PUBLIC OPINION IN MONTENEGRO ABOUT CORONAVIRUS

March 31, 2020

The public opinion survey in Montenegro was conducted by IPSOS with the support of UNICEF Montenegro

Wash your hands for at least 20 seconds with soap and water
METHODOLOGY

Implementation: Data collected in the period of 28-31 March 2020

Sample frame: Population of Montenegro 18+

Sample size: 812 respondents

Sample type: Single stage representative stratified sample

Respondents from households

Survey type: Telephone survey with a questionnaire lasting approximately for 15 minutes

Survey locations: 19 municipalities in Montenegro, urban, suburban and rural environments

Poststratification: By gender, age

Error:

±1.57% for occurrences with an incidence of 5%

±3.10% for occurrences with an incidence of 25%

±3.59% for occurrences with an incidence of 50% (marginal error)
MARCH 2020
N = 812 ∑ = 100%
RESULTS
Concerns that they and their loved ones could become infected with a coronavirus

Just over 4/5 of Montenegrin citizens are worried that they or their loved ones could be infected with coronavirus

Data expressed in %

- I am very much worried: 42%
- I am a little worried: 39%
- I AM WORRIED: 81%
- I AM NOT WORRIED: 19%
- I am not worried so much: 11%
- I am not worried at all: 8%
- Ne zna/Odbija da odgovori: 0%

How much do you personally worry that you and your loved ones could become infected with a coronavirus?

Base: Total target population, N= 812
Nine out of ten Montenegrin citizens heard that there was a special number to which they could report coronavirus symptoms, while just under half knew exactly what the number was.
Confidence in the readiness of institutions to fight successfully

There are more respondents who believe in the readiness of institutions to successfully deal with coronavirus than those who are skeptical about this issue.

Data expressed in %

<table>
<thead>
<tr>
<th>Institution</th>
<th>1 - I am not confident at all</th>
<th>2 - I AM NOT CONFIDENT (1+2)</th>
<th>4 - I am very confident</th>
<th>5 - I AM CONFIDENT (4+5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health system in Montenegro</td>
<td>19</td>
<td>11</td>
<td>8</td>
<td>19</td>
</tr>
<tr>
<td>Medical doctors and staff in your community</td>
<td>13</td>
<td>8</td>
<td>5</td>
<td>21</td>
</tr>
<tr>
<td>World Health Organization</td>
<td>15</td>
<td>9</td>
<td>6</td>
<td>24</td>
</tr>
<tr>
<td>Hospitals nearby your community</td>
<td>19</td>
<td>10</td>
<td>8</td>
<td>18</td>
</tr>
<tr>
<td>Government of Montenegro</td>
<td>22</td>
<td>15</td>
<td>7</td>
<td>16</td>
</tr>
<tr>
<td>Your friends and neighbours</td>
<td>11</td>
<td>4</td>
<td>7</td>
<td>20</td>
</tr>
</tbody>
</table>

Based on what you have seen, read, or heard, how confident you are that the following institutions are sufficiently prepared to successfully combat coronavirus?

Base: Total target population, N=812
Concerning coronavirus information, the respondents trust the institutions the most, while they are mostly skeptical about information received from the media. The Public Health Institute is the most trusted.

Data expressed in %

<table>
<thead>
<tr>
<th>Institution</th>
<th>1 - I have no confidence at all</th>
<th>2 - I have no confidence at all</th>
<th>4 - I have very much confidence</th>
<th>5 - I have very much confidence</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Representatives of the Public Health Institute</td>
<td>12</td>
<td>7</td>
<td>5</td>
<td>19</td>
<td>68</td>
</tr>
<tr>
<td>Representatives of the Ministry of Health and other national healthcare institutions</td>
<td>15</td>
<td>9</td>
<td>6</td>
<td>21</td>
<td>64</td>
</tr>
<tr>
<td>World Health Organization</td>
<td>13</td>
<td>7</td>
<td>7</td>
<td>24</td>
<td>63</td>
</tr>
<tr>
<td>Government of Montenegro</td>
<td>20</td>
<td>14</td>
<td>6</td>
<td>17</td>
<td>61</td>
</tr>
<tr>
<td>Friends, family, colleagues</td>
<td>14</td>
<td>7</td>
<td>7</td>
<td>20</td>
<td>58</td>
</tr>
<tr>
<td>UNICEF (United Nations Children’s Fund)</td>
<td>9</td>
<td>5</td>
<td>4</td>
<td>22</td>
<td>57</td>
</tr>
<tr>
<td>Media</td>
<td>22</td>
<td>9</td>
<td>13</td>
<td>19</td>
<td>44</td>
</tr>
</tbody>
</table>

How much confidence do you have in the accuracy of the coronavirus information you receive from the following?

*Base: Total target population, N=812*
Agreeing with the statement – CORONAVIRUS WILL AFFECT MY AND MY FAMILY’S FINANCIAL SITUATION

Just over three quarters of Montenegrin citizens believe that coronavirus will affect their financial situation.

Data expressed in %

5 - I absolutely agree 64
4 13
I AGREE 77
3 14
I DO NOT AGREE 7
2 3
1 - I totally disagree 4

Does not know/refuses to... 3

How much do you agree or disagree with the following statements? Please rate the agreement on a scale of 1 to 5, where 1 means you totally disagree and 5 means you completely agree

Base: Total target population, N=812
Almost two-thirds of the respondents believe that by buying domestic products we are strengthening the national economy.

Data expressed in %

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 - I absolutely agree</td>
<td>48%</td>
</tr>
<tr>
<td>4</td>
<td>15%</td>
</tr>
<tr>
<td>I AGREE</td>
<td>63%</td>
</tr>
<tr>
<td>3</td>
<td>15%</td>
</tr>
<tr>
<td>I DISAGREE</td>
<td>16%</td>
</tr>
<tr>
<td>2</td>
<td>7%</td>
</tr>
<tr>
<td>1 - I totally disagree</td>
<td>9%</td>
</tr>
<tr>
<td>Does not know/refuses to...</td>
<td>6%</td>
</tr>
</tbody>
</table>

How much do you agree or disagree with the following statements? Please rate the agreement on a scale of 1 to 5, where 1 means you totally disagree and 5 means you absolutely agree.

Base: Total target population, N=812
Agreeing with the statement – I AM CONFIDENT THAT AN ANTI-CORONAVIRUS VACCINE OR DRUG WILL BE SOON DEVELOPED BY PHARMACEUTICAL COMPANIES

Almost half of Montenegrin citizens believe that an anti-coronavirus drug will be developed soon.

Data expressed in %

- 5 - I absolutely agree: 35%
- 4 - I agree: 13%
- 3 - I disagree: 23%
- 2 - I totally disagree: 24%
- 1 - I totally disagree: 9%
- Does not know/refuses to: 6%

© How much do you agree or disagree with the following statements? Please rate the agreement on a scale of 1 to 5,
© where 1 means you totally disagree and 5 means you absolutely agree
© Base: Total target population, N=812
Agreeing with the statement – STAYING AT HOME OR SOCIAL ISOLATION IS THE ONLY WAY TO SLOW THE SPREAD OF CORONAVIRUS AND THEREBY PREVENT TOO MUCH PRESSURE ON THE HEALTH CARE SYSTEM AND MAKE IT POSSIBLE FOR ANYONE INFECTED TO RECEIVE ADEQUATE MEDICAL CARE

Almost all citizens, that is 9 out of 10, believe that social isolation is the only way to slow the spread of coronavirus.

Data expressed in %

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 - I absolutely agree</td>
<td>85%</td>
</tr>
<tr>
<td>4 I AGREE</td>
<td>92%</td>
</tr>
<tr>
<td>3 I DISAGREE</td>
<td>3%</td>
</tr>
<tr>
<td>2 I totally disagree</td>
<td>2%</td>
</tr>
<tr>
<td>Does not know/refuses to answer</td>
<td>1%</td>
</tr>
</tbody>
</table>

How much do you agree or disagree with the following statements? Please rate the agreement on a scale of 1 to 5, where 1 means you totally disagree and 5 means you absolutely agree. Base: Total target population, N=812
Agreeing with the statement – IF THE SELF-ISOLATION MEASURES TAKE A LONG TIME, I BELIEVE THAT IT WILL BE DIFFICULT FOR PEOPLE TO COPE WITH STRESS

On the other hand, the belief that it will be difficult for people to cope with stress if self-isolation takes a long time is shared by seven out of ten citizens.

Data expressed in %

- **5 - I absolutely agree**: 53%
- **I AGREE**: 70%
- **I DISAGREE**: 12%
- **1 - I totally disagree**: 8%
- **Does not know/refuses to answer**: 2%

How much do you agree or disagree with the following statements? Please rate the agreement on a scale of 1 to 5, where 1 means you totally disagree and 5 means you absolutely agree.

*Base: Total target population, N=812*
What do you think, how likely it is that the following coronavirus effects will be experienced in the long run?

**LONG-TERM ECONOMIC CONSEQUENCES OF CORONAVIRUS**

About three-quarters of citizens believe that Montenegro will suffer severe economic consequences, while seven in ten believe that many will lose their jobs because of this crisis. On the other hand, about half of them believe that companies will be either temporarily or permanently shut down.

Data expressed in %

<table>
<thead>
<tr>
<th>Event</th>
<th>NOT LIKELY (1+2)</th>
<th>LIKELY (4+5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The economy of Montenegro will suffer some serious consequences</td>
<td>954155874</td>
<td></td>
</tr>
<tr>
<td>Many people will lose their jobs</td>
<td>955195069</td>
<td></td>
</tr>
<tr>
<td>Prices of many products will go up</td>
<td>171164763</td>
<td></td>
</tr>
<tr>
<td>Companies in Montenegro will be permanently or temporarily shut down</td>
<td>1697182947</td>
<td></td>
</tr>
</tbody>
</table>

© What do you think, how likely it is that the following coronavirus effects will be experienced in the long run?
© Base: Total target population, N=812
The Government of Montenegro has set up a National Coordinating Body to Combat Infectious Diseases whose work has been intensified recently, in order to fight the coronavirus. This body has adopted a whole set of measures to protect public health from coronavirus.

Support to the Government of Montenegro in the establishment of the National Coordination Body to combat coronavirus and the adoption of a set of measures is at a very high level - 95% of respondents support it.

Data expressed in %

- I absolutely support it: 68%
- I support it to some extent: 27%
- I DO NOT support it: 4%
- I do NOT support it to some extent: 1%
- I do not support it at all: 3%
- Does not know/refuses to respond: 1%

The Government of Montenegro has set up a National Coordinating Body to Combat Infectious Diseases whose work has been intensified recently, in order to fight the coronavirus. This body has adopted a whole set of measures to protect public health from coronavirus.

To what extent do you support these measures by the Government or the National Coordination Body?

Base: Total target population, N=812
In general, most of the measures are highly supported by the public in Montenegro, especially the ban on all private and public gatherings, self-isolation, quarantine and the closure of catering facilities. Every fourth respondent does not support the publication of the names of persons in self-isolation.

Data expressed in %

<table>
<thead>
<tr>
<th>Measure</th>
<th>I DO NOT SUPPORT (1+2)</th>
<th>I SUPPORT (3+4)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ban on all public and private gatherings</td>
<td>91</td>
<td>97</td>
</tr>
<tr>
<td>Ordering citizens to self-isolate</td>
<td>88</td>
<td>97</td>
</tr>
<tr>
<td>Imposing quarantine orders</td>
<td>83</td>
<td>97</td>
</tr>
<tr>
<td>Closing catering facilities, such as restaurants, cafes, etc.</td>
<td>91</td>
<td>96</td>
</tr>
<tr>
<td>Closing promenades and parks for recreational activities (trim track)</td>
<td>68</td>
<td>88</td>
</tr>
<tr>
<td>Ban on presence and stay of more than two individuals outdoor at public places</td>
<td>70</td>
<td>88</td>
</tr>
<tr>
<td>Restricting the number of individuals who can be transported in the same vehicle at the same time</td>
<td>66</td>
<td>83</td>
</tr>
<tr>
<td>Ban on intercity public passenger transport</td>
<td>58</td>
<td>82</td>
</tr>
<tr>
<td>Publishing the names of individuals in self-isolation</td>
<td>58</td>
<td>73</td>
</tr>
</tbody>
</table>

Concerning the emergency measures adopted by the Government of Montenegro so far, to what extent do you support each one of them individually?

Base: Total target population, N=812
PERSONAL ADHERENCE TO THE PREVENTIVE MEASURES IMPOSED BY THE GOVERNMENT OF MONTENEGRO

Nine out of ten citizens say they adhere to the measures imposed by the Government of Montenegro so far.

Data expressed in %

- Yes, absolutely: 75%
- Yes, to a large extent: 17%
- Partially: 6%
- I ADHERE: 92%
- I do not adhere at all: 1%
- I mostly do not adhere: 1%
- Does not know/refuses to...: 0%

Do you personally comply with Government measures that recommend staying home, avoiding public gatherings and avoiding contact with other people?

Base: Total target population, N=812
ADHERENCE TO THE PREVENTIVE MEASURES IMPOSED BY THE GOVERNMENT OF MONTENEGRO BY INDIVIDUALS IN THE IMMEDIATE SURROUNDINGS

Concerning individuals in the immediate surroundings, three quarters of respondents believe that they adhere to the measures imposed.

Data expressed in %

- **Yes, absolutely**: 47%
- **Yes, to a large extent**: 28%
- **They adhere**: 75%
- **Partially**: 20%
- **They do not adhere**: 2%
- **They mostly do not adhere**: 1%
- **They do not adhere at all**: 1%
- **Does not know/refuses to answer**: 3%

Base: Total target population, N=812
In your opinion, can you tell me why they are partially adhering or not adhering to these measures?

Base: Those saying that people in their immediate surroundings are partially adhering or not adhering to emergency measures, N=812

The most common assessment of why citizens feel that individuals in their surroundings fail to adhere to emergency measures is related to the underestimation of the danger of the virus, as well as the necessity to go to work.

REASONS WHY INDIVIDUALS IN THE IMMEDIATE SURROUNDINGS FAIL TO ADHERE TO EMERGENCY MEASURES

Data expressed in %

- They do not believe that coronavirus is so dangerous: 34%
- They still have to go to work: 20%
- They are not afraid even of becoming infected: 15%
- They do not believe they will infect anyone: 11%
- They cannot stay at home 24/7: 9%
- No special reason: 6%
- They have to go out to get some fresh air/go to nature: 6%
- They must look after the elderly family members who live elsewhere: 6%
- They miss socializing so they still go for home visits: 3%
- Other: 10%
- I do not know: 12%
A quarter of Montenegrin citizens believe that fines would increase adherence to measures. However, more than one-third of them cannot say what could encourage citizens to adhere to these measures to a greater extent.

Data expressed in %

- Fine: 25%
- Imprisonment: 13%
- More infected and dead: 9%
- Curfew: 5%
- Stricter punishments: 4%
- Fear of worsening situation: 2%
- Stricter control: 2%
- State of emergency: 2%
- Stronger and more transparent media campaign: 2%
- Other: 7%
- Nothing: 1%
- Does not know/refuses to answer: 37%
Have you started using the following services more frequently since the onset of the Corona Crisis than before the epidemic:

**Base: Total target population, N=812**

Since the onset of the coronavirus crisis, one fifth of citizens have been using e-banking more frequently, and every tenth citizen has been making more frequent online purchases and exchanges with the bank electronically.

**Are online services used more since the beginning of the Corona Crisis?**

Data expressed in %

<table>
<thead>
<tr>
<th>Service</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Online shopping</strong></td>
<td>12</td>
<td>87</td>
</tr>
<tr>
<td><strong>E-banking</strong> (exchanges with the bank without going to the branch bank/bank teller)</td>
<td>21</td>
<td>78</td>
</tr>
</tbody>
</table>
Nearly two-thirds of citizens say they would be willing to use an online volunteer service and engage to help the elderly and sick. Furthermore, more than half of the citizens expressed their willingness to use other Internet services. On the other hand, they are the least willing to use an online gym with an instructor or trainer.

Data expressed in %

- **Online service for volunteer engagement to help the elderly and the sick**: Yes 65, No 32, Does not know/refuses to answer 2
- **Remote medical counseling for children and adults**: Yes 62, No 35, Does not know/refuses to answer 4
- **Platforms for the delivery of food and other supplies**: Yes 56, No 43, Does not know/refuses to answer 2
- **Online language courses**: Yes 52, No 48, Does not know/refuses to answer 1
- **Remote psychological support**: Yes 51, No 47, Does not know/refuses to answer 2
- **Online gym with an instructor or trainer**: Yes 27, No 71, Does not know/refuses to answer 3

Given the current situation and the amount of time you spend at home, would you be ready to use the following online services?

**Base:** Total target population, N=812
3/4 of the citizens have heard of economic measures taken by the Government of Montenegro to support citizens and businesses during the coronavirus pandemic.

Have you heard of the economic measures adopted by the Government of Montenegro to facilitate the lives of citizens and support the economy at the time of the coronavirus pandemic?

Data expressed in %

Base: Total target population, N=812
Among the economic measures adopted, delaying loan repayment and one-off assistance to pensioners are the measures that are most important to Montenegrin citizens. On the other hand, close to a third of citizens do not single out any economic measure as the most significant.

**Which of the adopted economic measures means the most to YOU PERSONALLY?**

*Base: Those who have heard about the economic measures of the Government of Montenegro adopted to ease the life of citizens and support the economy during the coronavirus pandemic*
Financial assistance, subsidies and non-payment of utility bills are the three new economic measures most commonly proposed by citizens.

Data expressed in %

<table>
<thead>
<tr>
<th>Economic Measure</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial assistance</td>
<td>12%</td>
</tr>
<tr>
<td>Subsidies</td>
<td>11%</td>
</tr>
<tr>
<td>Non-payment of electricity, water, sanitation bills</td>
<td>11%</td>
</tr>
<tr>
<td>while the measures are in force</td>
<td></td>
</tr>
<tr>
<td>Assistance to the unemployed</td>
<td>3%</td>
</tr>
<tr>
<td>Prohibition of price increases</td>
<td>2%</td>
</tr>
<tr>
<td>Stopping repayments of bank loans while measures</td>
<td>2%</td>
</tr>
<tr>
<td>are in effect</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
<tr>
<td>Nothing</td>
<td>3%</td>
</tr>
<tr>
<td>Does not know/refuses to answer</td>
<td>48%</td>
</tr>
</tbody>
</table>
More than two-thirds of citizens have at least once watched the 'Learn at Home' TV channel in the previous week. Most of the citizens who have watched this TV channel are satisfied with the quality of the content.

How satisfied are you with the quality of the content on this channel? Please rate it on a scale of 1 to 5, where 1 means you are not satisfied at all, and 5 that you are absolutely satisfied.

Base: Those who watched at least once in the past 7 days the TV channel for following classes called LEARN AT HOME, N=554

Data expressed in %
ABOUT IPSOS

Ipsos ranks third in the global research industry. With a strong presence in 87 countries, Ipsos employs more than 16,000 people and has the ability to conduct research programs in more than 100 countries. Founded in France in 1975, Ipsos is controlled and managed by research professionals. They have built a solid Group around a multi-specialist positioning – Media and advertising research; Marketing research; Client and employee relationship management; Opinion & social research; Mobile, Online, Offline data collection and delivery.

Ipsos is listed on Eurolist - NYSE-Euronext. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

GAMECHANGERS

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

We believe that our work is important. Security, simplicity, speed and substance applies to everything we do. Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

"GAME CHANGERS" - our tagline - summarises our ambition.