



Reach the people you need to know.



# **SOUTH AFRICAN CITIZENS SURVEY**

**ABRIDGED CORE REPORT – QUARTER 4 2018**



# HOW WAS THE DATA COLLECTED - SCIENTIFICALLY

## HOW MANY PEOPLE PARTICIPATE IN THE SURVEY EACH QUARTER



### THE SURVEY

- Citizen Surveys has been carrying out the South African Citizens Survey (SACS) since July 2015. Since its inception just over 55,000 South Africans have been interviewed.
- Every month we conduct face-to-face interviews on computer tablets with a nationally-representative sample of 3,900 South African adults (i.e. 18 years of age and older) per quarter.
- Interviews are conducted in the main official languages - English, Zulu, Xhosa, Afrikaans, Sotho, Sepedi, and Setswana.

### THE SAMPLE AND NUMBER OF PARTICIPANTS

- The sample is based on Census EA sample frame – which means that every person in the population has a known chance of being included in the survey.
- Sampling sites are chosen at random across all provinces and metro, urban and rural areas, with probability proportionate to population size, based on the latest Stats SA Census estimates of the population aged 18+.
- Results are reported quarterly on a total of 3,900 respondents, which produces results with a margin of error margin of error of  $\pm 1.5$  percentage points at the 95% confidence level.
- Weights are applied to ensure the sample represents the most recent national population with respect to province, race, gender, age, and area.



**3,900** INTERVIEWS PER QUARTER

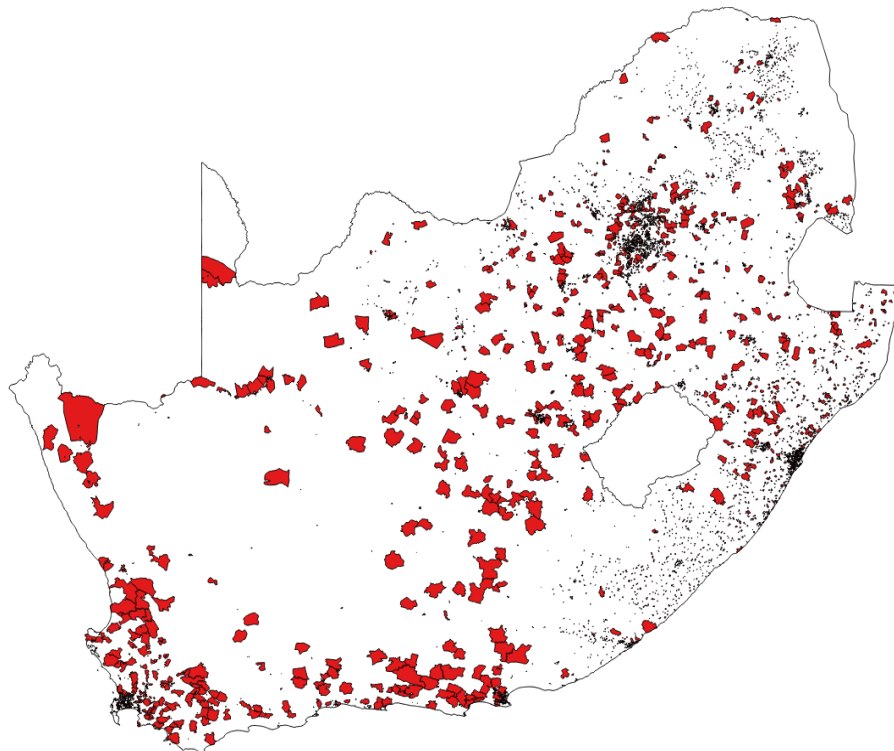


**1,300** INTERVIEWS PER MONTH

# WHERE WERE THE INTERVIEWS CONDUCTED ?

ALL PROVINCES ARE COVERED

- The South African Citizens Survey covers the whole of South Africa from the cities to the remotest villages of South Africa – giving a voice to all South Africans.
- Alongside is a map of all the Enumerator Areas where, during the course of the past 3 years, just over 55,000 interviews were conducted.
- This coverage, combined with our scientific sampling and rigorous quality controls, means that the data used for this report represents all South Africans, and can be relied upon for crucial and strategic decisions.



# **2019 GENERAL ELECTIONS**

## RESEARCH RESULTS AND ANALYSIS



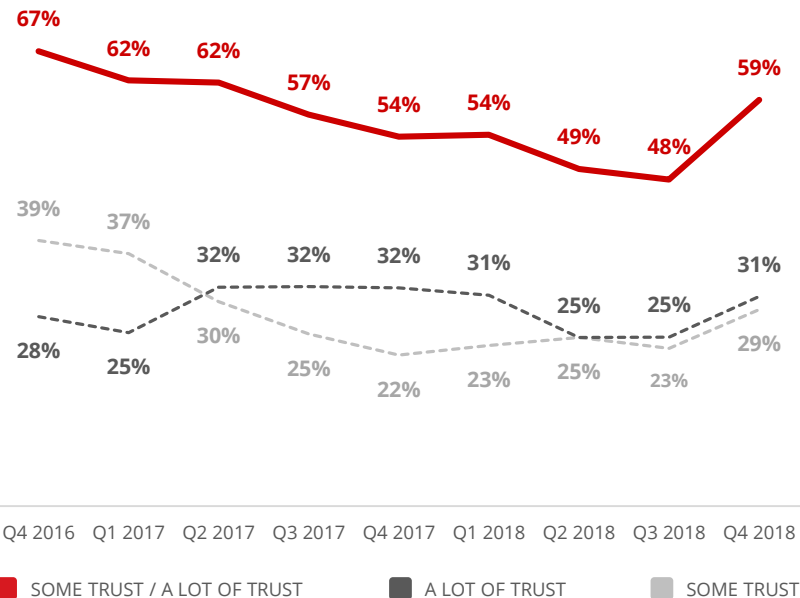
# PUBLIC TRUST IN THE IEC



- In Quarter 4 of 2018, trust in the IEC grew noticeably to 59% from its all-time low of 48% in the previous quarter.
- As the IEC engages with the public in the leadup to the general election, more adult citizens of South Africa have begun to trust the IEC.
- The degree of trust in the Electoral Commission has also changed over time: the proportion with “Some trust” has steadily declined over time, and has been overtaken by those with “A lot of trust”.
  - Those South Africans who said that they have a lot of trust in the IEC has dropped since the beginning of 2018, however, from 31% to 25% in Q2 of 2018 and Q3 of 2018.
  - Those with some trust in the IEC declined from 37% in Q1 of 2017 to 22% in Q4 of 2017, and have largely remained at this level until this quarter.
  - In this quarter, both degrees of trust saw growth.

## TRUST IN: ELECTORAL COMMISSION (IEC)

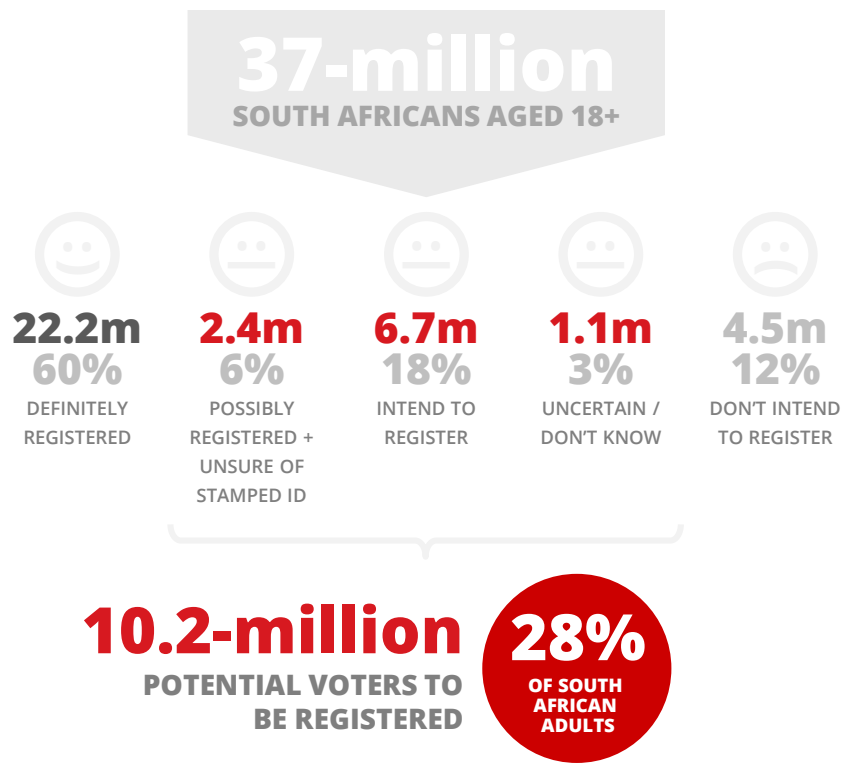
HOW MUCH TRUST, IF ANY, DO YOU HAVE IN... ?



# SPECIFIC QUESTION POSED AROUND THE ELECTIONS

## VOTER REGISTRATION STATUS AMONGST SOUTH AFRICANS AGED 18+ ( Q4 2018 )

- Being registered to vote is a precondition for being able to vote.
- We asked citizens whether they are registered, and if not whether they intend to register.
- Of the adult population of 37-million South Africans (18+ years), roughly 60% or **22.2-million potential voters said they were definitely registered to vote.**
  - Some 6% (2.4-million) potential voters believed that they are registered, but were uncertain.
  - Another 18% (6.7-million) potential voters said they intended to register.
  - About 3% (1.1-million) adults however said they uncertain about whether they were going to register.
  - However, a substantial number of eligible voters 12%, or **4.5-million said they don't intend to register to vote.**



# DEMOGRAPHIC PROFILE: Q4 2018

SOUTH AFRICAN ADULTS ( 18+ ) WHO DON'T INTEND TO REGISTER



## POPULATION GROUP

**BLACK**  
3,590,000 (79%)

**COLOURED**  
438,000 (10%)

**INDIAN**  
110,000 (2%)

**WHITE**  
387,000 (9%)

## AGE GROUP

**18-24** 1,543,000 (34%) ★

**25-34** 1,430,000 (32%) ★

**35-44** 746,000 (16%)

**45-54** 312,000 (7%)

**55+** 494,000 (11%)

## LIVING STANDARDS MEASURE

**10** 229,000 (5%)

**09** 376,000 (8%)

**08** 454,000 (10%)

**07** 622,000 (14%) ★

**06** 1,600,000 (35%) ★

**05** 548,000 (12%) ★

**04** 471,000 (10%) ★

**03** 109,000 (2%)

**02** 117,000 (3%)

**01**

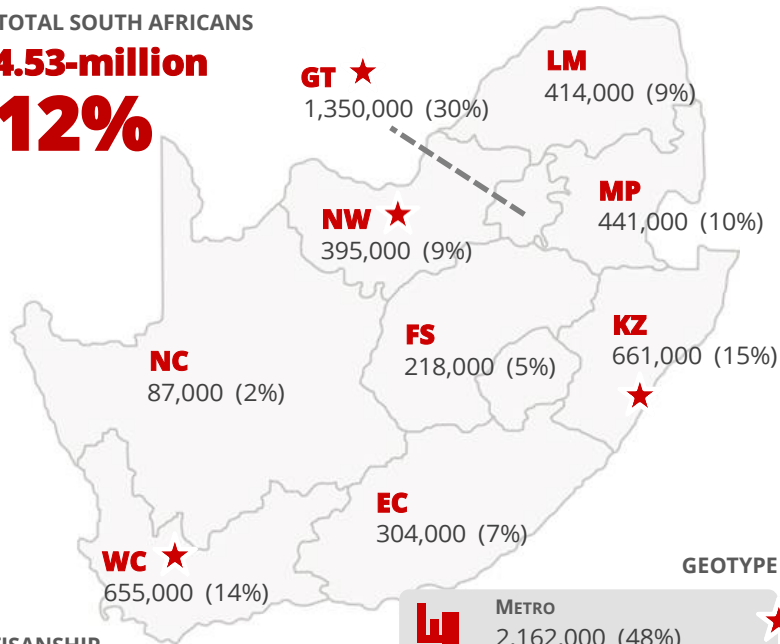
## GENDER

**FEMALE**  
2,039,000 (45%)

**MALE**  
2,486,000 (55%) ★

## TOTAL SOUTH AFRICANS

**4.53-million**  
**12%**



## PARTISANSHIP

**ANC** 435,000 (100%)

**DA** 173,000 (100%)

**EFF** 311,000 (100%) ★

## GEOTYPE

**METRO**  
2,162,000 (48%) ★

**URBAN**  
670,000 (15%)

**RURAL**  
1,693,000 (37%)



# THE MAIN REASON YOUNG SOUTH AFRICANS NOT REGISTERING TO VOTE

## ANALYSIS



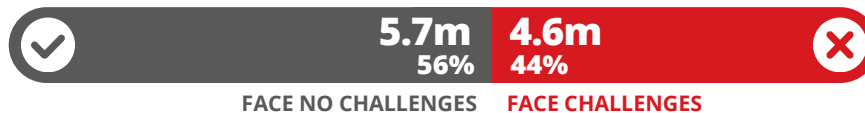
1. South Africans 18 to 34 years old constitute about two-third of those who either said they were **uncertain about whether they were going to register** or **did not intend to register** to vote.
  - About half of them are “born frees” (i.e. they were born after the Apartheid era).
  - Those in the 25-34 year age category spent their formative period within the new democracy.
2. One of the main reasons is political alienation.
  - In the overall adult population, about 50% “feel close to” a political party. This is a measure of political partisanship.
  - However, amongst those who do not intend to register to vote, 80% do not feel close to any political party.
3. As we know, the unemployment rate in the country continues to escalate, and it is highest amongst the Youth. In the absence of employment, it is difficult to advance in life.
  - In 2018, the South African economy went into recession. The youth are thus facing downward social mobility with few prospects and opportunities.
4. One of the questions the youth who don't intend to register are asking themselves is “does voting make a difference?”
5. Some people may say that the youth are apathetic. While they may not decide to engage in voting, the youth have other mechanisms of making their voices heard, as seen in the #FeesMustFall and #DataMustFall campaigns (which were largely driven by the youth).

# SPECIFIC QUESTION POSED AROUND THE ELECTIONS

## VOTER REGISTRATION CHALLENGES - COMMON ANSWER FROM THE PARTICIPANTS

- We asked of the 28% (10.2-million) potential voters to be registered about the challenges they may face in voter registration:

### POTENTIAL VOTERS TO BE REGISTERED

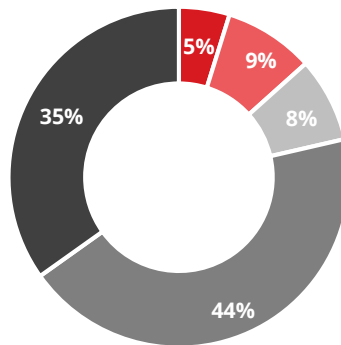


- How likely are you to take time off to register to vote?*
- How likely are you to pay for transport or walk in order to register?*
- How likely are you to give your residential address to the IEC?*

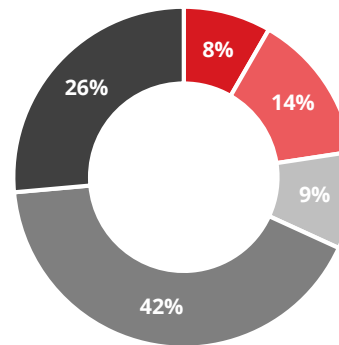
- About 79% (7.8-million) will be able to take time off to register.
- About 68% (6.7-million) will pay for transport or walk to register.
- About 75% (7.4-million) would provide the IEC with their proof of address.

### REGISTRATION CHALLENGES

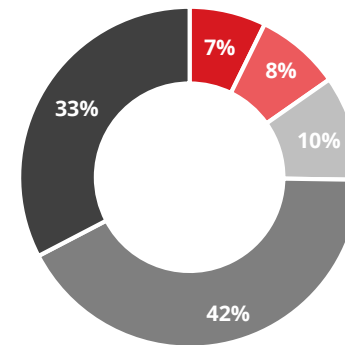
HOW LIKELY ARE YOU TO TAKE TIME OFF TO REGISTER ?



HOW LIKELY ARE YOU TO PAY FOR TRANSPORT OR WALK IN ORDER TO REGISTER?



HOW LIKELY ARE YOU TO GIVE YOUR RESIDENTIAL ADDRESS TO THE IEC ?



VERY LIKELY
LIKELY
NEITHER LIKELY NOR UNLIKELY
UNLIKELY
VERY UNLIKELY

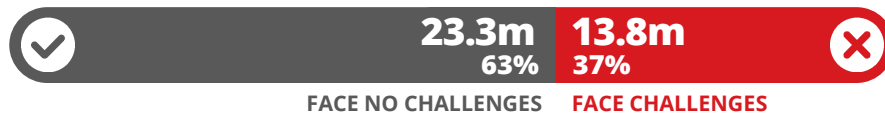
# SPECIFIC QUESTION POSED AROUND THE ELECTIONS

## VOTING DAY CHALLENGES - COMMON ANSWER FROM THE PARTICIPANTS



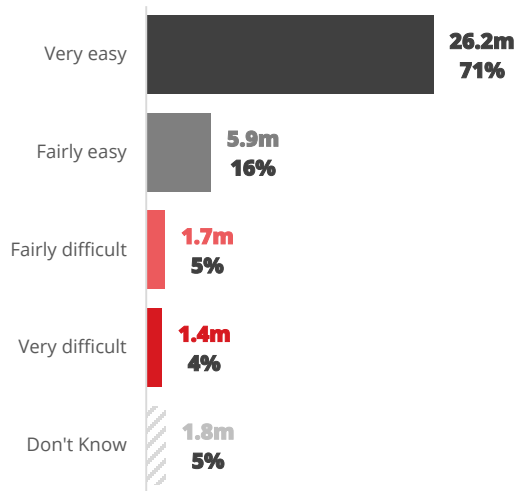
- Whether they are registered or not, voters may also face voting day challenges.
- We ask two questions in order to establish whether potential voters believe that they may encounter voting day challenges:
  - *How easy is it for you to get to a local polling station?* and
  - *How likely is it that you would wait to place your vote, even if there is a long queue at the voting station?*
- The respondent would be deemed able to overcome voting day challenges if they answered in the affirmative to both questions.
- Using these criteria, **63% or 23.3-million citizens would be able to overcome voting day challenges**, while 37% may face challenges at the polls.

### SOUTH AFRICAN ADULTS ( 18+ )



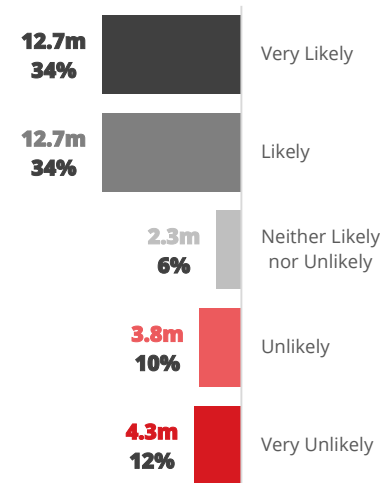
#### EASE OF VOTING

HOW EASY IS IT FOR YOU TO GET TO A LOCAL POLLING STATION?



#### VOTER PATIENCE

HOW LIKELY ARE YOU TO WAIT TO PLACE YOUR VOTE, EVEN IF THERE IS A LONG QUEUE?



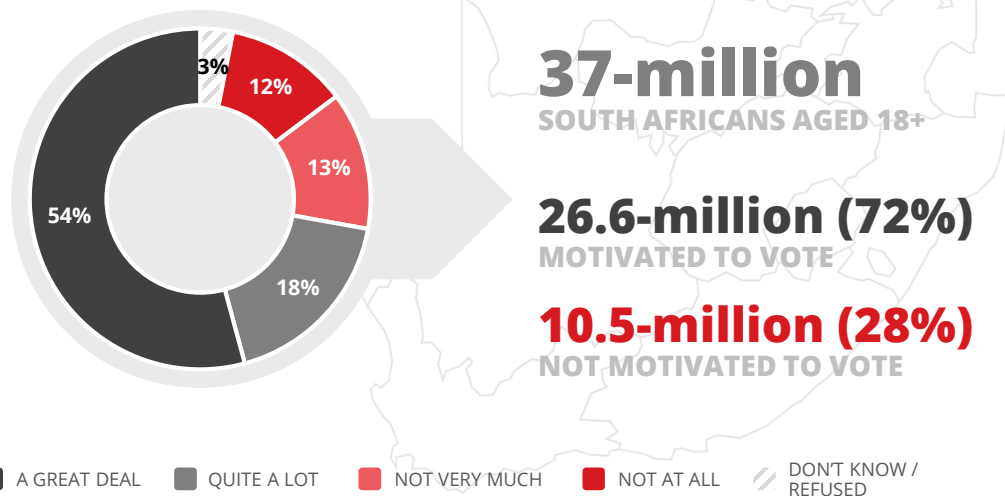
# SPECIFIC QUESTION POSED AROUND THE ELECTIONS

## VOTER MOTIVATION - COMMON ANSWER FROM THE PARTICIPANTS

- In order to gauge the motivation to vote amongst South African adults, we asked: *"Thinking about the 2019 national elections, how much do you want to vote in next year's elections?"*
- Overall, **72% or 26.6-million South African adults are motivated to vote**, while the remaining 28% or 10.5-million citizens have little or no motivation to vote.
- We also observe that 10.5-million (28%) are not motivated to vote.
- In the absence of motivation, the chances of the person going to vote, irrespective of whether they have the means or access, are low.

### VOTER MOTIVATION

THINKING ABOUT THE 2019 NATIONAL ELECTIONS, HOW MUCH DO YOU WANT TO VOTE IN NEXT YEAR'S ELECTIONS?



# VOTER READINESS SEGMENTATION MODEL - ANALYSIS

## OVERVIEW



### VOTER READINESS MODEL

- We set about modelling the impact of voter registration, voting-day challenges and the motivation to vote in order to establish the impact these factors may have on voter turnout.
- In total thirteen scenarios were considered, various combinations of voter motivation, registration challenges and voting day challenges. These thirteen scenarios were distilled into four prototype voter readiness segments.

### VOTER READINESS MODEL

#### READY VOTERS

Those citizens who are **registered** to vote, **motivated** to vote and are **capable of overcoming** all voting day challenges.

#### LIKELY VOTERS

Those citizens who are **motivated** to vote, are **uncertain** whether they are **registered to vote**, however they are **capable of overcoming registration challenges** as well as capable of overcoming all **voting-day challenges**.

#### CHALLENGED VOTERS

Those while they are **motivated** to vote are likely to **encounter registration and / or voting day challenges**.

#### UNMOTIVATED VOTERS

They are **not yet motivated** to vote regardless of whether they will face registration and / or voting day challenges.

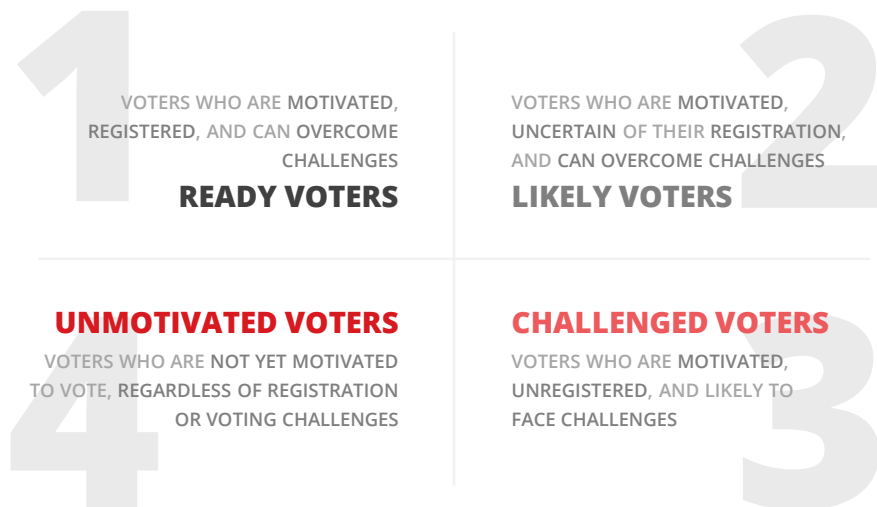
# VOTER READINESS SEGMENTATION MODEL - ANALYSIS

## FOUR VOTER SEGMENTS

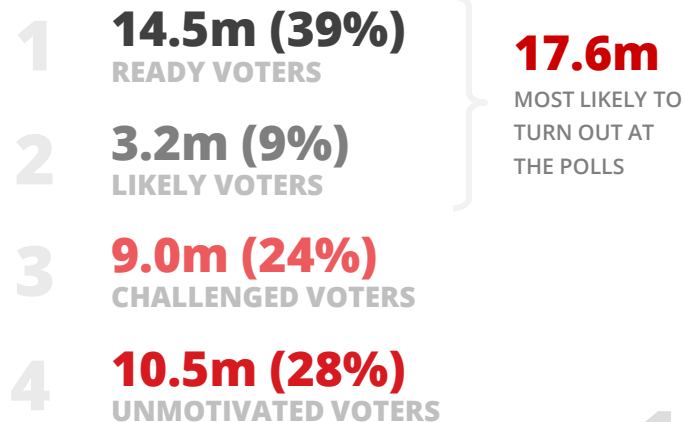


- In order to estimate voter turnout, we take into account all preceding preconditions: motivation to vote, registration status, registration challenges, and voting-day challenges. Collectively this allows us to divide South African adults into four segments:

- When we apply these segments to the overall adult population, we observe four segments emerging. Collectively this enables the construction of voter turnout scenarios.



**37-million**  
SOUTH AFRICANS AGED 18+



# HOW CAN POLITICAL PARTIES CONVINCe PEOPLE TO VOTE FOR THEM?

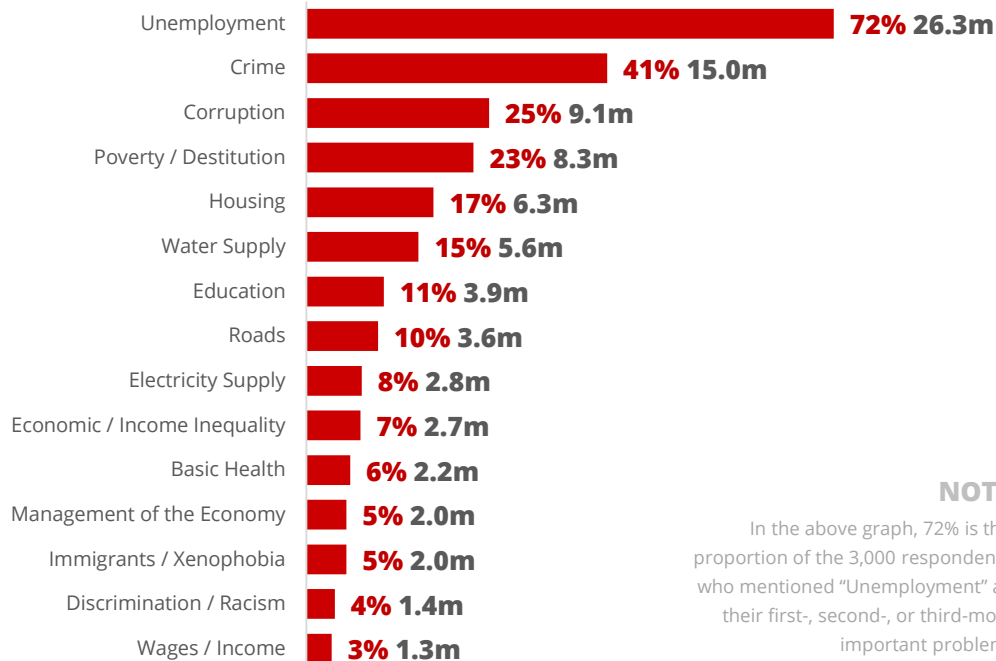
MANIFESTOS MUST SPEAK TO THE MOST IMPORTANT PROBLEMS FACING SOUTH AFRICANS



- The **number one** problem facing South Africa is **Unemployment** – as expressed by almost three-in-four South African adults (72%).
- This is **followed closely** by **Crime** - as indicated by four-in-ten (41%) South Africans and **Corruption**
  - While “Crime” grew from the previous quarter, “Corruption” grew even more. This is most likely owing to the continuing revelations of corruption, from State Capture to Steinhoff and now Bosasa.
- **Poverty and Destitution** was ranked at **fourth place**.

## MOST IMPORTANT PROBLEMS

IN YOUR OPINION, WHAT ARE THE THREE MOST IMPORTANT PROBLEMS FACING SOUTH AFRICA ?



### NOTE

In the above graph, 72% is the proportion of the 3,000 respondents who mentioned “Unemployment” as their first-, second-, or third-most important problem.

# THE MOST IMPORTANT PROBLEMS FACING SOUTH AFRICA

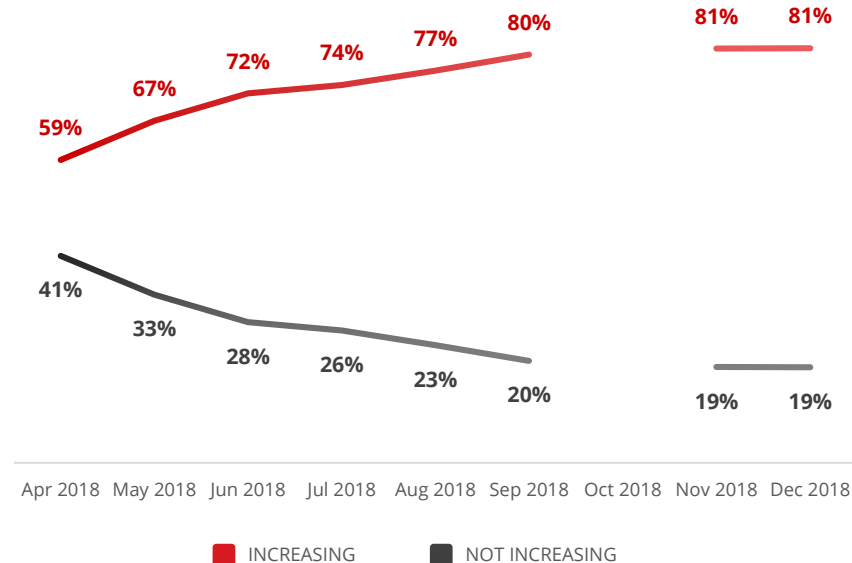
## PERCEPTIONS OF CORRUPTION



- President Ramaphosa has emphasised that rooting out government corruption would be a national priority. This resonates with South Africans, of whom 9.1-million (25%) said that corruption was one of the most important problems facing South Africa.
- Since April 2018, in the process of tackling corruption within government (for example, the Nugent and Zondo Commissions), South Africans have become increasingly aware of the extent of State Capture and general corruption and mismanagement, and their adverse impact on the country and its economy.
- In April, 59% of South Africans believed that corruption in South Africa is growing. In May, just over two-thirds (67%) believed this, and this measure has continued to grow. November and December 2018 have seen the highest levels, at 81%.
- Corruption is unlikely to be getting worse; instead, corruption is being brought out into the open. In order to restore trust, however, corrupt officials who broke the law must face serious consequences.

## PERCEPTIONS OF CORRUPTION

IN YOUR OPINION, IS THE LEVEL OF CORRUPTION IN SOUTH AFRICA INCREASING, STAYING THE SAME, OR DECREASING?





**THANK YOU.**

