it comes as no surprise to see just 1 percent viewing the US as having had the most success in this regard, whilst 4 percent cited the EU.

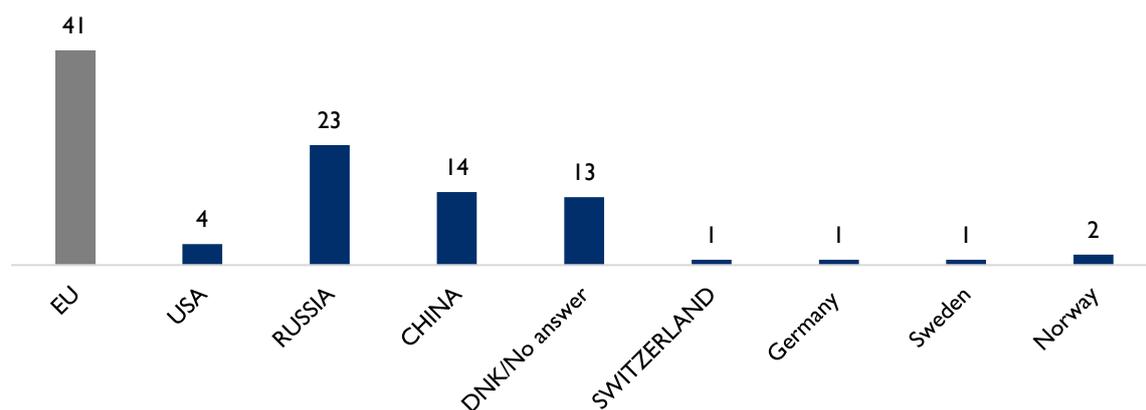
Russia was chosen by 13 percent. Under-19s were the sole group less likely to perceive China as the most successful actor in addressing Covid-19, tending to choose Russia instead.

Chart 7.4. Which of these countries or global actors is dominant in the following fields: Tackling the pandemic worldwide? (%)



Lastly, the largest proportion of those surveyed (41 percent) believed the EU was the global leader in terms of social, economic, and labour rights. Slightly under one-quarter of respondents (23 percent) felt Russia led the field in this regard, with 14 percent opting for China. The US was cited by 4 percent, and 1 percent each mentioned Switzerland, Germany, Sweden, and Norway. Again, more than one-tenth of those polled (13 percent) could not answer. Russia was more likely to be chosen by respondents with Eastern leanings, those aged 19 or under, less well educated individuals, residents of rural areas, and users of Happy TV, Pink, and Večernje Novosti.

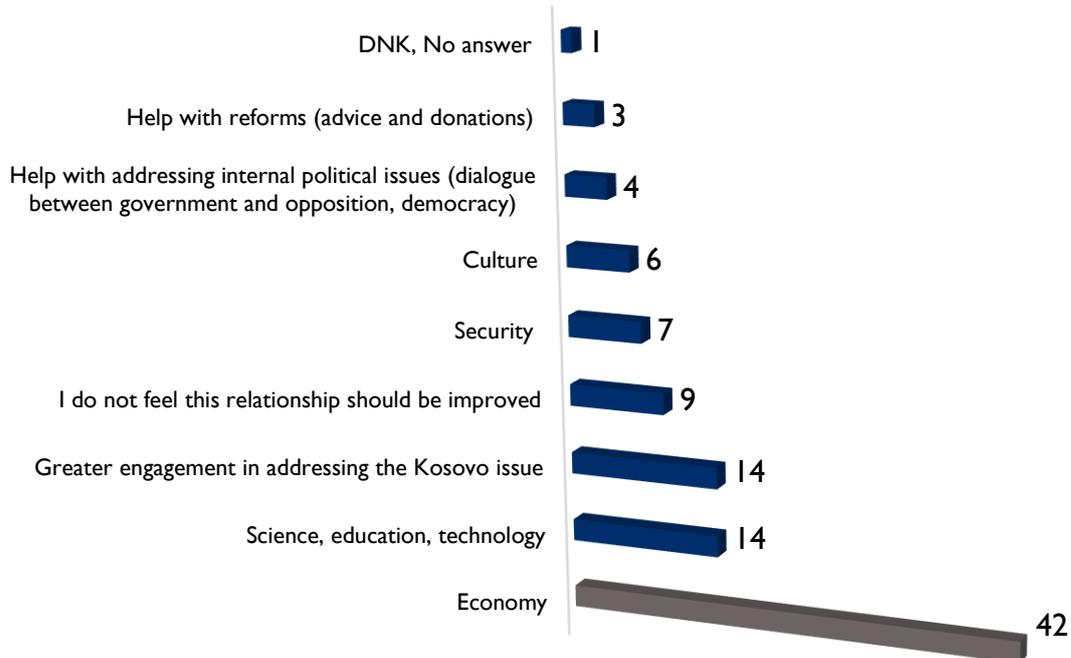
Chart 7.5. Which of these countries or global actors is dominant in the following fields: Social, economic, and labour rights? (%)



The majority of respondents would like to see Serbia improve its trading relationship with the EU and the US, as reported by 42 percent of those polled. The following two areas where the need for closer ties with these two global actors was identified were science, education, and technology, and greater engagement in addressing the Kosovo issue (both at 14 percent). Nearly one-tenth of those polled believed the relationship with the EU and the US needed no improvement. Fewer than 10 percent of the respondents each also cited security issues (7 percent), culture (6 percent),

help with addressing internal political issues such as facilitating dialogue between government and opposition and promoting democracy (4 percent), and help with reforms (3 percent).

Chart 7.6. In which of these areas would you first like to see improvement of Serbia's relationship with the EU and the US? (%)



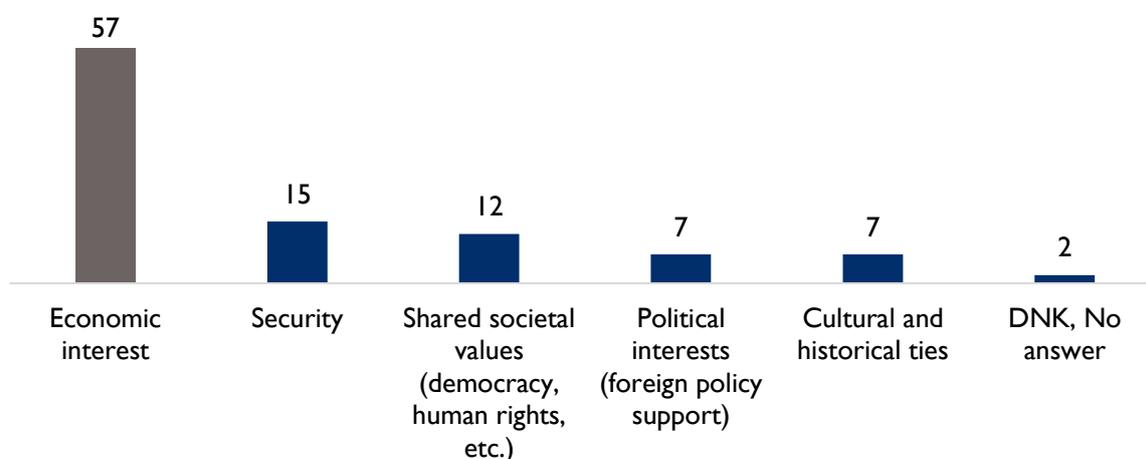
Improvement to the trading relationship was a priority for those aged between 30 and 39, as well as respondents with Eastern preferences, whereas, unsurprisingly, those aged between 20 and 29 who were still in education considered co-operation in science, education, and technology more important (29 percent of those polled in this group chose this answer). Pro-Western respondents also tended to choose culture, education, and technology more often. The youngest cohort were more likely to prioritise co-operation in culture and help addressing the Kosovo issue.

8. Attitudes of the Serbian public towards democracy and democratic values

Economic interest was seen as the primary criterion that Serbia ought to apply when choosing foreign partners and allies, according to the answers of 57 percent of those polled. Security was selected by 15 percent, whilst shared societal values (democracy, human rights, and the like) were chosen by no more than 12 percent of all respondents. Seven percent each felt political interests or cultural and historical ties ought to be the primary criterion for building partnerships and alliances.

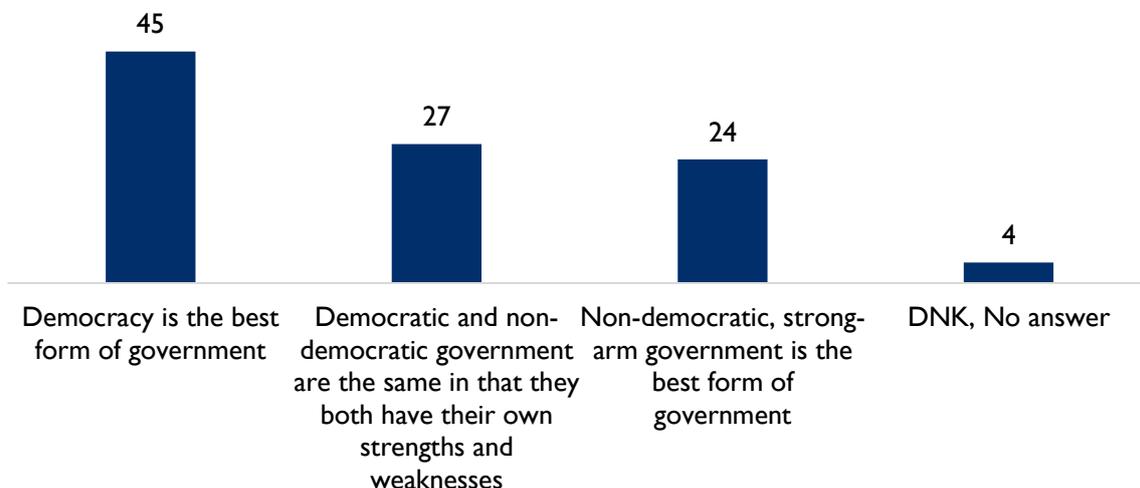
Cultural and historical ties tended to be chosen by respondents aged 15 to 19, whilst over-70s were more likely to prefer shared societal values. Pro-Eastern respondents more commonly opted for economic interests, whilst those with Western preferences were more likely to select political interests and shared societal values. Geopolitically neutral respondents focused on security and cultural and historical ties. Those who reported mainly getting their news from Happy TV were much more likely to claim Serbia ought to choose global partners based on shared societal values and cultural and historical ties, as were readers of *Večernje Novosti*, whilst users of *Mondo.rs* generally believed political and security interests should take precedence.

Chart 8.1. What primary criterion should Serbia generally follow when co-operating and allying with global actors? (%)



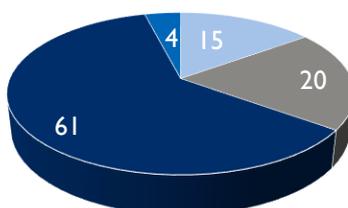
Fewer than one-half of those polled (45 percent) felt democracy was the best form of government. By contrast, nearly one-quarter (24 percent) believed non-democratic, strong-arm rule was best, with another 27 percent sharing the view that both democratic and non-democratic government had their strengths and weaknesses and were equally acceptable. The percentage of respondents who supported non-democratic rule increased with age, whilst, conversely, the youngest respondents were more likely to feel democracy was the best form of government. Residents of Western Serbia and Šumadija tended to believe in democratic governance, whilst respondents based in Vojvodina and Southern and Eastern Serbia were more likely to claim non-democratic, strong-arm rule was best. Respondents who relied on Happy TV, *Informer*, and *Večernje Novosti* were over-represented in the group that preferred non-democratic to democratic government.

Chart 8.2. Which of these statements about forms of government do you agree with the most? (%)



This section closed with the question of how Serbia should treat a country that did not hold free elections and failed to recognise election results. **The largest share of respondents (61 percent) felt Serbia ought to continue working with that country for as long as there was an interest in doing so and not interfere in the internal affairs of any other nation.** One-fifth claimed Serbia should co-operate with such countries only where this was dictated by global circumstances, whilst no more than 15 percent believed Serbia should distance itself from nations such as these. Preference for keeping these countries at arm's length was greater amongst pro-Western and neutral respondents, as well as residents of Vojvodina. Those based in Belgrade were more likely to claim Serbia should work with such countries only to the extent it is forced to by global circumstances.

Chart 8.3. If a country does not hold free elections and fails to recognise election results, how should Serbia treat it? (%)

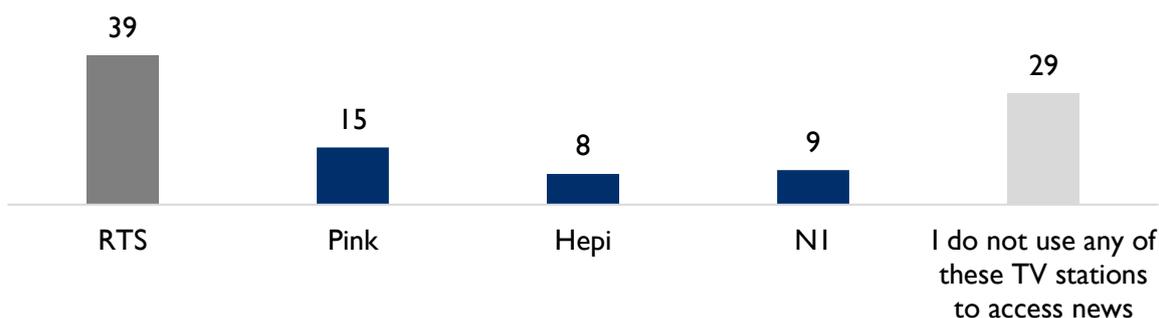


- Serbia should distance itself from that country
- Serbia should work with that country only in areas where global circumstances force it to do so
- Serbia should work with any country it shares interests with and not pay attention to other countries' internal issues
- DNK, No answer

9. Media consumption habits of the Serbian public

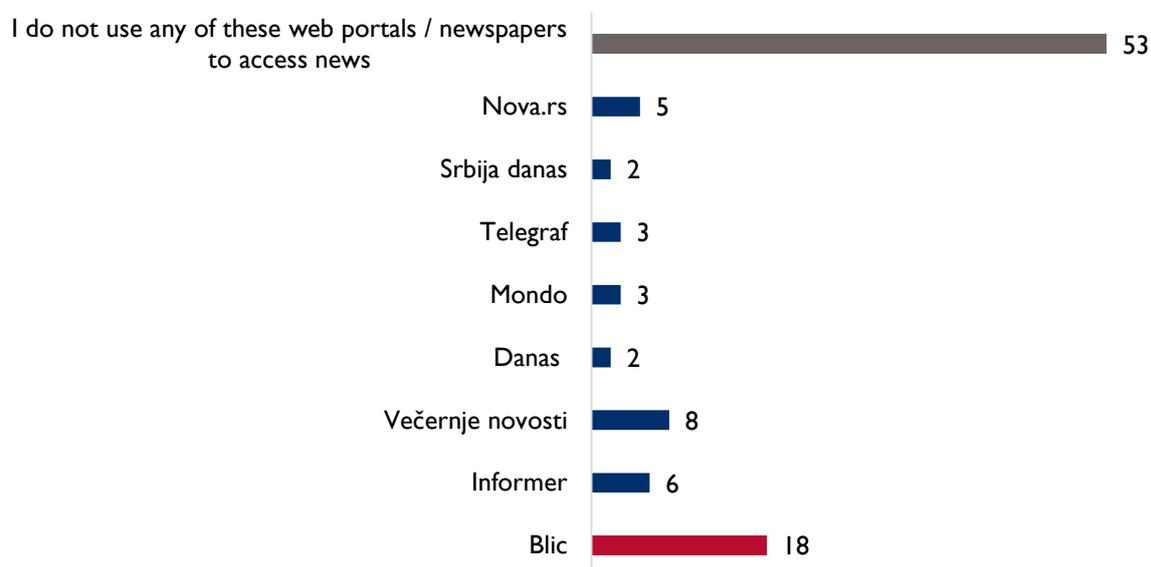
The first question in this battery concerned the television channel primarily used by the Serbian public to access news. Two-fifths of those surveyed (**39 percent**) reported relying on the **public broadcaster (RTS)**. Pink was cited as their go-to source of news by 15 percent, whilst Happy TV as the first choice for 8 percent. By contrast, slightly under one-tenth of all respondents (9 percent) chose NI. Close to one-third (29 percent) denied watching the news on any of these TV channels. Women tended to report using Pink or not watching the news on TV, whilst men were somewhat more likely to mention NI or Happy TV. Whilst RTS viewership was comprised of all age cohorts in similar proportions, the average Pink viewer was aged between 50 and 64, whereas NI viewers tended to be aged 40 to 49 and have university degrees. Pro-Western respondents were more likely to watch NI, whilst those with Eastern proclivities tended to cite the RTS. Pro-Western and geopolitically neutral respondents were also over-represented in the group that denied watching the news on these TV channels.

Chart 9.1. Which of these TV stations do you generally use to access news? (%)



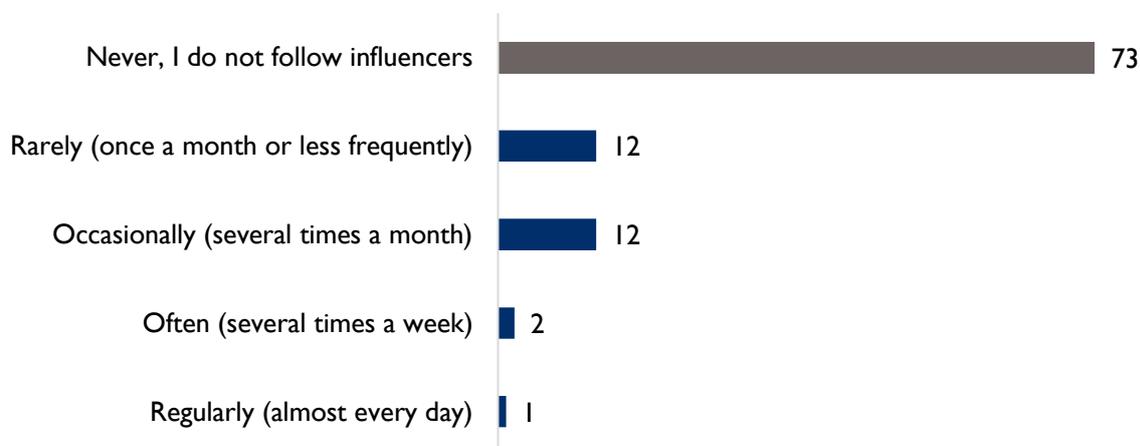
More than **one-half of those polled (53 percent)** reported **not using any of the web portals or print media offered in the survey**. Those who did admit to reading the news on these web sites or in these newspapers mainly chose *Blic*, which was read by 18 percent of those polled. *Večernje Novosti* was chosen by 8 percent, whilst *Informer* was the first choice for 6 percent of all respondents. Nova.rs was relied on for news by one in 20 of those surveyed, whilst 3 percent each chose Mondo.rs and Telegraf.rs. Lastly, 2 percent each of those polled reported using Srbijadanas.com and reading the *Danas* daily. Men were more likely to deny using any of these web sites or newspapers to access news, whilst women tended to choose *Blic*. The youngest cohorts were more likely to be readers of Mondo.rs, *Blic*, and *Večernje Novosti*, whilst *Informer* was the most popular source of information in the over-65 age group. Readers of Nova.rs were aged 40 to 49. Respondents with only elementary schooling or no education were more likely to deny using web sites and print media, whilst university graduates were over-represented amongst readers of Nova.rs. Residents of Vojvodina tended to read *Blic*, whilst those based in Belgrade tended to choose Nova.rs and *Večernje Novosti*. Finally, readers of Mondo.rs, *Danas*, and Nova.rs were more likely to share pro-Western sentiments, whilst pro-Eastern respondents generally reported not using any of these outlets. *Blic* readers tended to declare themselves neutral in geopolitical terms.

Chart 9.2. Which of these web portals or newspapers do you generally use to access news? (%)



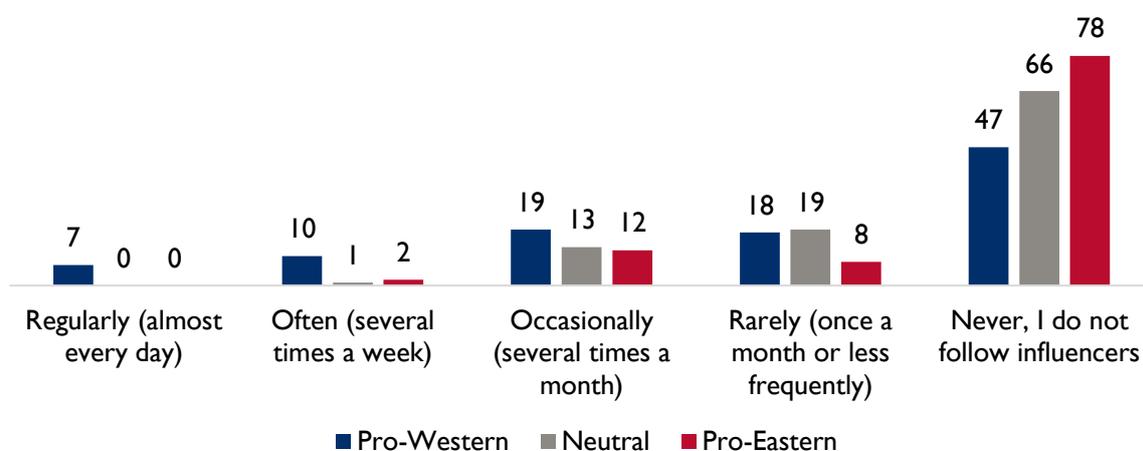
Nearly three-quarters of those polled reported never following influencers. **Those who did admit to doing so usually followed celebrities and other prominent individuals online only ‘occasionally’ or ‘rarely’ (an aggregate of 24 percent, with 12 percent each claiming to do so ‘rarely’ and ‘occasionally’).** No more than 2 percent reported following influencers ‘often (several times a week)’, whilst just 1 percent claimed to do so daily. Under-30s were more likely to claim they never followed influencers (as reported by 60 percent); in this cohort, 24 percent claimed they followed influencers ‘rarely’, with another 12 percent doing so ‘occasionally’. Respondents based in Southern and Eastern Serbia were more likely to report following influencers (either ‘rarely’ or ‘occasionally’).

Chart 9.3. Do you follow influencers (celebrities on social media) and, if so, how often? (%)



Geopolitical preferences made the greatest difference in how often respondents followed influencers: here, 78 percent of those with a pro-Eastern orientation reported ‘never’ following online influencers, with the same view shared by only 47 percent of pro-Western respondents. As many as 7 percent of those with Western leanings claimed to follow influencers ‘regularly’, with another one-tenth doing so ‘often’.

Chart 9.4. Do you follow influencers (celebrities on social media) and, if so, how often? By preference for East or West (%)



Most respondents who admitted to following influencers claimed these did not affect their attitudes towards products, personalities, or events at all (as reported by 39 percent). A further 26 percent reported influencers shaped their views ‘somewhat’, with the same percentage claiming influencers did so ‘moderately’. A total of 8 percent claimed influencers were a major influence on their attitudes (aggregate of ‘very much’ and ‘extremely’). The only statistically significant difference here in terms of respondents’ socio-demographics was found for residents of Vojvodina, 17 percent of whom reported influencers affecting their opinions ‘very much’ or ‘extremely’.

Chart 9.5. To what extent do influencers affect your attitudes towards products, personalities, or events? (%)

