

PUBLIC OPINION IN SERBIA AND MEDIA

December 2022.

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Biro za društvena istraživanja
BIRODI
Za integritet • javnost • inkluziju

About us

Bureau for Social Research (BIRODI) – Serbia is a think-tank, non-governmental organization (founded in 2005) in Social and Political Sciences field, which conducts applied research, analyzes, proposes and implements viable solutions within the public, civil and commercial part of society. It is addressed to decision makers, civil society and the general public.

All BIRODI activities are sorted in 3 programs:

Surveys/research

BIRODI mission is to put research into the function of democratization. Under this program BIRODI is promoting the importance of research in designing and evaluation of social, political, economic and cultural development; creating a system for monitoring and evaluating the process of social development; developing and improving research methods and techniques; disseminating research results to all relevant social groups, institutions, government bodies and international organizations. BIRODI has conducted more than 120 surveys for non-commercial clients so far.

Media monitoring

During the last 15 years, BIRODI team has participated in several projects dealing with media content analysis. In 2012 and 2013 Bureau for Social Research (BIRODI) in cooperation with organization MEMO 98 from Slovakia worked on a 6 months project “Fostering objective and professional election reporting” supported by National Endowment for Democracy (NED) with activities on media monitoring in the pre-election period.

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About public opinion poll

Public opinion poll was conducted in partnership with Nova Broadcasting Group EOOD (ordering party, covering costs of fieldwork, sampling, statistical data processing, data visualization and English translation), Bureau for Social Research (author of research instrument and data analysis – volunteer contribution) and agency Sprint Insight (sample design and data collection using face-to-face method).

Goal of the poll was to determine:

- media functions of the television stations
- attitudes toward international actors and war in Ukraine
- attitudes toward EU

Period of the realization: Fieldwork was conducted in period 8th to 23rd December 2022

Data collection method: Face-to-face (F2F), field survey (D2D)

Control of interviewers' work: Google maps (GPS) live location sharing

Type: TAPI (Tablet Assisted Personal Interviewing)

Survey instrument: Personal interview questionnaire comprising 47 questions

Population: 18+ years of age (6.360.728 voters without Kosovo and Metohija)

Sample type: Representative stratified three-stage random sample

Sampling unit: Constituency - polling place territory (number of units: 120)

Stratification criterion - nine strata: (1) Small, medium-sized, and large polling places; (2) Region

Randomization of respondents: (1) polling place (PPS sampling); (2) household; (3) first following birthday

Sample size: 1.185 respondents

Interval of trust: + / - 2,85 for occurrences with expected incidence of 50%

Weighting procedure: Multinomial proportion fitting through multilinear regression procedure

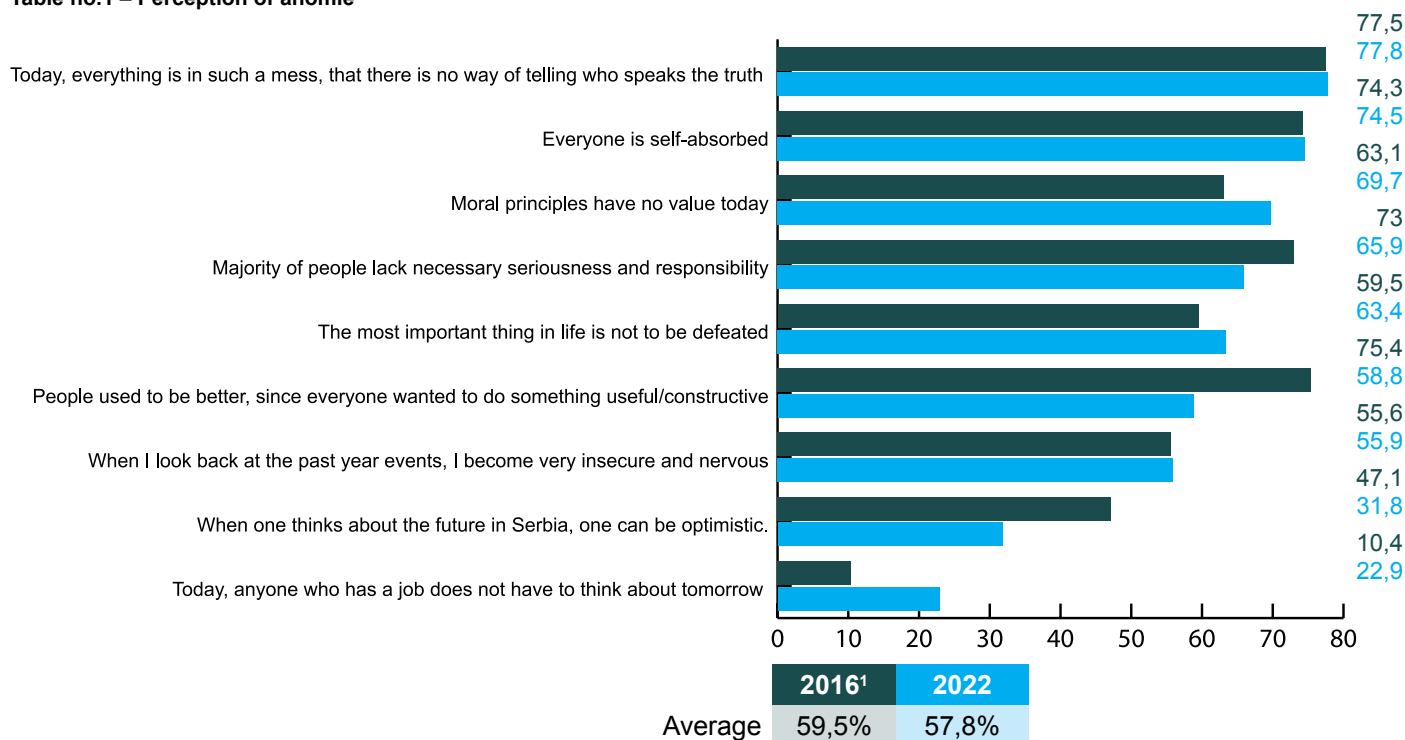
Weighting criterion for demography: Census data + Wittgenstein Centre assessment

Social context in which research was conducted

Serbia has not accomplished the structural and normative reform required for the rule of law, institutional integrity, and a free public. The aforementioned resulted in personal power and partocratic structures that control unreformed institutions, i.e. an anomic society in which there is no clear consensus and willingness to respect laws and moral principles, i.e. no certainty of punishment for noncompliance.

This is confirmed by society's opinion of anomie, which has not changed considerably in the last six years.

Table no.1 – Perception of anomie



Along with anomie, Serbia is a society where material concerns take precedence and which cries out for the establishment of laws, order, as well as solidarity, or the lowering of class distinctions. In such a setting, conservatism, or ethno-national priorities, which offer psychological warmth of communion such as depending on tradition and (national) history, or leaning toward the (fraternal) East, become more essential priorities than democracy and individual freedom.

Table no.2 – Priorities of Serbian citizens (%)

Greater concern of the state about employment, medical treatment and education	68,2
Rule of law and state of law	58,3
Existence of order and system in the society	56,7
Protection of strategic economic branches of Serbia	53,7
Developing a sense of solidarity among citizens	53
Reducing the gap between rich and poor	50,8
Reliance on tradition and history	49,4
Respecting the right to diversity/own choice of all citizens	45,7
More democracy	41,1
Collaboration with the East	36,8
Collaboration with the West	24,6
More capitalism	12,8

¹ The research was conducted on a sample of 1004 respondents by telephone survey.

Using two traumas, the populism industry in the controlled media promotes the conservation of society along with a collapsed, terrified, and blackmailed public. The trauma of lost wars is one, and the incomplete transition—the (re) distribution of capital and social opportunities during privatization—is the other.

This study, but others as well, have demonstrated how some social groups cede their autonomy and priorities to powerful structures in exchange for the comfort, security, and warmth that ethno-nationalism offers. It is the predominate response to the anomie.

In opposition to the aforementioned are the parts of society that rebel against the state of anomie through (short-term) protests or politics based on ethno-nationalism, which includes tolerating war as acceptable. Citizens' anti-anomic reactions include emigrating abroad or escaping to the social margin, which includes social networks, in search of alternatives and information.

For Serbian citizens, the media are first and foremost a means of (simply) transmitting information, then a means of education and cultural development, entertainment and leisure.

Table no. 3 – Media is a means of:



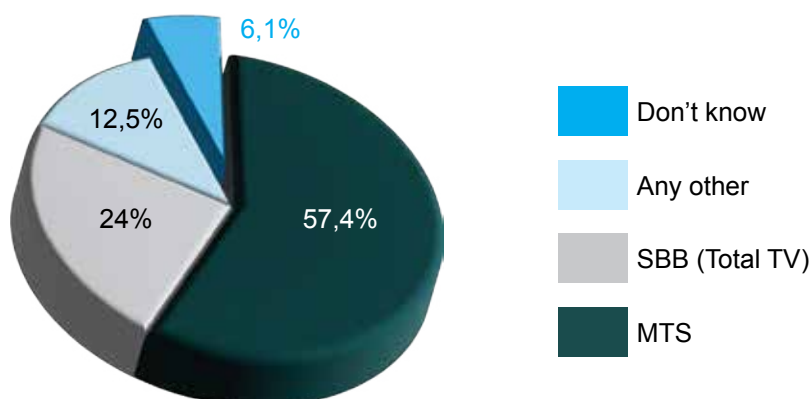
The public in Serbia does not value the analytical and critical character of the media, which supports the thesis that citizens hardly feel the need to hold their government accountable and put it at their service.

What they can see in the national TV channels, namely the promotion of (personal) authority, is what the respondents want least.

Functionality of the media

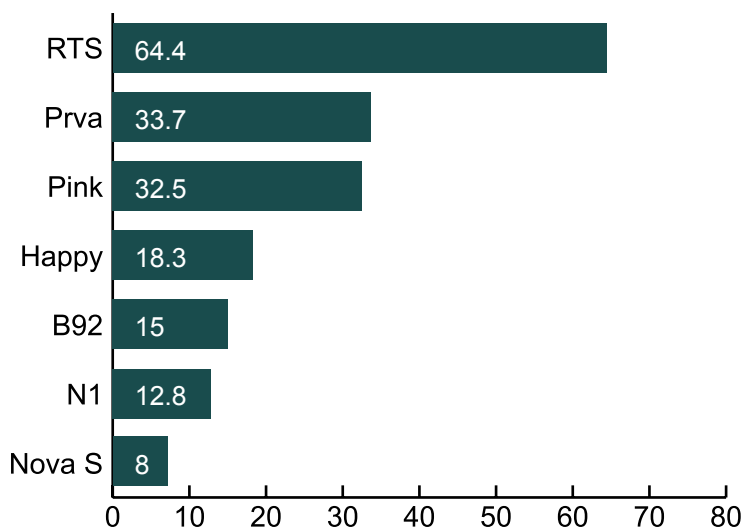
According to the results of the survey, the largest number of respondents use MTS, and one in four uses SBB.

Table no.4 – Use of cable operators (%)



Taking into account the ten-year results of BIRODI's media monitoring, we can conclude that for the public, the most important sources of information about politics among the mentioned TV channels are those that report (over-) positively about the government (RTS1, Prva, Pink, Happy and B92), while TV channels critical of the government were mentioned significantly less often as a source of information about politics.

Table no.5 – Main sources of informing the public (television outlets) (%)



The analysis of voting preferences and the media that respondents follow has shown what the elections would look like if only consumers of certain media content had the right to vote.

For example, if only viewers of TV Pink voted in the elections, the ruling parties would get 84.7% of the vote, the right-wing opposition would get a combined 9.1% of the vote, while the entire civic opposition would fail to pass the 3% threshold. The same is true for the TV Happy viewers, with a slightly better result for the right-wing opposition. On all television stations with national coverage, the national opposition has more supporters among the viewers of these television channels.

Table no.6 – Main sources of informing the public (television outlets) and electoral preferences (%)

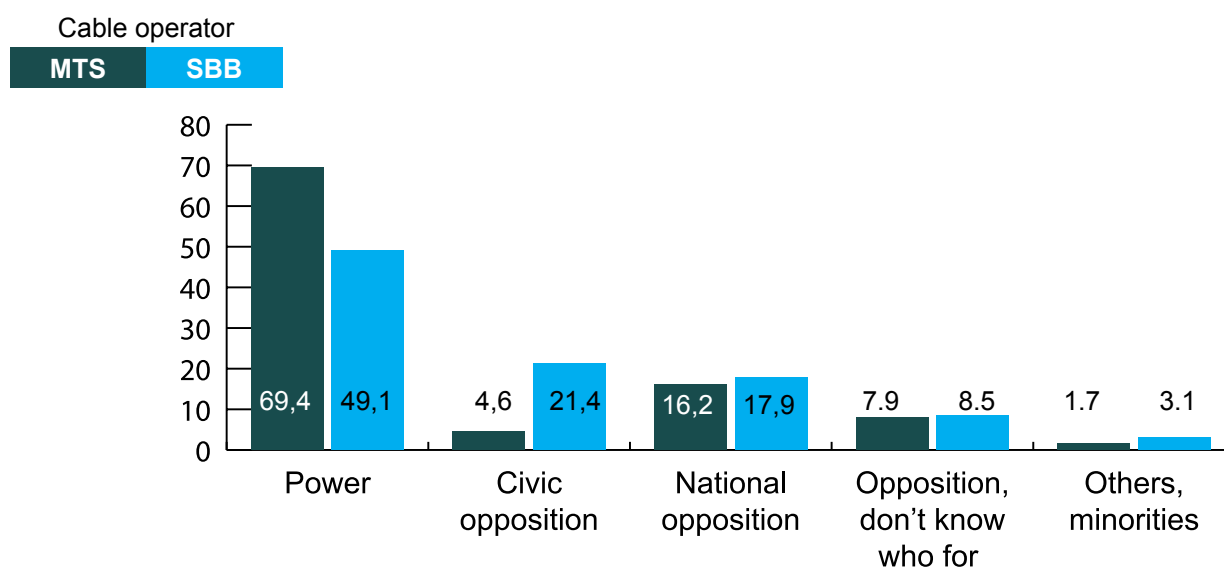
Source of information	Party blocs				
	Power	Civic opposition	National opposition	Opposition, don't know who for	Others/ Minorities
RTS	70,7	6,3	13,3	6,7	2,9
Prva	64,6	7,3	20,5	6,1	1,5
Pink	84,7	2,6	9,1	1,5	2,1
Happy	79,3	1,5	17,2	1	1
N1	22,8	34,6	28,3	11	3,1
Nova S	18,4	37,9	27,6	10,3	5,7

On the other side are the N1 and Nova S television channels where the civic opposition parties would get the most votes, followed by the national opposition and the parties in power. It should be noted that voters who are undecided about the opposition are informed mainly on cable TV channels N1 and Nova S, although they are also present on RTS and Prva.

At the very end of this section, electoral support data by cable operators are presented, which once again confirms the findings of greater party diversity among SBB subscribers, as pointed out in BIRODI's previous research.

If only MTS subscribers voted in hypothetical elections, parties in power would receive almost 70% of the vote, while SBB subscribers' support would be less than half. In the elections where only MTS subscribers were eligible to vote, the civic opposition would have less than 5% of the vote and more than 20% in the elections voted by SBB subscribers.

Table no.7 – Electoral preferences by cable operators (%)



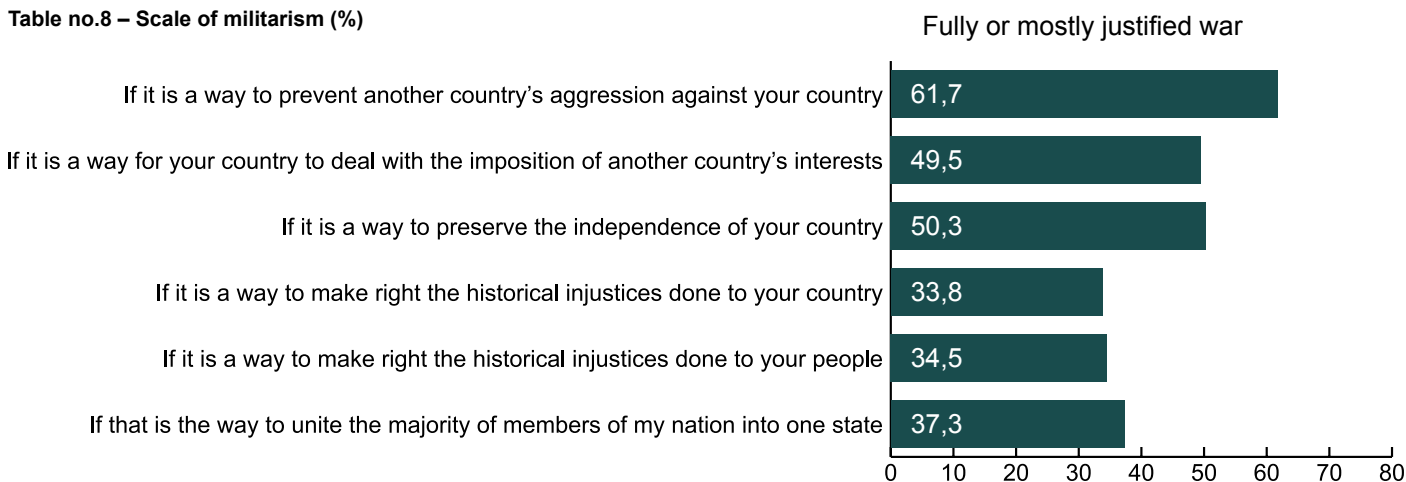
Analysis of pro-Russian sentiment among the Serbian public

Prior to being asked about their opinions on Russia's aggression against Ukraine, the respondents had the opportunity to express their general views on the use of war as a means. For the purposes of this research, these views were measured using a militarism scale that was especially created and divided into two categories: defensive/safeguarding and offensive militarism.

Defensive militarism	If it is a way to prevent another country's aggression against your country
	If it is a way for your country to deal with the imposition of another country's interests
	If it is a way to preserve the independence of your country
Offensive militarism	If it is a way to make right the historical injustices done to your country
	If it is a way to make right the historical injustices done to your people
	If that is the way to unite the majority of members of my nation into one state

The results show that among research participants, defensive militarism is more common but there is also offensive militarism which is less prevalent.

Table no.8 – Scale of militarism (%)



When the answers as to which media they follow for information and the index of militarism were cross-checked, the audiences of Happy, Pink, B92, Srpski telegraf, Blic, Informer, and Kurir had above half values (0.50 and more) of the index of militarism. Vreme, NIN, Nova S, and Danas audiences had the lowest militarism index.

Table br.9 – Sources of information and index of militarism (television outlets)

Source of information about politics	Index of militarism (0-1)
Happy	0.61
Pink	0.53
B92	0.52
RTS	0.48
Prva	0.45
N1	0.44
NovaS	0.29

Table no.10 – Sources of information and index of militarism (press)

Source of information about politics	Index of militarism (0-1)
Srpski telegraf	0.60
Blic	0.57
Informer	0.52
Kurir	0.50
Danas	0.32
Nin	0.24
Vreme	0.12

A comparison of the militarism index and attitudes toward the (un)justification of Russia's war on Ukraine reveals that offensive and defensive militarism are more prevalent among those who believe Russia's aggression is justified, albeit to varying degrees. Offensive militarism is twice as prevalent among individuals who support Russia's war on Ukraine. The same holds true for defensive militarism.

Table no.11 – Comparison of militarism index and attitude to (un)justification of war in Ukraine

Justification of Russia's war on Ukraine	Index of offensive militarism
Justified	0.58
Not justified	0.26
Justification of Russia's war on Ukraine	Index of defensive militarism
Justified	0.74
Not justified	0.38

Viewers of TV Happy (54.3% : 21.5%) and TV Pink (43.6% : 23.8%) have the most understanding for Russia's aggression against Ukraine. There are more pronounced discrepancies among B92 and TV Prva viewers, but only among N1 viewers is there disagreement over the justification for the Russian intervention.

Table no.12 – Justification of Russia's invasion of Ukraine and sources of information (%)

Source of information	Justification of Russia's invasion of Ukraine			
	Justified	Not justified	Can't decide	Don't follow
RTS	38,3	26,7	27,5	7,5
Prva	38,3	21,1	32,8	7,7
Pink	43,6	23,8	23,8	8,7
Happy	54,3	21,5	18,7	5,5
B92	46,6	31,3	18,2	4
N1	39,1	39,1	19,9	2
Nova S	41,7	31,3	21,9	5,2

Significant disparities on this issue can be seen among voters from different political blocs.

Almost twice as many voters in the civic opposition parties agree that Russia's invasion of Ukraine is unjustified. This share is considerably greater among minority party voters, and even among undecided opposition voters, the general attitude is that the invasion is not justifiable, despite the fact that a quarter of this group says they are following the events in Ukraine.

The majority of SNS and SPS voters believe the invasion is justified (42.7%), but slightly more than a quarter of respondents - voters of the ruling parties - believe there is no justification for the war on Ukraine (26.8%). The attitude toward the justification of the aggression is predominant among voters of right-wing and Eurosceptic parties (61.1%), while only one in seven (14.6%) believe that the invasion is not justified.

Table no.13 - Justification of Russia's invasion of Ukraine and party preferences (%)

Party blocs	Justification of Russia's invasion of Ukraine			
	Justified	Not justified	Can't decide	Don't follow
Power	42,7	26,8	23,4	7,1
Civic opposition	22,4	42,4	32,9	2,4
National opposition	61,1	14,6	22,9	1,4
Opposition, don't know who for	15,3	23,6	36,1	25
Others/minority	14,3	57,1	10,7	17,9

Although Serbian citizens are divided on whether Russia is to blame for the Ukraine conflict (43.8% believe it is not, while 39.33% believe it is), the majority blamed other international actors.

More than 80% of citizens blame America and NATO, while the EU and Ukraine are blamed by two-thirds of respondents (62.2% of the EU and 63.3% of Ukraine).

More than 80% of citizens blame America and NATO, while the other two-thirds blame Ukraine and the EU (62.2% blame the EU, and 63.3% blame Ukraine).

Cross-checking these figures with voter preferences reveals that voters in minority parties and the civic opposition mainly blame Russia for the conflict in Ukraine. In addition, there are undecided opposition voters, where exactly half of respondents blame Russia.

On the other side are voters for the ruling parties and the right-wing opposition, where it should be emphasised that as many as 55.8% of national opposition voters believe Russia is not at all to blame for the war, compared to only 32.8% of SNS and SPS voters.

Another interesting finding is that no group of voters, either of parties in power or opposition (both pro- and anti-Western), rated Ukraine's blame for the war less than half. As a result, we can conclude that voters of all major parties/coalitions share with the majority of Serbian citizens the perception that Ukraine is to blame for the war, as opposed to Russia's guilt, where there are still exceptions from the total population.

To this, the "evaluation" of the guilt of other international actors should be included. Not only do voters of the ruling parties and the right-wing opposition believe that the United States and NATO are the main culprits in the conflict (national opposition and the EU), but such a narrative also has strong support among civic opposition voters (78.2% USA, 77.6% NATO, and slightly less, 51.3% EU).

Table no.14 – Attitude to responsibility for the war in Ukraine and party preferences (%)

Party blocs	Who is to blame for the war in Ukraine (sum 4+5 – „mostly “ and „fully“)				
	Russia	Ukraine	EU	USA	NATO
Power	34,3	75,8	59,2	81,4	82,9
Civic opposition	55,6	62,5	51,3	78,2	77,6
National opposition	24,6	72,3	82,8	93,2	91,1
Opposition, don't know who for	50	64	46,9	75	84,3
Others/minority	70,3	73,9	78,2	85,8	87,5

Comparing "guilt for the war" and information sources yields only marginally different results. More than a half of the audience, but only those who receive information from N1, believe Russia is to blame for the war (NovaS - 48.8%). However, three-quarters of N1 viewers identify Ukraine as one of the perpetrators. TV Happy viewers are 83% higher than the average, while NovaS viewers are 69.6% lower.

To this, the "assessment" of the guilt of other international actors should be added. Not only do voters of the ruling parties and the right-wing opposition believe that the US and NATO are the primary perpetrators of the conflict (national opposition and the EU), but such a narrative also has strong support among civic opposition voters (78.2% USA, 77.6% NATO, and slightly less, 51.3% EU). There are no significant differences between other international actors. Viewers of NovaS have slightly lower opinions of the European Union, whereas consumers of all media content have a nearly unanimous opinion of NATO's role in the Ukraine conflict.

Table no.15 – Attitude to responsibility for the war in Ukraine and sources of information (%)

Source of information	Who is to blame for the war in Ukraine (sum 4+5 – „mostly“ and „fully“)				
	Russia	Ukraine	EU	USA	NATO
RTS	35,1	72,9	60,8	85,8	86,1
Prva	33,3	70,9	69,5	87,8	89,5
Pink	35,6	76,3	63,8	85,7	87,2
Happy	33,7	83	65,3	88,6	87,2
B92	37,9	75,6	64,5	86	86,3
N1	51,4	74,9	63,3	83,1	82,5
NovaS	48,8	69,6	57,3	83,8	84,9

We have key findings in the section of the research that dealt with Serbia's expected and desired conduct in relation to the war in Ukraine. The majority of Serbian citizens identify neutrality as a key sentiment. As many as 55.7% of all respondents believe Serbia should be neutral, slightly less than two-fifths (37.8%) believe it should support Russia, and only 6.4% believe it should support Ukraine.

The neutrality of Serbia is dominant among the consumers of various media content (even among those who believe that the invasion of Ukraine was unjustified), with the exception of viewers of Pink, TV Happy, and B92, who lean slightly more or equally towards Russia.

Viewers of NovaS and N1 have a slightly more pronounced attitude toward picking the Ukrainian side, but the proportion of such respondents is still negligible. For example, while "even" 39.1% of N1 viewers believe Russia's aggression against Ukraine is unjustified, only 10.1% believe siding with Ukraine is desirable.

Table No. 16 - Desirable conduct of Serbia in relation to the war in Ukraine according to information sources (%)

Source of information about politics	How should Serbia act		
	Support Ukraine	Support Russia	Neutral
RTS	5,6	38	56,4
Prva	2,8	40,9	56,3
Pink	6,3	47,6	46,1
Happy	4,4	47,8	47,8
B92	5,3	47,3	47,3
N1	10,1	33,3	56,6
NovaS	10	38,8	51,3

The prevalence of pro-Russian and neutral sentiments among Serbian voters demonstrates that all opposition parties that insist on imposing sanctions on Russia have very little leeway. Even among civic opposition voters, 71.8% believe Serbia should remain neutral, while only 15.5% believe Serbia should support the Ukrainian side. The concept of neutrality is also largely popular among undecided opposition and minority party voters. Neutrality is slightly lower among voters of the ruling parties and the right-wing opposition, but this is because a large number of them believe Serbia should clearly align with Russia (44.2% ruling parties, 62.5% national opposition).

Support for the Ukrainian side is also low across all demographics. Support for Russia or the concept of neutrality is a major area of differentiation between demographic groups. Thus, support for the Russian side rises with age, while support for the concept of neutrality falls (18-34: 63.8%; 35-54: 57.7%; 55+: 49.5%).

Similar trends can be seen in the area of education, where individuals with an academic degree are more likely to accept the concept of neutrality (63.2%) than are those with only elementary schooling or less (45.5%), while support for Russia decreases with each new level of education.

Students (71.1%), the unemployed (71.2%), and public sector employees (62%), prefer neutrality as a foreign policy concept, while support for Russia is the strongest among pensioners (49.8%).

Table no.17 - Desirable conduct of Serbia in relation to the war in Ukraine according to information sources about politics (%)

Source of information about politics	How should Serbia act		
	Support Ukraine	Support Russia	Neutral
Power	6,5	44,2	49,3
Civic opposition	15,5	12,7	71,8
National opposition	3,1	62,5	34,4
Opposition, don't know who for	11,4	13,6	75
Others/minority	12,5	8,3	79,2

Questions about the imposition of sanctions, i.e. Serbia's specific behaviour in relation to this war was measured indirectly.

In the total sample, as many as 71.6% of respondents answered "no" to the question "Should Serbia impose sanctions on Russia", 14.1% of them answered "I don't know" and 14.3% "yes". As one might expect, differences exist at the level of partisan families. Among right-wing opposition voters, 82.6% opposed the sanctions against Russia, while this share of ruling party voters fell to 78.7%.

The situation is similar in the other categories (share of "no" among undecided opposition members: 58.9%; minority/others: 48.3%; civic opposition: 48.2%). Even in the civic opposition, only slightly more than a quarter of voters (28.2%) support sanctions against Russia. However, one of the most important findings came from a follow-up question to all those who said Serbia should not impose sanctions on Russia, as well as those who said "I don't know" (a total of 85.7% of respondents).

Namely, we specifically targeted rewards and punishments for different political profiles of Serbian citizens. It's interesting to note that the collective West's rewards and punishments have the least potential. Accelerating the process of European integration, providing significant financial aid, threatening sanctions, threatening visas, cancelling financial aid, threats to withdraw European companies, and expelling Serbian sports teams from European competitions are the options that would change the minds of 12.6% to 15.9% of respondents about imposing sanctions on Russia. A slightly higher proportion (18.7%) would change their minds if the West threatened to push even harder for Kosovo and Metohija's independence or if Serbia stopped being pressured to recognise Kosovo and Metohija (17%). Overall, including respondents who clearly chose to impose sanctions on Russia, a two-thirds majority of Serbian citizens are unwilling to support this foreign policy move, even if doing so would result in certain benefits (acceleration to the EU, or relief from pressure on Kosovo) or if doing nothing, i.e. not imposing sanctions, resulted in penalties (introduction of visas, EU economic sanctions, etc.).

In fact, Russia has the greatest potential to push Serbia towards the imposition of sanctions against Russia if Russia breaches the agreement and stops supplying energy to Serbia (28.9% "yes"), drastically raises the price of energy products arriving in Serbia (20.3%), or it is revealed (and the public in Serbia is adequately informed) that Russia committed war crimes against civilians in Ukraine (22.3%),

We asked respondents about their perceptions of the major international actors. Respondents are unambiguous in their belief that states/associations violate international law. The EU, Russia, and China are viewed as having a higher regard for international law. Respondents see the EU, the United States, and the United Kingdom as economic exploiters of Serbia, but not China or Russia.

According to the research participants, China and the EU are the main supporters of the government, while the US and the EU are considered supporters of the opposition. According to the research participants, Russia and the EU are the two international actors that have contributed the most to the improvement of the rule of law, while China and the EU have contributed the most to Serbia's economic development. Finally, China and Russia are international actors who are recognised as Serbia's protectors in terms of global interests, but also in the case of Kosovo, i.e. Republika Srpska.

Table no.18 – Attitude towards international actors (%)

	EU countries	USA	United Kingdom	Russia	China
Respects international law	27,2	7,3	8,5	27,1	19
Economically exploits Serbia for own interests	31,9	25,2	20,6	17,7	15,9
Supports present Serbian government	25,8	10,5	9,1	42	30,3
Supports present Serbian opposition	18,2	21,6	15,2	16,9	10,7
Contributes to the establishment of the rule of law in Serbia	29,8	6,5	6,9	30,6	17,5
Facilitates economic progress of Serbia	36,8	4,7	7,3	47,3	36,4
Protects Serbian interests at the international level	20,8	4	4,5	47,4	30
Has the policy about Kosovo which is in the interest of Serbia	10,6	2,8	4,5	61,1	34,8
Has the policy about Republika Srpska which is in the interest of Serbia	9,8	2,6	4	53,3	30,1

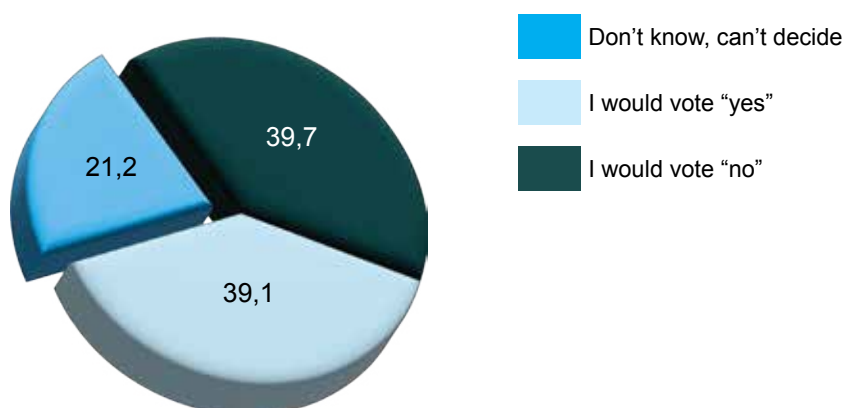
In addition to the perceived attitude toward Serbia, we asked respondents about their emotional attitude to international actors. The majority of respondents are indifferent and respectful of the EU, while they are hateful and indifferent to the United States. In the case of the United Kingdom, respondents are mostly indifferent, but they also have feelings of respect and hatred. More than half of respondents have respect for Russia as an international actor, and slightly less than 40% admire it, while the majority of survey participants are indifferent or respectful to China.

Table br.19 – Emotional attitude to international actors (%)

	EU	USA	United Kingdom	Russia	China
Hatred	13,4	30,7	16,6	2,8	3,7
Fear	9,8	29,6	8,7	8,7	4,7
Contempt	12,9	25,6	15,1	3,6	2,6
Respect	30,2	16,3	18,8	54,7	36,9
Admiration	17,5	8	9,1	37,2	22,7
Love	12,3	4	5,3	31,8	10,6
Indifference	34,1	30,8	46,3	30,2	37,7

According to the survey results, four out of ten respondents support and the same number oppose Serbia's membership in the EU, with a fifth undecided.

Table no.20 – Attitude to Serbia's EU membership (%)



Only every fourth respondent knows where Serbia stands in terms of EU integration.

Table no.21 - At what phase is the EU integration process of Serbia? (%)

