Public Opinion Poll: Residents of North Macedonia

March 4 - April 6, 2021



Detailed Methodology

- The survey was conducted on behalf of the <u>Center for Insights in Survey Research</u> by <u>Brima</u> market research firm (member of Taylor Nelson Sofres and Gallup International).
- Data was collected between March 4 and April 6, 2021, through face-to-face interviews by trained professionals.
- A nationally representative sample size of 1,222 respondents ages 18 and over was surveyed. The margin of error was ± 2.8 points at 95 percent confidence level. The response rate was 66 percent.
- In addition to the national sample, six oversamples were conducted in the municipalities of Gjorce Petrov (total sample n=242), Shtip (total sample n=248), Tetovo (total sample n=257), Gostivar (total sample n=284), Kumanovo (total sample n=277) and Ohrid (total sample n=247). The margin of error does not exceed ± 6.7 points in each of the oversampled municipalities. Respondents from the city of Skopje (n=744) were analyzed as a separate sample, with a margin of error of ± 3.6 points.
- For analysis at the national level, the oversamples in these municipalities were weighed backed down to their national proportion. The total sample for this poll is n=2,507.
- Both the national sample and the six oversamples were prepared using according to 2019 population estimates from the State Statistical office for the population aged 18 and older. It also considered the structure of the population according to age, gender, residence, national affiliation and region, and was updated accordingly with estimates and primary information collected by BRIMA.
- A multi-stage probability sampling method was used with the random route and next birthday methods for respondent selection.
- Stratification was based on three stages:
 - Stage One: The number of respondents for each of the regions was specified in proportion to the size of its population (aged 18 and older).
 - Stage Two: The sampling plan consisted of 376 sampling points located according to urban/rural split, municipality size and nationality diffusion.
 - Stage Three: The selection of households was based on a random route method. In urban areas, every third household on the left-hand side of the street was selected. In rural areas, the "wave-wise" approach was applied, in which the interviewer selects every fourth inhabited house/dwelling on both sides of the interviewer's route/track, counting from the first house on the left.

Detailed Methodology cont.

- The "next birthday method" was used to select respondents.
- Figures in charts and tables may not add up to 100 percent due to rounding. Values between 0.1 percent and 0.4 percent are displayed as <1 percent.
- Any data cited from previous surveys comes from surveys with comparable methodology.
- This poll was conducted with support from the National Endowment for Democracy.
- The field work was conducted in the period of COVID-19 pandemic with all protective measures for interviewers and supervisors according to BRIMA's protocol.

Political Party Glossary

Party Name

AfA: Alliance for Albanians

Alternative

BESA: Movement BESA

DOM: Democratic Movement of Macedonia

DPA: Democratic Party of Albanians

DUI: Democratic Union for Integration

LDP: Liberal Democratic Party

The Left: Levica

SDSM: Social Democratic Union of Macedonia

TDP: Turkish Democratic Party

VMRO-DPMNE: Internal Macedonian Revolutionary Organization - Democratic

Party for Macedonian National Unity

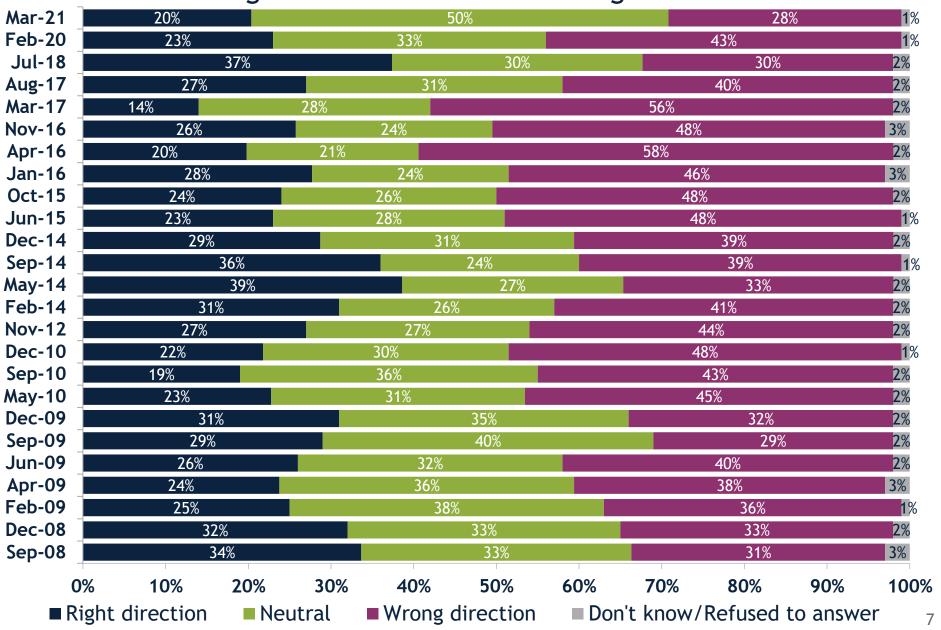
Political Context

- May 2021 By May 13, 154,709 people had been infected with COVID-19 and 5,184 had died. North Macedonia has an estimated population of 2 million.
- April 2021 A population census planned to take place April 1-21, was delayed, following mutual agreement by political leaders. North Macedonia has not held a population census since 2002.
- July 15, 2020 Snap parliamentary elections, previously scheduled for spring, take place amid the COVID-19 pandemic. The governing SDSM - DUI coalition remains in power.
- March 27, 2020 North Macedonia becomes full member of NATO.
- March 2020 North Macedonia declares state of emergency due to the COVID-19 pandemic and starts initiating a number of restrictive measures.
- October 18, 2019 The European Council fails to approve the start of EU accession talks with North Macedonia and Albania following rejection by France.

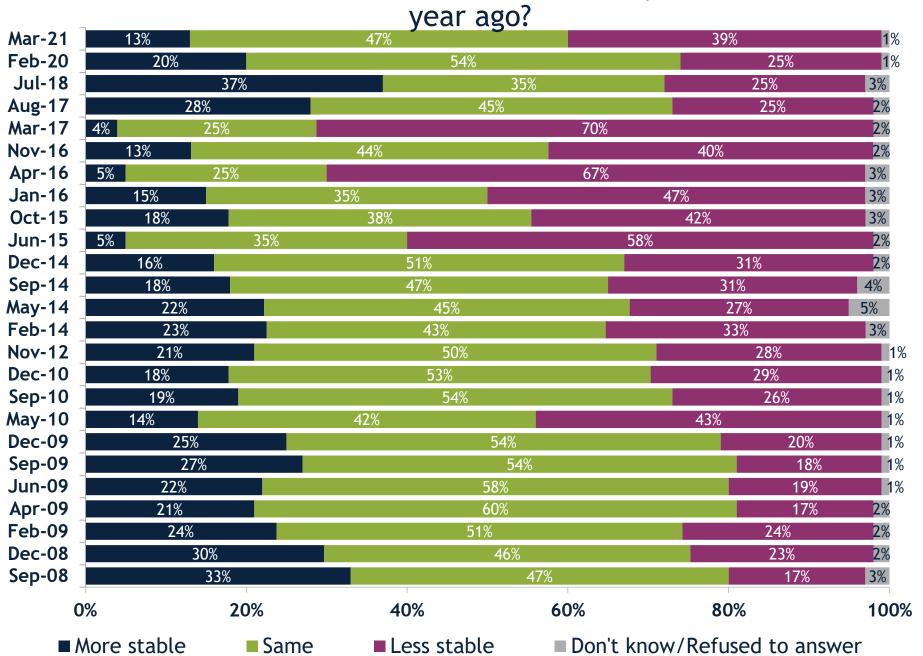
General and Economic Outlook of the Country



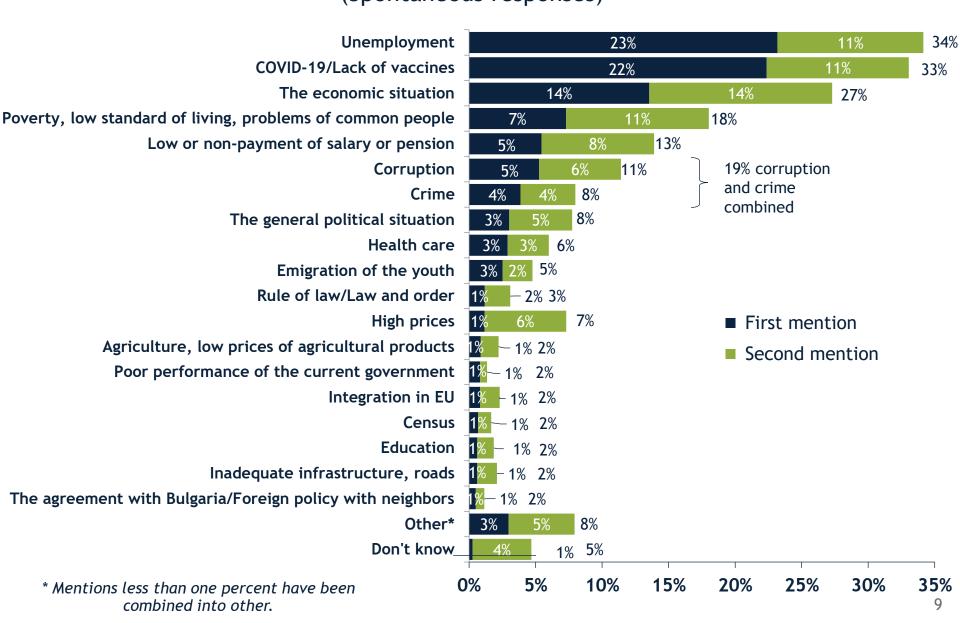
In general, would you say that North Macedonia is heading in the right direction or in the wrong direction?



Is North Macedonia more or less stable today than it was one

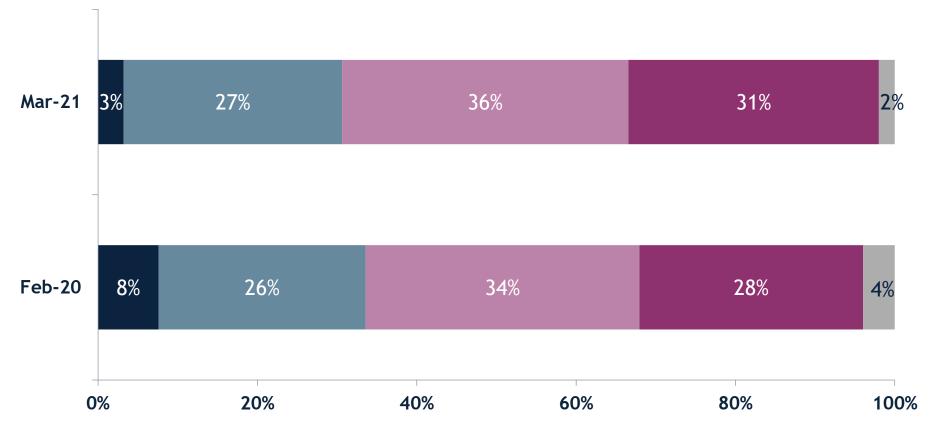


What is the most important problem facing North Macedonia today? ... And what is the second most important problem? (Spontaneous responses)



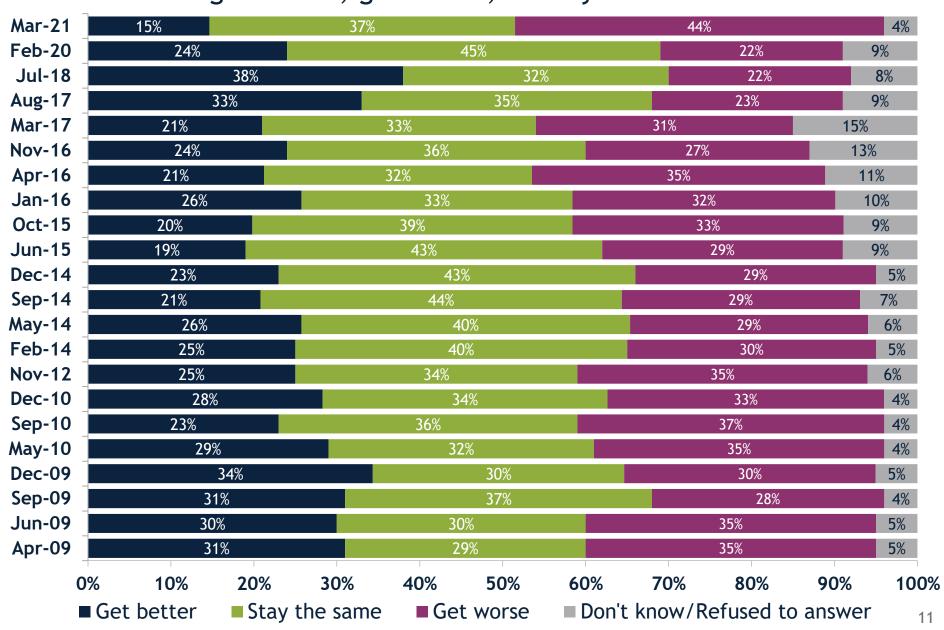
In your opinion, did Zaev's Government dedicate itself to solving the first most important problem North Macedonia is facing that you mentioned before?

(n = 1634, those who mentioned first important problem)

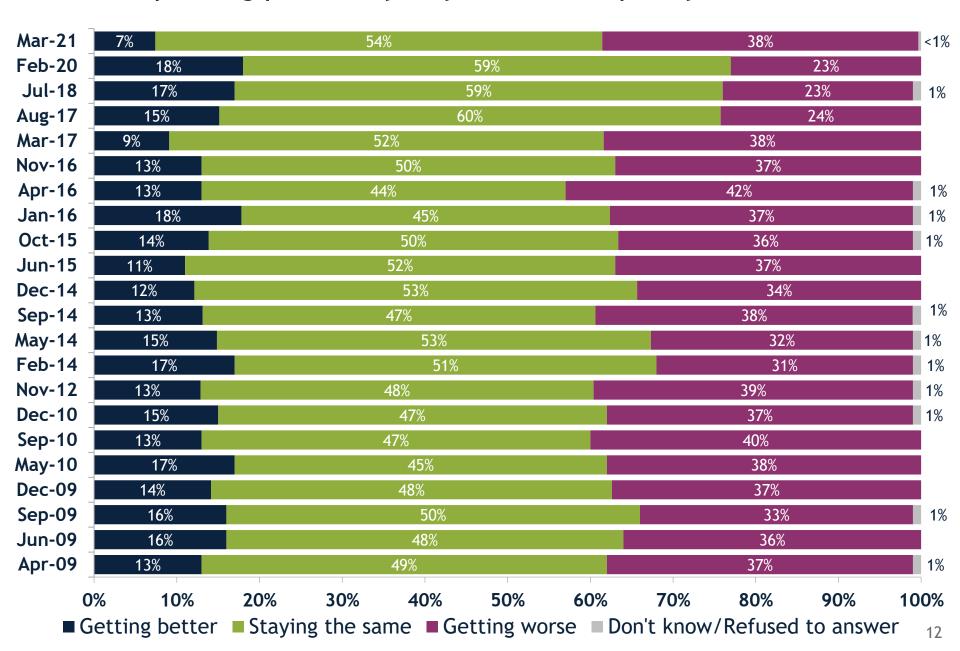


■ Yes, completely ■ In general, yes ■ In general, no ■ Not at all ■ Don't know/Refused to answer

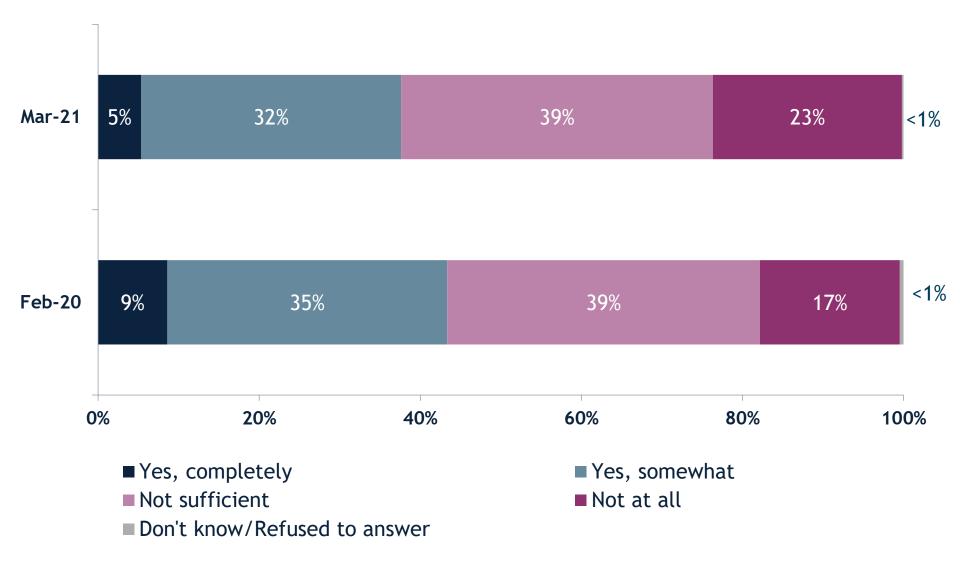
In the next two years, will the economy in North Macedonia get better, get worse, or stay the same?



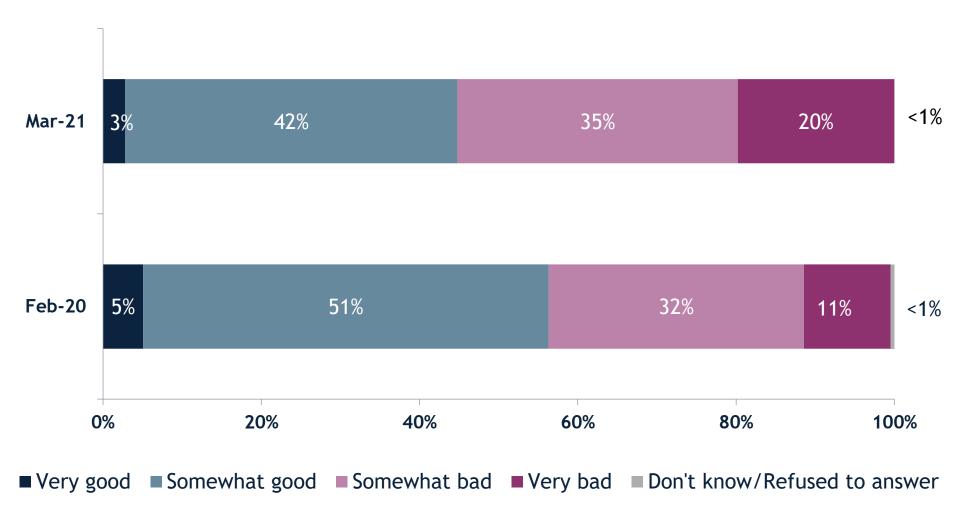
Speaking personally, is your overall quality of life...?



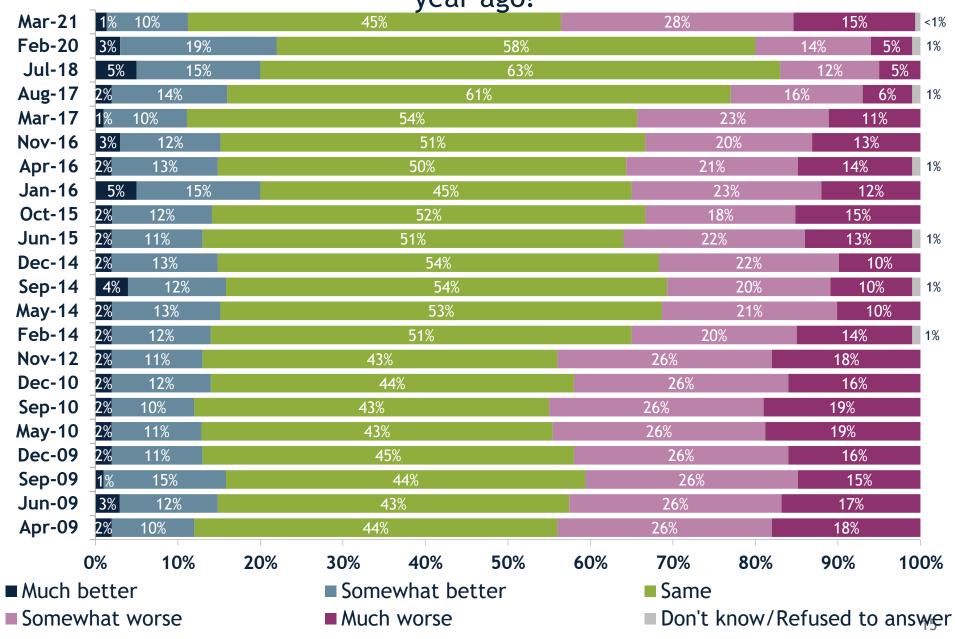
Is your household monthly income sufficient to satisfy monthly needs?

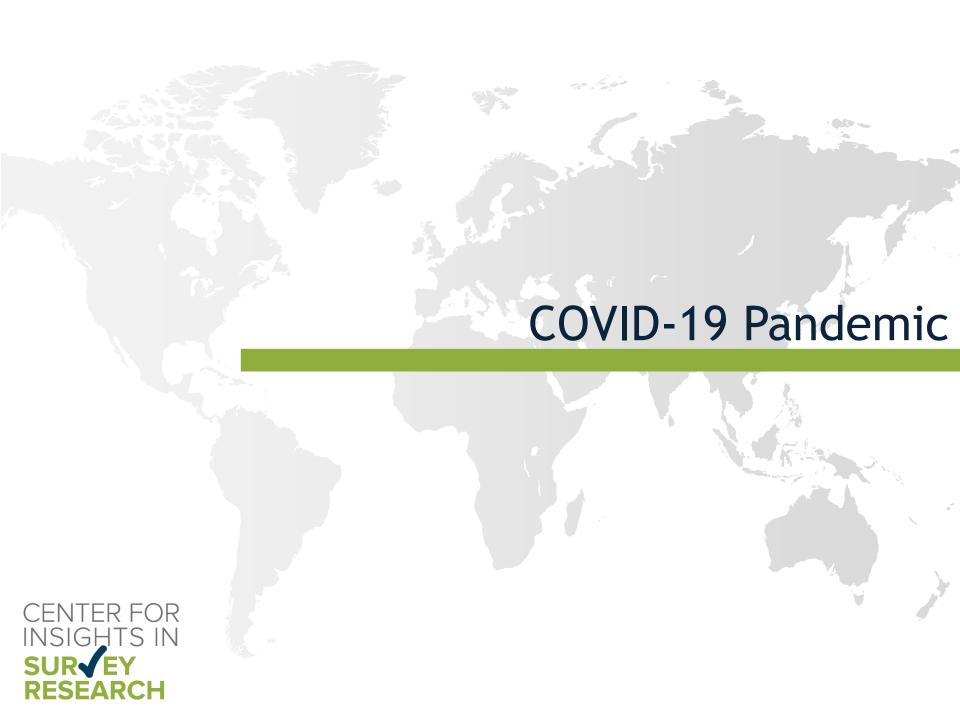


How would you describe the current economic situation of your household?

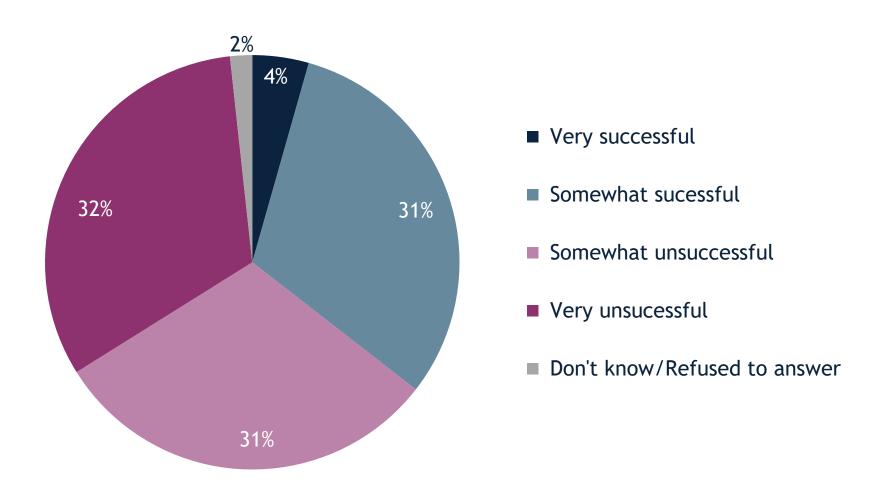


How is your family's economic situation compared to one year ago?

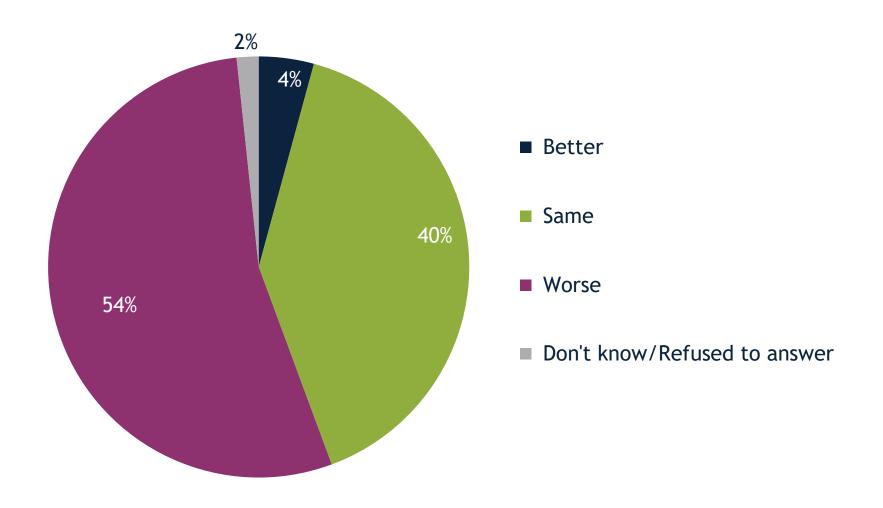




In your opinion, how is the government dealing with the COVID-19 pandemic?

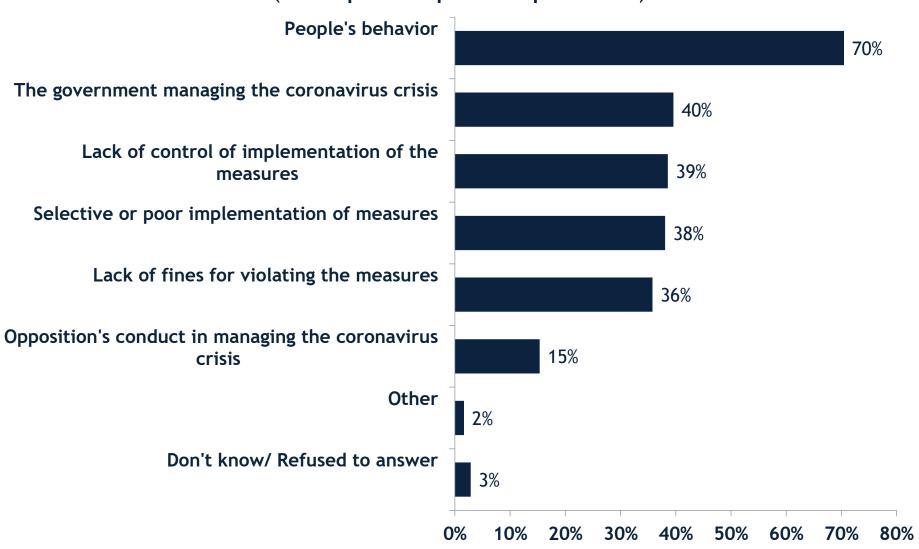


In your opinion, how does the government deal with the COVID-19 compared to the countries in the region?

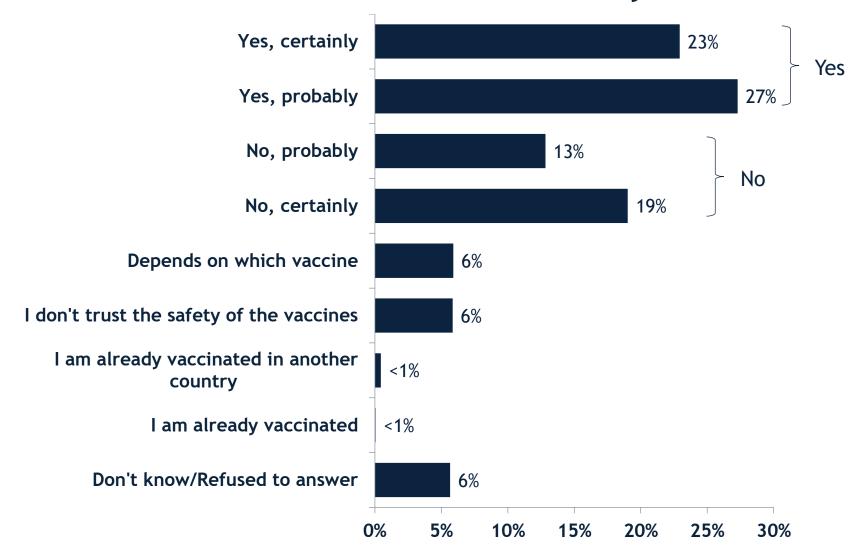


What do you think are the main reasons for the spread of coronavirus in the country?

(Multiple responses possible)

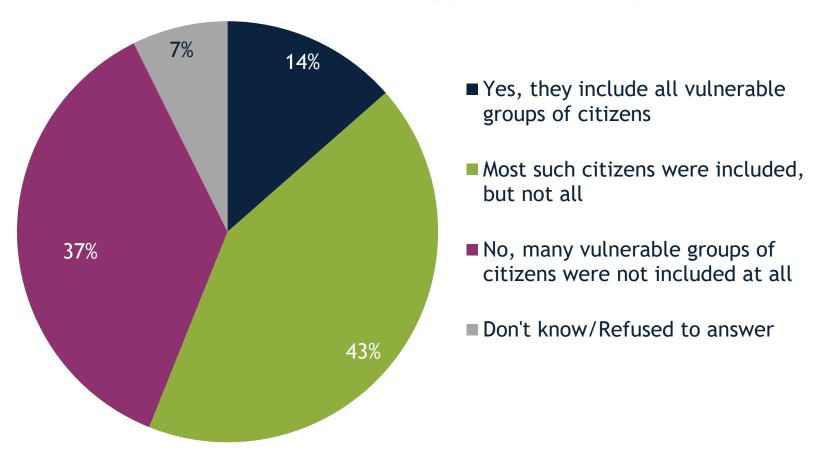


Will you get a COVID-19 vaccine once vaccines become available in the country?

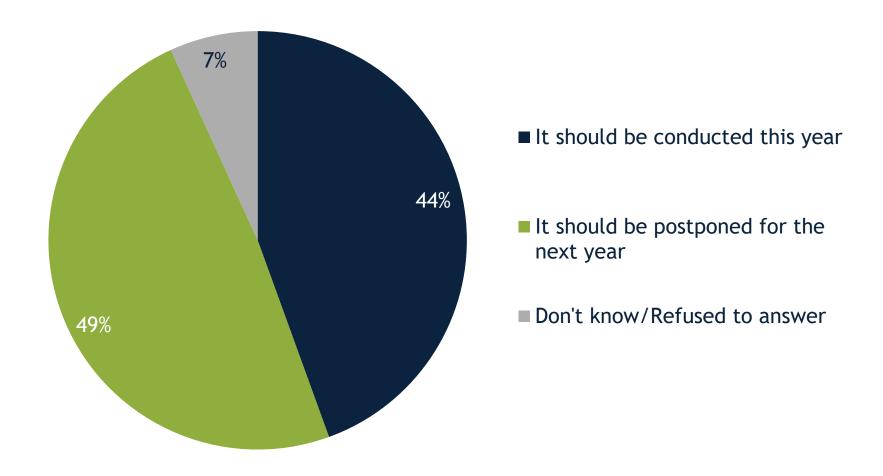


The government has implemented a number of economic measures to address the consequences of COVID-19: granting monetary aid, payment cards, vouchers for tourism and/or shopping, etc.

Do you think these measures do or do not include those groups of citizens who need the most support during the pandemic?

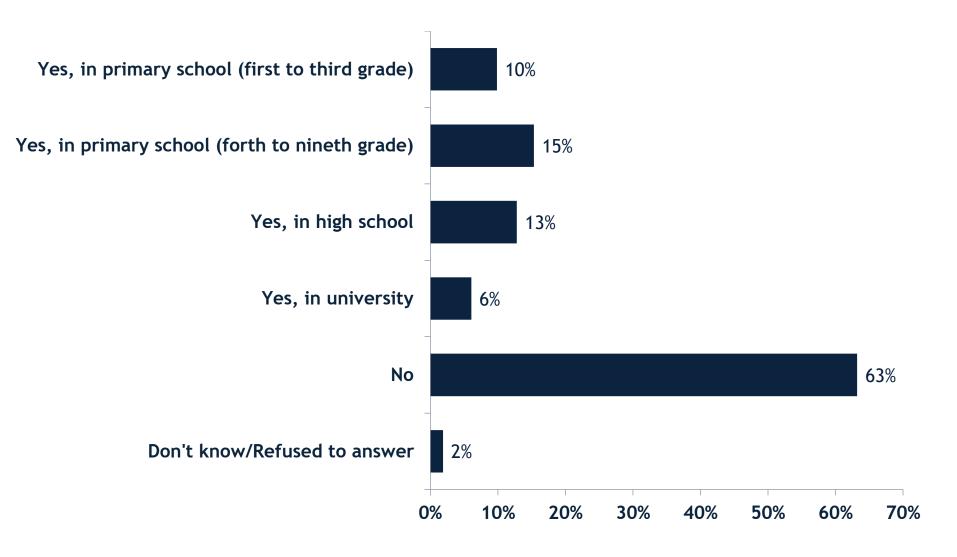


North Macedonia has not conducted a census since 2002, and it should be conducted in April this year. Having in mind the COVID-19 pandemic, do you think the census should be done this year or postponed for the next year?*

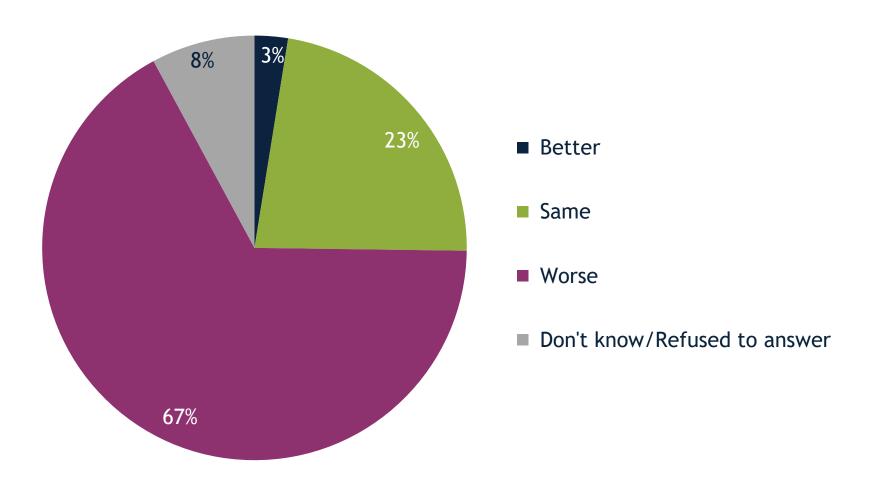


^{*} The fielding of the poll was started before the postponement of the census which was planned to last April 1-21, 2021.

Do you have a school-age child/children? (Multiple responses permitted)



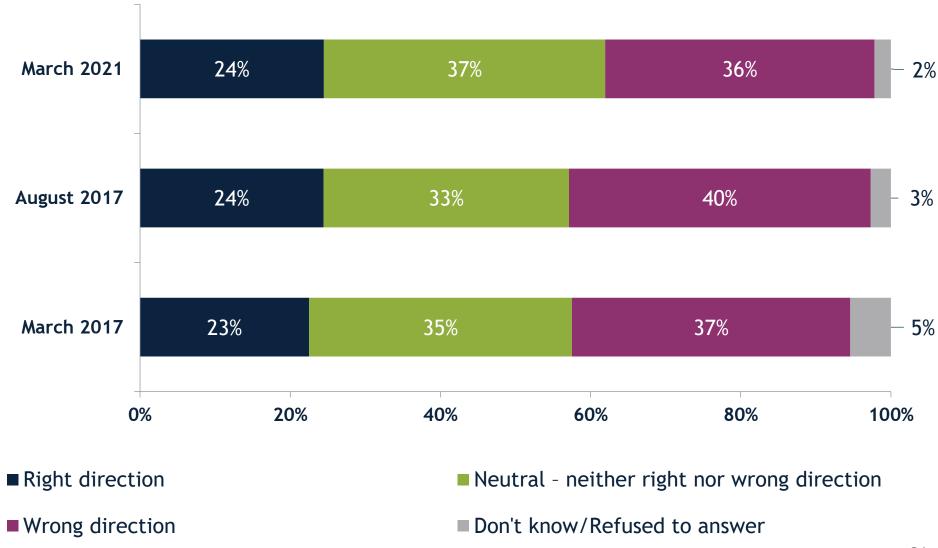
How do you rate the quality of education during the corona-crisis compared to before?



Local Government and Local Governance

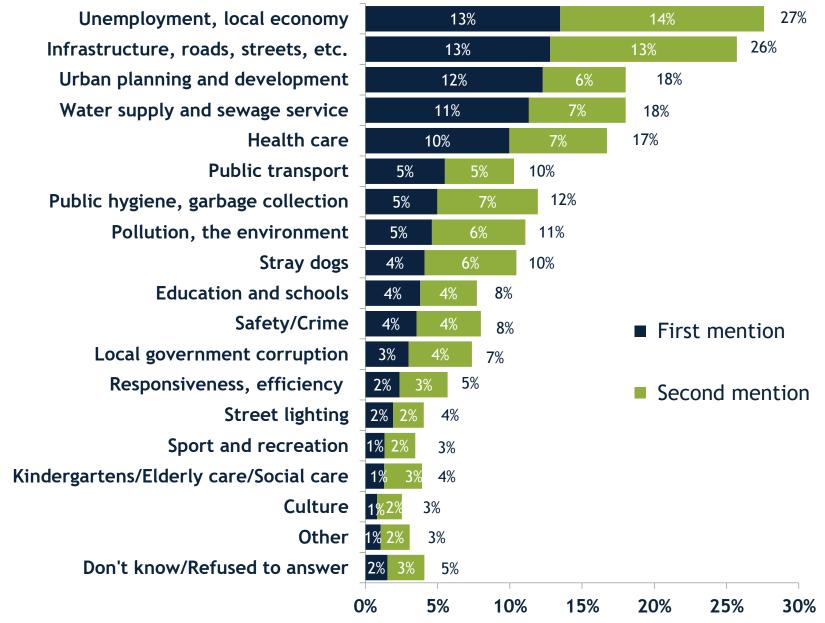


Overall, are things in your municipality moving in the right or wrong direction?



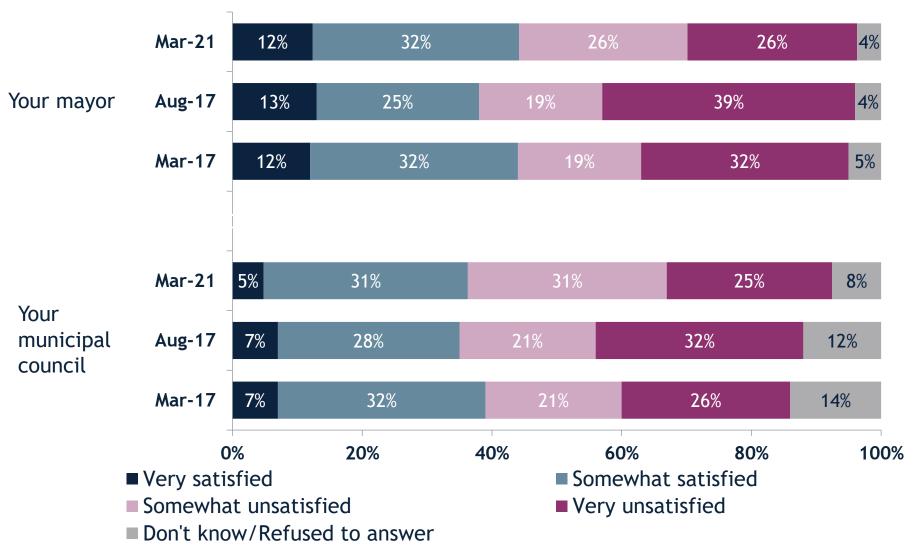
In your opinion, what are the most serious problems facing your municipality today?

(Up to two responses accepted)

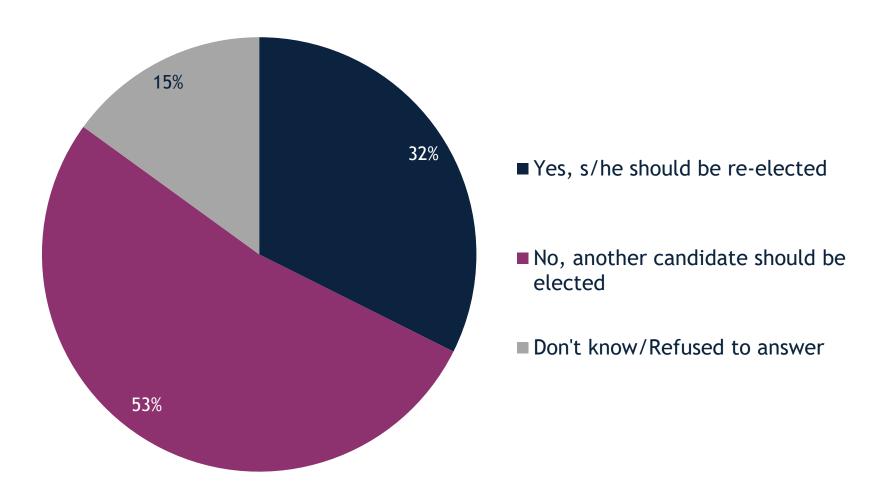


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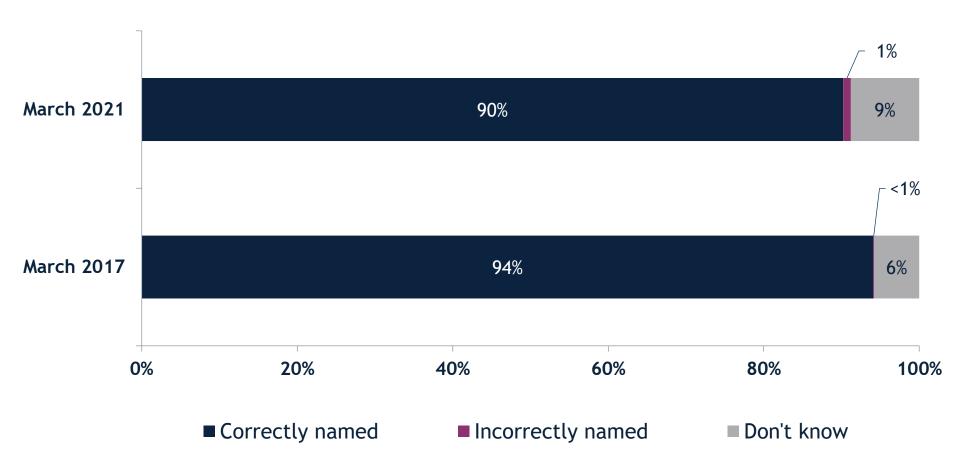
How satisfied or unsatisfied are you with the past performance of each of the following?



Does the mayor in your municipality do his/her job well enough to be re-elected or should a new mayor should be elected?

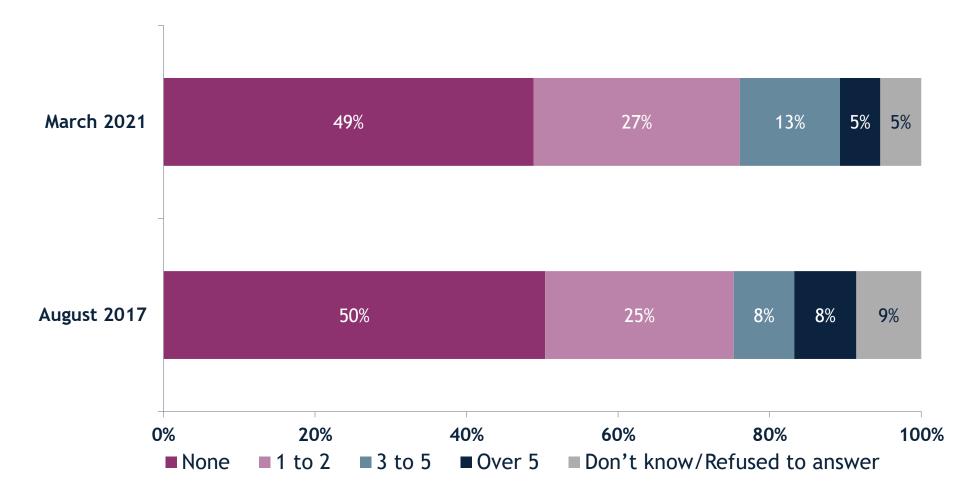


Can you tell me the name of your mayor?*



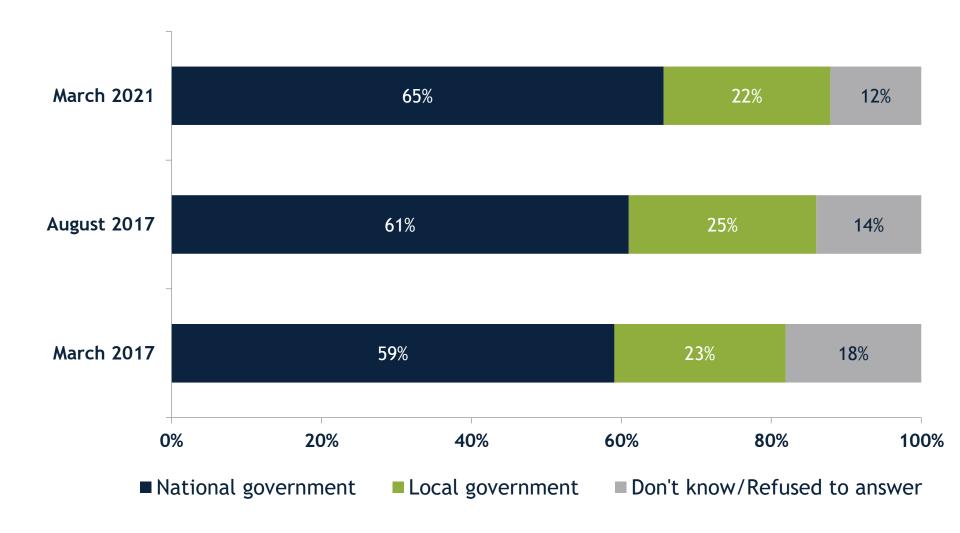
^{*}Municipalities in North Macedonia are run by directly-elected mayors. There are 80 municipalities and the city of Skopje is a separate local government unit.

How many of your municipal councilors can you name?*

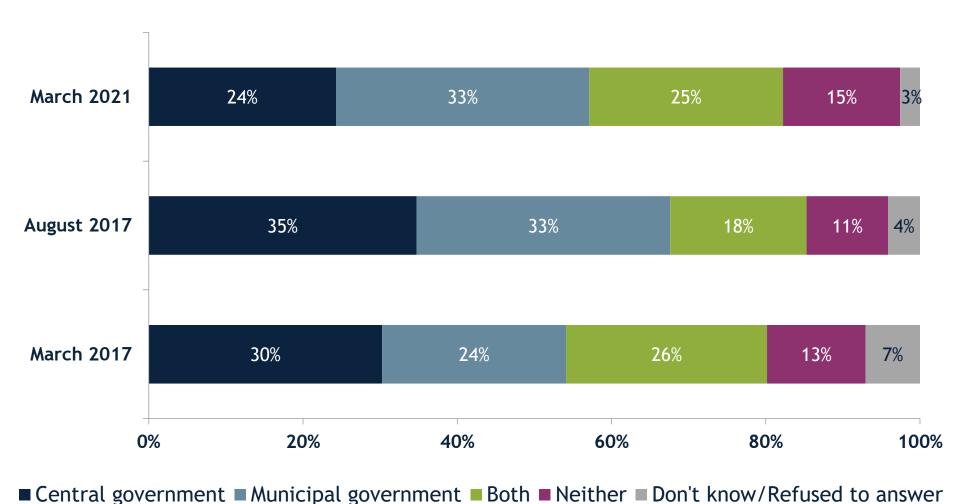


^{*}A municipal council in North Macedonia can be composed of between 9 to 33 councilors, elected from closed proportional party lists.

Which has more impact on your quality of life?



Which level of government is more responsive to citizen concerns?

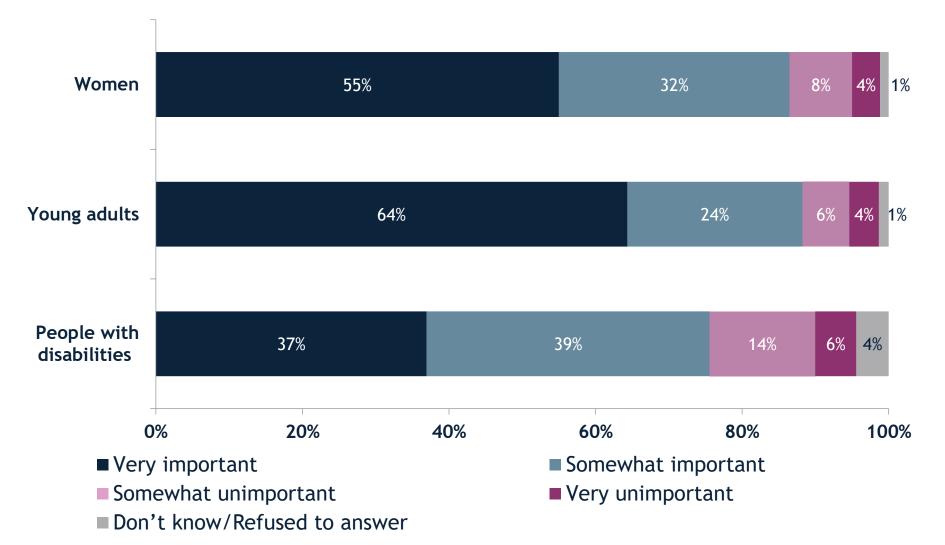


Rule of Law, Governance and Social Cohesion



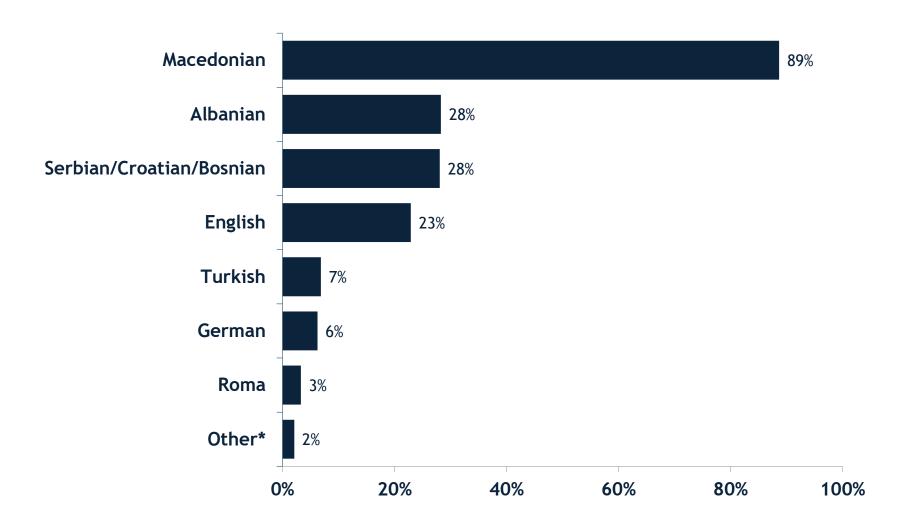
How important or unimportant is it that all members of our country's adult population are included in political decision making?

How important is that [...] are included?



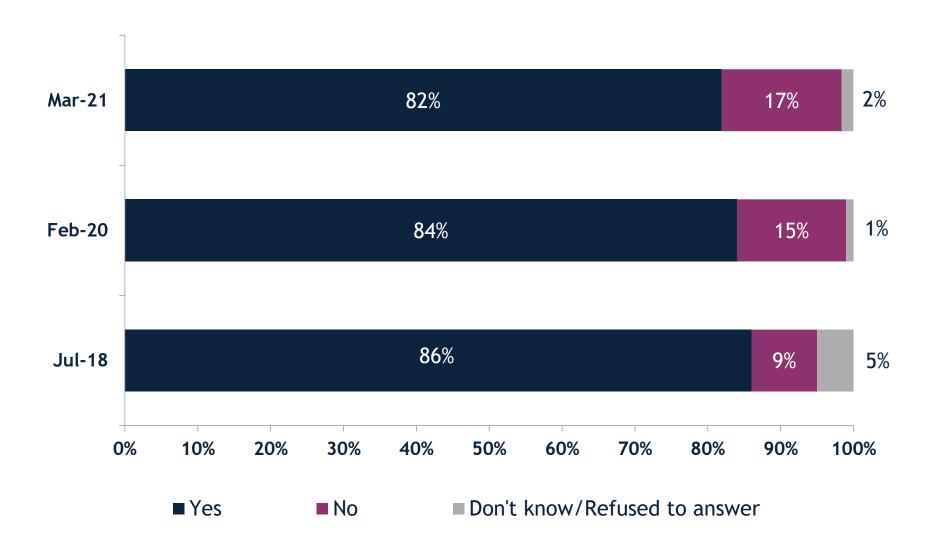
What language(s) do you speak at a level to be able to study and work in that language?

(Spontaneous response; multiple responses permitted)

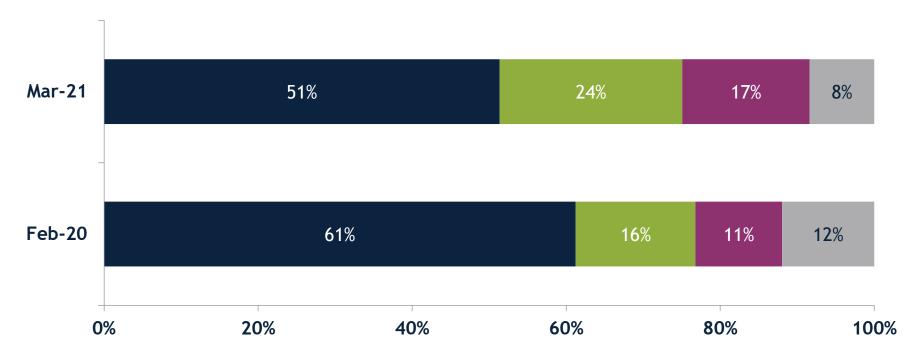


^{*} Mentions less then one percent have been combined into other.

Should all citizens, regardless of ethnic background, be proficient in Macedonian language as the official state language?

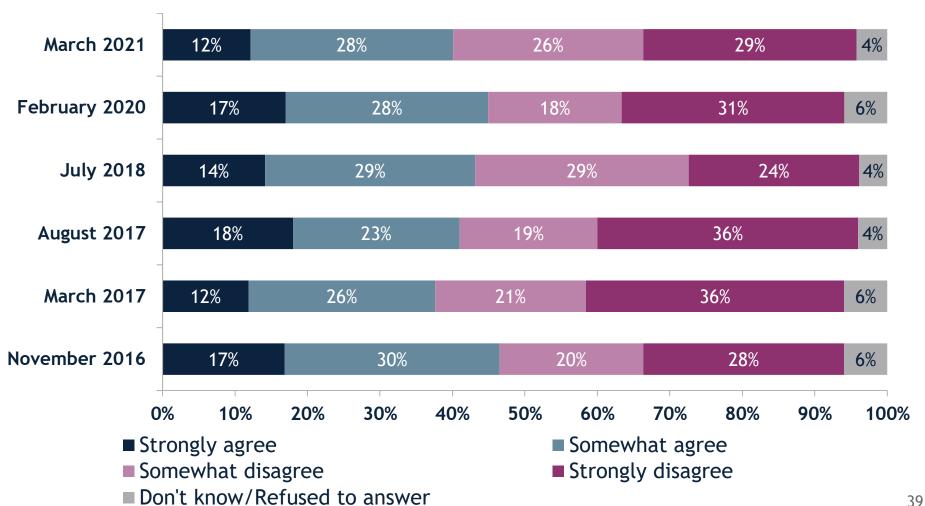


Do you believe that democracy is the best possible form of government for our country?



- Yes, it is the best possible form of government for our country
- No, there are other forms of government that could be equally good for our country
- No, there are other forms of government that are better than democracy
- Don't know/Refused to answer

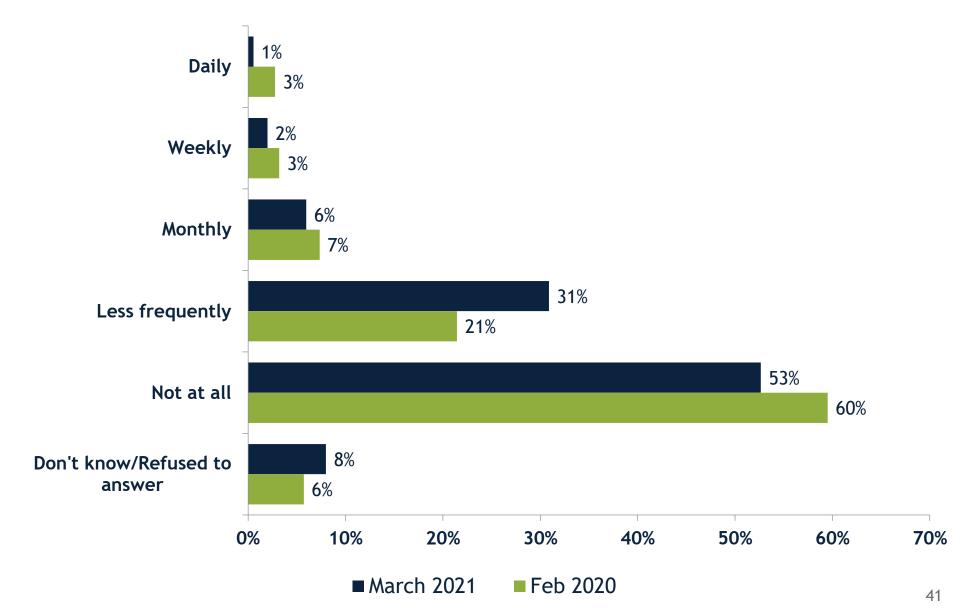
The rule of law in a democracy can be understood as: "a state when all people and institutions are accountable to the law and the Constitution, and the Constitution and the law are equally applied towards all." How strongly do you agree or disagree that rule of law exists in our country?



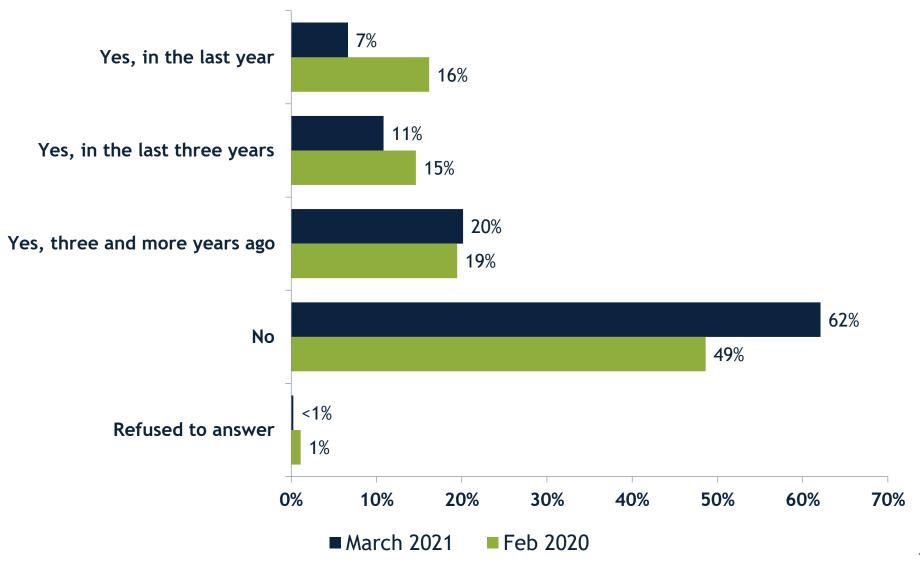
Now I would like to discuss corruption with you. When I say corruption, I mean having to do a favor, give a gift or pay a bribe because someone misuses their position for personal gains. To what extent, if any, has corruption had a negative impact on you?



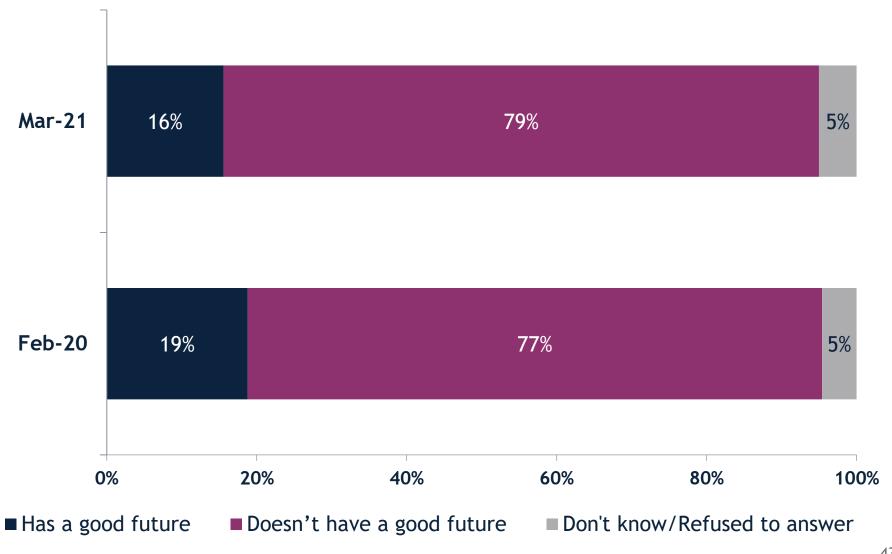
In the past 12 months, how often, if at all, have you had to do a favor, give a gift or pay a bribe?



Is there any member of your household who has emigrated to live and/or work abroad?



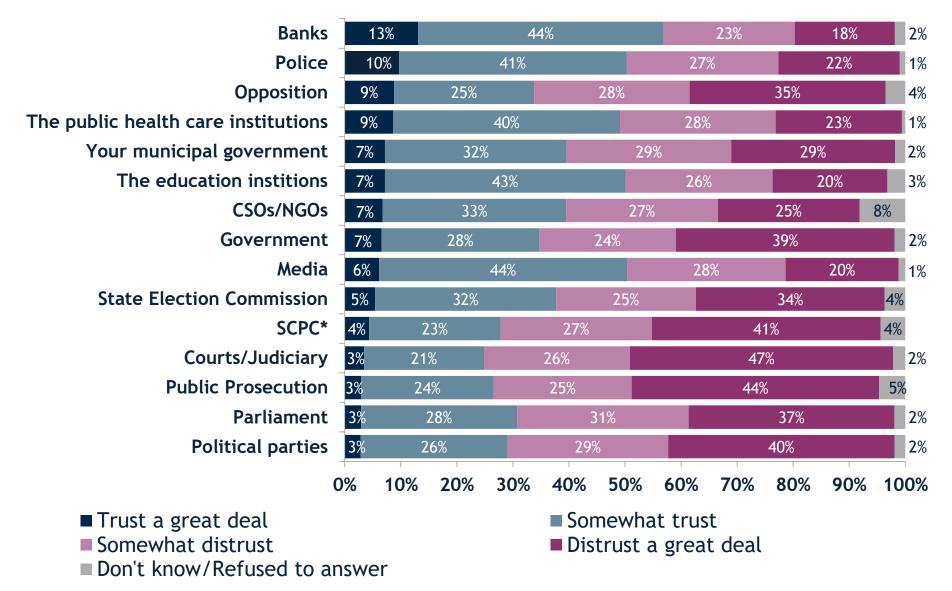
Do you think that today's generation of young people has a good future in our country or not?





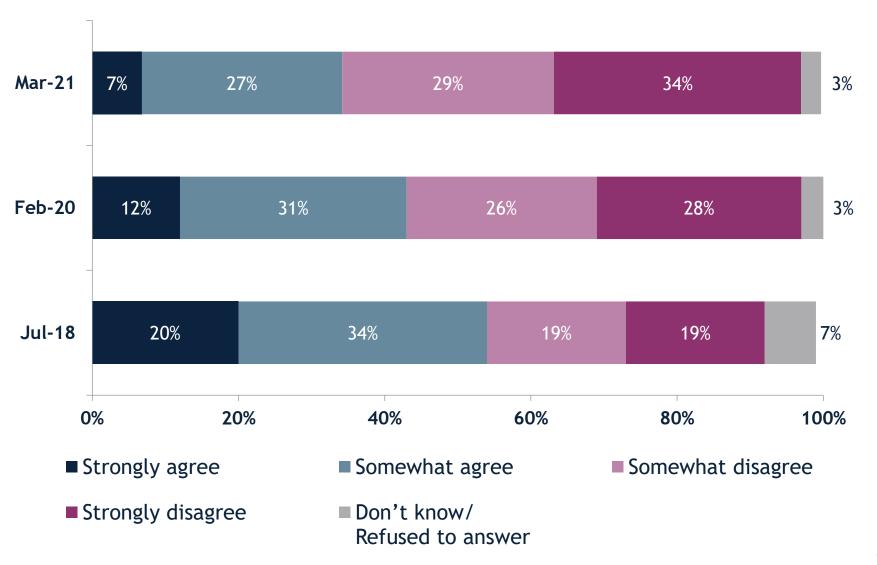


To what extent do you trust or distrust each of the following institutions:...?



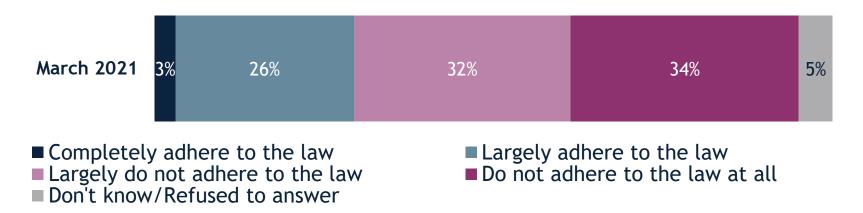
^{*}SCPC = State Commission for Prevention of Corruption

How strongly do you agree or disagree with the following statement: "The current Government is open and accountable to the citizens and the public"?

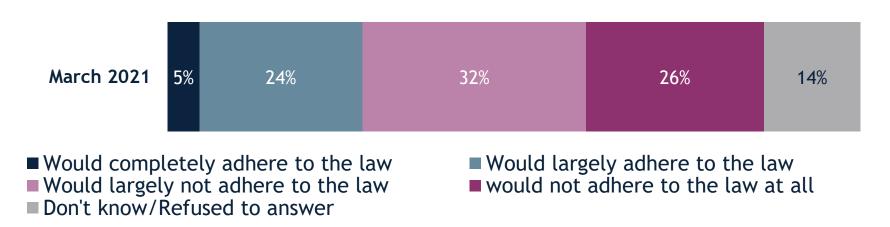


According to you, to what extent [...]

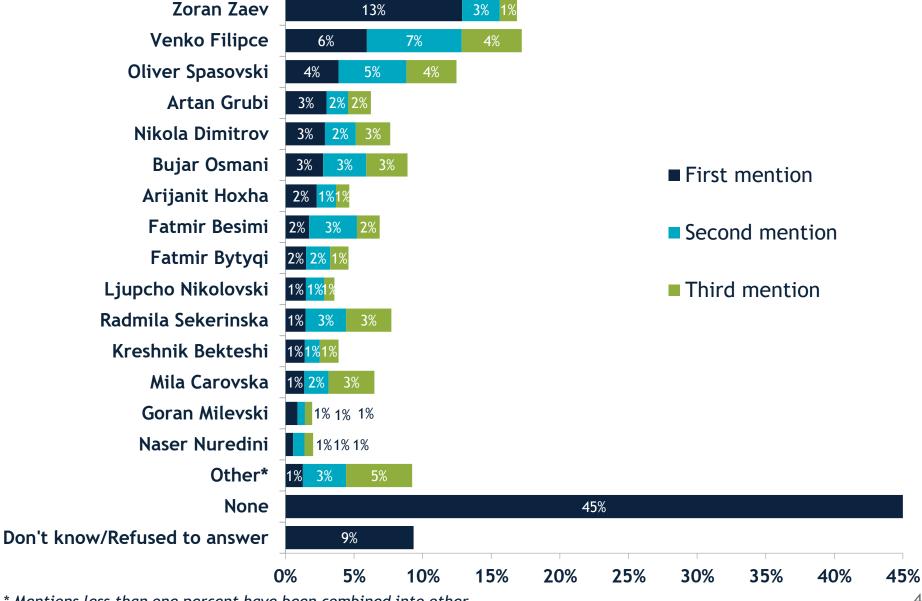
...do government officials adhere to the law in performing their jobs?



...would opposition politicians adhere to the law if they are elected?



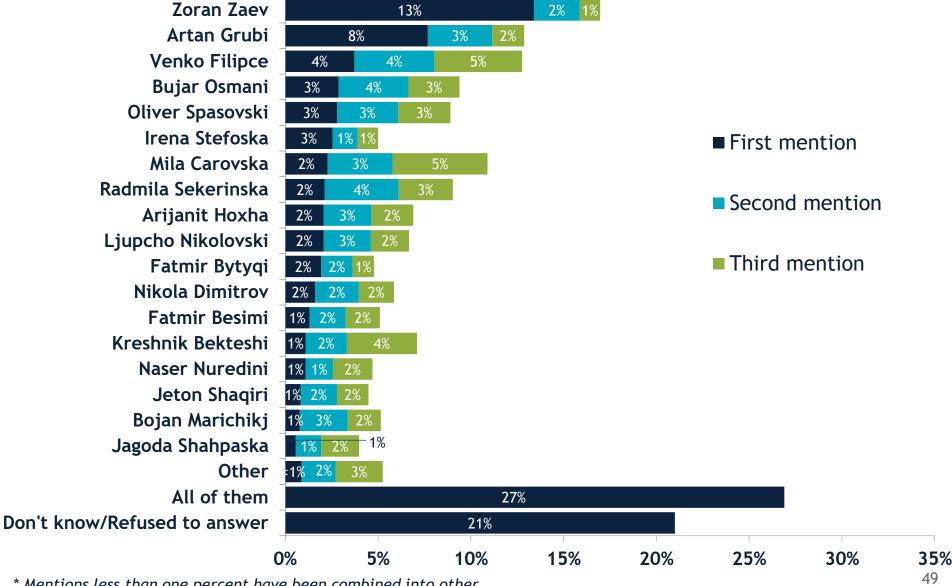
Which three ministers in the Government are doing the best job?* (Up to three responses permitted)



^{*} Mentions less than one percent have been combined into other.

Which three ministers in the Government are not doing their job as they should?

(Up to three responses permitted)

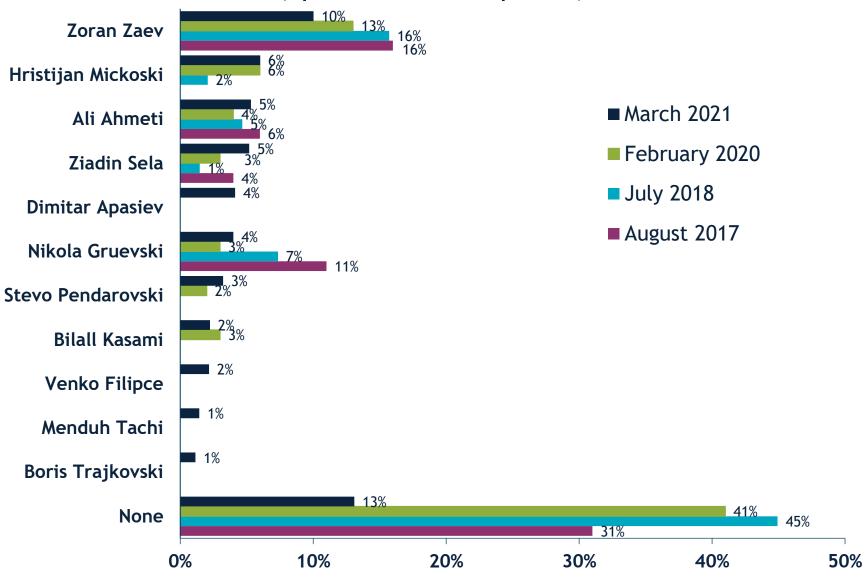


^{*} Mentions less than one percent have been combined into other.

Elections and Political Parties

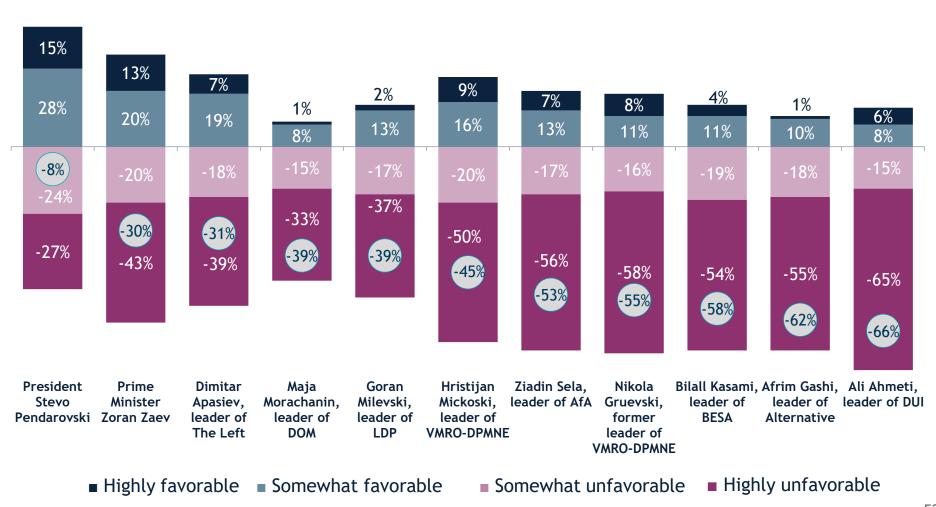


When you think about people in political life, who is the one person in North Macedonia whom you view most favorably? (Spontaneous response)



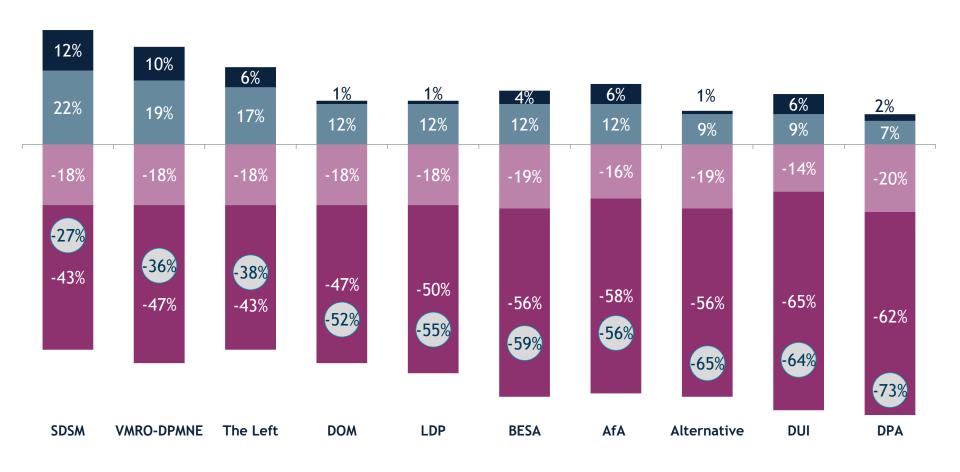
I will read you a list of names of political persons. Please tell me if you have a highly favorable, somewhat favorable, somewhat unfavorable, or highly unfavorable opinion of this individual.

(Net favorability of political persons, Don't know/Refused to answer is not displayed)



I will read you a list of political parties. Please tell me if you have a highly favorable, somewhat favorable, somewhat unfavorable, or highly unfavorable opinion of this party.

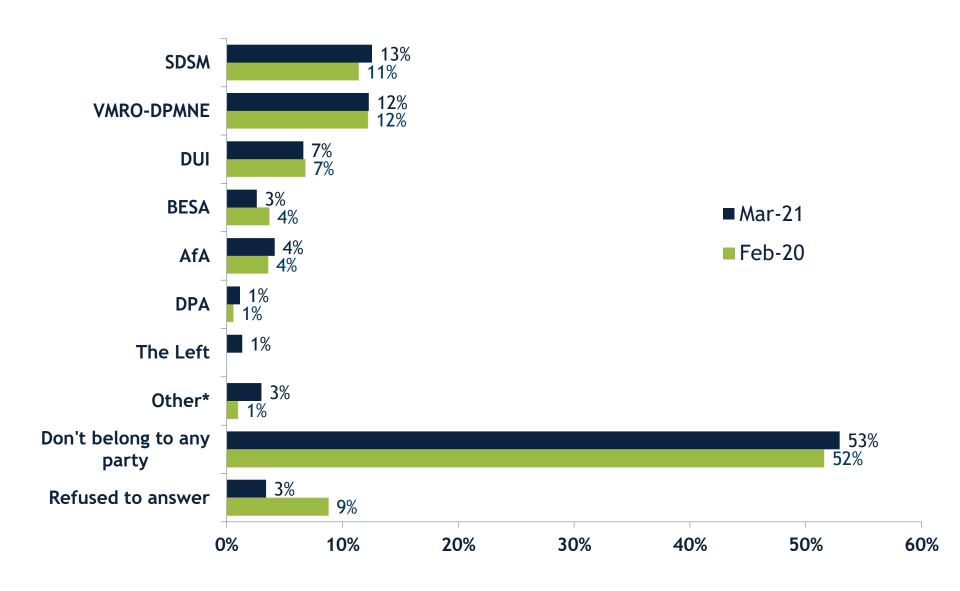
(Net favorability of political parties, Don't know/Refused to answer is not displayed)



Somewhat favorable

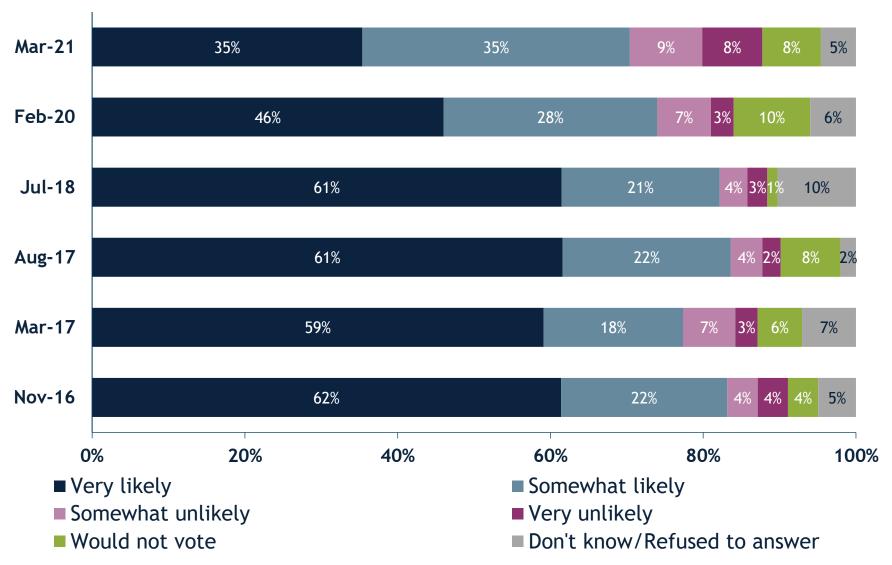
Somewhat unfavorable
Highly unfavorable

To which political party do you belong?

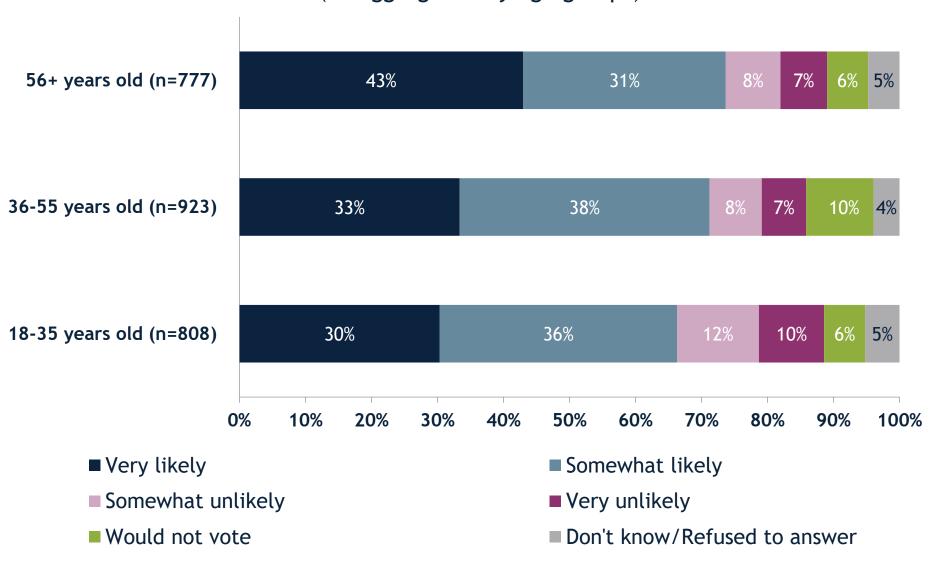


^{*}Mentions less than one percent have been included into other.

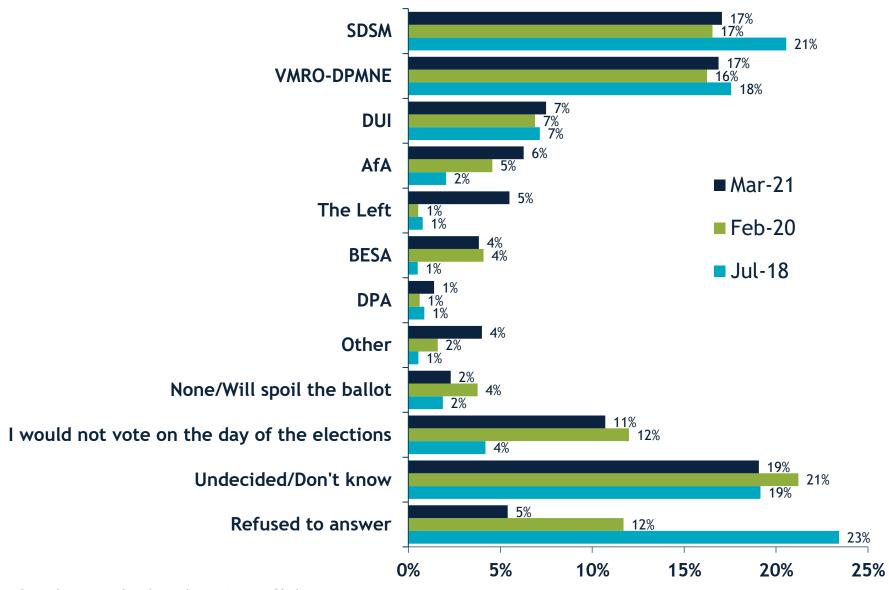
How likely are you to vote in the parliamentary elections if they are held this Sunday?



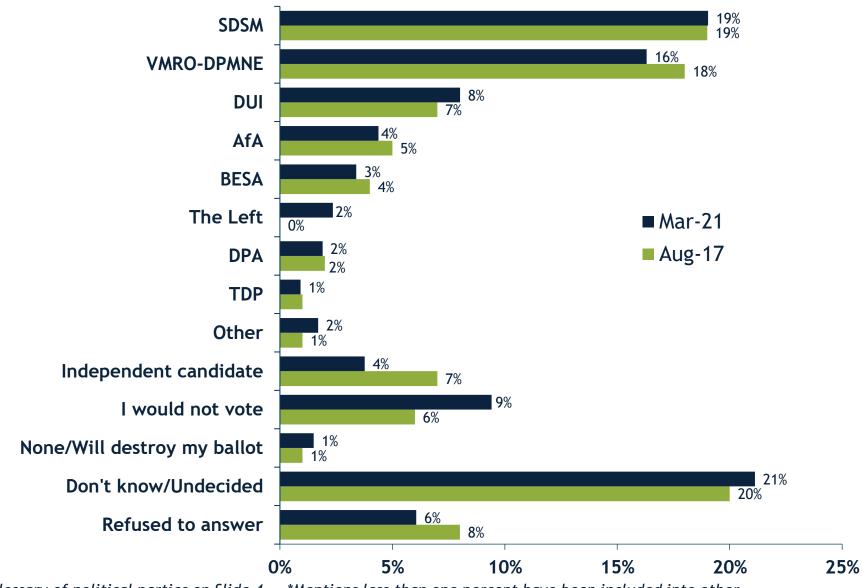
How likely or unlikely are you to vote in the parliamentary elections if they are held this Sunday? (Disaggregated by age groups)



If parliamentary elections were held this coming Sunday which party, if any, would you vote for?*



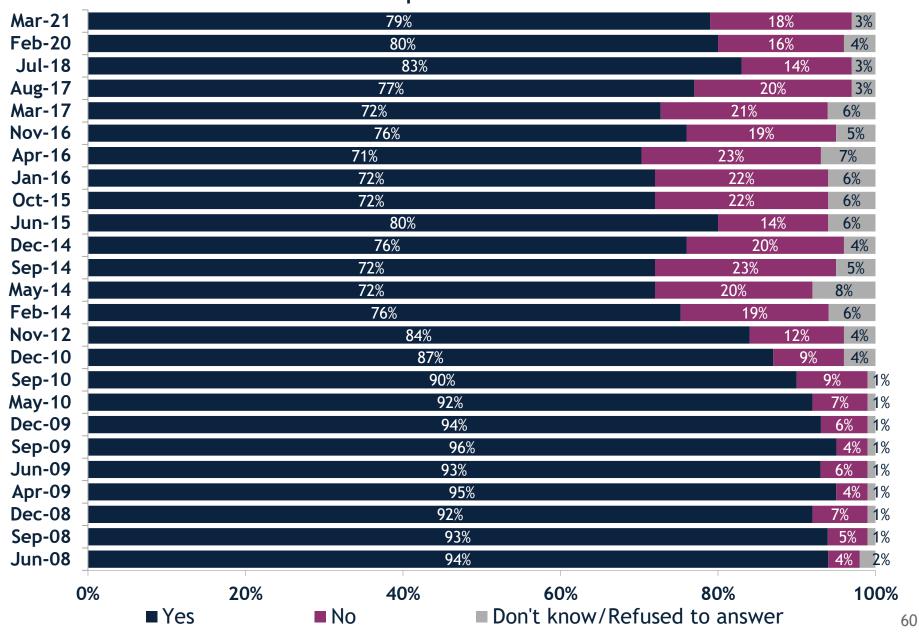
If local elections were held today, for which party's candidate would you vote for as mayor of your municipality?*



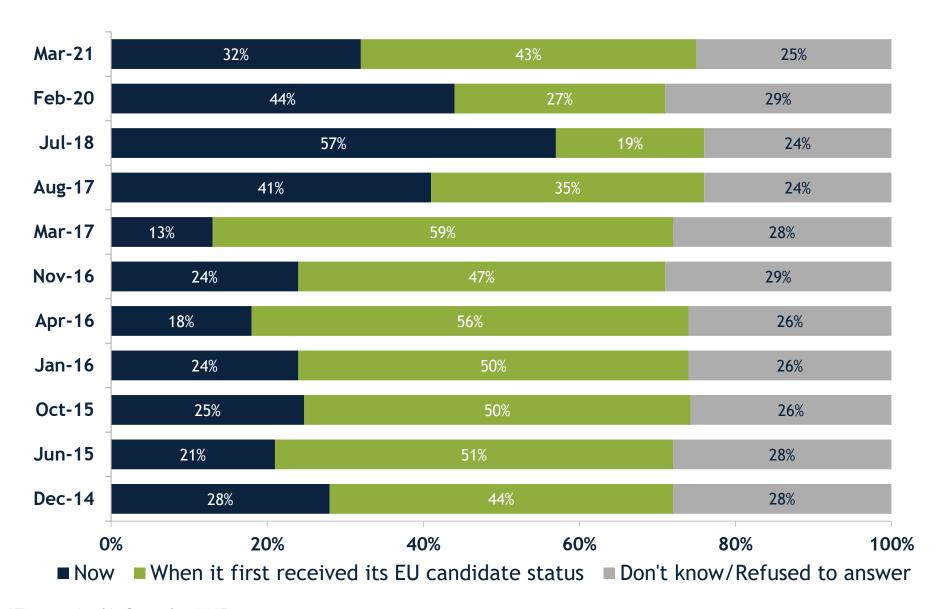
Attitudes toward Euro-Atlantic Integration and Foreign Relations



Do you support North Macedonia becoming a member of the European Union?

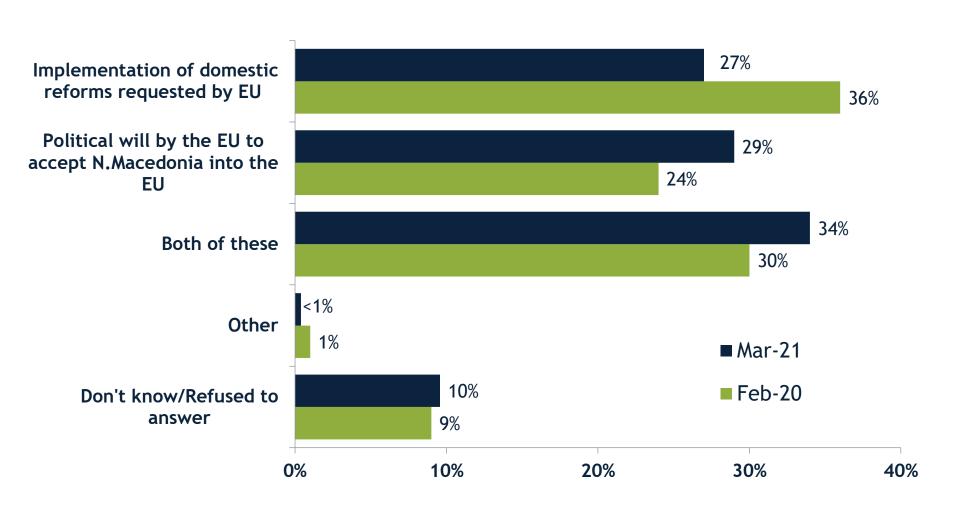


Do you think North Macedonia is closer to EU entry today, or was it closer when it first received its EU candidate member status?*



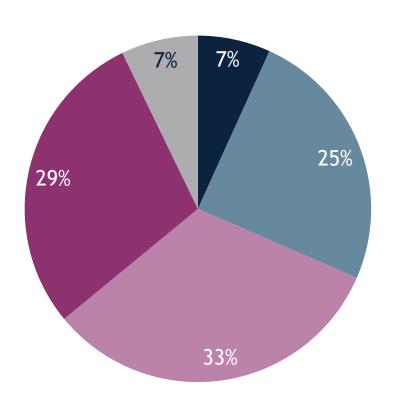
*First received in December 2005

What is most important for North Macedonia's accession to the EU?



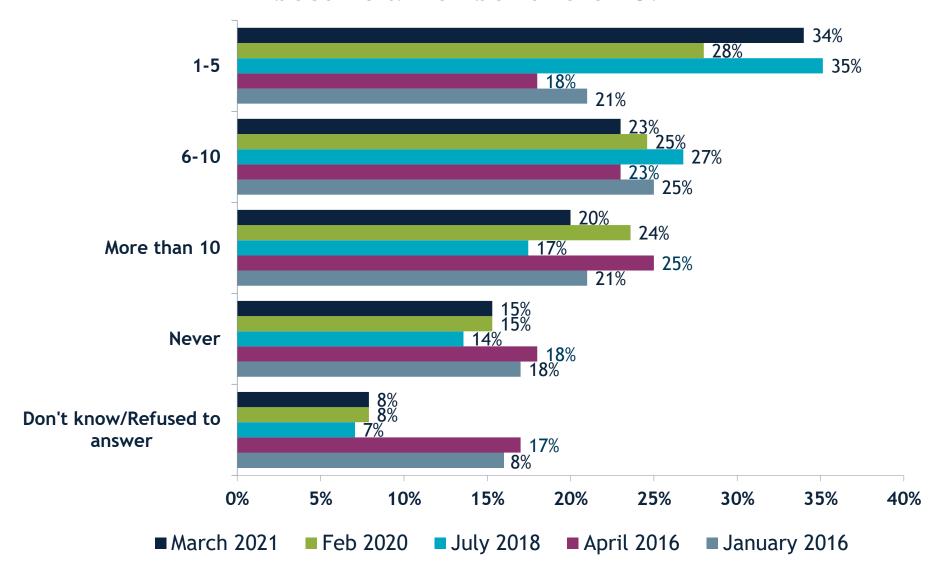
Bulgaria recently vetoed the start of North Macedonia's negotiations with the EU.

In your opinion, what should North Macedonia do in its relations with Bulgaria in order to unblock the negotiations?

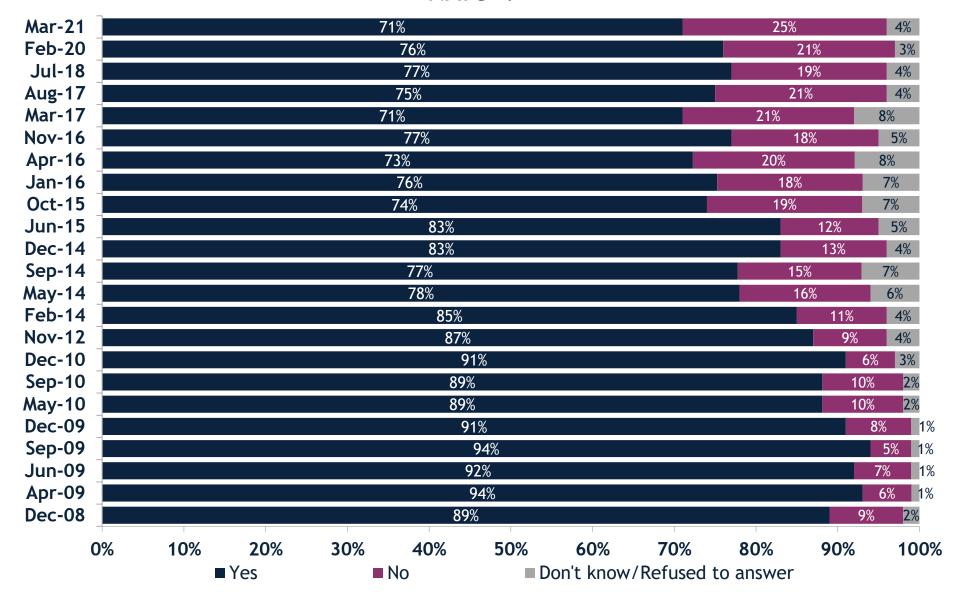


- Accept Bulgaria's demands on the language, the Friendship Treaty and the Macedonian minority in Bulgaria
- Carry on with the talks with Bulgaria without jeopardizing its positions
- Should not accept any request and should not continue talks with Bulgaria
- It shouldn't do anything, EU countries should pressure Bulgaria
- Don't know/Refused to answer

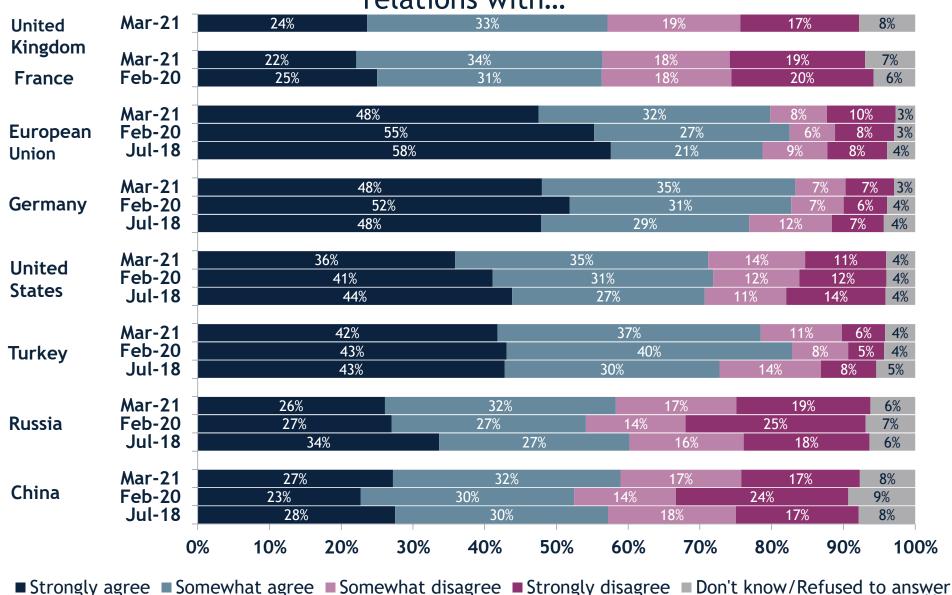
In how many years do you think North Macedonia will become a member of the EU?



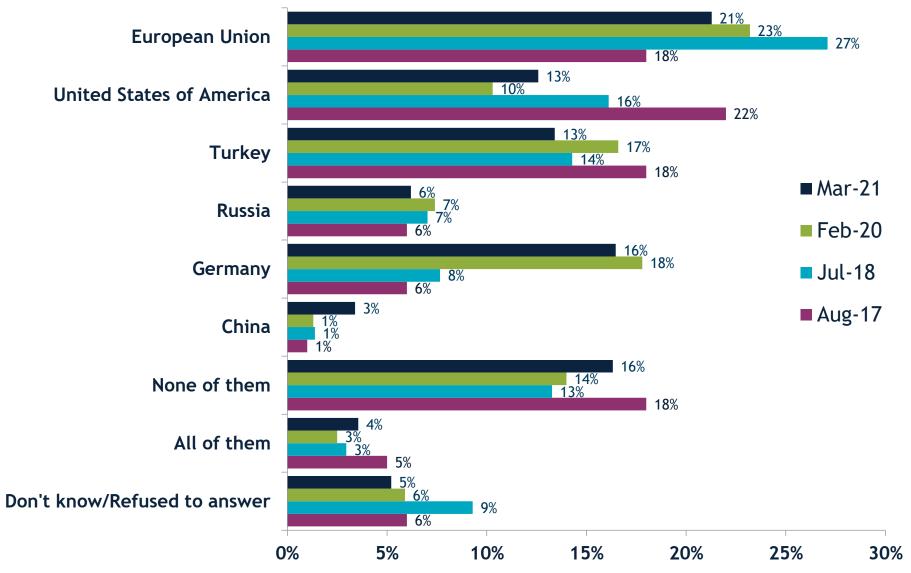
Do you support North Macedonia's membership in NATO (in February 2020 and before the question was "...becoming a member of NATO"?

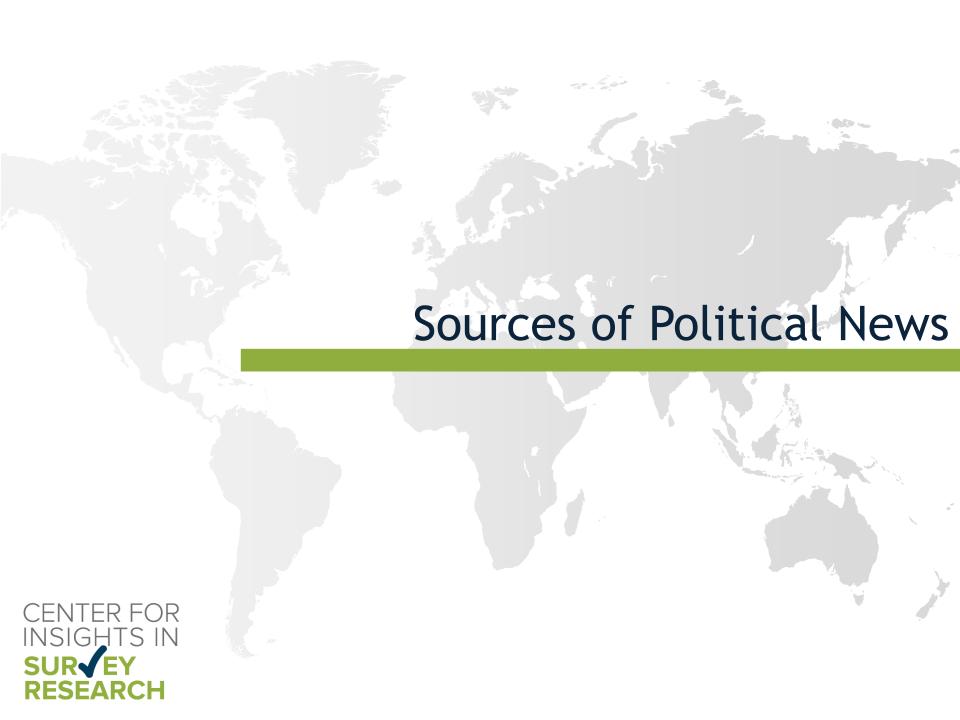


How strongly do you agree or disagree with the following statements: "North Macedonia's interests are best served by maintaining strong relations with..."

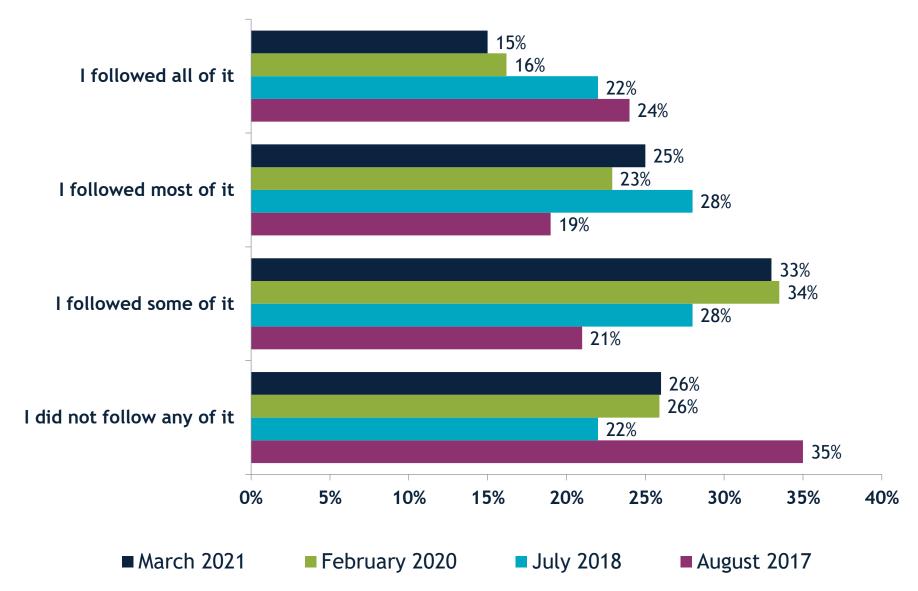


Which one of these countries (including the EU) helps North Macedonia's national interests the most?





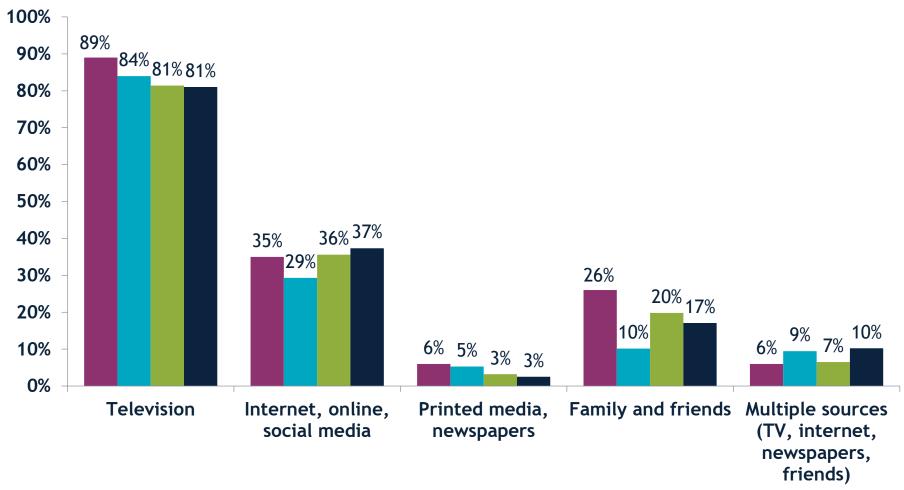
How much did you follow political news yesterday?



^{*} Don't know/Refused to answer is not displayed.

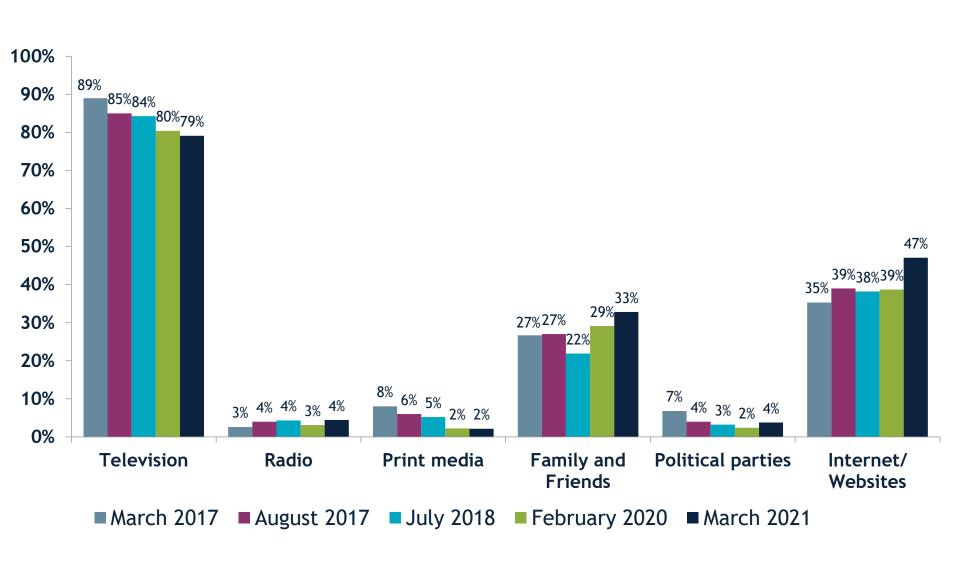
Where did you follow political news yesterday?

(Spontaneous response; multiple responses permitted; among those who answered that they followed at least some political news yesterday)



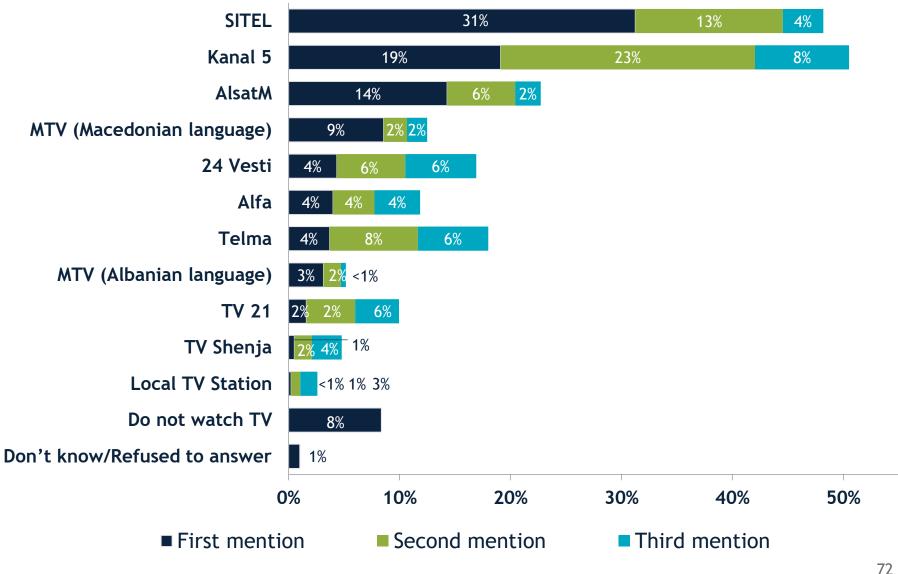
- August 2017 (n=710; margin of error ± 3.6)
 July 2018 (n=853; margin of error ± 3.4)
- February 2020 (n=888; margin of error \pm 3.2) March 2021 (n= 1820; margin of error \pm 2.3)

What are your most used sources of political news? (Multiple responses permitted)

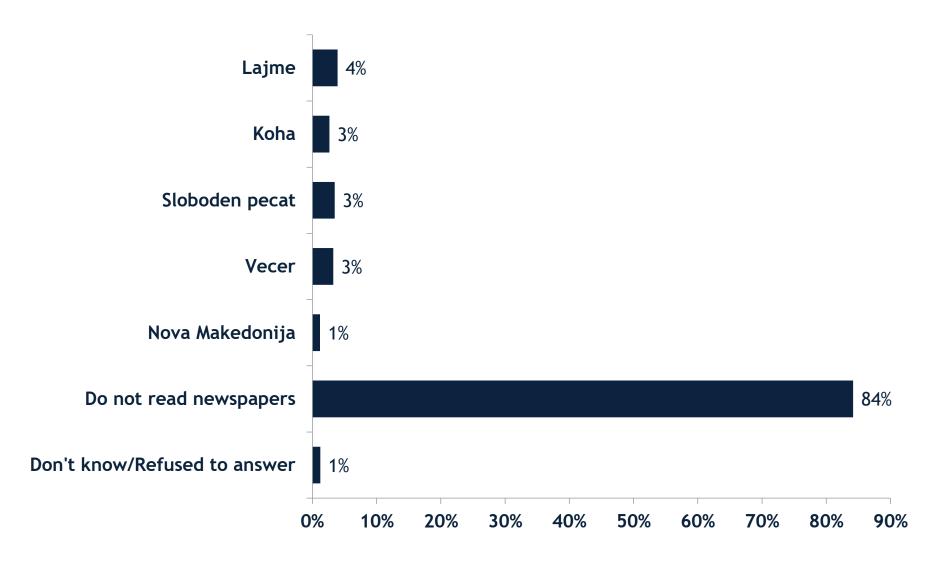


Which television station do you watch most often for political news?

(Spontaneous response; multiple responses permitted)



Which daily newspaper do you read most often for political news? (Spontaneous response)

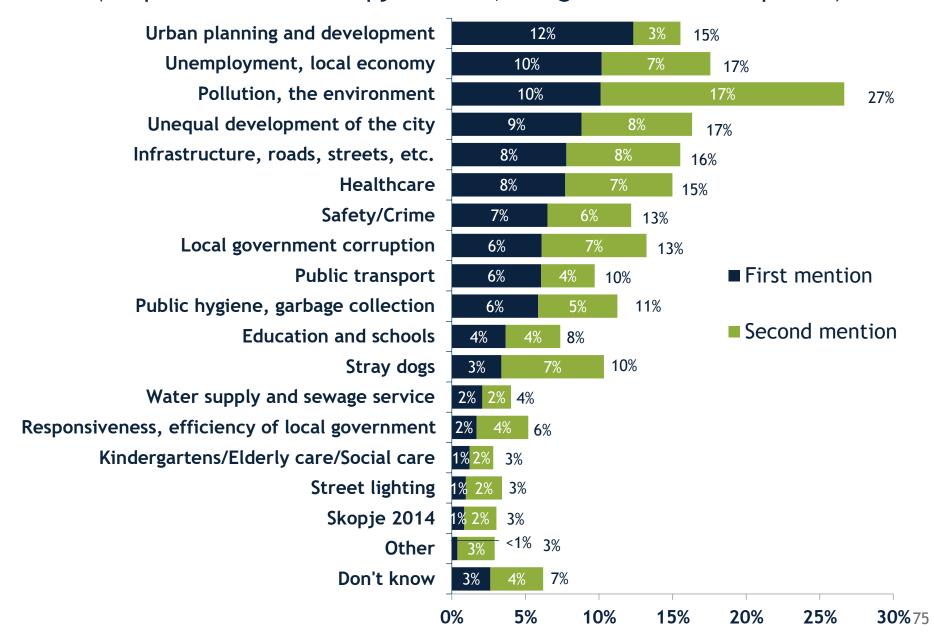


City of Skopje

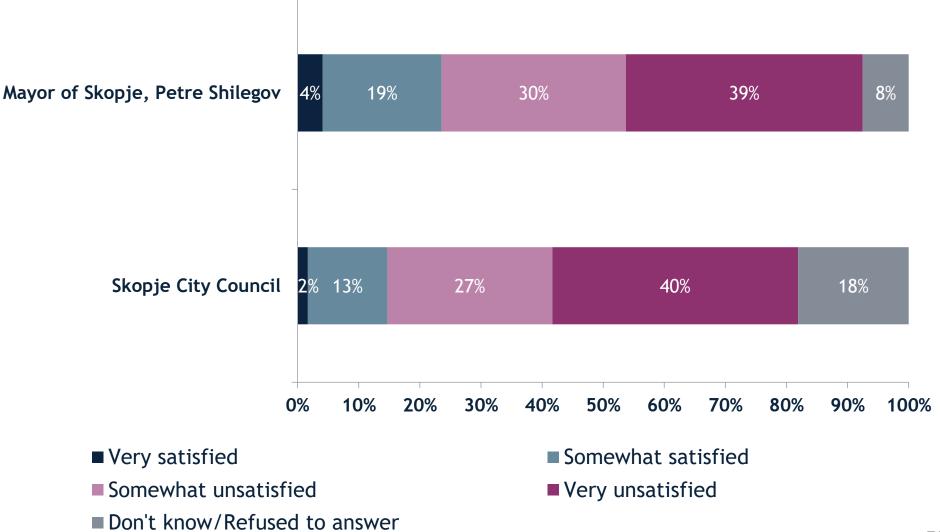
(Respondents from Skopje: n=744)



What are the two most serious problems facing Skopje today? (Respondents from Skopje: n=744; margin of error ±3.6 points)

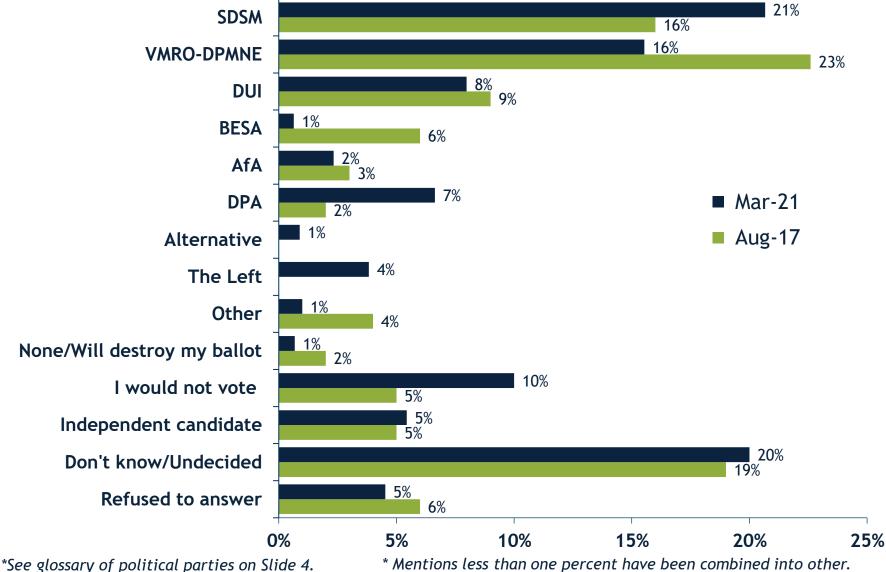


How satisfied or unsatisfied are you with the past performance of each of the following:



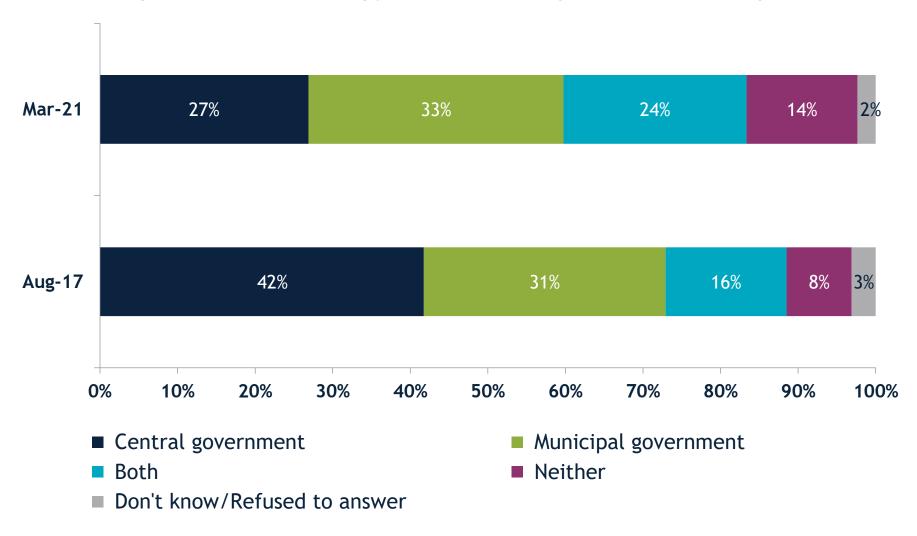
If local elections were held today, for which party's candidate would you vote to be mayor of Skopje?*

(Respondents from Skopje: n=744; margin of error ±3.6 points)



Which level of government is more responsive in addressing citizens' concerns?

(Respondents from Skopje: n=744; margin of error ±3.6 points)

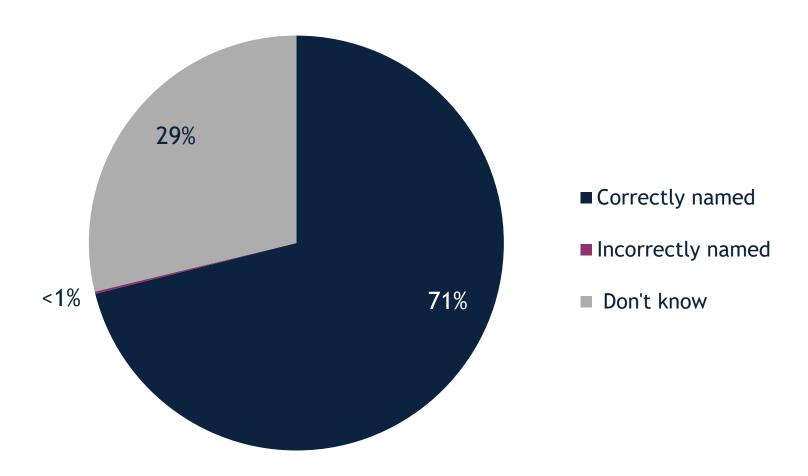


Gjorce Petrov

(Respondents from Gjorce Petrov: n=242)

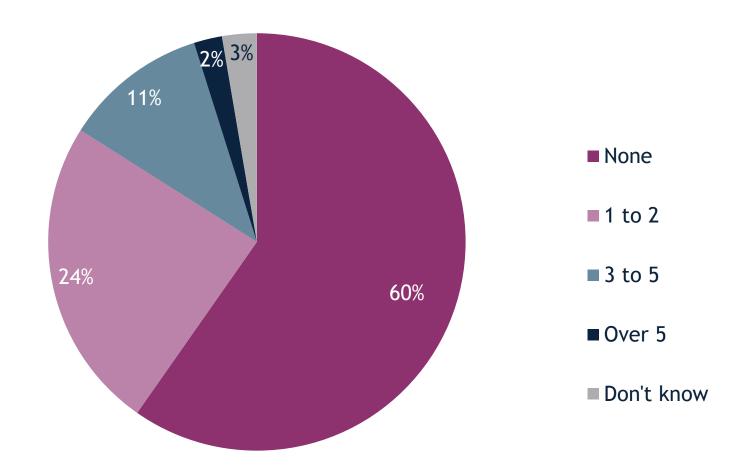


Can you please tell me the name of your mayor?* (Respondents from Gjorce Petrov: n=242; margin of error ±6.3 points)



^{*}Municipalities in North Macedonia are run by directly-elected mayors. There are 80 municipalities in North Macedonia; the city of Skopje is a separate local government unit.

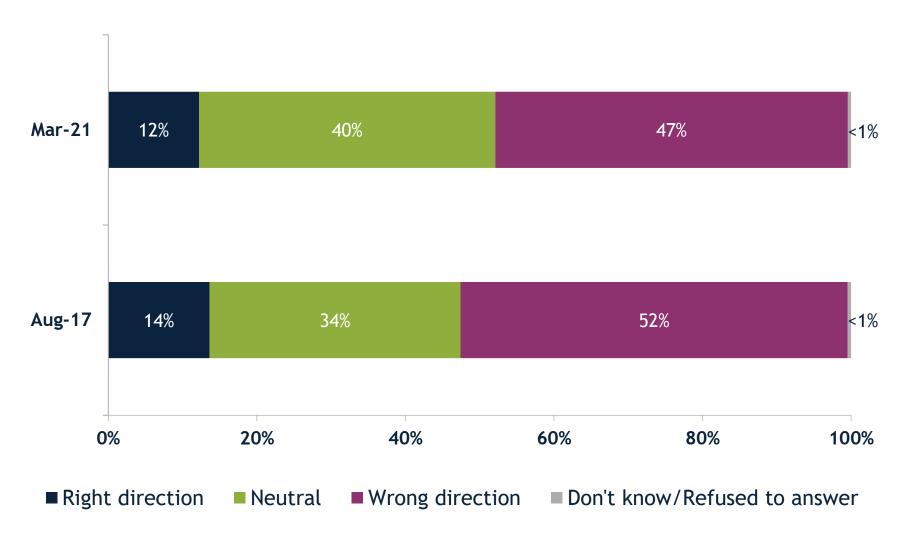
How many of your municipal councilors can you name? * (Respondents from Gjorce Petrov: n=242; margin of error ±6.3 points)



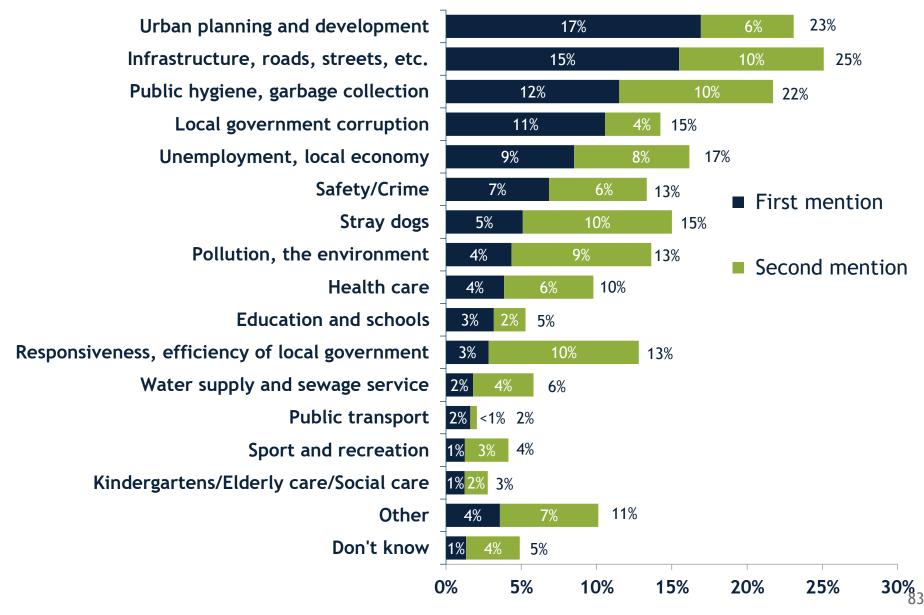
^{*}A municipal council in North Macedonia can be composed of between 9 to 33 councilors, elected from closed proportional party lists.

Overall, are things in your municipality moving in the right or wrong direction?

(Respondents from Gjorce Petrov: n=242; margin of error ± 6.3 points)

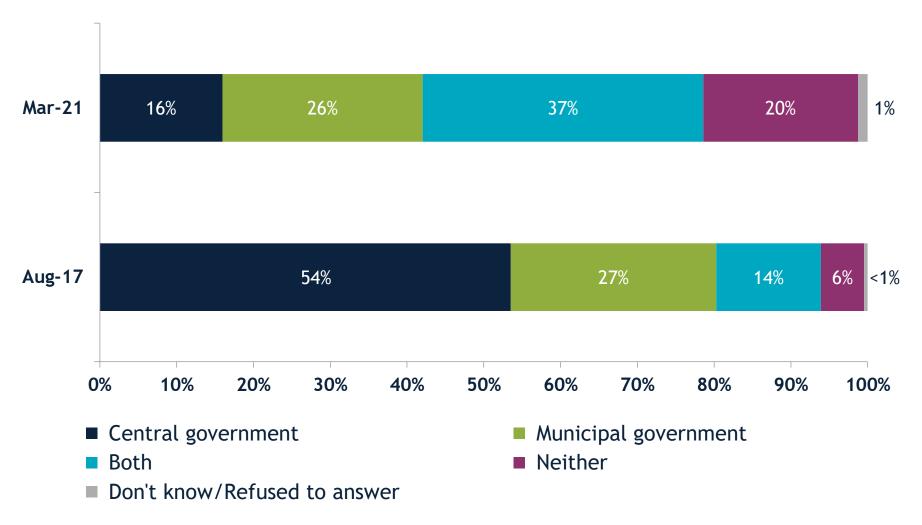


What are the most serious problems facing your municipality today? (Respondents from Gjorce Petrov: n=242; margin of error ±6.3 points) (Up to two responses accepted)



Which level of government is more responsive in addressing citizens' concerns?

(Respondents from Gjorce Petrov: n=242; margin of error ± 6.3 points)

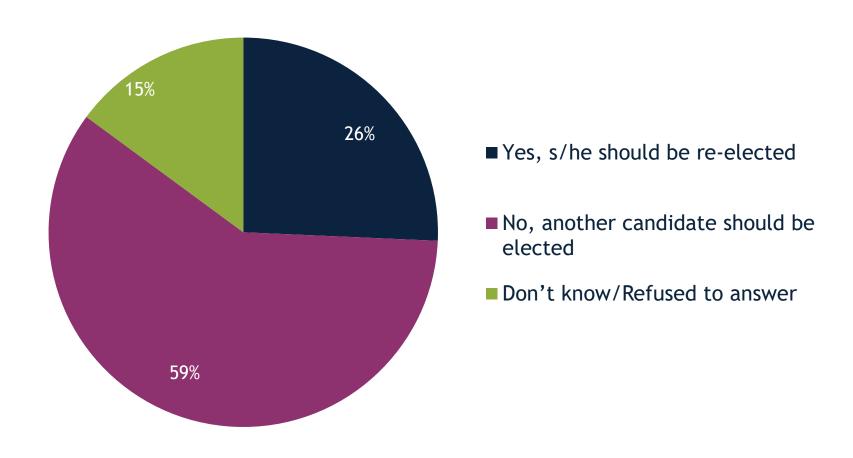


How satisfied or unsatisfied are you with the past performance of each of the following:

(Respondents from Gjorce Petrov: n=242; margin of error ± 6.3 points)

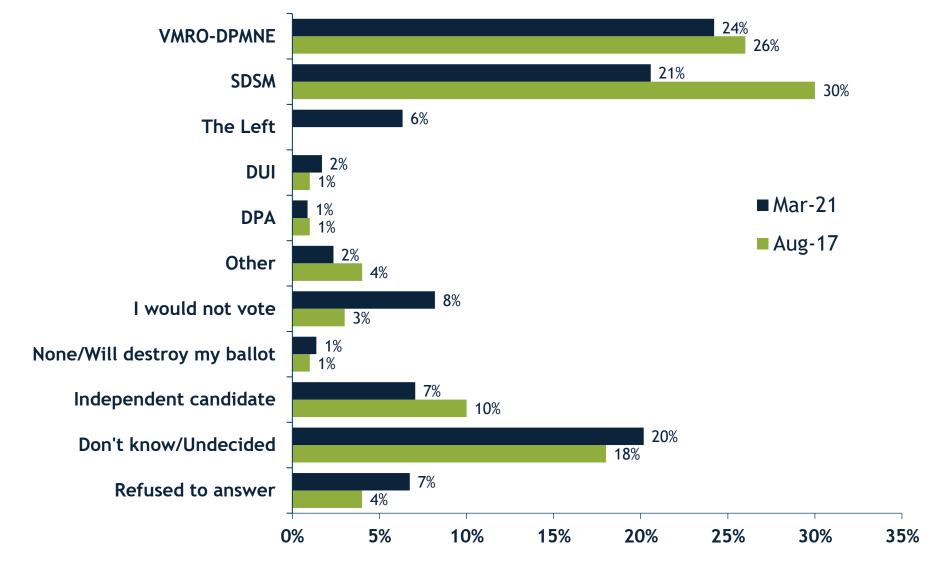


Does the mayor in your municipality do his/her job well enough to be re-elected or should a new mayor be elected? (Respondents from Gjorce Petrov: n=242; margin of error ±6.3 points)

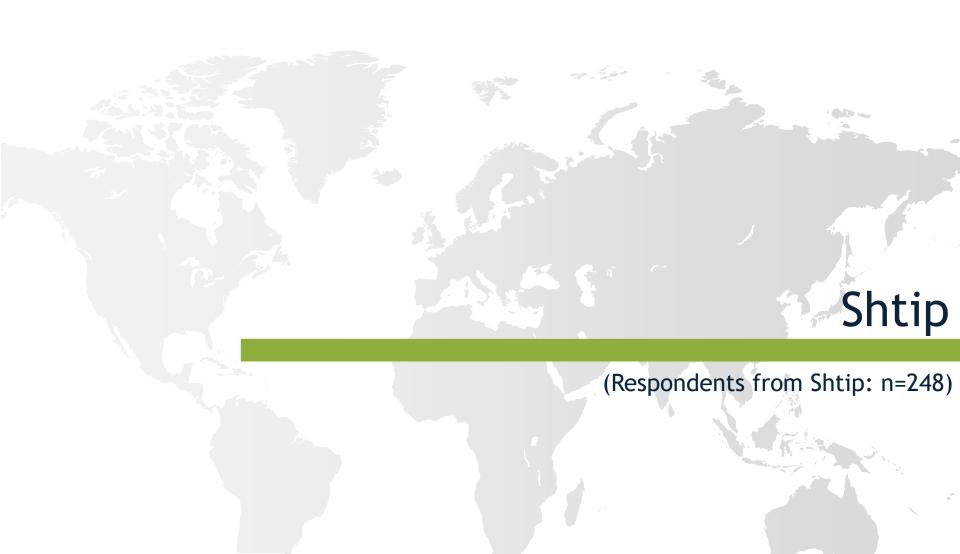


If local elections were held today, for which party's candidate would you vote to be mayor of your municipality?*

(Respondents from Gjorce Petrov: n=242; margin of error ±6.3 points)

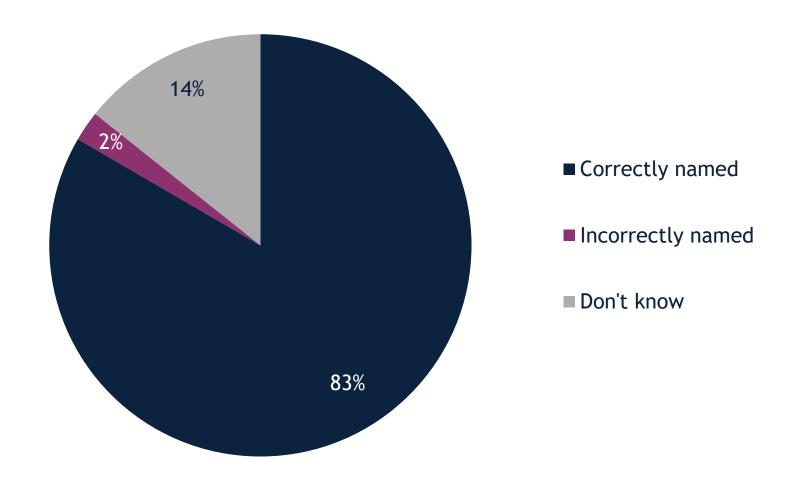


^{*}See glossary of political parties on Slide 4.



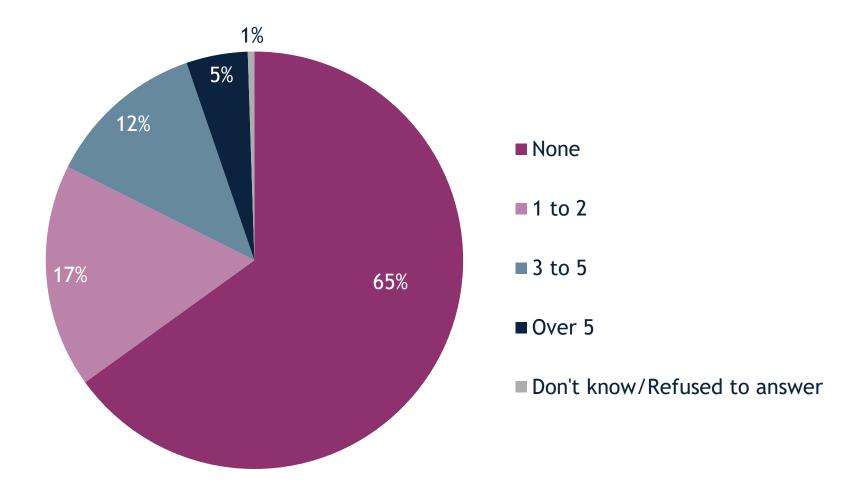


Can you please tell me the name of your mayor?*



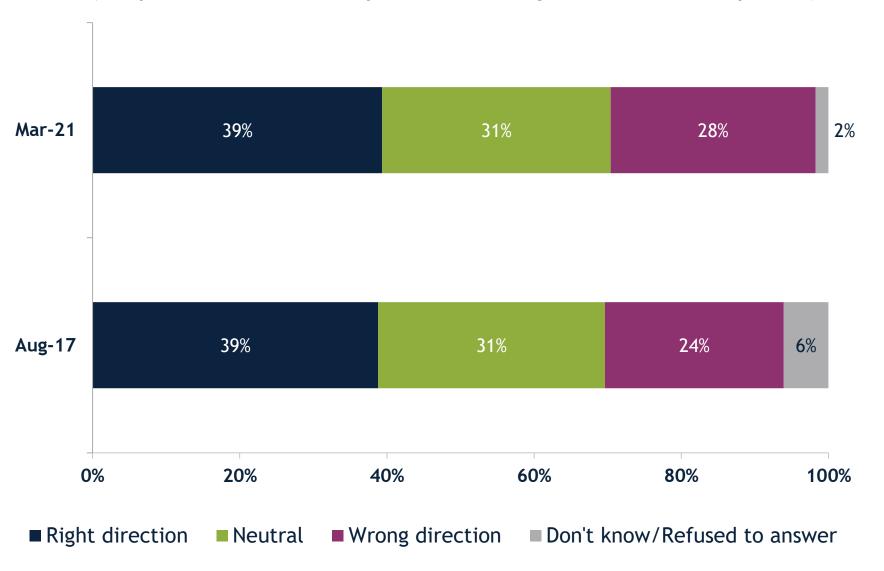
^{*}Municipalities in North Macedonia are run by directly-elected mayors. There are 80 municipalities in North Macedonia; the city of Skopje is a separate local government unit.

How many of your municipal councilors can you name?* (Respondents from Shtip: n=248; margin of error ±6.2 points)

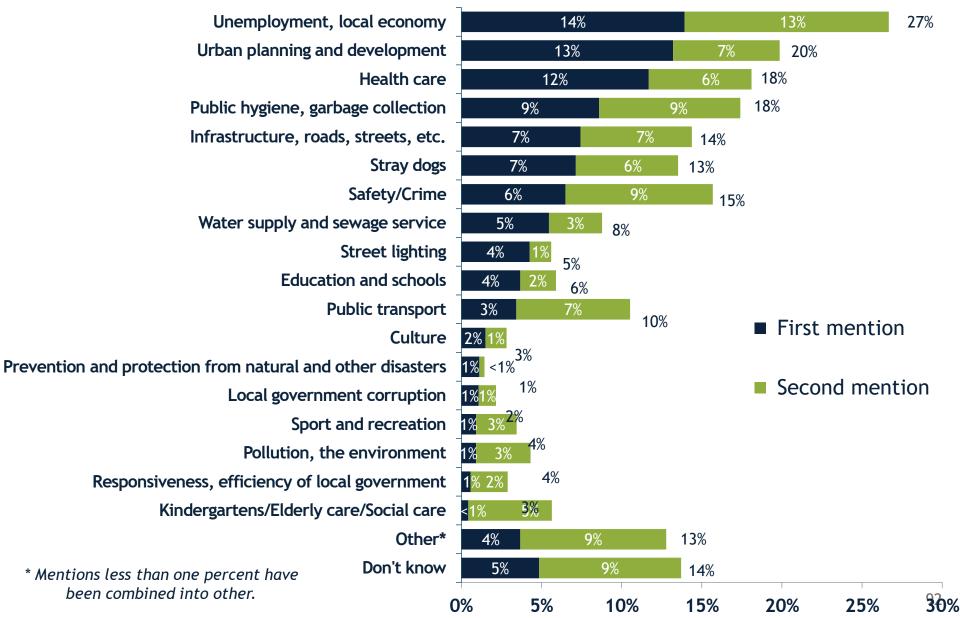


^{*}A municipal council in North Macedonia can be composed of between 9 to 33 councilors, elected from closed proportional party lists.

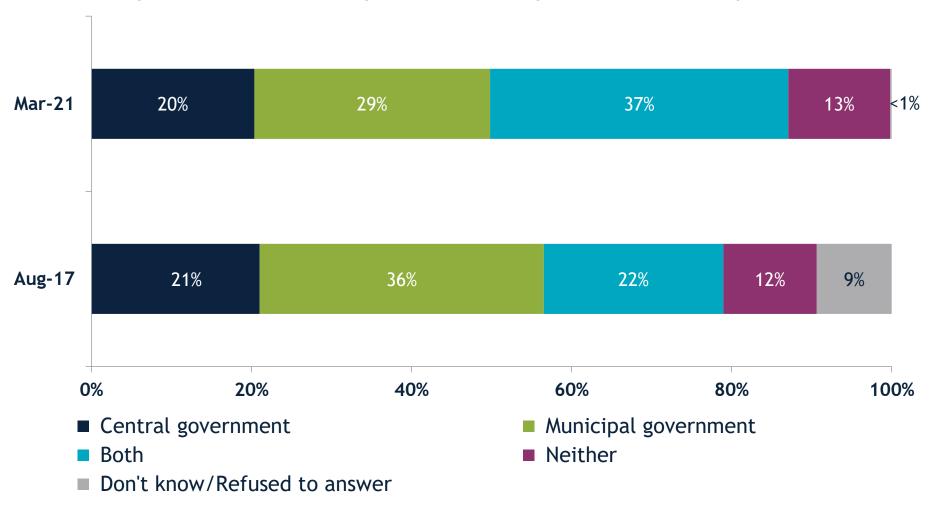
Overall, are things in your municipality moving in the right or wrong direction?



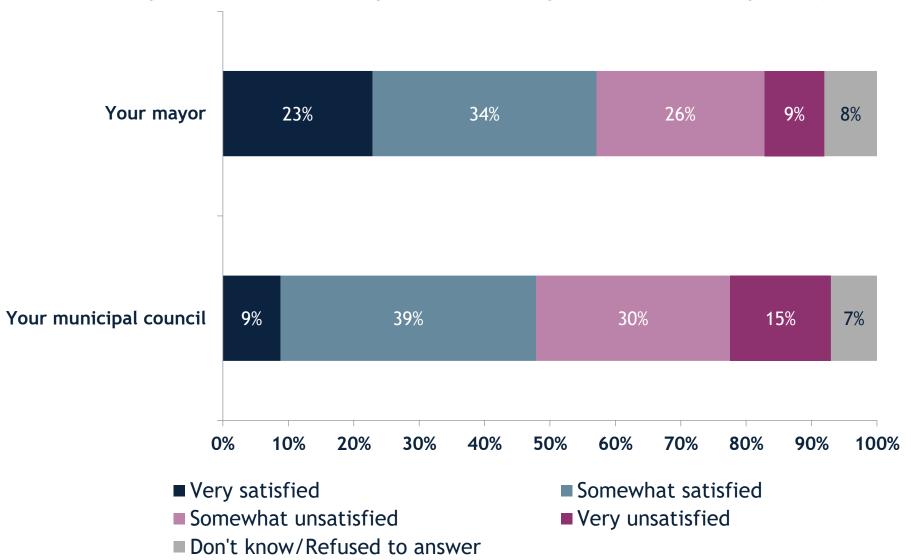
What are the most serious problems facing your municipality today? (Respondents from Shtip: n=248; margin of error ± 6.2 points) (Up to two responses allowed)



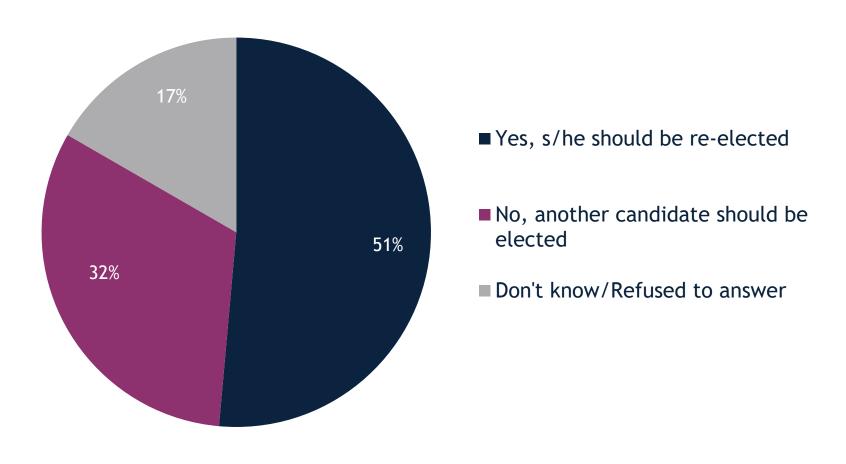
Which level of government is more responsive in addressing citizens' concerns?



How satisfied or unsatisfied are you with the past performance of each of the following:

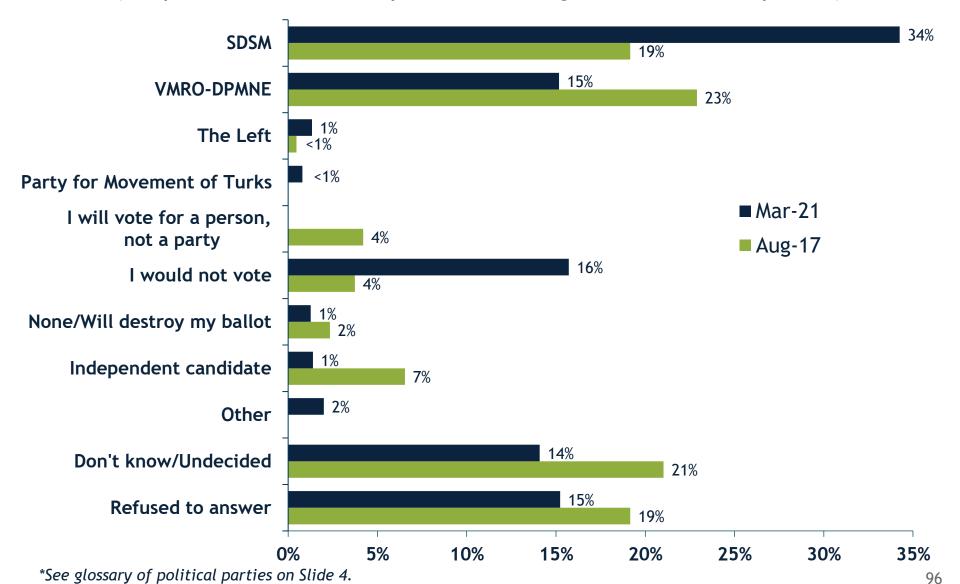


Does the mayor in your municipality do his/her job well enough to be re-elected or should a new mayor be elected?



If local elections were held today, for which party's candidate would you vote to be mayor of your municipality?*

(Respondents from Shtip: n=248; margin of error ±6.2 points)

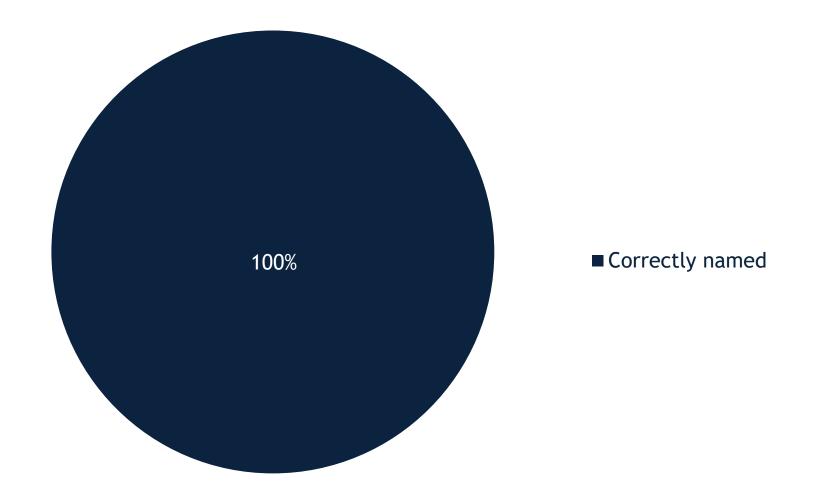


Tetovo

(Respondents from Tetovo: n=257)

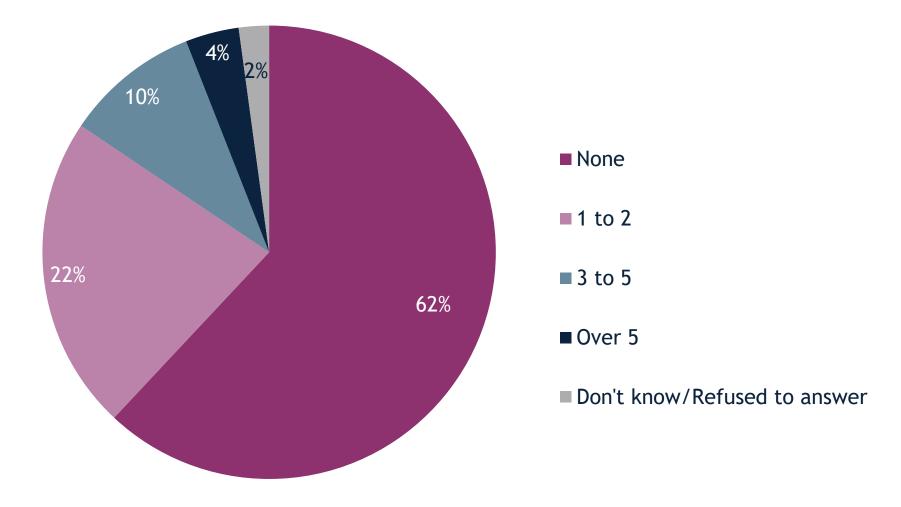


Can you please tell me the name of your mayor?*



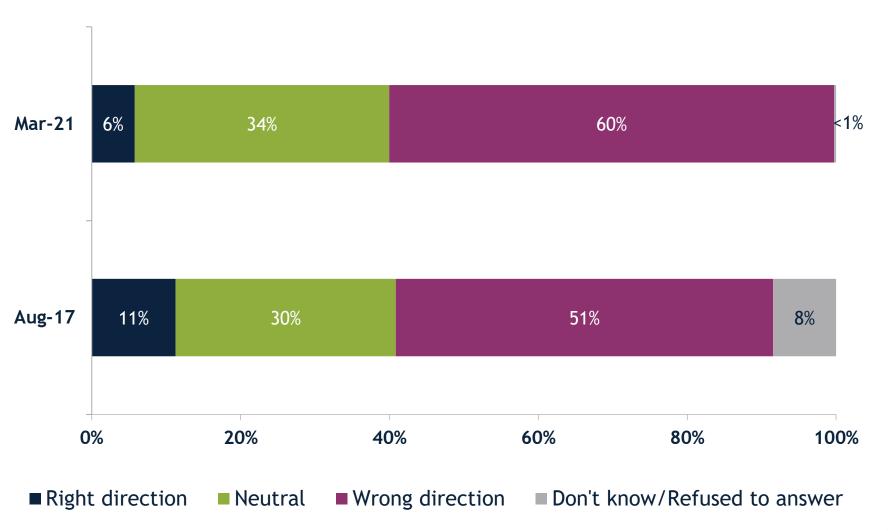
^{*}Municipalities in North Macedonia are run by directly-elected mayors. There are 80 municipalities in North Macedonia; the city of Skopje is a separate local government unit.

How many of your municipal councilors can you name?* (Respondents from Tetovo: n=257; margin of error ±6.1 points)

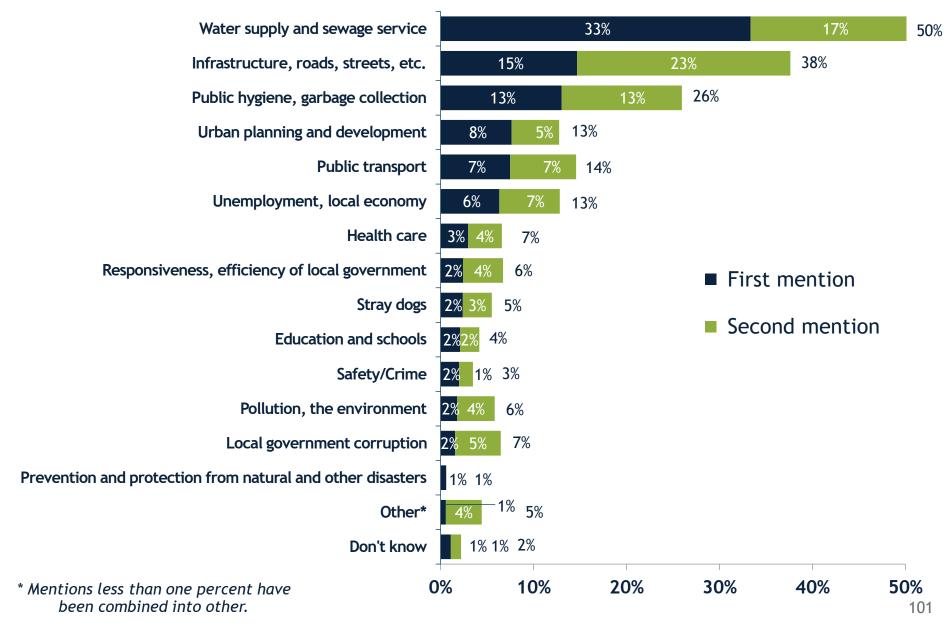


^{*}A municipal council in North Macedonia can be composed of between 9 to 33 councilors, elected from closed proportional party lists.

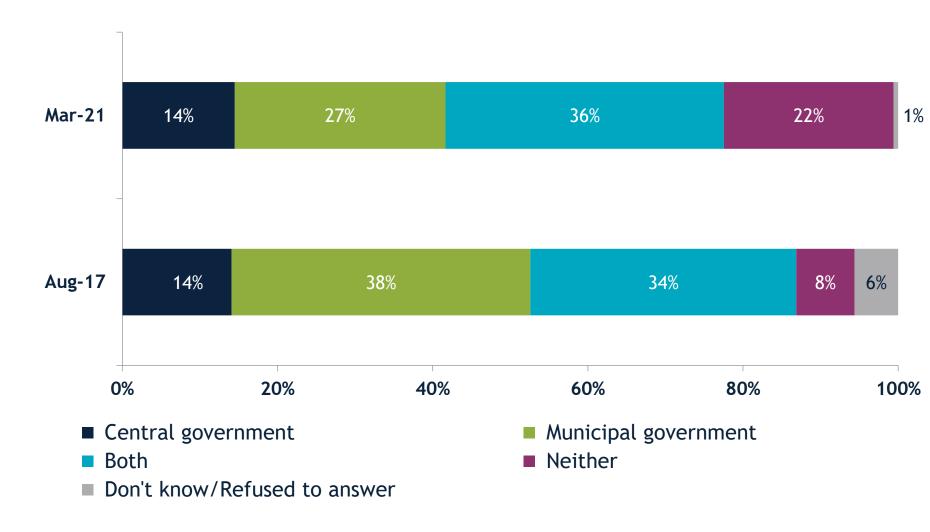
Overall, are things in your municipality moving in the right or wrong direction?



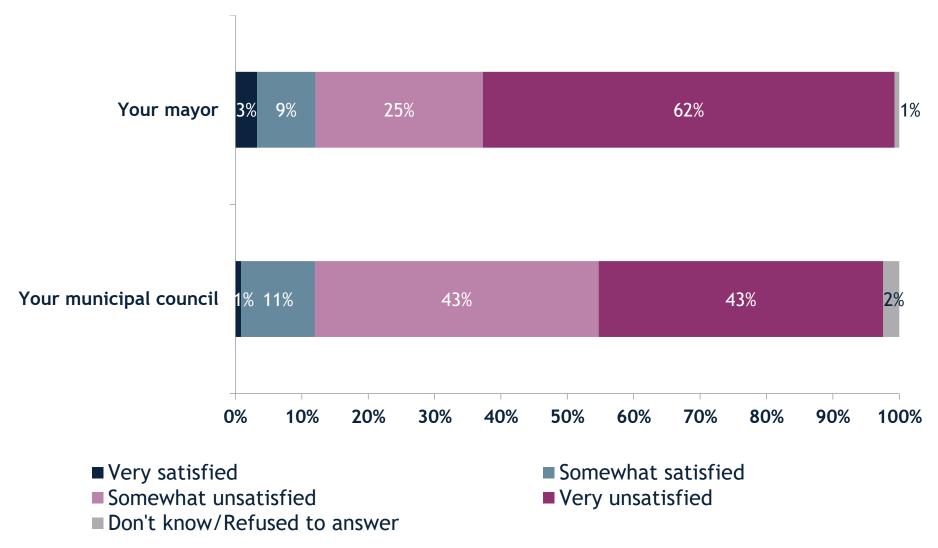
What are the most serious problems facing your municipality today? (Respondents from Tetovo: n=257; margin of error ± 6.1 points)



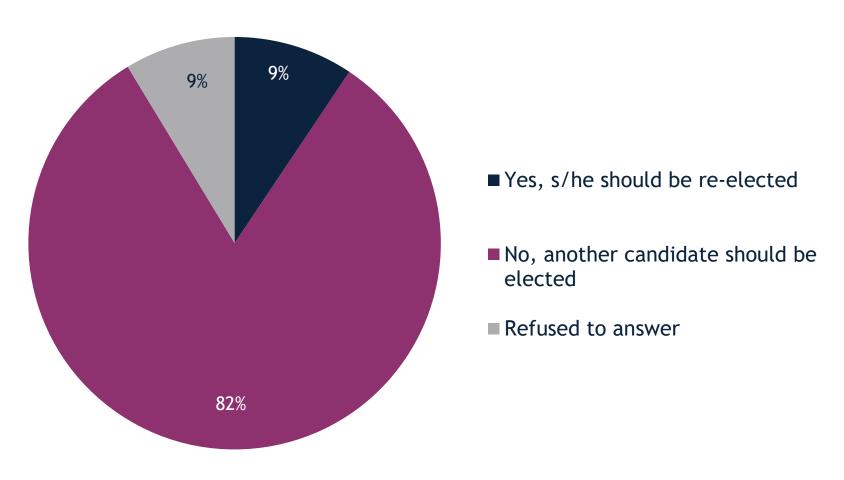
Which level of government is more responsive in addressing citizens' concerns?



How satisfied or unsatisfied are you with the past performance of each of the following:

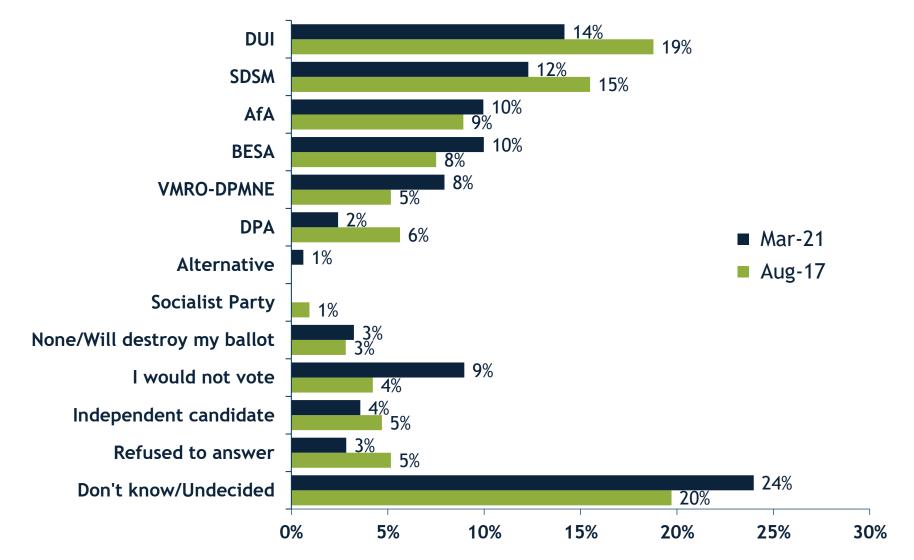


Does the mayor in your municipality do his/her job well enough to be re-elected or should a new mayor be elected?



If local elections were held today, for which party's candidate would you vote to be mayor of your municipality?*

(Respondents from Tetovo: n=257; margin of error ±6.1 points)

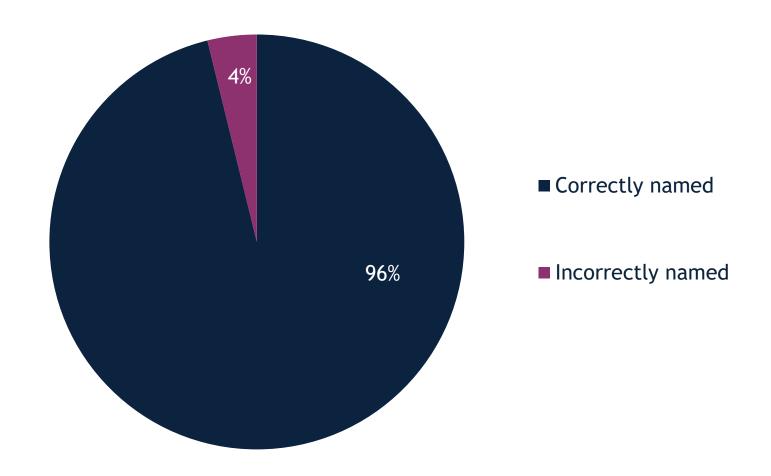


Gostivar

(Respondents from Gostivar: n=284)

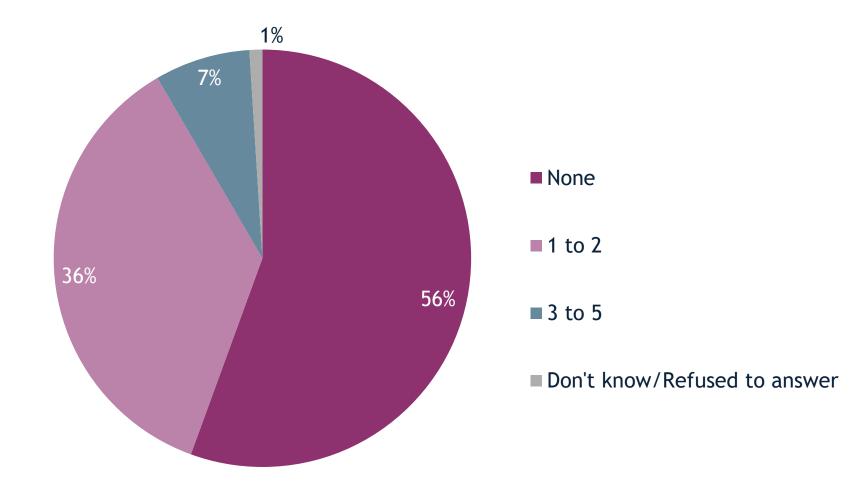


Can you please tell me the name of your mayor?* (Respondents from Gostivar: n=284; margin of error ±5.8 points)



^{*}Municipalities in North Macedonia are run by directly-elected mayors. There are 80 municipalities in North Macedonia; the city of Skopje is a separate local government unit.

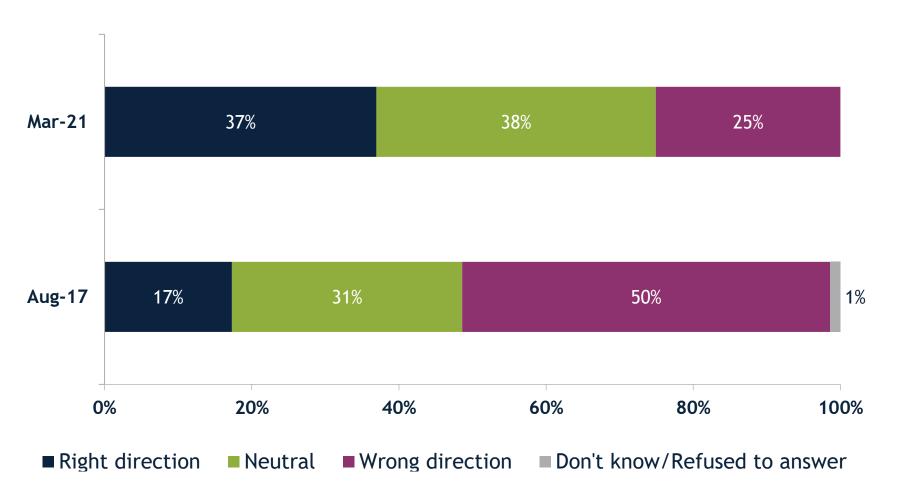
How many of your municipal councilors can you name?* (Respondents from Gostivar: n=284; margin of error ±5.8 points)



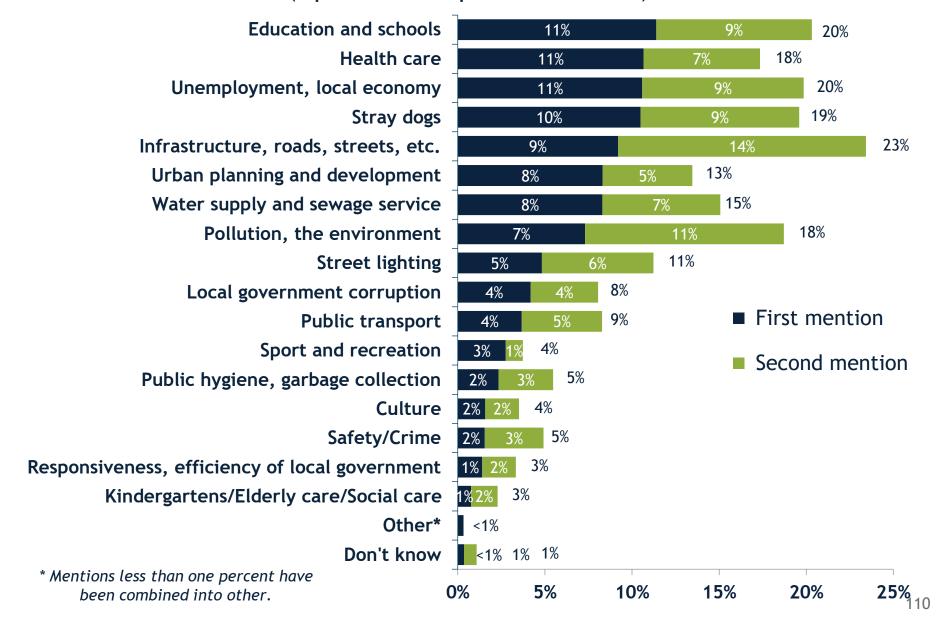
^{*}A municipal council in North Macedonia can be composed of between 9 to 33 councilors, elected from closed proportional party lists.

Overall, are things in your municipality moving in the right or wrong direction?

(Respondents from Gostivar: n=284; margin of error ±5.8 points)

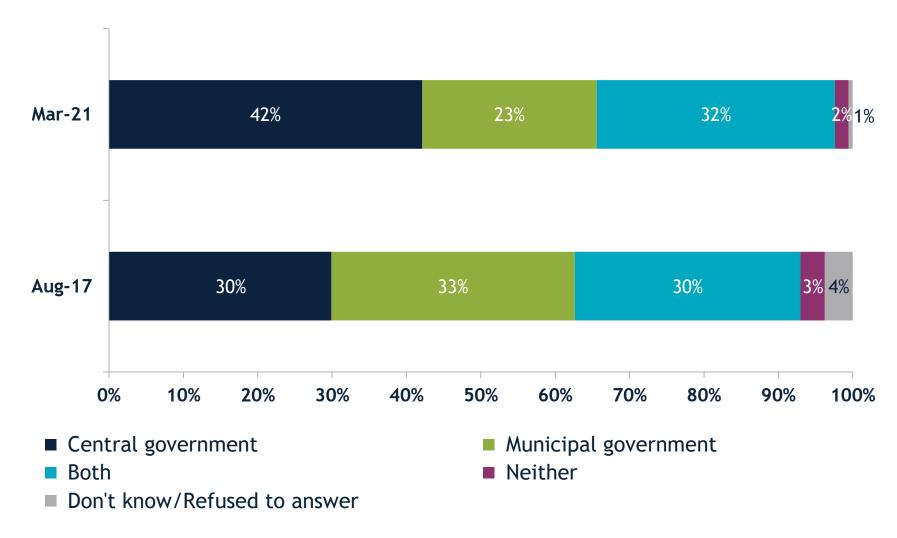


What are the most serious problems facing your municipality today? (Respondents from Gostivar: n=284; margin of error ±5.8 points) (Up to two responses allowed)



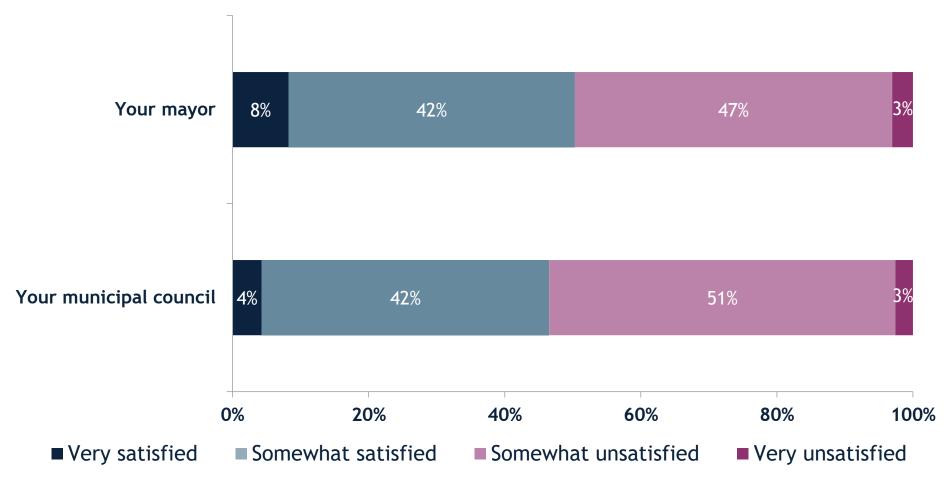
Which level of government is more responsive in addressing citizens' concerns?

(Respondents from Gostivar: n=284; margin of error ±5.8 points)



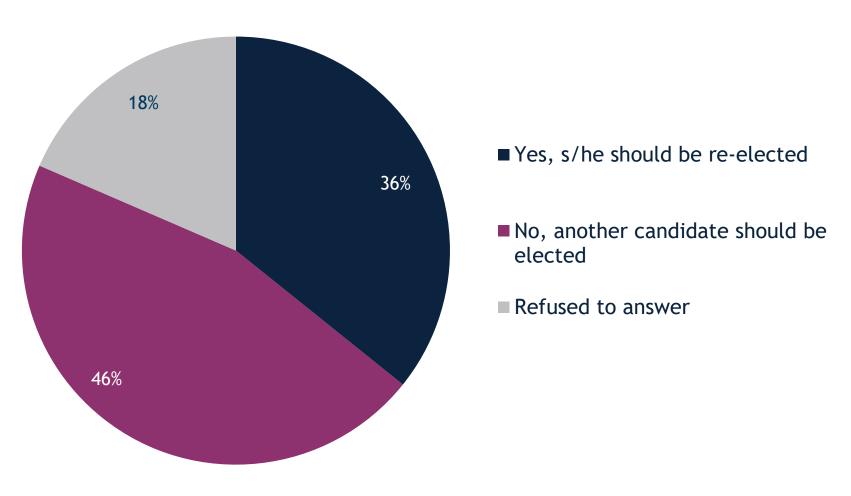
How satisfied or unsatisfied are you with the past performance of each of the following:

(Respondents from Gostivar: n=284; margin of error ± 5.8 points)



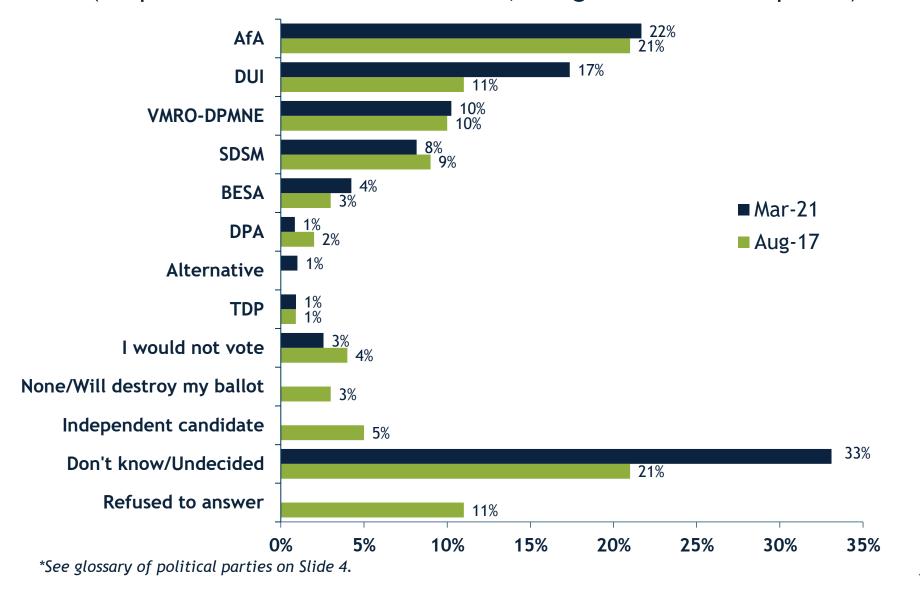
Does the mayor in your municipality do his/her job well enough to be re-elected or should a new mayor be elected?

(Respondents from Gostivar: n=284; margin of error ±5.8 points)



If local elections were held today, for which party's candidate would you vote to be mayor of your municipality?*

(Respondents from Gostivar: n=284; margin of error ±5.8 points)

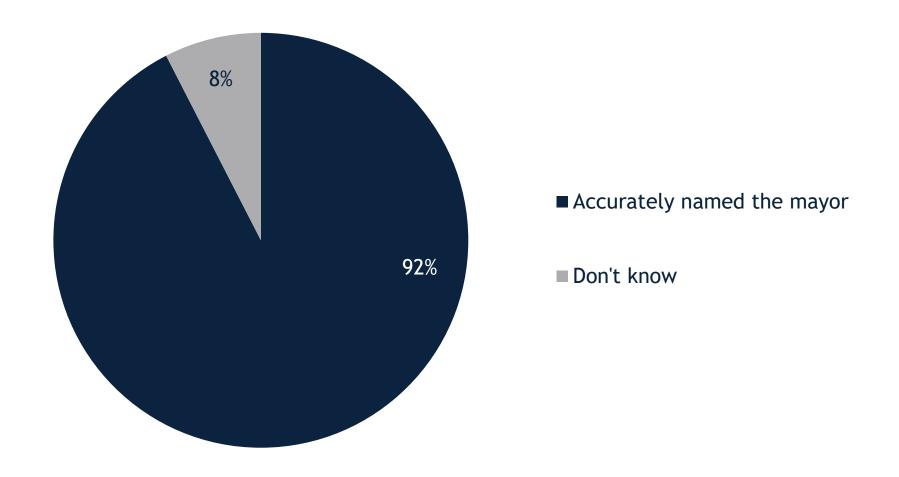


Kumanovo

(Respondents from Kumanovo: n=277)

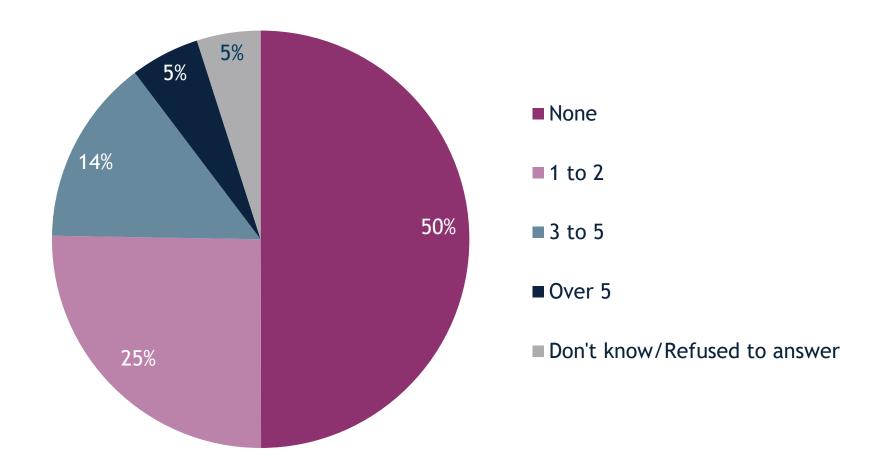


Can you please tell me the name of your mayor?* (Respondents from Kumanovo: n=277; margin of error ±5.9 points)



^{*}Municipalities in North Macedonia are run by directly-elected mayors. There are 80 municipalities in North Macedonia; the city of Skopje is a separate local government unit.

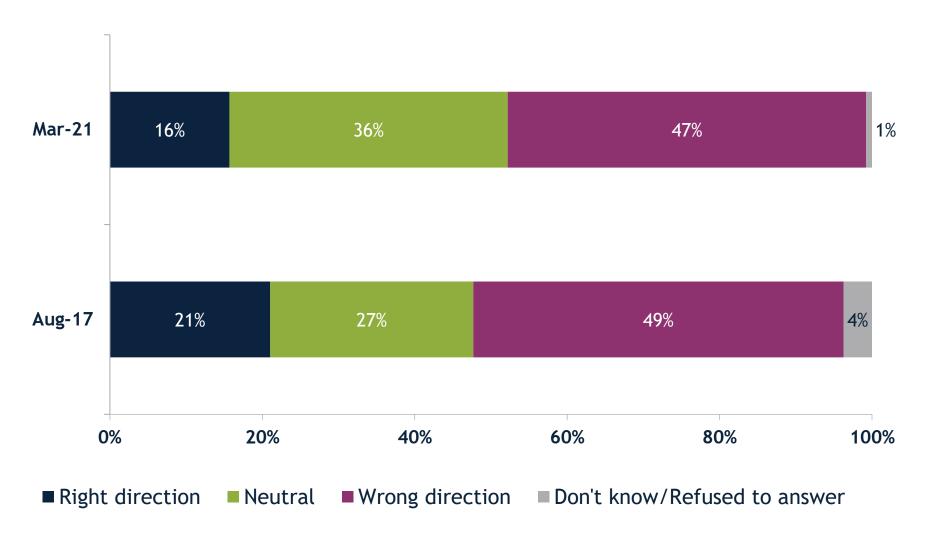
How many of your municipal councilors can you name?* (Respondents from Kumanovo: n=277; margin of error ±5.9 points)



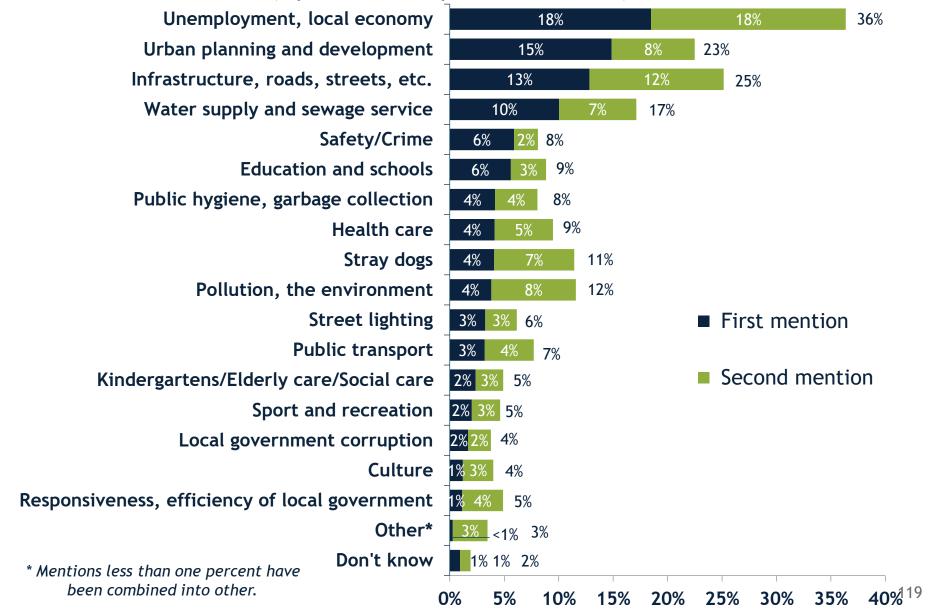
^{*}A municipal council in North Macedonia can be composed of between 9 to 33 councilors, elected from closed proportional party lists.

Overall, are things in your municipality moving in the right or wrong direction?

(Respondents from Kumanovo: n=277; margin of error ±5.9 points)

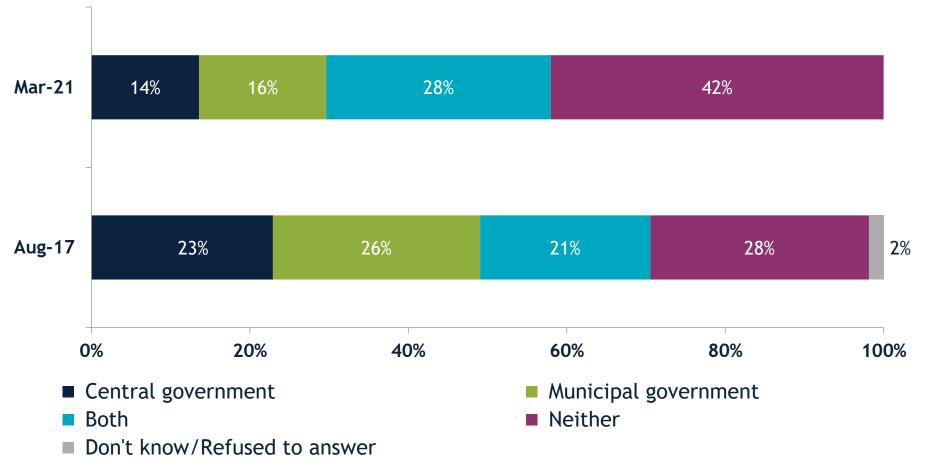


What are the most serious problems facing your municipality today? (Respondents from Kumanovo: n=277; margin of error ±5.9 points) (Up to two responses allowed)



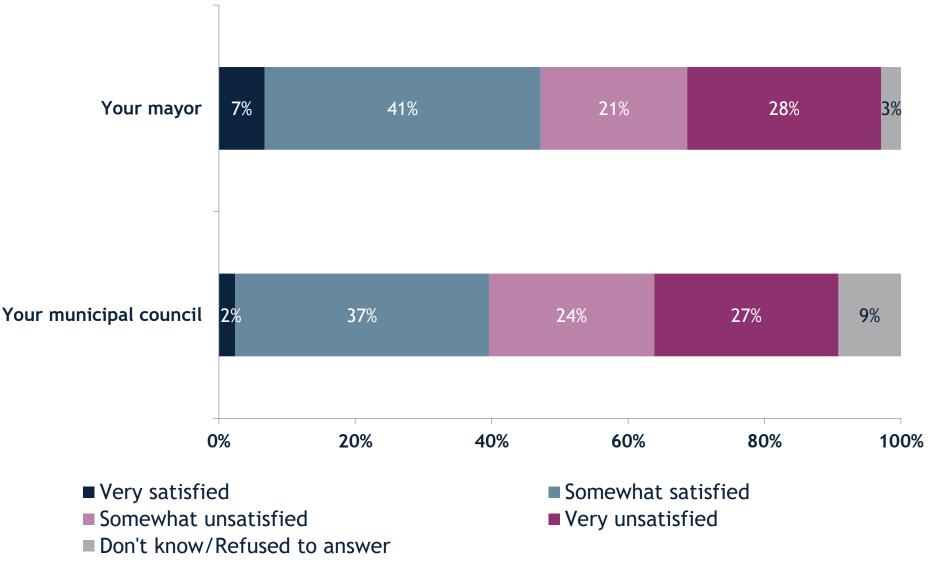
Which level of government is more responsive in addressing citizens' concerns?

(Respondents from Kumanovo: n=277; margin of error ± 5.9 points)



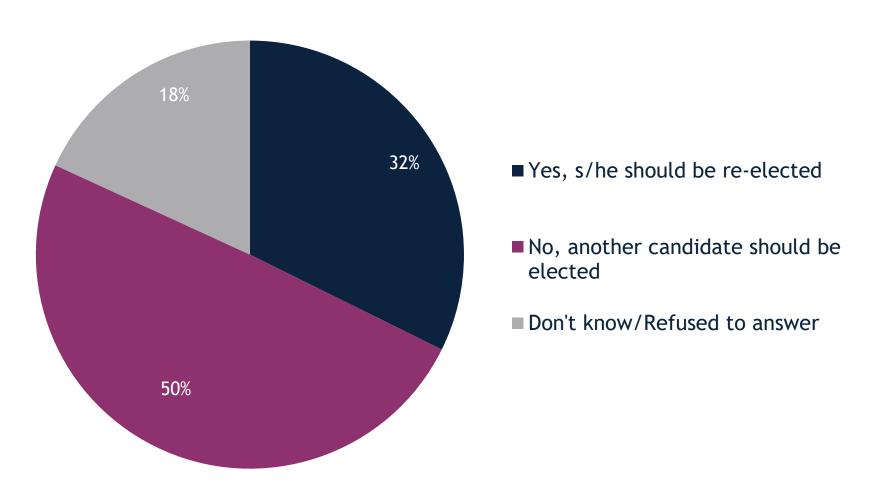
How satisfied or unsatisfied are you with the past performance of each of the following:

(Respondents from Kumanovo: n=277; margin of error ±5.9 points)



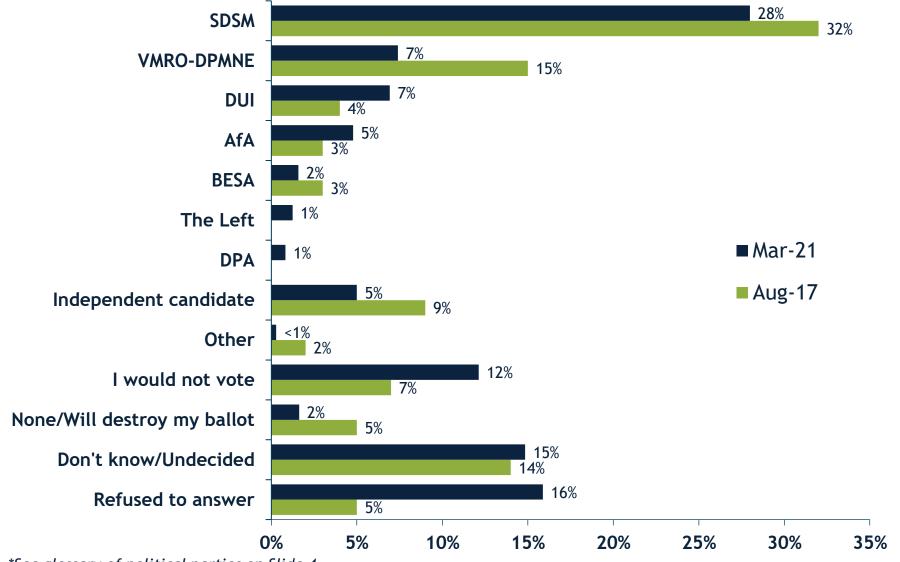
Does the mayor in your municipality do his/her job well enough to be re-elected or should a new mayor be elected?

(Respondents from Kumanovo: n=277; margin of error ± 5.9 points)



If local elections were held today, for which party's candidate would you vote to be mayor of your municipality?*

(Respondents from Kumanovo: n=277; margin of error ±5.9 points)

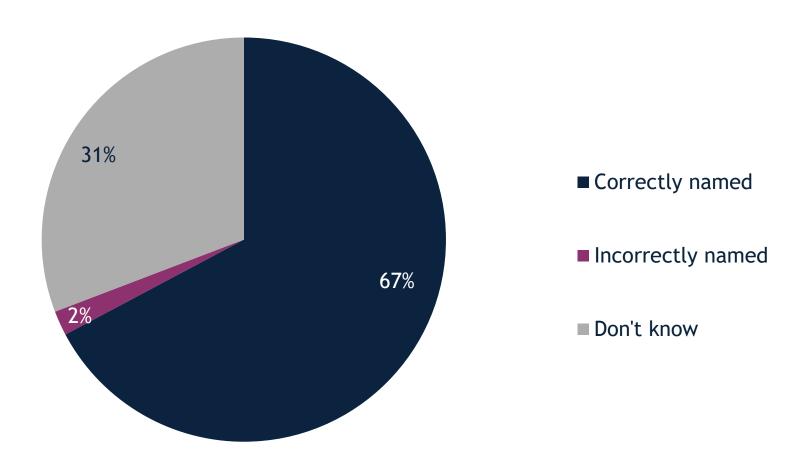


Ohrid

(Respondents from Ohrid: n= 247)

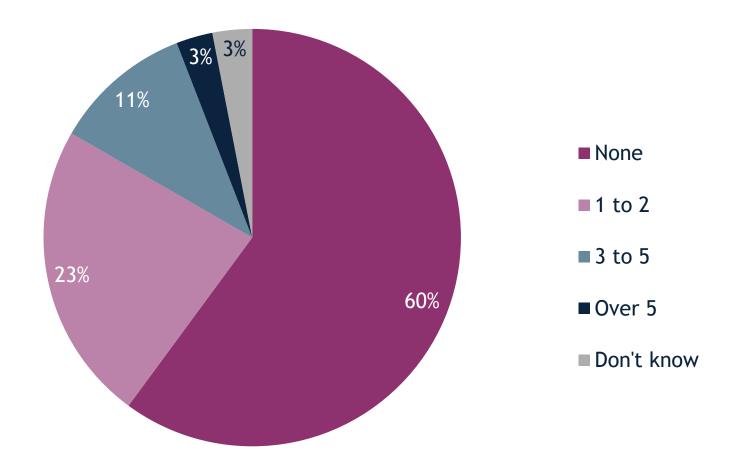


Can you please tell me the name of your mayor?* (Respondents from Ohrid: n=247; margin of error ±6.2 points)



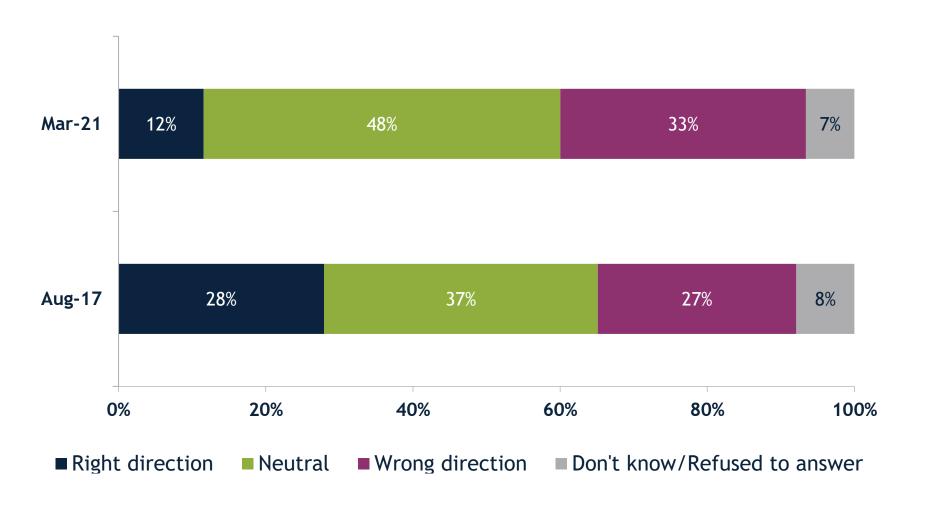
^{*}Municipalities in North Macedonia are run by directly-elected mayors. There are 80 municipalities in North Macedonia; the city of Skopje is a separate local government unit.

How many of your municipal councilors can you name?* (Respondents from Ohrid: n=247; margin of error ±6.2 points)



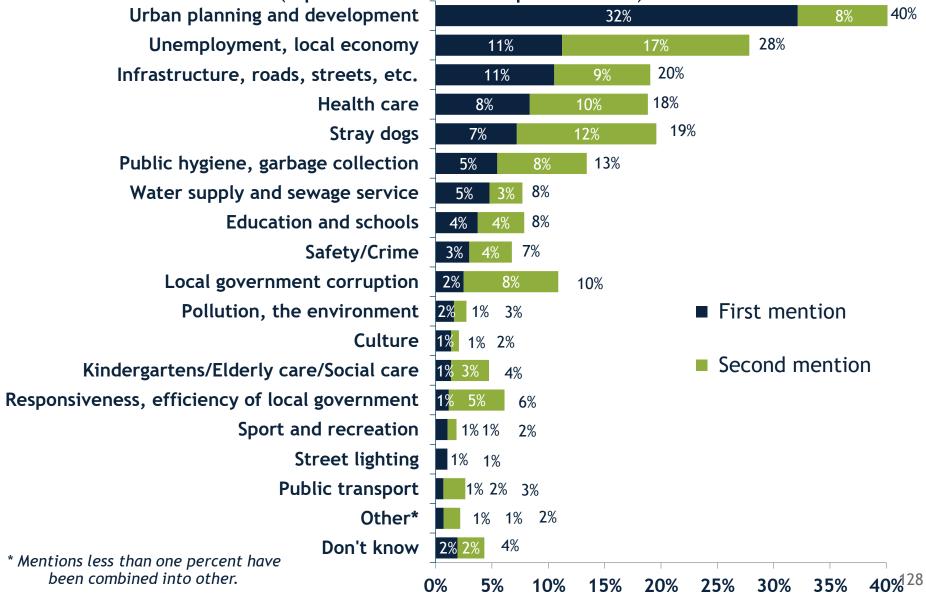
^{*}A municipal council in North Macedonia can be composed of between 9 to 33 councilors, elected from closed proportional party lists.

Overall, are things in your municipality moving in the right or wrong direction?

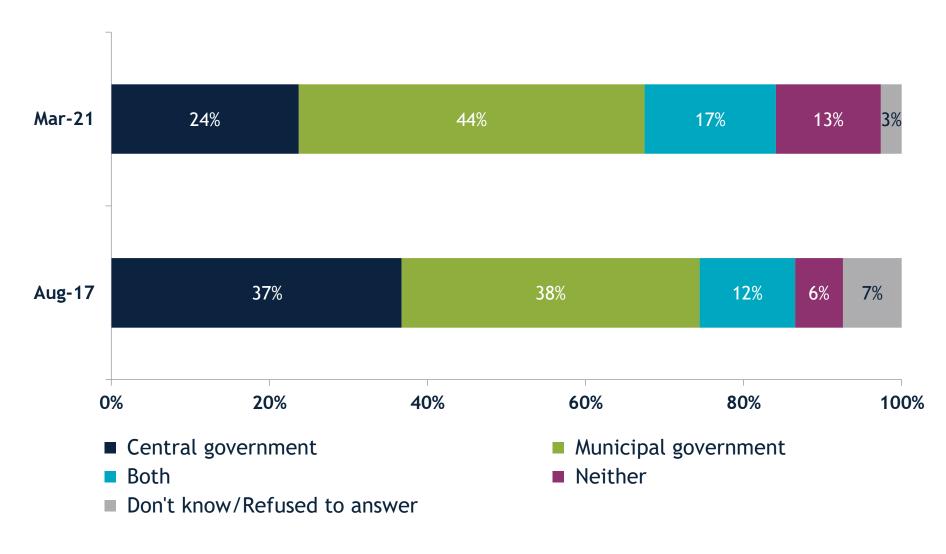


What are the most serious problems facing your municipality today?

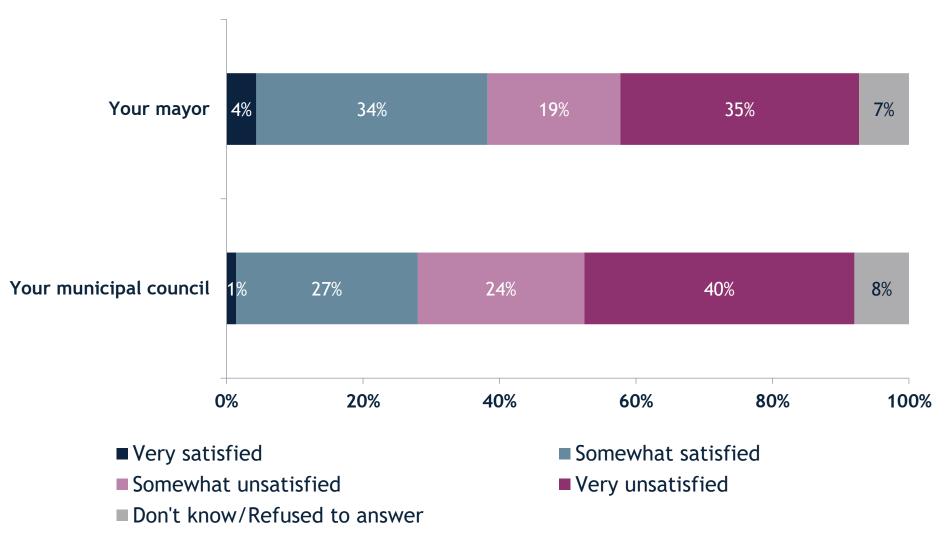
(Respondents from Ohrid: n=247; margin of error ±6.2 points) (Up to two answers permitted)



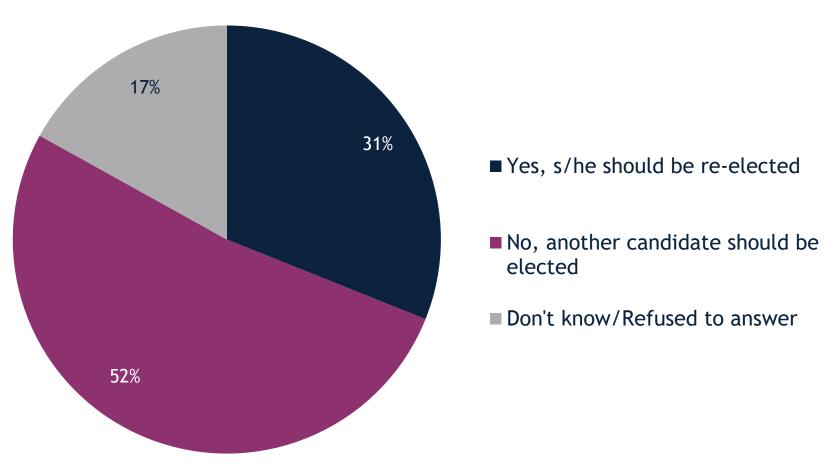
Which level of government is more responsive in addressing citizens' concerns?



How satisfied or unsatisfied are you with the past performance of each of the following:

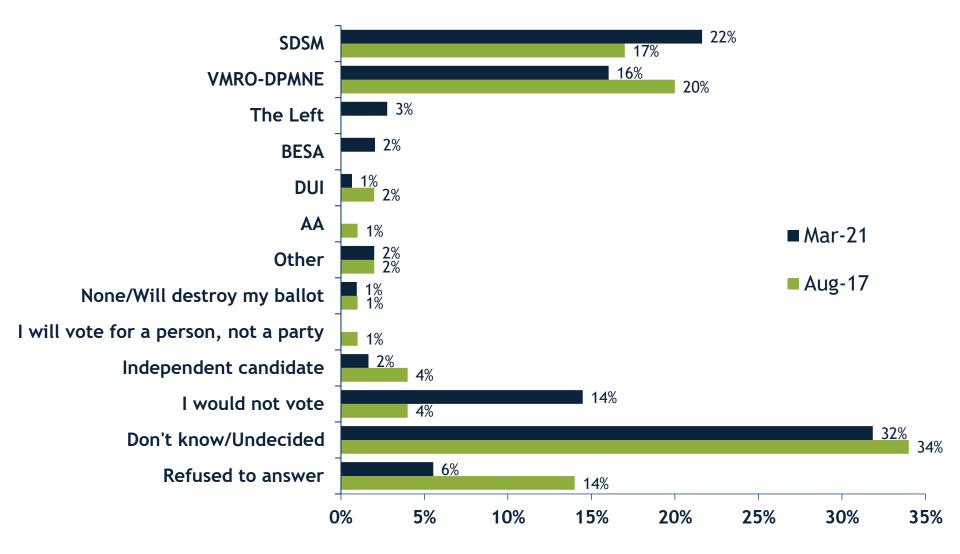


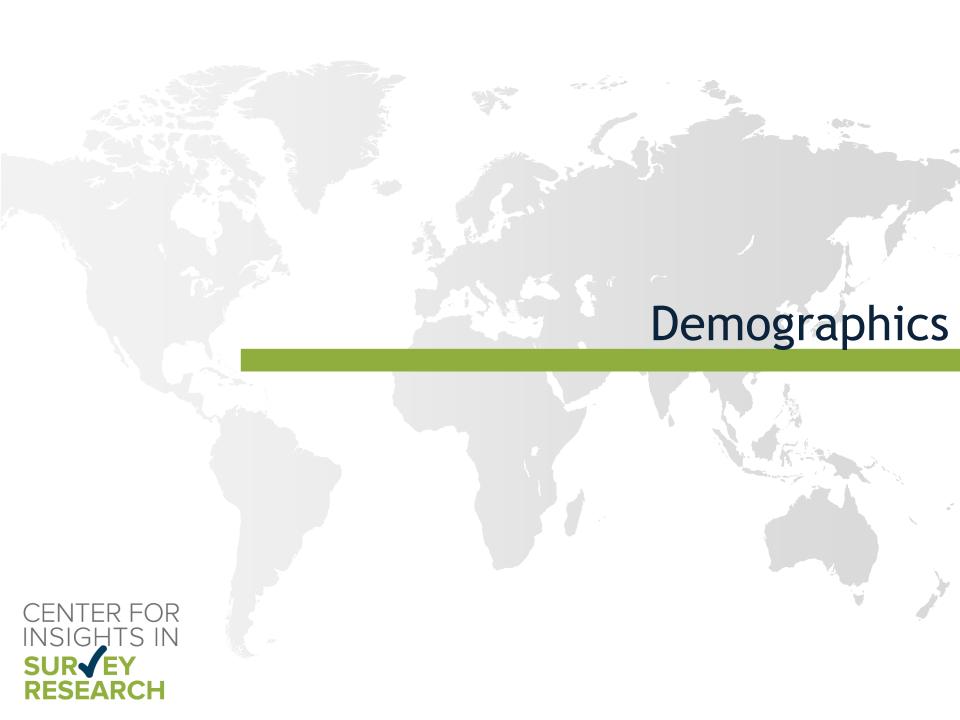
Does the mayor in your municipality do his/her job well enough to be re-elected or should a new mayor be elected?



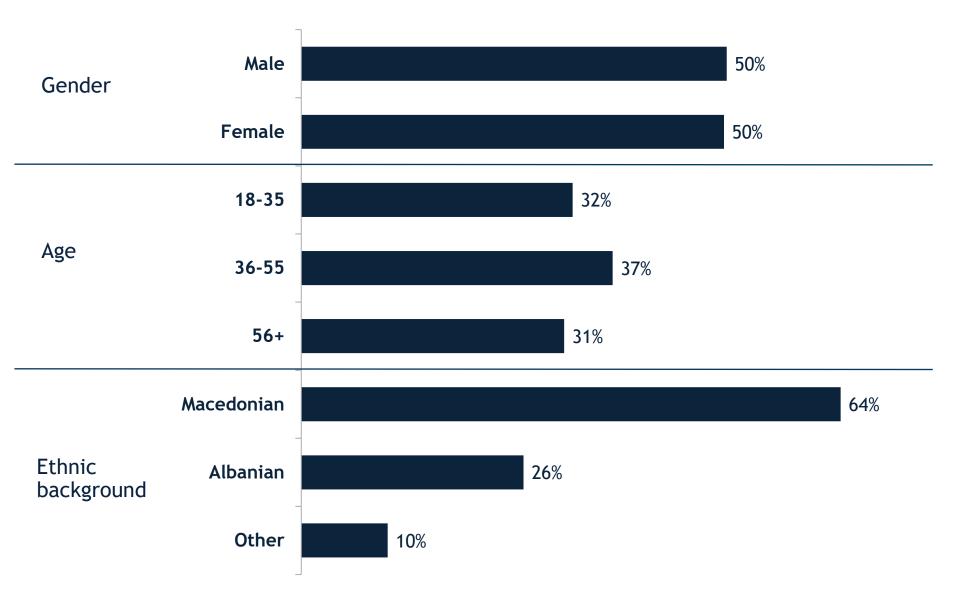
If local elections were held today, which party's candidate would you vote for to be mayor of your municipality?*

(Respondents from Ohrid: n=247; margin of error ±6.2 points)

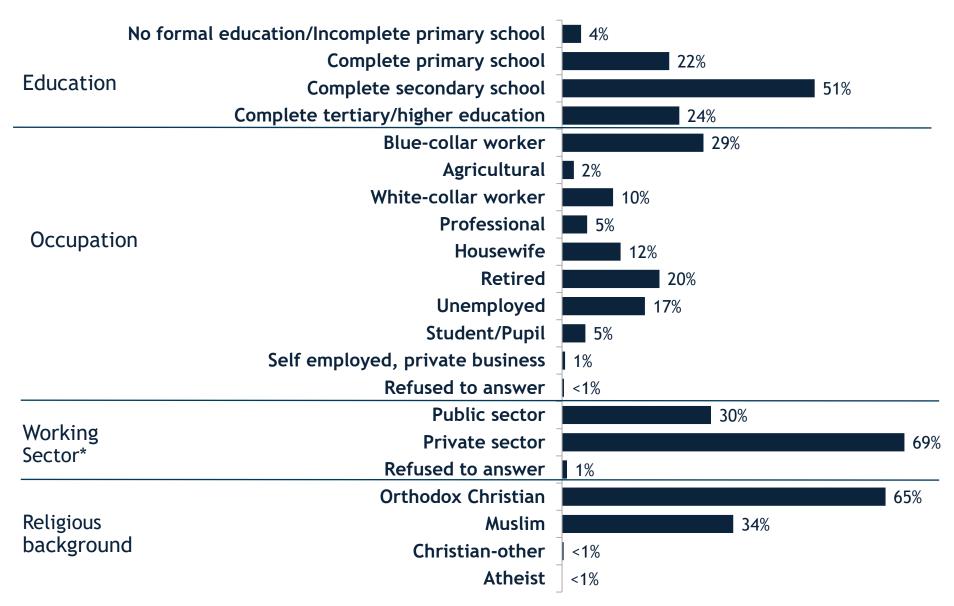




Demographics



Demographics



^{*}Among employed people, n=1394

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