





All terms used in the text in the grammatical masculine gender imply both the masculine and feminine genders of the persons they refer to. Example: "student".





Foreword

With the goal of assessing the current political environment in Serbia, Westminster Foundation for Democracy (WFD) conducted a nationwide opinion poll. Special research focus was put on citizens' trust in political institutions and their general political views. The primary aim of this survey was to identify key areas for WFD's future engagement with political institutions and civil society in Serbia.

The public opinion poll was conducted in February 2023 and collected responses from 1.208 adults through a questionnaire. The survey provides insights into how well Serbian citizens are informed, their views on domestic political issues and developments, opinions on the position of women and youth in society, as well as their perspectives on contemporary international affairs.

Furthermore, the survey report provides a fresh perspective on how citizens make political decisions, and how they perceive the most pressing political matters. WFD will use this data to support the work of national and local political institutions in Serbia and their accessibility to citizens. The main objective of WFD's engagement will be to help increase political transparency, inclusivity, institutional resilience, and help strengthen the democratic capacities of Serbia.

This report provides an overview and summary of key analytical points of the survey. While the report contains information based on statistics it also takes great care to represent sentiments of different demographic categories regarding several important political questions. This report could also serve as a guideline for the international community in identifying entry points for supporting international political development.

Westminster Foundation for Democracy (WFD), Serbia





Key Insights

1. The dominant media for obtaining political information are television and mobile phones. RTS and Pink are the most influential in that regard, which has been a stable trend for the past few years according to WFD's surveys. Facebook is the most dominant social network platform.

The survey results show that a large percentage of the Serbian population is most often informed on political events through the RTS and Pink television channels (national coverage, both cable and antenna), but also through Facebook.

By which means do you most often follow political events in Serbia?

TV	59.2%
Radio	0.9%
Printed newspapers	3.8%
Mobile phones	22.9%
Computer/Laptop	4.5%
I do not follow political events	8.6%

The oldest respondents, as well as the middle generation, are predominantly informed through television. On the other hand, the largest number of young people are predominantly informed via mobile phones. When education is taken into account, for respondents with different levels of education television is still the dominant media for obtaining information. Nevertheless, analyses show that the usage of mobile phones and laptops as sources of information grows alongside the level of education. Voters of the ruling party and the right-wing opposition are mostly informed via television, while liberal and liberal-left respondents are informed via mobile phones.





2. The most popular platforms for exchanging political information are Facebook and Viber. Considering that Meta company owns Facebook, Instagram, and WhatsApp, it is clear how the use of Meta-owned platforms can contribute to maintaining strong influence on the political landscape in Serbia.

The survey results show that a large percentage of the Serbian population is most often informed on political events through the RTS and Pink television channels (national coverage, both cable and antenna), but also through Facebook.

How do you receive, share, and discuss political news with other people?

Electronic mail - Email	2.5%
Sending messages – SMS	4%
Sending messages through the WhatsApp application	8.5%
Sending messages through the Viber application	27.7%
Sending messages through the Telegram or Signal application	3.4%
Via the social network Facebook	38.8%
Via the social network Instagram	16.6%
Via the social network TikTok	6.4%
Via the social network Twitter	7.9%
I do not know / I do not use these applications	34.9%

In this question respondents could choose three dominant platforms. WFD asked Serbian citizens this question for the second year in a row. Viber is noticeably becoming rather important for the exchange of political content, and so is Instagram. Most of the population uses Facebook and Viber to exchange information about politics. Men use WhatsApp and Twitter to exchange political news significantly more than women do. For the oldest respondents, Viber is the main tool for keeping up to date with politics, while the youngest respondents mostly turn to Facebook and Instagram.





3. Since 2020, trust in political institutions in Serbia has risen significantly. Serbia is moving in the right direction, which applies even to the economy which was more problematic in the eyes of citizens just six months ago.

More than half of the respondents, predominantly the older ones and those whose highest education is either on the elementary or secondary level, believe that Serbia is moving in the right direction. These citizens are showing confidence in most of the state institutions and deem them accessible to citizens. Related to this, the findings of this survey show that Serbian citizens, to the greatest extent, trust the army, the church, the education system, and the president of the country whose rule is supported by every second person. It is important to note the significant rise in citizen confidence in the Parliament since 2020 which could among other factors be attributed to the return of the opposition to the Parliament.

In general, would you say that Serbia is moving in a good or bad direction?

Good direction	54.4%
Bad direction	29.4%
I do not know	16.3%

What do you think the state of the Serbian economy throughout the next year will be?

Much worse	12.4%
A bit worse	14.5%
Mostly the same	32.8%
A bit better	27.1%
Much better	8.9%
I do not know	4.3%

These results should be put in the perspective of citizens' views on the current democratic capacities in Serbia. Namely, even though they show significant trust in the political institutions, only a quarter of citizens think that the country is governed democratically. Compared data thus indicates that the perceived lack of democratic capacities does not lead to political distrust. In other words, citizens of Serbia predominantly see positive outcomes and outlooks for Serbia while they think the country is not being governed democratically. What adds weight to the perceived lack of democracy is the fact that 40% of citizens consider it justified to feel fear if one engages more socially and expresses their opinion publicly in Serbia nowadays.

To what extent is Serbia being governed democratically? Using a scale of 1 to 10, where 1 means "not at all democratic" and 10 means "completely democratic", what position would you choose?

Non-democratic (1-2-3)	19.9%
Neither democratic nor non-democratic (4-5-6-7)	54.4%
Democratic (8-9-10)	25.7%
Average	5.68





Another inconsistency appears in areas/topics people are most preoccupied with and their views on the Serbian economy. Although citizens are currently most concerned about the rise in food prices, energy, low standard of living, and poverty, almost 40% of the respondents believe that the state of the Serbian economy will improve in the next year.

4. The top three reasons for party support remain stable – programme, trustworthy team of people, and the ability to provide stability and economic progress. Also, the view on the domestic political actors is rather negative, as citizens assess their communication as very aggressive and divisive. Trust in political parties remains low.

Even though there is an increase in the positive perception of some political institutions, the support for political parties remains low, with almost half of the citizens not trusting the parties. This is confirmed by their view on the communication between political actors, which could be highly correlated.

How would you rate the communication of politicians in Serbia in general?

	Disagree	Neither agree nor disagree	Agree	Average (1-5)
Politicians' communication is aggressive	10.5%	24.6%	64.9%	3.78
Politicians' communication is uncultured	12.8%	25.4%	61.8%	3.75
Politicians' communication is full of mutual hatred	13.9%	24.5%	61.6%	3.75
Politicians' communication is divisive for the people	19.1%	21.3%	59.6%	3.65
Politicians' communication is very complicated and difficult to understand	19.7%	31%	49.3%	3.5
Politicians' communication is good and appropriate	50.5%	30.6%	18.9%	2.45

One of the reasons for such a negative view on the political parties could also be the discrepancy between the needs of the citizens and how parties address them. Namely, respondents have chosen the three most important factors for their political preferences, the top being the party programme/ideology. This should be analysed briefly. All relevant political organisations officially have political programmes and are formally aligned with some ideology. Nevertheless, the question is what citizens perceive as their actual programme and/or ideology. The conclusion is that they see key messages on the most pressing political issues as programme and ideology, even when one political party promotes confronting messages in terms of ideological consistency.

What factors contribute most to your support of a particular party?

	Not contributing	Neither contributing, nor not contributing	Contributing	Average (1-5)
Party leader	8.1%	14.6%	77.3%	4.13
Programme/ideology of the party	4.2%	11.2%	84.6%	4.29
Previous results of the party	9.9%	14.3%	75.8%	4.13
Because it has a team of people I trust (expertise, integrity)	5.1%	12.1%	82.8%	4.24





	Not contributing	Neither contributing, nor not contributing	Contributing	Average (1-5)
Because that party is less bad than other parties	23.2%	16%	60.8%	3.62
Because it deals with topics that are very important to me	5.8%	14.8%	79.4%	4.17
Because I have a feeling that it speaks to me and protects my interests and values	9.2%	16.1%	74.7%	4.04
Because I feel that I benefit directly from the party	50.4%	16.8%	32.8%	2.61
Because I am blackmailed (by losing my job) I feel pressure	82.4%	6.2%	11.4%	1.62
Because it is present on my local level	32.4%	26%	41.6%	3.12
Because it gives me confidence that it will ensure stability and economic progress	6.6%	13.6%	79.8%	4.16
Because it gives me confidence that it will manage the crisis caused by the Russian-Ukrainian war well	8.6%	16.2%	75.2%	4.09
Because I believe that it will bring us into the EU	29.6%	26.3%	44.1%	3.23
Because I believe that it will not impose sanctions on Russia	15%	22.5%	62.5%	3.78

5. For women in Serbia, the quality of life is negatively affected by (1) poor conditions in maternity wards, (2) violence on social media, and (3) psychological abuse. Nevertheless, half of the respondents assess that the position of women in Serbia has improved in the last ten years.

Every third respondent believes that the position of women in Serbia has not changed significantly in the last ten years, while every second respondent feels that it has improved. There is no considerable difference between male and female respondents when it comes to answers to this question. There is a slightly higher percentage of the youngest respondents who believe that the position of women in Serbia has worsened in the last ten years compared to the representation of this attitude among the oldest respondents. The situation is similar with education, where with the increase in level of education, the belief that the position of women in Serbia has worsened in the last ten years also grows.

Has the position of women in Serbia changed in the last 10 years and in what way?

It has become a lot worse	3.6%
It has become slightly worse	5%
It mostly remained the same	36.6%
It has slightly improved	30.9%
It has improved a lot	18.5%
I do not know / I do not want to answer	5.4%





The disproportion in the respondents' answers is also noticeable when their perception of attitudes towards women is considered; therefore, twice as many women as men believe that gender equality is not present in Serbia. Also, data shows that women perceive their safety threatened more than men and think that the quality of their life is also negatively affected by bad conditions in maternity wards, violence on social media, and psychological abuse.

To what extent is gender equality represented in Serbia?

Not at all	2.7%
A little	14.2%
Neither yes, nor no	33.4%
Significantly represented	31.8%
Fully represented	12.8%
I do not know / I do not want to answer	5.1%

Respondents were also asked about the perception of leadership ability when it comes to gender. Around half of the interviewees believe that there are no differences between men and women as leaders at home, at work, or in politics.

Both male and female respondents believe that women are better leaders when it comes to decision-making at home/in the family. However, when it comes to work-related decision-making, analyses show that men are 2.5 times more likely to believe in their professional leadership abilities than women are. Additionally, only one in six female respondents believe that women are better leaders at work. When it comes to politics, this pattern is even more pronounced. According to survey results, men are three times more likely to believe in their political leadership skills than women are. The research results also show that with increasing age, the belief that men are better leaders at work and in politics also increases. In addition, there is a trend that as the level of education decreases, the belief that men are better leaders at work and in politics increases.

The most negatively impacting factors on the quality of women's life in Serbia are (1) poor conditions in maternity wards; (2) violence on social media; (3) psychological abuse; (4) physical violence; and (5) sexual violence. The data shows that female respondents believe that these issues have a poor impact on their quality of life significantly more than male respondents. This gap is most evident when it comes to "pressure and expectations from society on how women should behave and live". Here, data shows that male respondents believe this pressure has a negative impact on the quality of life of women in Serbia significantly less than female respondents. In addition, research results indicate a significant generational difference. The more the respondents' age increases, the more their belief that these issues negatively impact women's quality of life decreases. The data also shows that as the level of education increases, the belief that these things have a negative impact on the quality of life of women in Serbia also increases.





6. The general population in Serbia views youth as too distracted. On the other hand, young people are less convinced than their seniors that the current form of government is democratic in nature.

The respondents think that violence on social media is aimed at young people and that their quality of life is negatively affected by peer violence, too much time spent on the internet, limited outside activities, and easily accessible opiates (narcotics). In addition, when it comes to the youngest respondents this survey shows that they perceive today's governance in Serbia as democratic less than the oldest respondents do. Youth also has the lowest degree of trust in almost all state institutions. The specificity of their views can also be seen in their thoughts on the state of Serbian foreign policy, which they mostly perceive differently than citizens who belong to the older population.

To what extent do the following matters threaten the quality of life of young people in Serbia:

	Not at all	Neither yes nor no	Yes	Average (1-5)
Physical violence	13.4%	17%	69.6%	3.89
Mental/Psychological violence	14.2%	18.9%	66.9%	3.89
Sexual violence	20.9%	17.7%	61.4%	3.68
Peer violence	4.1%	10.4%	85.5%	4.35
Violence on social media and digital violence	4.6%	12.7%	82.7%	4.28
Easy access to drugs and narcotics	8.9%	12.2%	78.9%	4.25
Easy access to betting shops, casinos, and games of chance	12%	11%	77%	4.16
Poor education system	15.9%	17%	67.1%	3.86
Lack of positive role models in the media	15.4%	18.7%	65.9%	3.87
Spending too much time on the internet and too little outside	4%	13.5%	82.5%	4.33

Data shows that female respondents believe that these matters have a negative impact on the quality of life of young people in Serbia significantly more than male respondents. Additionally, the results of the study indicate a significant generational difference. Namely, younger respondents believe that physical, psychological, sexual, and peer violence, alongside violence on social media, poor education system, and lack of positive role models in the media have a negative impact on the quality of life of youth more than older respondents do. On the other hand, Serbian seniors more than youth believe that easy access to drugs and narcotics, betting shops, casinos, and games of chance, as well as spending too much time on the internet and too little outside, have a negative impact on the quality of life of young people.





7. Citizens' views on the Russian invasion of Ukraine remain stable in favour of Russia, while the support for Serbian sanctions on Russia remains low. The support to the EU is also stable, according to this and WFD's previous annual surveys.

The Serbian population maintains a strong affinity towards Russia in terms of its foreign policy and international relations. This stance heavily impacts the position of Serbia toward the Russian invasion of Ukraine. As was the case last year, a high percentage of the population believes that Russia's attack on Ukraine is justified (4 out of 10 respondents). However, this issue has a polarising affect on the Serbian population with an only 7% lower support to the "Not justified" option.

According to your opinion, is the Russian attack on Ukraine justified?

Justified	43.1%
Not justified	36%
I do not know	20.9%

Significantly more male than female respondents believe that the Russian attack on Ukraine is justified. The oldest respondents are the most likely to believe that the attack is justified, followed by middle-aged respondents, while the youngest respondents are the least likely to hold this view. With an increase in the level of education, there is a significant decrease in the proportion of respondents who believe that the Russian attack on Ukraine is justified.

This is consistent with the findings on citizens' perception of Serbia's foreign policy position. Namely, the largest number of people believes that Serbia should rely on Russia in international relations. This goes hand in hand with their positive attitude toward the Russian President Vladimir Putin, who has received the best rating among all foreign leaders evaluated. Most of the respondents who think that Serbia primarily belongs to the East are the oldest and middle-aged citizens, so their affinity toward China and its President Xi Jinping is not surprising.

Which statement is closest to your opinion about Serbia?

Serbia belongs to the West	17.3%
Serbia belongs to the East	28.1%
Serbia does not belong to either the West or the East	42.6%
I do not know	12%

However, the situation is different within the younger population who see Serbia as a part of the West. Respondents with a university education are four times more likely than those with a primary education to believe that Serbia belongs to the West. Another variable that affects the perception of Serbian partners in international politics is political orientation. Specifically, voters of the ruling party and the right-wing opposition support Eastern partnerships, while liberal and liberal-left opposition voters are oriented toward the West.





Who should Serbia rely on the most in international relations?

Russia	42.1%
EU	25.8%
USA	2.6%
China	7.9%
UK	0.5%
Other	9.8%

Male respondents are more likely to believe that Serbia should rely on Russia than female respondents. The oldest and middle-aged respondents believe that Serbia should rely on Russia, while the youngest believe that Serbia should rely on the European Union. As the level of education increases, the prevalence of the belief that Serbia should rely on the EU increases, and the prevalence of the belief that Serbia should rely on Russia decreases. Respondents who have SBB optics are more likely to believe that Serbia should rely on the EU, than those with MTS optics. Voters of the ruling party and the right-wing opposition predominantly believe that Serbia should rely on Russia, while voters of the civic opposition believe that Serbia should rely on the European Union.

The attitude toward sanctions on Russia among Serbian citizens seems to be anchored in the position of being strongly against, and especially interesting is the fact that this goes for the whole political spectrum. Slightly over 70% of respondents do not support imposing sanctions on Russia, showing no significant difference compared to previous years. Moreover, there is not a noteworthy party in the spectrum whose majority of voters support sanctions. The question of sanctions is one of the rare hot political issues which unifies the populace in such a manner.

According to your opinion, should Serbia impose sanctions on Russia?

Yes	11.9%
No	74.3%
I do not know	20.9%

There is no significant difference between male and female respondents when it comes to the decision of whether Serbia should impose sanctions on Russia. The youngest respondents are twice as likely as the oldest to believe that Serbia should impose sanctions on Russia. As the level of education increases, the representation of the view that Serbia should impose sanctions on Russia significantly increases.

When it comes to citizen support of the European Union there are more people who are for than those who are against Serbia relying on the EU, which has been a stable trend since 2020. The identified decrease of support is not sufficient for concluding that the popular attitude is swinging towards "No." Also, the potential referendum campaign concerning Serbia's accession to the EU could push the "Yes" camp further with voters usually being highly emotional when making such big voting decisions.





If a referendum on Serbia's accession to the European Union was held tomorrow, how would you vote?

I would definitely vote against	24.1%
I would probably vote against	18.9%
I would probably vote for	25.7%
I would definitely vote for	19.7%
I do not know, I cannot discern	11.5%

A significantly larger number of female respondents support Serbia's accession to the EU compared to male respondents. The youngest respondents give the greatest support to Serbia's EU integration, while support decreases with age. With an increase in the level of education, the prevalence of positive attitudes toward Serbia's EU integration significantly increases. Respondents who have SBB optics (independent cable operator viewed as owned by the opposition, with predominantly EU and West-oriented reporting) support Serbia's accession to the EU more than those with MTS optics (state cable operator, predominantly supporting the ruling coalition aligned channels and positive attitudes toward Russia and China). Voters of the civic opposition support Serbia's accession to the EU the most, followed by significantly fewer voters of the ruling party, while voters of the right-wing opposition support it the least.

8. Kosovo is back in the top three most important issues for Serbian citizens.

For the first time since WFD started conducting nation-wide surveys in Serbia (2019), Kosovo has become a principal topic in the Serbian public, and an issue that concerns the public significantly. The series of crises in Kosovo in the last year and a half, as well as the new efforts by the EU to conclude the new agreement on the path to Belgrade-Pristina normalisation, influenced the public and made Kosovo one of the most important matters in Serbia once again.

How concerned are you about the following issues in Serbia? (1 - not concerned at all; 5 - very concerned)

	4+5	Average
Rising prices of food and energy	91.8	4.6
Low standard of living, poverty	86.7	4.38
Status of Kosovo and Metohija	79.9	4.28
Collapsed healthcare system	79.8	4.23
Poor quality of state institutions' work	79.6	4.15
Unemployment and layoffs	79.4	4.2
Corruption and crime	79.2	4.23
Violations of workers' rights	76.6	4.07





Respondents are most concerned about (1) rising food and energy prices; (2) low living standards/poverty; (3) the status of Kosovo-Metohija; (4) the collapsed healthcare system; (5) poor quality of work of state institutions.

49.4

25.9

Insufficient involvement of women in political decision-making

Endangerment of LGBTQ community rights





3.34

2.37

Conclusion

The analysis of the data collected through this survey gave WFD a snapshot of the current political environment in Serbia, highlighting some of the key developments. The major novelty is a much more vibrant political dynamics than in previous years, especially in 2020 when the Parliament was dismissed. Plurality returned to Serbian politics, and this led to a slight increase of citizens' trust in political institutions, especially the Parliament. Also, unlike previous survey results, this year Kosovo became one of the most important issues in public life. This is presumably the effect of a long period (and series of) political crises, alongside recent breakthroughs in the Belgrade-Pristina dialogue.

Nevertheless, even though the EU is portrayed as an actor who threatens Serbia if it does not comply with the European proposal for Kosovo, the support for EU integration has been quite solid for the past couple of years. Lastly, a large majority of Serbian citizens are against introducing sanctions to Russia, which represents a cross-party voters' consensus.

Citizens' social and political views have not varied much since WFD's previous survey. This year, one of the most important and insightful findings is the low level of support to women in professional decision-making and leadership, even in women themselves. Such results further emphasise the continuous need for support to civil society and political institutions in providing the necessary conditions for inclusive and participatory social and political settings.

WFD will use the conclusions from this survey to better understand Serbian society's needs and most pressing challenges and additionally support political institutions in tackling them. Also, these insights are ground basis for the continuation of support to the institutions in strengthening transparency, openness to citizens, and delivery of effective and efficient procedures.

This research was conducted in collaboration with Sprint Insight consultancy and research firm. The research positions and conclusions expressed in this study represent the views of the authors, and do not necessarily represent the official views and opinions of the Westminster Foundation for Democracy (WFD) and the Conflict, Stability and Security Fund (CSSF) of the UK Government.



