Pre-Presidential Election National Survey of Mongolian Public Opinion

April 24 - May 4, 2017

A PROJECT FROM THE INTERNATIONAL REPUBLICAN INSTITUTE
Detailed Methodology

• The survey was conducted by the Social Policy Development Research Institute (SPDRI) under the supervision of Chariot LLC and the Center for Insights in Survey Research between April 24 - May 4, 2017.

• Data was collected through in-person, in-home interviews. The sample was stratified by 13 of Mongolia’s 21 aimags (provinces) and Ulaanbaatar and then by soum (town) or district. Interviews were conducted in both urban and rural locations.

• The sample consisted of 3,000 respondents (response rate: 96.7 percent) aged 18 and older, and was representative of voting-age adults nationally.

• Within each of the selected 13 aimags outside of Ulaanbaatar, 1,680 interviews were conducted in three randomly selected soums. All nine districts in Ulaanbaatar were surveyed, where 1,320 interviews were conducted. The total number of interviews to conduct within an aimag was determined by utilizing voter registration information from the 2013 presidential election.

• After identifying a centrally located starting point, a skip pattern was used to select appropriate households. Within each household, the Kish Grid was then used to select respondents 18 years and older.

• Interview teams were comprised of both men and women.

• The margin of error does not exceed plus or minus 1.8 percent at the mid-range with a confidence level of 95 percent.

• The information in this report has been compiled in accordance with international standards for market and social research methodologies. Figures in charts and tables may not sum to 100 percent due to rounding.
General Attitudes
Overall, do you think Mongolia is headed in the right direction or the wrong direction?

- May 2017: 20% Right direction, 19% Wrong direction, 61% Don't know/Refused to answer
- February 2017: 22% Right direction, 21% Wrong direction, 57% Don't know/Refused to answer
- August 2016: 31% Right direction, 22% Wrong direction, 47% Don't know/Refused to answer
- March 2016: 19% Right direction, 21% Wrong direction, 61% Don't know/Refused to answer
General positive feeling

Economic crisis is diminishing

The right political party won the elections

Mongolia is a democratic and open society

Construction and infrastructure is developing

Open and multilateral foreign policy

People's livelihoods have improved

Expanded opportunity for individuals

Freedom to travel and migrate

Other
Why do you say wrong direction?  
(Open-ended; n=1,841)

- Economic instability and income inequality: 36% May 2017, 39% February 2017
- Failed government policies: 24% May 2017, 26% February 2017
- Corruption and bureaucracy: 14% May 2017, 26% February 2017
- The wrong political party, politicians and/or president was elected: 5% May 2017, 5% February 2017
- Inadequate health services: 5% May 2017, 5% February 2017
- Morals and ethics are declining: 4% May 2017, 4% February 2017
- Inadequate policy on mineral extraction and inappropriate use of income from mining: 3% May 2017, 5% February 2017
- Uncertain future for Mongolians: 3% May 2017, 3% February 2017
- Policies are not influenced by public opinion: 3% May 2017, 2% February 2017
- General negative feeling: 2% May 2017, 6% February 2017
- Increased tax pressure: 2% May 2017, <1% February 2017
- Environmental degradation: 1% May 2017, 3% February 2017
- Other: <1% May 2017, 2% February 2017
What is the most important problem facing Mongolia?

- Unemployment: 32%
- Poverty: 20%
- Corruption: 9%
- Price inflation: 6%
- Political conflict: 6%
- Economy: 6%
- Foreign loan debt: 4%
- Alcoholism: 3%
- Pollution/Environmental issues: 2%
- Mining/Resource allocation: 2%
- Other: 6%
Overall, how would you rate the current economic conditions in Mongolia?

- **Very good**
  - May 2017: 2%
  - February 2017: 2%
  - August 2016: 1%
  - March 2016: 4%

- **Good**
  - May 2017: 13%
  - February 2017: 13%
  - August 2016: 14%
  - March 2016: 5%

- **Bad**
  - May 2017: 52%
  - February 2017: 53%
  - August 2016: 57%

- **Very bad**
  - May 2017: 24%
  - February 2017: 30%
  - August 2016: 27%

- **Don’t know/Refused to answer**
  - May 2017: 3%
  - February 2017: 3%
  - August 2016: 4%
  - March 2016: 2%
Has the economic situation of you and your family improved, worsened or remained the same in the past year?

- **Improved**: 6% (May 2017), 8% (February 2017), 9% (August 2016), 6% (March 2016)
- **Worsened**: 45% (May 2017), 44% (February 2017), 44% (August 2016), 56% (March 2016)
- **Remained the same**: 40% (May 2017), 47% (February 2017), 46% (August 2016), 37% (March 2016)
- **Don’t know/Refused to answer**: 1% (May 2017), 7% (February 2017), 2% (August 2016), 2% (March 2016)
Do you expect the price of basic commodities such as milk, bread and meat to be much higher, slightly higher, the same, slightly lower, or much lower one year from now?

- **Much higher**
  - May 2017: 24%
  - February 2017: 23%
  - August 2016: 21%
  - March 2016: 16%

- **Slightly higher**
  - May 2017: 45%
  - February 2017: 52%
  - August 2016: 45%
  - March 2016: 51%

- **Same**
  - May 2017: 13%
  - February 2017: 16%
  - August 2016: 17%
  - March 2016: 17%

- **Slightly lower**
  - May 2017: 6%
  - February 2017: 4%
  - August 2016: 6%
  - March 2016: 7%

- **Much lower**
  - May 2017: 0%
  - February 2017: 1%
  - August 2016: 1%
  - March 2016: 1%

- **Don’t know/Refused to answer**
  - May 2017: 10%
  - February 2017: 6%
  - August 2016: 14%
  - March 2016: 6%
Do you expect the national government of Mongolia to be more stable, less stable or remain the same over the next year?

- More stable:
  - May 2017: 21%
  - February 2017: 26%
  - August 2016: 41%

- Same:
  - May 2017: 37%
  - February 2017: 33%
  - August 2016: 26%

- Less stable:
  - May 2017: 28%
  - February 2017: 24%
  - August 2016: 21%

- Don’t know/Refused to answer:
  - May 2017: 14%
  - February 2017: 17%
  - August 2016: 13%
Do you think Mongolia is better off, the same, or worse than last year?

- **Better**
  - May 2017: 8%
  - February 2017: 9%
  - August 2016: 8%
  - March 2016: 6%

- **Worse**
  - May 2017: 38%
  - February 2017: 44%
  - August 2016: 44%
  - March 2016: 56%

- **Same**
  - May 2017: 40%
  - February 2017: 40%
  - August 2016: 46%
  - March 2016: 37%

- **Don’t know/Refused to answer**
  - May 2017: 2%
  - February 2017: 7%
  - August 2016: 2%
  - March 2016: 2%
Since Parliament’s autumn session began, would you say the government has done a very good, somewhat good, somewhat bad or very bad job of addressing the following issues:

<table>
<thead>
<tr>
<th>Issue</th>
<th>Very good</th>
<th>Somewhat good</th>
<th>Somewhat bad</th>
<th>Very bad</th>
<th>Don't know/Refused to answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic violence</td>
<td>6%</td>
<td>33%</td>
<td>35%</td>
<td>18%</td>
<td>8%</td>
</tr>
<tr>
<td>Improving education</td>
<td>6%</td>
<td>31%</td>
<td>37%</td>
<td>18%</td>
<td>8%</td>
</tr>
<tr>
<td>Fighting crime</td>
<td>4%</td>
<td>32%</td>
<td>38%</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>Creating affordable housing</td>
<td>4%</td>
<td>23%</td>
<td>39%</td>
<td>26%</td>
<td>9%</td>
</tr>
<tr>
<td>Attracting foreign investment</td>
<td>4%</td>
<td>24%</td>
<td>37%</td>
<td>22%</td>
<td>15%</td>
</tr>
<tr>
<td>Developing the mining sector</td>
<td>4%</td>
<td>24%</td>
<td>38%</td>
<td>22%</td>
<td>12%</td>
</tr>
<tr>
<td>Protecting the environment</td>
<td>4%</td>
<td>20%</td>
<td>39%</td>
<td>29%</td>
<td>9%</td>
</tr>
</tbody>
</table>
Since Parliament’s autumn session began, would you say the government has done a very good, somewhat good, somewhat bad or very bad job of addressing the following issues:

<table>
<thead>
<tr>
<th>Issue</th>
<th>Very good</th>
<th>Somewhat good</th>
<th>Somewhat bad</th>
<th>Very bad</th>
<th>Don't know/Refused to answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advocating for persons with disabilities, orphans, single mothers</td>
<td>4%</td>
<td>19%</td>
<td>31%</td>
<td>36%</td>
<td>9%</td>
</tr>
<tr>
<td>or other vulnerable communities</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Addressing unemployment</td>
<td>4%</td>
<td>12%</td>
<td>45%</td>
<td>33%</td>
<td>6%</td>
</tr>
<tr>
<td>Protecting land rights</td>
<td>3%</td>
<td>23%</td>
<td>36%</td>
<td>25%</td>
<td>13%</td>
</tr>
<tr>
<td>Improving the economy</td>
<td>3%</td>
<td>17%</td>
<td>38%</td>
<td>38%</td>
<td>6%</td>
</tr>
<tr>
<td>Combating corruption</td>
<td>3%</td>
<td>16%</td>
<td>36%</td>
<td>39%</td>
<td>7%</td>
</tr>
<tr>
<td>Addressing air pollution</td>
<td>2%</td>
<td>13%</td>
<td>30%</td>
<td>50%</td>
<td>5%</td>
</tr>
<tr>
<td>Reducing poverty</td>
<td>2%</td>
<td>11%</td>
<td>38%</td>
<td>44%</td>
<td>5%</td>
</tr>
</tbody>
</table>

- **Very good**
- **Somewhat good**
- **Somewhat bad**
- **Very bad**
- **Don't know/Refused to answer**
If you could give one piece of advice to Parliament what would it be?

- Work in Mongolia’s interest, not a political party’s interest (28%)
- Keep promises made during the elections (26%)
- Address economic challenges (20%)
- Seize politicians’ offshore bank accounts (13%)
- Recruit professionals (5%)
- Reduce air pollution (4%)
- Improve land ownership and usage policies (2%)
- Don’t know/Refused to answer (2%)
<table>
<thead>
<tr>
<th>Institution</th>
<th>Strongly approve</th>
<th>Somewhat approve</th>
<th>Somewhat disapprove</th>
<th>Strongly disapprove</th>
<th>Don't know/Refused to answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Army</td>
<td>27%</td>
<td>48%</td>
<td>14%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Police</td>
<td>25%</td>
<td>50%</td>
<td>15%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Media</td>
<td>21%</td>
<td>49%</td>
<td>17%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Civil society organizations</td>
<td>15%</td>
<td>41%</td>
<td>26%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Aimag government</td>
<td>12%</td>
<td>38%</td>
<td>27%</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>Mongolian Parliamentary Women's Caucus</td>
<td>12%</td>
<td>34%</td>
<td>26%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>Independent Authority Against Corruption</td>
<td>11%</td>
<td>34%</td>
<td>31%</td>
<td>18%</td>
<td>8%</td>
</tr>
<tr>
<td>Supreme Court</td>
<td>10%</td>
<td>35%</td>
<td>28%</td>
<td>15%</td>
<td>12%</td>
</tr>
<tr>
<td>Prime Minister</td>
<td>7%</td>
<td>35%</td>
<td>35%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>State Great Hural</td>
<td>7%</td>
<td>34%</td>
<td>37%</td>
<td>15%</td>
<td>6%</td>
</tr>
<tr>
<td>Speaker of Parliament</td>
<td>6%</td>
<td>33%</td>
<td>35%</td>
<td>18%</td>
<td>8%</td>
</tr>
<tr>
<td>Opposition parties in government</td>
<td>8%</td>
<td>30%</td>
<td>33%</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>General Election Commission</td>
<td>7%</td>
<td>31%</td>
<td>33%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>President</td>
<td>5%</td>
<td>31%</td>
<td>35%</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>Political parties</td>
<td>4%</td>
<td>25%</td>
<td>40%</td>
<td>23%</td>
<td>7%</td>
</tr>
</tbody>
</table>
Voting and Elections
If you could have only one or the other, which is more important to you: a democratic system of government or a prosperous economy?

- **Democracy is definitely more important to me**
  - May 2017: 39%
  - February 2017: 37%
  - August 2016: 37%
  - March 2016: 37%

- **Democracy is somewhat more important to me**
  - May 2017: 16%
  - February 2017: 12%
  - August 2016: 15%
  - March 2016: 14%

- **Prosperity is somewhat more important to me**
  - May 2017: 23%
  - February 2017: 11%
  - August 2016: 10%
  - March 2016: 18%

- **Prosperity is definitely more important to me**
  - May 2017: 27%
  - February 2017: 12%
  - August 2016: 27%
  - March 2016: 30%

- **Don't know/Refused to answer**
  - May 2017: 9%
  - February 2017: 9%
  - August 2016: 13%
  - March 2016: 11%
Do you expect the condition of democracy in Mongolia to improve over the next four years, stay the same or worsen?

- **Improve**: 25% May 2017, 30% February 2017, 36% August 2016
- **Stay the same**: 41% May 2017, 43% February 2017, 42% August 2016
- **Worsen**: 18% May 2017, 14% February 2017, 10% August 2016
- **Don’t know/Refused to answer**: 15% May 2017, 14% February 2017, 12% August 2016
Did you vote in the 2016 parliamentary elections?

- Yes: 83%
- No: 15%
- Don’t know/Refused to answer: 2%
If you voted in the 2016 parliamentary elections, for which party did you vote?
(August 2016: n=4,274; February 2017: n=4,202; May 2017: n=2,477)

- **Mongolian People's Party**
  - August 2016: 58%
  - February 2017: 56%
  - May 2017: 56%

- **Democratic Party**
  - August 2016: 26%
  - February 2017: 27%
  - May 2017: 30%

- **Independent candidate**
  - August 2016: 8%
  - February 2017: 5%
  - May 2017: 9%

- **Mongolian People's Revolutionary Party**
  - August 2016: 4%
  - February 2017: 4%
  - May 2017: 5%

- **Other**
  - August 2016: 5%
  - February 2017: 3%
  - May 2017: 2%

- **Don't know/Refused to answer**
  - August 2016: 2%
  - February 2017: 2%
  - May 2017: 8%
If the parliamentary elections were held today, would you vote the same way as you did on June 29, 2016?

<table>
<thead>
<tr>
<th></th>
<th>May 2017</th>
<th>February 2017</th>
<th>August 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>58%</td>
<td>65%</td>
<td>80%</td>
</tr>
<tr>
<td>No</td>
<td>23%</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>Don’t know/Refused to answer</td>
<td>15%</td>
<td>17%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Response options: Yes, No, Don’t know/Refused to answer.
The Mongolian People’s Party gained a supermajority in the 2016 parliamentary elections and now controls 65 of the 76 seats (86%) of Parliament.

Do you believe that this parliament is representative of the range of political viewpoints in Mongolia?

<table>
<thead>
<tr>
<th>Response</th>
<th>May 2017</th>
<th>February 2017</th>
<th>August 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>40%</td>
<td>38%</td>
<td>47%</td>
</tr>
<tr>
<td>No</td>
<td>46%</td>
<td>43%</td>
<td>36%</td>
</tr>
<tr>
<td>Don’t know/Refused</td>
<td>13%</td>
<td>19%</td>
<td>17%</td>
</tr>
</tbody>
</table>

2016 Data included to show change over time.
How likely, if at all, are you to vote in the presidential election in 2017?

- Very likely: 50% (May 2017), 57% (February 2017), 63% (August 2016)
- Somewhat likely: 28% (May 2017), 35% (February 2017), 27% (August 2016)
- Somewhat unlikely: 6% (May 2017), 6% (February 2017), 5% (August 2016)
- Very unlikely: 4% (May 2017), 5% (February 2017), 2% (August 2016)
- Don’t know/Refused to answer: 4% (May 2017), 5% (February 2017), 4% (August 2016)
Which of the following best describes how you will decide to vote in the 2017 presidential election?

- Primarily on the candidate: 47% (May 2017)
- Primarily on the party with which the candidate is affiliated: 16% (February 2017), 14% (May 2017)
- Both the party and the candidate: 26% (February 2017), 24% (May 2017)
- Neither the party nor the candidate: 6% (February 2017), 10% (May 2017)
- Don’t know/Refused to answer: 5% (February 2017), 6% (May 2017)
Do you believe the June 2017 presidential election will be free and fair?

- Yes: 48%
- No: 25%
- Don’t know/Refused to answer: 28%
Do you agree or disagree with the following statement: “Voting gives me a chance to influence decision-making in the country.”

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree
- Don’t know/Refused to answer

May 2017
February 2017
August 2016
March 2016
Do you agree or disagree with the following statements?

“It is easy to have my voice heard by my elected governmental representatives.”

- Strongly agree: 24%
- Somewhat agree: 25%
- Somewhat disagree: 5%
- Strongly disagree: 9%
- Don't know/Refused to answer: 16%

“It is easy to have my voice heard by my political party.”

- Strongly agree: 26%
- Somewhat agree: 26%
- Somewhat disagree: 9%
- Strongly disagree: 5%
- Don't know/Refused to answer: 15%
Which of the following do you believe is more important for Mongolia’s democracy?

- An efficient government, where the President and majority of parliamentarians are from the same political party: 31%
- A balanced government, where the President and the majority of parliamentarians are from different political parties: 50%
- Don't know/Refused to answer: 17%
Do you have a favorable or unfavorable opinion of the following political parties?

- **Democratic Party**
  - Strongly favorable: 15%
  - Somewhat favorable: 33%
  - Somewhat unfavorable: 30%
  - Strongly unfavorable: 15%
  - Don’t know/Refused: 4%

- **Mongolian People’s Party**
  - Strongly favorable: 13%
  - Somewhat favorable: 36%
  - Somewhat unfavorable: 30%
  - Strongly unfavorable: 15%
  - Don’t know/Refused: 4%

- **Mongolian People’s Revolutionary Party**
  - Strongly favorable: 3%
  - Somewhat favorable: 24%
  - Somewhat unfavorable: 38%
  - Strongly unfavorable: 27%
  - Don’t know/Refused: 6%

- **Civil Will-Green Party**
  - Strongly favorable: 2%
  - Somewhat favorable: 16%
  - Somewhat unfavorable: 35%
  - Strongly unfavorable: 34%
  - Don’t know/Refused: 12%

- **National Labor Party**
  - Strongly favorable: 2%
  - Somewhat favorable: 11%
  - Somewhat unfavorable: 32%
  - Strongly unfavorable: 35%
  - Don’t know/Refused: 18%

- **Mongolian National Democratic Party**
  - Strongly favorable: 1%
  - Somewhat favorable: 11%
  - Somewhat unfavorable: 34%
  - Strongly unfavorable: 35%
  - Don’t know/Refused: 17%
If you could give one piece of advice to the leaders of the various political parties, what would that advice be?

- Work in Mongolia's interest, not the party's interest: 36%
- Keep promises made during the elections: 29%
- Address economic challenges: 19%
- Seize politicians' offshore bank accounts: 8%
- Recruit professionals: 3%
- Reduce air pollution: 2%
- Improve land ownership and usage policies: 1%
- Other: 1%
- Don't know/Refused to answer: 1%
Regardless of which party you voted for in the 2016 parliamentary election, which political party most closely aligns with your personal point of view?
Perceptions of Corruption
Do you believe that corruption is a major problem, a minor problem, not much of a problem or not a problem at all?

A major problem
- May 2017: 67%
- February 2017: 72%
- August 2016: 76%
- March 2016: 75%

A minor problem
- May 2017: 22%
- February 2017: 12%
- August 2016: 14%
- March 2016: 13%

Not much of a problem
- May 2017: 6%
- February 2017: 3%
- August 2016: 4%
- March 2016: 3%

Not a problem at all
- May 2017: 2%
- February 2017: 2%
- August 2016: 4%
- March 2016: 1%

Don’t know/Refused to answer
- May 2017: 2%
- February 2017: 4%
- August 2016: 9%
- March 2016: 8%
Do you believe giving monetary gifts to service providers such as doctors, nurses, teachers and other civil servants is wrong?

- Yes: 61%
- Yes, but only when I must give a gift in order to receive quality service: 22%
- Yes, but only if they ask for the gift: 7%
- No: 6%
- Don’t know/Refused to answer: 4%
How optimistic are you about how the national government deals with each of the following issues?

<table>
<thead>
<tr>
<th>Issue</th>
<th>Very optimistic</th>
<th>Somewhat optimistic</th>
<th>Not too optimistic</th>
<th>Not optimistic at all</th>
<th>Don’t know/Refused to answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving education</td>
<td>10%</td>
<td>43%</td>
<td>31%</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>Addressing unemployment</td>
<td>10%</td>
<td>30%</td>
<td>40%</td>
<td>17%</td>
<td>3%</td>
</tr>
<tr>
<td>Developing roads, highways, bridges</td>
<td>9%</td>
<td>44%</td>
<td>29%</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Delivering quality healthcare</td>
<td>9%</td>
<td>43%</td>
<td>32%</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Fighting crime</td>
<td>9%</td>
<td>43%</td>
<td>33%</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Addressing domestic violence</td>
<td>9%</td>
<td>39%</td>
<td>33%</td>
<td>14%</td>
<td>5%</td>
</tr>
<tr>
<td>Enhancing young people's involvement in the political system</td>
<td>9%</td>
<td>38%</td>
<td>30%</td>
<td>16%</td>
<td>7%</td>
</tr>
<tr>
<td>Protecting the environment</td>
<td>8%</td>
<td>32%</td>
<td>36%</td>
<td>19%</td>
<td>5%</td>
</tr>
<tr>
<td>Developing the mining sector</td>
<td>8%</td>
<td>38%</td>
<td>34%</td>
<td>15%</td>
<td>6%</td>
</tr>
<tr>
<td>Attracting foreign investment</td>
<td>7%</td>
<td>37%</td>
<td>33%</td>
<td>15%</td>
<td>8%</td>
</tr>
</tbody>
</table>

- Very optimistic
- Somewhat optimistic
- Not too optimistic
- Not optimistic at all
- Don’t know/Refused to answer
How optimistic are you about how the national government deals with each of the following issues?

- Creating affordable housing: 7% Very optimistic, 36% Somewhat optimistic, 35% Not too optimistic, 17% Not optimistic at all, 5% Don’t know/Refused to answer
- Improving the economy: 7% Very optimistic, 29% Somewhat optimistic, 35% Not too optimistic, 24% Not optimistic at all, 6% Don’t know/Refused to answer
- Combating corruption: 7% Very optimistic, 26% Somewhat optimistic, 37% Not too optimistic, 26% Not optimistic at all, 3% Don’t know/Refused to answer
- Protecting land rights: 6% Very optimistic, 34% Somewhat optimistic, 35% Not too optimistic, 18% Not optimistic at all, 7% Don’t know/Refused to answer
- Advancing democratic reforms: 6% Very optimistic, 26% Somewhat optimistic, 36% Not too optimistic, 21% Not optimistic at all, 12% Don’t know/Refused to answer
- Reducing poverty: 6% Very optimistic, 25% Somewhat optimistic, 40% Not too optimistic, 25% Not optimistic at all, 3% Don’t know/Refused to answer
- Advancing gender equality: 5% Very optimistic, 30% Somewhat optimistic, 36% Not too optimistic, 17% Not optimistic at all, 14% Don’t know/Refused to answer
- Addressing air pollution: 5% Very optimistic, 21% Somewhat optimistic, 31% Not too optimistic, 36% Not optimistic at all, 7% Don’t know/Refused to answer
- Supporting human rights for lesbians, gays, bisexuals and transgender people: 4% Very optimistic, 18% Somewhat optimistic, 25% Not too optimistic, 21% Not optimistic at all, 33% Don’t know/Refused to answer
To what degree are you concerned about the amount of Mongolia’s national debt?

- Very concerned: 56%
- Somewhat concerned: 34%
- Not too concerned: 5%
- Not concerned at all: 2%
- Don’t know/Refused to answer: 2%
To what degree do you support the government’s actions in 2017 to address Mongolia’s national debt?

- Strongly support: 15%
- Somewhat support: 40%
- Somewhat oppose: 18%
- Strongly oppose: 9%
- Don’t know/Refused to answer: 18%
Please rate your level of agreement or disagreement with the following positions:

Air quality has negative effects on my health or my family's health
- Strongly agree: 56%
- Somewhat agree: 25%
- Somewhat disagree: 10%
- Strongly disagree: 5%
- Don't know/Refused to answer: 3%

The province should be given a proportional share of revenue from natural resources to address local problems
- Strongly agree: 27%
- Somewhat agree: 41%
- Somewhat disagree: 17%
- Strongly disagree: 8%
- Don't know/Refused to answer: 6%

Individuals should continue to be allowed to have personal bank accounts in U.S. dollars
- Strongly agree: 19%
- Somewhat agree: 36%
- Somewhat disagree: 23%
- Strongly disagree: 11%
- Don't know/Refused to answer: 11%

It is easy to open a new business in Mongolia
- Strongly agree: 9%
- Somewhat agree: 22%
- Somewhat disagree: 33%
- Strongly disagree: 27%
- Don't know/Refused to answer: 9%
Would you say that climate change is a very serious problem, a somewhat serious problem, not that much of a problem, or not a problem at all?
To what degree would you say the government is involved in economic and business affairs?

- Too involved: 28%
- Involved at just the right level: 35%
- Not involved enough: 17%
- Not involved at all: 7%
- Don’t know/Refused to answer: 14%
To what degree would you say that civil servants are professional?

- **Very professional**: 13% May 2017, 11% February 2017, 10% August 2016
- **Somewhat professional**: 34% May 2017, 31% February 2017, 25% August 2016
- **Not too professional**: 29% May 2017, 27% February 2017, 25% August 2016
- **Not professional at all**: 11% May 2017, 11% February 2017, 11% August 2016
- **Other**: 6% May 2017, 8% February 2017, 8% August 2016
- **Don’t know/Refused to answer**: 8% May 2017, 9% February 2017, 13% August 2016
Which of the following do you believe would do the most to improve the level of professionalism among civil servants?

- Job stability and independence from changes of ruling party: 28%
- More management involvement and direction: 27%
- Better training: 17%
- Greater flexibility to do their job as they see fit: 9%
- Better leadership from elected officials: 9%
- Additional explanation of what is expected of them: 7%
- Don’t know/Refused to answer: 2%
Who should have primary responsibility for overseeing the mining of natural resources in Mongolia?

- **Provincial governments**: 46% (May 2017), 44% (February 2017)
- **National government**: 37% (May 2017), 38% (February 2017)
- **Private companies under government contract**: 10% (May 2017), 10% (February 2017)
- **Don’t know/Refused to answer**: 6% (May 2017), 8% (February 2017)
Do you favor or oppose the involvement of foreign companies in mining operations in Mongolia?

- **Strongly favor**: 12% (February 2017) / 10% (May 2017)
- **Somewhat favor**: 36% (February 2017) / 36% (May 2017)
- **Somewhat oppose**: 24% (February 2017) / 31% (May 2017)
- **Strongly oppose**: 20% (February 2017) / 14% (May 2017)
- **Don’t know/Refused to answer**: 10% (February 2017) / 7% (May 2017)
Would you favor or oppose Parliament passing laws that would prevent any foreign investment in mining operations in Mongolia?

- **Strongly favor**: 21% (May 2017), 21% (February 2017), 30% (August 2016)
- **Somewhat favor**: 35% (May 2017), 33% (February 2017), 36% (August 2016)
- **Somewhat oppose**: 25% (May 2017), 23% (February 2017), 18% (August 2016)
- **Strongly oppose**: 8% (May 2017), 8% (February 2017), 7% (August 2016)
- **Don’t know/Refused to answer**: 10% (May 2017), 15% (February 2017), 9% (August 2016)
What do you think foreign investors in mining should focus on the most?

- Hiring Mongolians: 33% (May 2017), 46% (February 2017), 35% (August 2016)
- Investing in community infrastructure such as schools and clinics: 20% (May 2017), 18% (February 2017), 20% (August 2016)
- Environmental protection: 23% (May 2017), 19% (February 2017), 21% (August 2016)
- Procurement of local goods and services: 7% (May 2017), 6% (February 2017), 7% (August 2016)
- Maximizing profits/royalties: 11% (May 2017), 7% (February 2017), 12% (August 2016)
- Don’t know/Refused to answer: 4% (May 2017), 3% (February 2017), 6% (August 2016)

Note: Data is from May 2017, February 2017, and August 2016.
Is your opinion of Oyu Tolgoi LLC* favorable or unfavorable?

- **Strongly favorable**
  - May 2017: 10%
  - February 2017: 14%

- **Somewhat favorable**
  - May 2017: 45%
  - February 2017: 43%

- **Somewhat unfavorable**
  - May 2017: 25%
  - February 2017: 20%

- **Strongly unfavorable**
  - May 2017: 8%
  - February 2017: 8%

- **Don’t know/Refused to answer**
  - May 2017: 11%
  - February 2017: 16%

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*Oyu Tolgoi LLC is a Mongolian company, jointly owned by Erdenes Oyu Tolgoi LLC on behalf of the Government of Mongolia (34 percent) and the Canadian company Turquoise Hill Resources (66 percent). Turquoise Hill Resources is listed on the Toronto and New York Stock exchanges and is indirectly owned by Rio Tinto, which manages Oyu Tolgoi on behalf of the partnership. Oyu Tolgoi LLC controls the Oyu Tolgoi gold and copper mine.*
Is your opinion of Erdenes Mongol* favorable or unfavorable?

<table>
<thead>
<tr>
<th>Opinion</th>
<th>May 2017</th>
<th>February 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly favorable</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Somewhat favorable</td>
<td>24%</td>
<td>37%</td>
</tr>
<tr>
<td>Somewhat unfavorable</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Strongly unfavorable</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Don’t know/Refused to answer</td>
<td>16%</td>
<td>28%</td>
</tr>
</tbody>
</table>

*Erdenes Mongol is the leading state-owned company in Mongolia’s mining, infrastructure and energy sectors. The Government of Mongolia has empowered Erdenes Mongol to manage its shares in Mongolia’s mining assets, including Oyu Tolgoi LLC and Erdenes Tavan Tolgoi JSC.
Is your opinion of Centerra Gold* favorable or unfavorable?

- Strongly favorable: 6% (May) 7% (February)
- Somewhat favorable: 24% (May) 17% (February)
- Somewhat unfavorable: 23% (May) 18% (February)
- Strongly unfavorable: 14% (May) 13% (February)
- Don't know/Refused: 32% (May) 46% (February)

*Centerra Gold is a Canadian gold mining and exploration company engaged in the operation, exploration, development and acquisition of gold properties in Asia, North America and other markets worldwide. Centerra Gold owns the Gatsuurt gold mine, located in North Central Mongolia.
Gender Equality and Youth Inclusion
Do you agree or disagree with the following statement: “Women are equally represented in political decision-making positions in Mongolia.”

- Strongly agree: 22%
- Somewhat agree: 32%
- Somewhat disagree: 24%
- Strongly disagree: 16%
- Don’t know/Refused to answer: 6%
Which of the following would you say is the greatest barrier to increased women’s participation in political decision making:

- Male-dominated political structure: 35%
- Lack of support from voters: 13%
- Household duties and roles: 12%
- Women’s limited access to economic resources: 10%
- Women’s lack of education, knowledge, skill and power: 11%
- Women’s inactivity: 8%
- Men are more talented than women: 4%
- Don’t know/Refused to answer: 5%
Do you agree or disagree with the following statement: “Women can compete equally with men for holding positions of elected office.”

- Strongly agree: 32%
- Somewhat agree: 41%
- Somewhat disagree: 16%
- Strongly disagree: 5%
- Don’t know/Refused to answer: 6%
Do you agree or disagree with the following statement: “Parliament should enforce a 30 percent quota* of women candidates nominated by a political party in future elections.”

*The current quota of women candidates nominated by a political party is 20 percent.
If there are two candidates running for office and they have the same qualifications aside from the fact that one is a man and one is a woman, which candidate are you more likely to support?

- **Man**: 26%
- **Woman**: 34%
- **It makes no difference to me**: 35%
- **Don’t know/Refused to answer**: 4%
Do you agree or disagree with the following statement: “Politicians do not listen to the needs and ideas of women.”

- Strongly agree: 19%
- Somewhat agree: 43%
- Somewhat disagree: 20%
- Strongly disagree: 7%
- Don’t know/Refused to answer: 10%
Do you agree or disagree with the following statements:

“Political parties should be doing more to promote women to positions of leadership.”

- Strongly agree: 23%
- Somewhat agree: 43%
- Somewhat disagree: 15%
- Strongly disagree: 7%
- Don’t know/Refused to answer: 10%

“Political parties should be doing more to nominate and support women candidates for elected office.”

- Strongly agree: 23%
- Somewhat agree: 42%
- Somewhat disagree: 17%
- Strongly disagree: 8%
- Don’t know/Refused to answer: 9%
Do you believe that young people are capable of becoming leaders of political parties?

- Yes: 70%
- No: 21%
- Don’t know/Refused to answer: 9%
Do you agree or disagree with the following statement: “It is time for Mongolia to transition to a younger generation of political leaders.”

- Strongly agree: 46%
- Somewhat agree: 26%
- Somewhat disagree: 11%
- Strongly disagree: 3%
- Don’t know/Refused to answer: 4%
Do you agree or disagree with the following statement: “Politicians do not listen to the needs and ideas of young people.”

- Strongly agree: 34% (May 2017), 36% (February 2017), 35% (August 2016), 38% (March 2016)
- Somewhat agree: 41% (May 2017), 40% (February 2017), 41% (August 2016), 38% (March 2016)
- Somewhat disagree: 13% (May 2017), 14% (February 2017), 14% (August 2016), 18% (March 2016)
- Strongly disagree: 4% (May 2017), 6% (February 2017), 4% (August 2016), 5% (March 2016)
- Don’t know/Refused to answer: 7% (May 2017), 6% (February 2017), 6% (August 2016), 8% (March 2016)
Foreign Relations and Trade
Would you say that you have a favorable or unfavorable opinion of the following countries:

- **Russia**: 38% Strongly favorable, 52% Favorable, 6% Somewhat favorable, 2% Somewhat unfavorable, 3% Favorable, 2% Strongly unfavorable, 2% Don't know/Refused to answer.
- **Japan**: 25% Strongly favorable, 55% Favorable, 11% Somewhat favorable, 4% Somewhat unfavorable, 4% Favorable, 4% Strongly unfavorable, 4% Don't know/Refused to answer.
- **United States**: 23% Strongly favorable, 59% Favorable, 9% Somewhat favorable, 1% Somewhat unfavorable, 7% Favorable, 2% Strongly unfavorable, 2% Don't know/Refused to answer.
- **Germany**: 18% Strongly favorable, 57% Favorable, 13% Somewhat favorable, 2% Somewhat unfavorable, 9% Favorable, 2% Strongly unfavorable, 2% Don't know/Refused to answer.
- **Canada**: 17% Strongly favorable, 57% Favorable, 10% Somewhat favorable, 2% Somewhat unfavorable, 13% Favorable, 4% Strongly unfavorable, 4% Don't know/Refused to answer.
- **South Korea**: 17% Strongly favorable, 56% Favorable, 16% Somewhat favorable, 4% Somewhat unfavorable, 5% Favorable, 4% Strongly unfavorable, 4% Don't know/Refused to answer.
- **Australia**: 17% Strongly favorable, 55% Favorable, 13% Somewhat favorable, 2% Somewhat unfavorable, 12% Favorable, 2% Strongly unfavorable, 2% Don't know/Refused to answer.
- **United Kingdom**: 15% Strongly favorable, 54% Favorable, 14% Somewhat favorable, 2% Somewhat unfavorable, 13% Favorable, 3% Strongly unfavorable, 2% Don't know/Refused to answer.
- **France**: 15% Strongly favorable, 54% Favorable, 15% Somewhat favorable, 3% Somewhat unfavorable, 13% Favorable, 3% Strongly unfavorable, 2% Don't know/Refused to answer.
- **China**: 10% Strongly favorable, 33% Favorable, 31% Somewhat favorable, 22% Somewhat unfavorable, 4% Favorable, 4% Strongly unfavorable, 4% Don't know/Refused to answer.
- **India**: 8% Strongly favorable, 47% Favorable, 23% Somewhat favorable, 9% Somewhat unfavorable, 13% Favorable, 4% Strongly unfavorable, 4% Don't know/Refused to answer.
Which foreign country is Mongolia’s most significant economic partner? (Open-ended)

- China: 38% (May 2017), 47% (February 2017)
- Russia: 28% (February 2017), 25% (May 2017)
- Japan: 7% (May 2017), 7% (February 2017)
- United States: 3% (May 2017), 3% (February 2017)
- South Korea: 2% (May 2017), 2% (February 2017)
- Canada: 1% (May 2017)
- Don't know/Refused to answer: 12% (May 2017), 20% (February 2017)

Options: 
- China
- Russia
- Japan
- United States
- South Korea
- Canada
- Don't know/Refused to answer
Which foreign country would you prefer to be Mongolia’s most significant economic partner?
(Open-ended)

<table>
<thead>
<tr>
<th>Country</th>
<th>May 2017</th>
<th>February 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russia</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>United States</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Japan</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>China</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>South Korea</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Canada</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>Don’t know/Refused to answer</td>
<td>10%</td>
<td>19%</td>
</tr>
</tbody>
</table>

May 2017 vs February 2017
In which industry, other than mining, would you want to see more foreign investment?

- Animal husbandry: May 2017 - 18%, February 2017 - 23%
- Consumer goods manufacturing: May 2017 - 16%, February 2017 - 16%
- Infrastructure: May 2017 - 14%, February 2017 - 16%
- Tourism: May 2017 - 11%, February 2017 - 13%
- Agricultural cultivation: May 2017 - 12%, February 2017 - 12%
- Renewable energy: May 2017 - 9%, February 2017 - 9%
- Cashmere processing: May 2017 - 7%, February 2017 - 7%
- Telecommunications: May 2017 - 5%, February 2017 - 2%
- Other: May 2017 - 3%, February 2017 - 2%
- Don't know/Refused to answer: May 2017 - 5%
In which industry, other than mining, would you want to see more private domestic investment?

- Consumer goods manufacturing: 24% (May 2017), 19% (February 2017)
- Animal husbandry: 23% (May 2017), 23% (February 2017)
- Agricultural cultivation: 14% (May 2017), 13% (February 2017)
- Tourism: 12% (May 2017), 12% (February 2017)
- Infrastructure: 9% (May 2017), 9% (February 2017)
- Cashmere processing: 8% (May 2017), 9% (February 2017)
- Renewable energy: 5% (May 2017), 8% (February 2017)
- Telecommunications: 2% (May 2017), 3% (February 2017)
- Other: 1% (May 2017), 1% (February 2017)
- Don't know/Refused to answer: 3% (May 2017), 5% (February 2017)
From which of the following countries would you most favor additional investment in Mongolia?

- **Russia**: 27% (May 2017), 31% (February 2017)
- **United States**: 20% (May 2017), 20% (February 2017)
- **Japan**: 13% (May 2017), 17% (February 2017)
- **Canada**: 7% (May 2017), 8% (February 2017)
- **Germany**: 7% (May 2017), 4% (February 2017)
- **South Korea**: 5% (May 2017), 5% (February 2017)
- **Australia**: 3% (May 2017), 3% (February 2017)
- **China**: 2% (May 2017), 3% (February 2017)
- **United Kingdom**: 3% (May 2017), 3% (February 2017)
- **France**: 2% (May 2017), 1% (February 2017)
- **India**: 1% (May 2017), 1% (February 2017)
- **Don’t know/Refused to answer**: 6% (May 2017), 11% (February 2017)
From which type of media are you most likely to get your news?

- Television: 65%
- Internet: 16%
- Social media: 13%
- Newspapers: 3%
- Radio: 2%
- Don’t know/Refused to answer: 1%
Do you believe the media covers female politicians more or less fairly than male politicians?

- Female politicians are covered more unfairly: 21%
- Female politicians receive equally fair treatment: 41%
- Female politicians are covered more fairly: 14%
- Don’t know/Refused to answer: 24%
Do you believe the media is free, fair and unbiased?

- **Yes**
  - May 2017: 40%
  - February 2017: 42%
  - August 2016: 46%

- **No**
  - May 2017: 40%
  - February 2017: 33%
  - August 2016: 34%

- **Don’t know/Refused to answer**
  - May 2017: 19%
  - February 2017: 26%
  - August 2016: 20%
Do you expect the media to remain free, fair and unbiased over the next year?
(Respondents who agreed with the proposition: August 2016: n=2,276; February 2017: n=2,073; May 2017: n=1,204)

Question wording in August 2016 and February 2017 was “[...]free, fair and unbiased under the new government over the next year?”
What is the primary reason you believe the media is not or will no longer be free, fair or unbiased?

(Respondents who disagree with the proposition: August 2016: n=2,258; February 2017: n=2,308; May 2017: n=1,494)
Which social media platform* do you rely on most for political news?

- **Facebook**: 35% (May 2017), 35% (February 2017), 43% (August 2016)
- **Comments section of news websites**: 10% (May 2017), 20% (February 2017), 23% (August 2016)
- **Twitter**: 4% (May 2017), 5% (February 2017)
- **Instagram**: 2% (May 2017), 2% (February 2017)
- **I do not use social media for political news**: 16% (May 2017), 29% (February 2017)
- **Don’t know/Refused to answer**: 5% (May 2017), 10% (February 2017), 11% (August 2016)

*The Communications Regulatory Commission of Mongolia estimated that there are 2,430,159 “internet subscribers” (inclusive of 3G/wifi/cabled internet) in 2015, comprising approximately 79 percent of the total population.
To what extent do you rely on Facebook* for your news?

- **I get most, if not all of my news from Facebook**
  - May 2017: 21%
  - February 2017: 20%

- **I get some of my news from Facebook but from other sources as well**
  - May 2017: 28%
  - February 2017: 25%

- **I mostly get news from other sources but also get some news from Facebook**
  - May 2017: 18%
  - February 2017: 16%

- **I rarely get news from Facebook, if at all**
  - May 2017: 23%
  - February 2017: 19%

- **Don’t know/Refused to answer**
  - May 2017: 9%
  - February 2017: 19%

*According to September 2016 data from Statista, the number of Facebook users in Mongolia comprises 47 percent of the population (approximately 1.4 million people).
# Demographics

<table>
<thead>
<tr>
<th>Gender</th>
<th></th>
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<tbody>
<tr>
<td>Female</td>
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<tr>
<td>Male</td>
<td>48%</td>
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<table>
<thead>
<tr>
<th>Age</th>
<th></th>
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<td>18-30</td>
<td>31%</td>
</tr>
<tr>
<td>31-40</td>
<td>28%</td>
</tr>
<tr>
<td>41-50</td>
<td>20%</td>
</tr>
<tr>
<td>51-60</td>
<td>14%</td>
</tr>
<tr>
<td>61+</td>
<td>6%</td>
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<table>
<thead>
<tr>
<th>Monthly Income*</th>
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<tbody>
<tr>
<td>0-300,000 MNT</td>
<td>13%</td>
</tr>
<tr>
<td>300,001-500,000 MNT</td>
<td>22%</td>
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<tr>
<td>500,001-700,000 MNT</td>
<td>17%</td>
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<td>700,001-900,000 MNT</td>
<td>14%</td>
</tr>
<tr>
<td>900,001-1,100,000 MNT</td>
<td>9%</td>
</tr>
<tr>
<td>1,100,001-1,600,000 MNT</td>
<td>10%</td>
</tr>
<tr>
<td>1,600,001-2,100,000 MNT</td>
<td>3%</td>
</tr>
<tr>
<td>2,100,001+ MNT</td>
<td>1%</td>
</tr>
<tr>
<td>Refused to answer</td>
<td>11%</td>
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<table>
<thead>
<tr>
<th>Employment Status</th>
<th></th>
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<tbody>
<tr>
<td>Full-time worker</td>
<td>30%</td>
</tr>
<tr>
<td>Self-employed</td>
<td>24%</td>
</tr>
<tr>
<td>Retired</td>
<td>11%</td>
</tr>
<tr>
<td>Contract worker</td>
<td>10%</td>
</tr>
<tr>
<td>Student</td>
<td>9%</td>
</tr>
<tr>
<td>Unemployed</td>
<td>8%</td>
</tr>
<tr>
<td>Takes care of children</td>
<td>5%</td>
</tr>
<tr>
<td>Disabled</td>
<td>2%</td>
</tr>
<tr>
<td>Refused to answer</td>
<td>1%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</th>
<th></th>
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<tbody>
<tr>
<td>No formal schooling</td>
<td>1%</td>
</tr>
<tr>
<td>Primary</td>
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</tr>
<tr>
<td>Partial secondary</td>
<td>11%</td>
</tr>
<tr>
<td>Full secondary</td>
<td>31%</td>
</tr>
<tr>
<td>Vocational</td>
<td>16%</td>
</tr>
<tr>
<td>College/University</td>
<td>38%</td>
</tr>
<tr>
<td>Refused to answer</td>
<td>1%</td>
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</table>

<table>
<thead>
<tr>
<th>Religious Affiliation</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Buddhism</td>
<td>53%</td>
</tr>
<tr>
<td>Not religious</td>
<td>23%</td>
</tr>
<tr>
<td>Shamanism</td>
<td>11%</td>
</tr>
<tr>
<td>Islam</td>
<td>5%</td>
</tr>
<tr>
<td>Christianity</td>
<td>5%</td>
</tr>
<tr>
<td>Other/Refused to answer</td>
<td>4%</td>
</tr>
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<table>
<thead>
<tr>
<th>Location</th>
<th></th>
</tr>
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<tbody>
<tr>
<td>Urban</td>
<td>53%</td>
</tr>
<tr>
<td>Aimag center</td>
<td>35%</td>
</tr>
<tr>
<td>Soum/Rural</td>
<td>12%</td>
</tr>
</tbody>
</table>

*MNT = Mongolian National Tugrik, the official currency of Mongolia.*