Citizen
Surveys

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SOUTH AFRICAN CITIZENS SURVEY

CORE REPORT – QUARTER ONE (January-March) 2019

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SECTION ONE

BACKGROUND AND SAMPLE

BACKGROUND TO THE STUDY

THE SURVEY

- Citizen Surveys has been carrying out the South African Citizens Survey (SACS) since July 2015. In total, just under 60,000 interviews.

- Face-to-face interviews are conducted on computer tablets with a nationally-representative sample of 1,300 South African adults (i.e. 18 years of age and older) per month.

- Interviews are conducted in English, Zulu, Xhosa, Afrikaans, Sotho, Sepedi, and Setswana.

- The SACS covers a range of current issues. Citizen Surveys invites researchers from universities and non-profit organizations to access the data free of charge – subject to usage conditions – by visiting our website (https://citizensurveys.net/sa-citizens-survey and clicking on **Request Our Data**), or contacting us on +27 (0)21 447 4484.

THE SAMPLE

- Designed as a complex, multi-stage stratified probability sample, based on the Census EA sample frame.

- 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 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 ±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.

1,300 INTERVIEWS PER MONTH

3,900 INTERVIEWS PER QUARTER

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BACKGROUND TO THE STUDY
WHERE WERE THE INTERVIEWS CONDUCTED ?

- Over the course of the South African Citizens Survey, just over 11,000 Enumerator Areas were covered in order to ensure that all South Africans – from the cities, towns, villages and remotest regions of South Africa – had the opportunity to have their voices heard.

- Alongside is a map of all the Enumerator Areas where, during the course of the past 3 years, just over 50,000 interviews were conducted.

- This coverage, combined with our scientific sampling and rigourous quality controls, means that the data used for this report represents all South Africans, and can be relief upon for crucial and strategic decisions.

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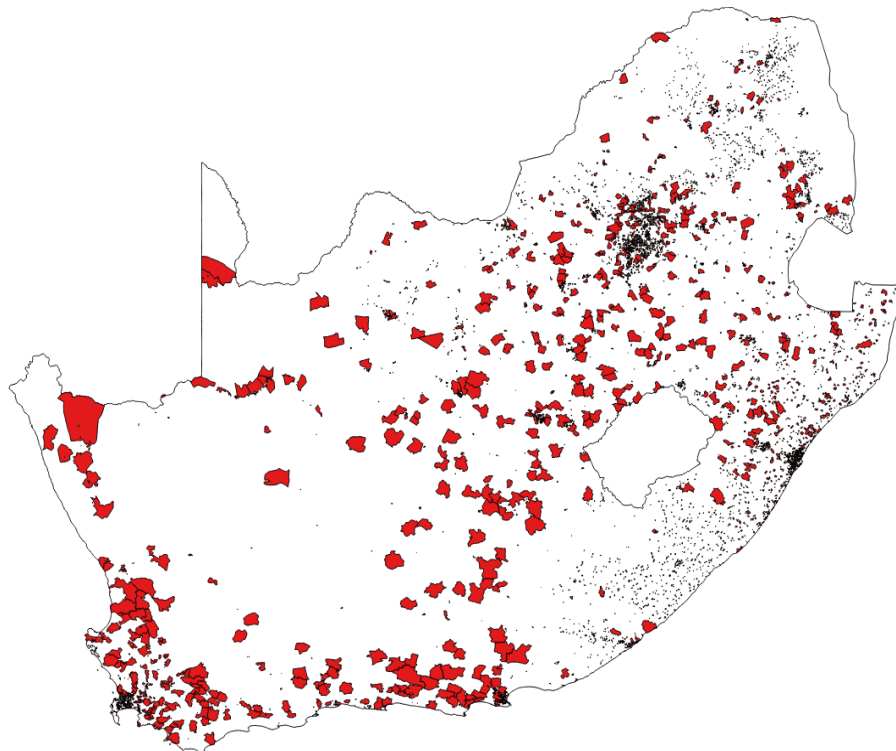
ABOUT CITIZEN SURVEYS

- Citizen Surveys, founded in 1996, operates both nationally and internationally and has a broad selection of clients including international corporates, public institutions, government departments, academic institutions, NGOs, and development agencies.

- We specialize in research that has a social impact, and in large-scale national household surveys, continuous tracking studies, customer satisfaction surveys and segmentation modelling.

- Our robust, scientific methods and quality management systems deliver superior quality information and insights that can be trusted.

- Most of our business stems from repeat business and client recommendations.

- Some of our clients include:

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SECTION TWO

KEY FINDINGS

- The first quarter of 2019 follows the downward trend in public opinion about the direction in which the country is headed. In March 2019 ((when Eskom implemented Stage 4 load-shedding) the number of South Africans who believed the country is headed in the right direction dropped to 22% .

- The current level of pessimism is similar to that recorded in the last six months of Zuma's rule, a period where the country was at its lowest point in the past 25 years.

- Perceptions of a weakening economy and a declining standard of living continued during the first quarter of 2019. Only one-quarter (24%) of South African adults reported an improvement in personal living conditions, while an even smaller group (21%) believed the economy had improved over the past 12 months.

- While many South Africans remain hopeful about the economy improving in the future, there has been a quarter-on-quarter decline over the course of 2018. When Cyril Ramaphosa became president, optimism about the future of the economy rose to 61%. A year later, however, it is down to 47%.

- Eskom's load-shedding has had a major impact on public opinion about the direction in which the country is headed and that corruption and state looting is increasing, all the way through to the potential electoral performance of the ANC.

  - Trust in Eskom dropped to 49% in February and declined further to 39% in March, with the onset of Stage 4 load-shedding. While levels of trust in other state institutions have been stable during this quarter, the overall trend remains one of declining trust.

  - Trust in the Electoral Commission grew the most (+12%) to 60%.

- The impact of load-shedding, a stagnant economy, a stubborn unemployment rate and deepening revelations of the extent of state looting continue to undermine the public's confidence in the political process.

- These dynamics, coupled with the decline in the credibility of the organs of state and pillars of South African society, threaten to overshadow the achievements of our democracy, and are more than just evidence of a worrying trend that does not bode well for the future of our country.

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KEY FINDINGS
POLITICAL PARTY AFFINITY AND SUPPORT

- Despite a decline in job performance ratings, from 68% (in April, May and June) to 61% in March 2019, President Ramaphosa remains the most popular political party leader polled over the past 12 months.

- Between January and February 2019, there was a drop of 6% in Ramaphosa's job approval rating. In March it returned to 61%, however. We can therefore infer that perceptions of Ramaphosa's job performance were unscathed by Eskom's load-shedding in March 2019.

- The biggest challenge for Ramaphosa is whether he will be able to maintain the public's confidence into the 2019 elections, as much more time may be needed to fix the deep-rooted problems that face him.

- The popularity of the opposition DA leader, Mmusi Maimane, has been on a gradual downward trajectory since mid 2017, and currently stands at 28%.

- In contrast, the EFF leader, Julius Malema's popularity continues to grow. At 27% in the first quarter of 2019, he is almost neck-on neck with the DA leader.

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SECTION THREE

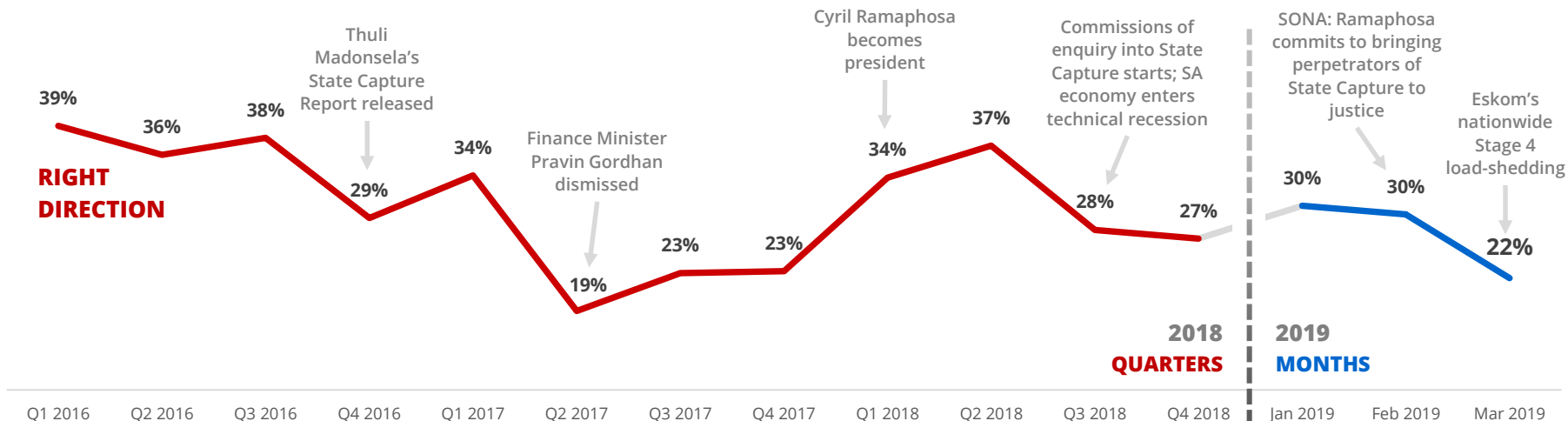**DIRECTION OF THE COUNTRY AND ECONOMIC PERCEPTIONS**
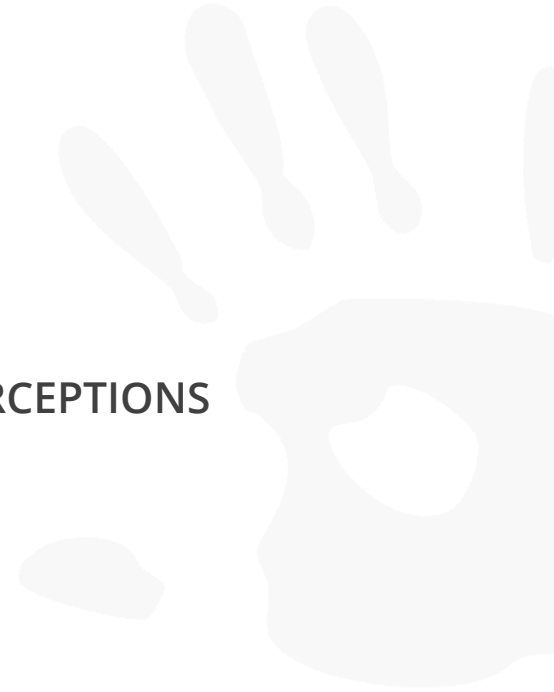
DIRECTION OF THE COUNTRY

The first quarter of 2019 follows the downward trend in public opinion about the direction in which the country is headed. In the last half of 2018, perceptions of the country heading in the right direction dropped to around 27%. It picked up to 30 % in January and remained constant in February 2019, when we had the State of the Nation Address and the Budget Speech. However, a significant drop to 22% occurred in March (when Eskom implemented Stage 4 load-shedding). The current level of pessimism is similar to that recorded in the last six months of Zuma's rule, a period where the mood of the country was at its lowest point in the past 25 years.

DIRECTION OF THE COUNTRY
WOULD YOU SAY THE COUNTRY IS GOING IN THE RIGHT DIRECTION OR IN THE WRONG DIRECTION ?

- Thuli Madonsela's State Capture Report released
- Finance Minister Pravin Gordhan dismissed
- Cyril Ramaphosa becomes president
- Commissions of enquiry into State Capture starts; SA economy enters technical recession
- SONA: Ramaphosa commits to bringing perpetrators of State Capture to justice
- Eskom's nationwide Stage 4 load-shedding

RIGHT DIRECTION

39% 36% 38% 29% 34% 19% 23% 23% 34% 37% 28% 27% 30% 30% 22%

2018 QUARTERS | **2019 MONTHS**

Q1 2016 | Q2 2016 | Q3 2016 | Q4 2016 | Q1 2017 | Q2 2017 | Q3 2017 | Q4 2017 | Q1 2018 | Q2 2018 | Q3 2018 | Q4 2018 | Jan 2019 | Feb 2019 | Mar 2019
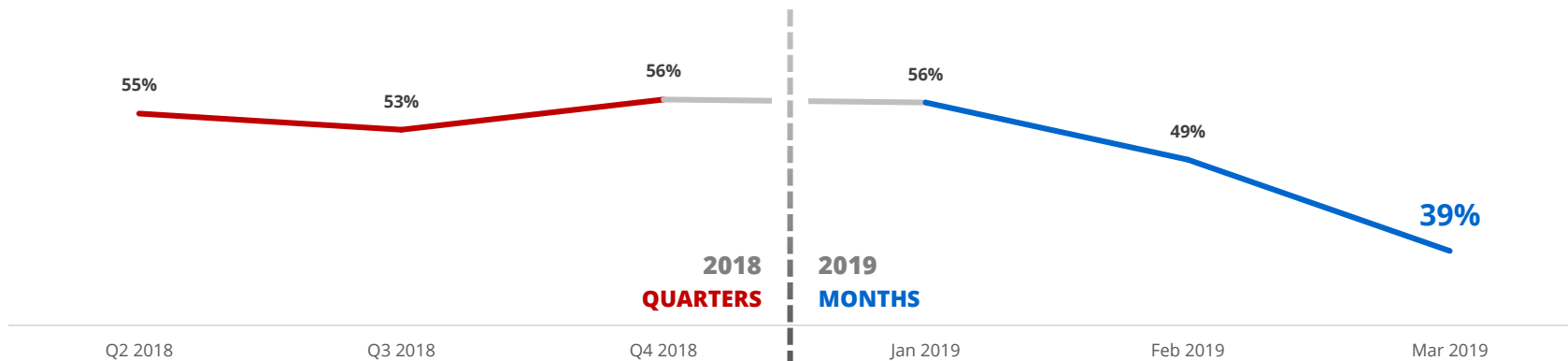
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TRUST IN ESKOM

- Despite revelations that Eskom had been compromised by state-capture, trust in Eskom remained relatively stable between April 2018 and January 2019 at around 55% . However, with the onset of load-shedding in February 2019, the impact of state-capture was directly experienced by all households and businesses in South Africa, and the entire economy suffered its consequences. Trust in Eskom dropped to 49% in February and declined further to 39% in March, with the implementation of stage-four load-shedding.

- Load-shedding has had a major and negative impact on the public's perceptions of the direction in which the country is heading and the belief that corruption is increasing, all the way through to the potential electoral performance of the ANC.

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

55%	53%	56%	56%	49%	39%
Q2 2018	Q3 2018	Q4 2018	Jan 2019	Feb 2019	Mar 2019

2018
QUARTERS

2019
MONTHS

13

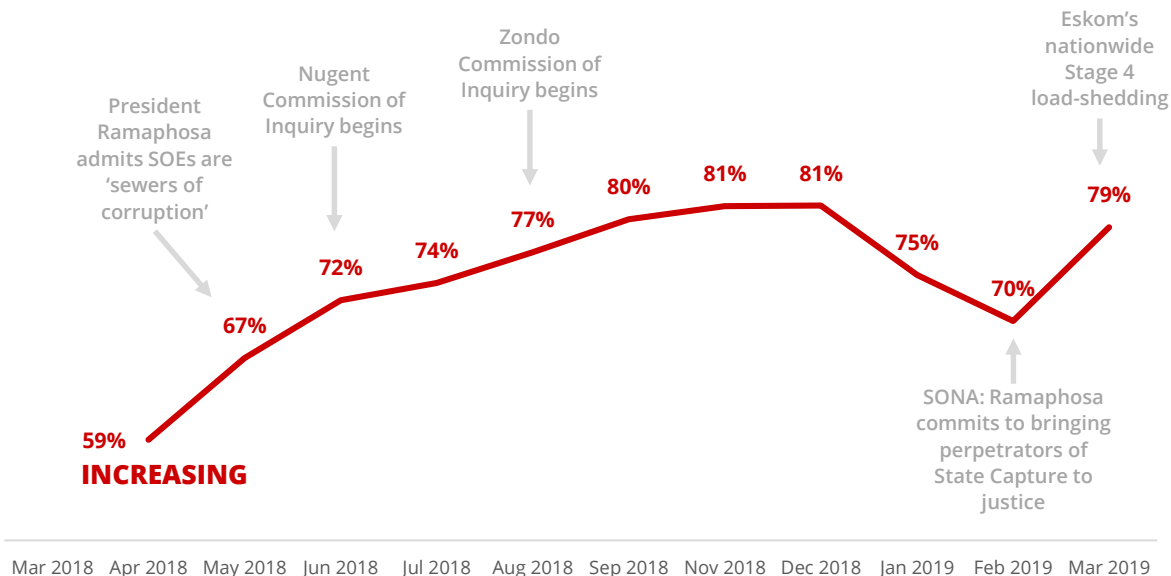# THE MOST IMPORTANT PROBLEMS FACING SOUTH AFRICA
PERCEPTIONS OF CORRUPTION

- South Africans' perceptions of corruption have increased with the continuing revelations of State Capture and corruption, and their adverse impact on the country.

- The proportion of the adult population who believe corruption in South Africa is on the rise, grew significantly from 59% in April 2018 to 79% in March 2019.

- Eskom's Stage 4 load-shedding, largely due to the looting of Stage coffers, provided a first-hand experience of the debilitating impact of state capture on both the economy and the daily lives of the entire population.

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

President Ramaphosa admits SOEs are 'sewers of corruption'

Nugent Commission of Inquiry begins

Zondo Commission of Inquiry begins

Eskom's nationwide Stage 4 load-shedding

59%
67%
72%
74%
77%
80%
81%
81%
75%
70%
79%

INCREASING

SONA: Ramaphosa commits to bringing perpetrators of State Capture to justice

Mar 2018   Apr 2018   May 2018   Jun 2018   Jul 2018   Aug 2018   Sep 2018   Nov 2018   Dec 2018   Jan 2019   Feb 2019   Mar 2019
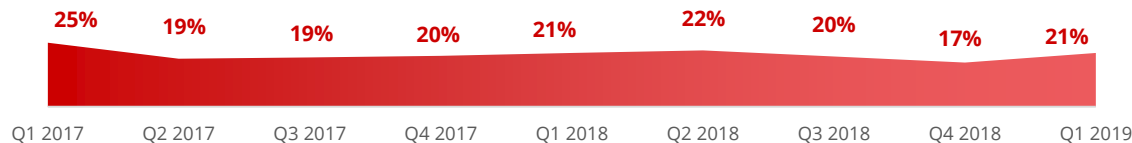
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PERCEPTIONS OF THE ECONOMY

- The overall trend over the past two years indicates that the majority of South Africans do not believe the economy is improving.

- As of the first quarter of 2019, only one-in-five citizens (21%) felt the economy had improved over the past 12 months.

- The graphs show that people generally tend to be more hopeful about the economy improving in the future. However, over the course of 2018, there has been a quarter-on-quarter decline in hopefulness.

- When Cyril Ramaphosa became president at the beginning of 2018, optimism about the future of the economy rose to 61%. A year later, however, it stands at 47% (comparable to the last quarter of 2017, when Zuma was unseated).
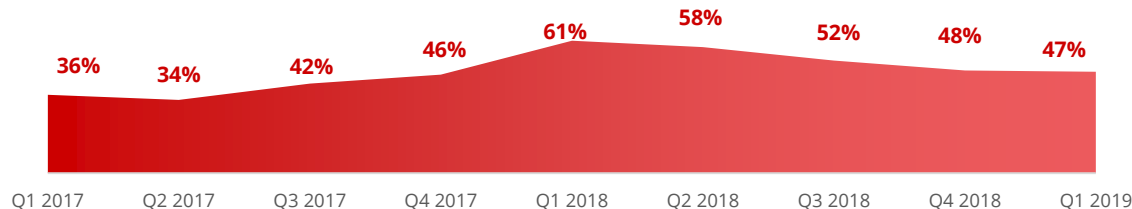
PAST ECONOMIC PERFORMANCE

THE ECONOMY HAS IMPROVED OVER THE PAST 12 MONTHS

Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
25%	19%	19%	20%	21%	22%	20%	17%	21%

FUTURE ECONOMIC PERFORMANCE

THE ECONOMY WILL IMPROVE OVER THE NEXT 12 MONTHS

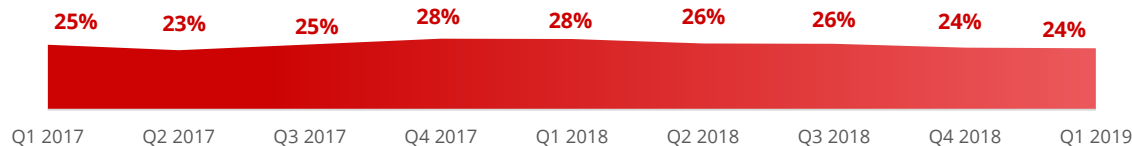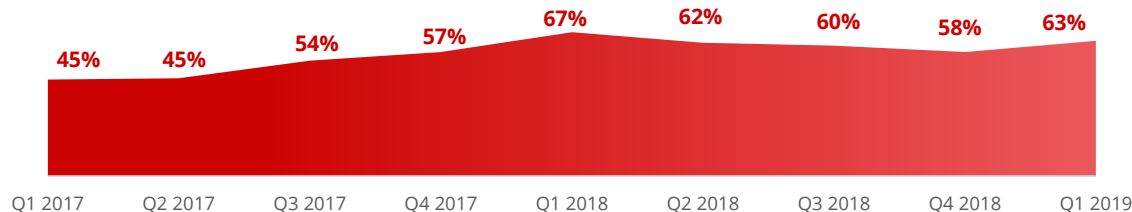| Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
36%	34%	42%	46%	61%	58%	52%	48%	47%

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PERCEPTIONS OF PERSONAL LIVING CONDITIONS

- We asked South Africans whether or not their personal living conditions had improved over the past 12 months, and whether they believed it would improve over the coming year.

- Just under one-quarter of (24%) of South Africans felt that their personal living conditions had improved in the past year.

- In line with optimism about the future of the economy, the graphs show that people also tend to be more hopeful about their personal living conditions improving in the future.

- In quarter one of 2019, roughly six-in-ten citizens (63%) said they believe their personal living conditions will improve over the coming year.

PERSONAL LIVING CONDITIONS OVER PAST 12 MONTHS
IMPROVED OVER THE PAST 12 MONTHS

25%	23%	25%	28%	28%	26%	26%	24%	24%
Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019

PERSONAL LIVING CONDITIONS WILL IMPROVE OVER NEXT 12 MONTHS

45%	45%	54%	57%	67%	62%	60%	58%	63%
Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019

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SECTION FOUR
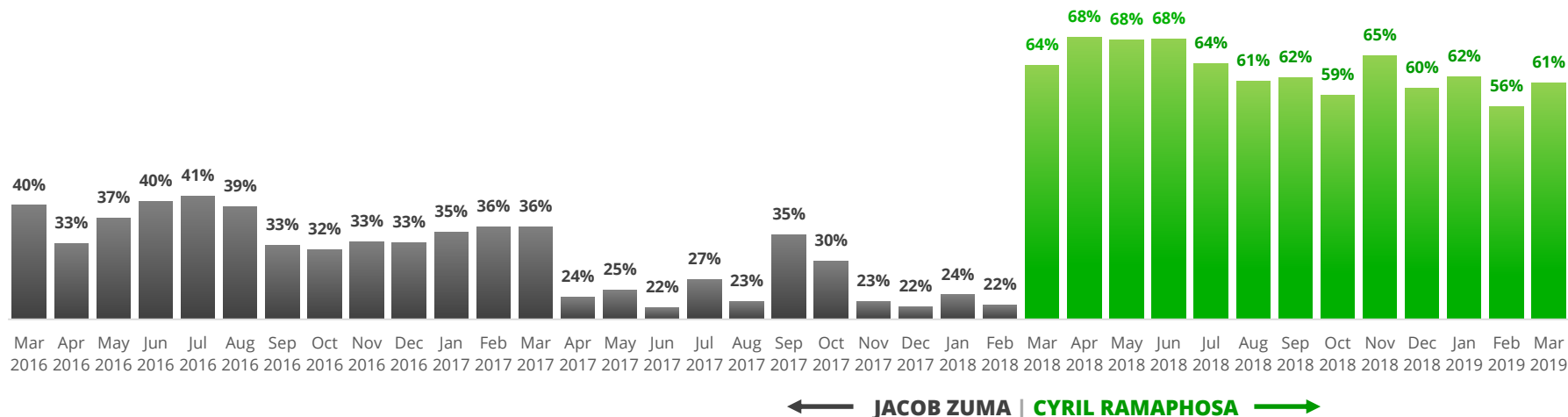
POLITICAL PARTIES AND KEY LEADERS

PERFORMANCE OF PRESIDENT RAMAPHOSA

- Between January and February 2019, we observe a drop of 6% in President Ramaphosa's job approval rating. In March, however, his rating jumps back to 61%. We can therefore infer that Ramaphosa's job approval rating was unscathed by Eskom's load-shedding in March 2019.

- Nonetheless, the trend shows that while the President's job approval rating is currently above the 60% mark, it is well below the high of 68% he achieved at the height of Ramaphoria.

PERFORMANCE OF THE PRESIDENT
THE PRESIDENT IS DOING HIS JOB WELL / VERY WELL

Mar 2016	Apr 2016	May 2016	Jun 2016	Jul 2016	Aug 2016	Sep 2016	Oct 2016	Nov 2016	Dec 2016	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	Jun 2017	Jul 2017	Aug 2017	Sep 2017	Oct 2017	Nov 2017	Dec 2017	Jan 2018	Feb 2018	Mar 2018	Apr 2018	May 2018	Jun 2018	Jul 2018	Aug 2018	Sep 2018	Oct 2018	Nov 2018	Dec 2018	Jan 2019	Feb 2019	Mar 2019
40%	33%	37%	40%	41%	39%	33%	32%	33%	33%	35%	36%	36%	24%	25%	22%	27%	23%	35%	30%	23%	22%	24%	22%	64%	68%	68%	68%	64%	61%	62%	59%	65%	60%	62%	56%	61%

← JACOB ZUMA | CYRIL RAMAPHOSA →

DEMOGRAPHIC PROFILE: Q1 2019

SOUTH AFRICAN ADULTS (18+) WHO BELIEVE THAT THE PRESIDENT IS DOING HIS JOB "WELL / VERY WELL"

POPULATION GROUP

- **BLACK** 17,836,000 (80%) ★
- **COLOURED** 1,798,000 (8%)
- **INDIAN** 575,000 (3%)
- **WHITE** 2,222,000 (10%) ★

AGE GROUP

- **18-24** 4,708,000 (21%)
- **25-34** 6,093,000 (27%)
- **35-44** 4,639,000 (21%)
- **45-54** 3,060,000 (14%)
- **55+** 3,930,000 (18%)

LIVING STANDARDS MEASURE

- **10** 1,344,000 (6%) ★
- **09** 2,007,000 (9%) ★
- **08** 1,716,000 (8%) ★
- **07** 2,892,000 (13%) ★
- **06** 7,476,000 (33%) ★
- **05** 3,945,000 (18%) ★
- **04** 2,143,000 (10%)
- **03** 545,000 (2%)
- **02** 281,000 (1%)
- **01** 82,000 (0%)

GENDER

- **FEMALE** 11,100,000 (49%)
- **MALE** 11,331,000 (51%)

TOTAL SOUTH AFRICANS

22.43-million

61%

- **GT** ★ 7,162,000 (32%)
- **LM** ★ 2,551,000 (11%)
- **NW** 1,729,000 (8%)
- **MP** 1,891,000 (8%)
- **NC** 441,000 (2%)
- **FS** 1,184,000 (5%)
- **KZ** ★ 2,390,000 (11%)
- **EC** ★ 2,449,000 (11%)
- **WC** ★ 2,634,000 (12%)
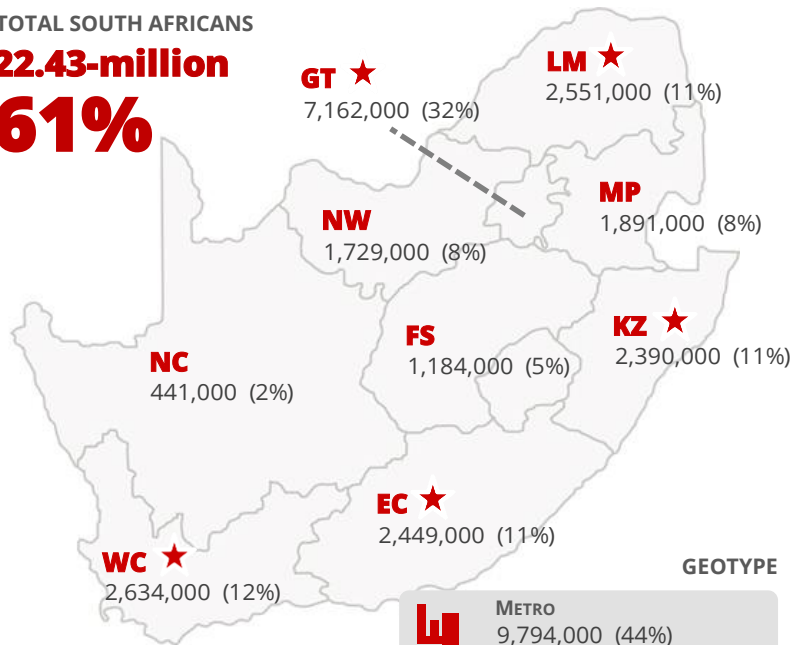
GEOTYPE

- **METRO** 9,794,000 (44%)
- **URBAN** 4,198,000 (19%)
- **RURAL** 8,438,000 (38%)

AFFINITY TOWARDS POLITICAL LEADERS
FAVOURABILITY RATINGS

- President Ramaphosa's favourability ratings have remained relatively stable over the past three quarters. He also appears to have emerged unscathed from the Eskom crisis in March, with his favourability rating increasing from 55% in the last quarter of 2018 to 57% in the first quarter of 2019.

- Mmusi Maimane and Julius Malema continue to battle for the second spot.

- However, Julius Malema is enjoying consistent growth in favourability, while Mmusi Maimane's favourability rating has been declining gradually since mid-2017 (where he enjoyed the highest favourability rating of all major political leaders),

AFFINITY TOWARDS POLITICAL LEADERS
HAVE A FAVOURABLE OPINION OF LEADER

Legend:
- JACOB ZUMA
- CYRIL RAMAPHOSA
- MMUSI MAIMANE
- JULIUS MALEMA
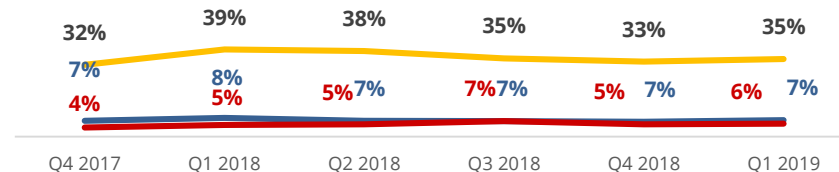
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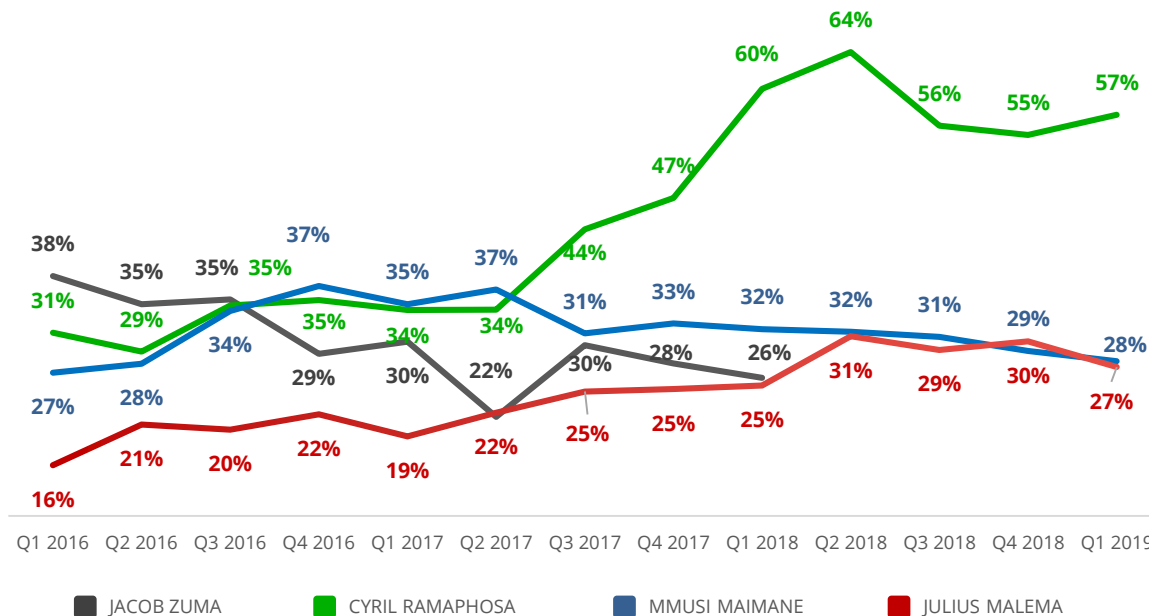
KEY FINDINGS
POLITICAL PARTY AFFINITY AND SUPPORT

- Party support and affinity remain relatively flat for the three main political parties.

- In the first quarter of 2019, those who feel close to the ANC increased slightly to 35%, corresponding with the increase in the favourability rating of President Ramaphosa.

- Partisanship levels remain at 7% for the DA and 6% for the EFF.

- The favourability of the ANC has remained stable over the past six months around 55%, while preference for the ANC remains at 44%.

- In quarter one of 2019, the favourability score of the DA remained flat at 31%. Similarly, preference for the party remained at 14%.

- The EFF shows a similar flat trend, with a favourability score remaining at 28% and a preference score remaining at 10%.

- The ANC, however, continues to benefit from Ramaphosa being at the helm of the party and the country. Over the past 12 months, the ANC's support has grown from 43% to 55%, while preference for the ANC has increased from 37% to 44%.
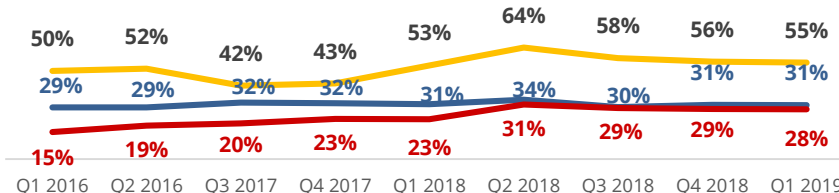
AFFINITY TOWARDS POLITICAL PARTIES

- We use three measures to gauge political party affinity: feeling close to a party (partisanship), likeability/favourability, and party preference.

- Partisanship: This is one of the strongest measures of political party support. In the first quarter of 2019, the proportion of South Africans who feel close to the ANC increased slightly to 35%, corresponding with the increase in the favourability rating of President Ramaphosa. The DA's partisanship level remained flat, at 7%, while the EFF's partisanship remains around 6%.

- Favourability: The favourability of the ANC has remained relatively stable over the past six months, around 55%. The DA and EFF's favourability ratings have also remained relatively unchanged.

- Party Preference: Over the past three quarters preference for each of the three major parties have been relatively stable.
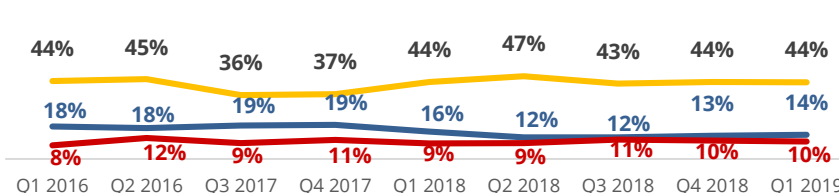
FEEL CLOSE TO THE PARTY

	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
ANC	32%	39%	38%	35%	33%	35%
DA	7%	8%	5% 7%	7% 7%	5% 7%	6% 7%
EFF	4%	5%	5%			

LIKE THE PARTY

	Q1 2016	Q2 2016	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
ANC	50%	52%	42%	43%	53%	64%	58%	56%	55%
DA	29%	29%	32%	32%	31%	34%	30%	31%	31%
EFF	15%	19%	20%	23%	23%	31%	29%	29%	28%

PREFER THE PARTY ABOVE OTHERS

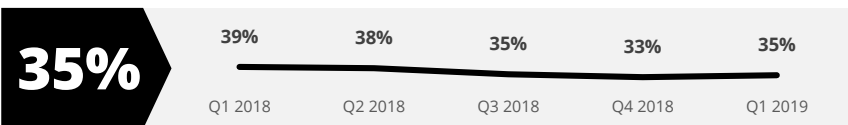|	Q1 2016	Q2 2016	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
ANC	44%	45%	36%	37%	44%	47%	43%	44%	44%
DA	18%	18%	19%	19%	16%	12%	12%	13%	14%
EFF	8%	12%	9%	11%	9%	9%	11%	10%	10%

ANC DA EFF

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AFFINITY TOWARDS THE ANC

- The proportion of South African adults who feel close to the ANC has been stable over the past three quarters, and is currently at 35%.

- A similar trend emerges when examining both the favourability of the party and a combined measure of 'like and prefer the ANC'.

- Moreover, all other political parties also remain flat.

- The infographic overleaf shows the demographic profiles of South African adults who feel closest to the ANC, highlighting that:

  - the ANC has the highest proportion of female supporters in comparison to the other political parties.

  - While the party has limited support amongst the upper-middle classes, it enjoys significant support among the working class and the poor.

  - While support comes from metro, urban and rural areas, it is weighted towards peri-urban and rural areas.

FEEL CLOSE TO THE PARTY

35%

39%	38%	35%	33%	35%
Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019

LIKE THE PARTY

55%

50%	52%	42%	43%	53%	64%	58%	56%	55%
Q1 2016	Q2 2016	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019

PREFER THE PARTY

44%

44%	45%	36%	37%	44%	47%	43%	44%	44%
Q1 2016	Q2 2016	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019

LIKE & PREFER THE PARTY

40%

41%	43%	32%	33%	40%	44%	40%	41%	40%
Q1 2016	Q2 2016	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019

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DEMOGRAPHIC PROFILE: Q1 2019

SOUTH AFRICAN ADULTS (18+) WHO FEEL CLOSEST TO ANC

POPULATION GROUP

BLACK
12,437,000 (95%) ★

COLOURED
338,000 (3%)

INDIAN
196,000 (2%)

WHITE
99,000 (1%)

AGE GROUP

18-24 1,820,000 (14%)

25-34 3,390,000 (26%) ★

35-44 2,901,000 (22%) ★

45-54 2,131,000 (16%)

55+ 2,827,000 (22%)

LIVING STANDARDS MEASURE

10 185,000 (1%)

09 516,000 (4%)

08 665,000 (5%)

07 1,483,000 (11%)

06 4,274,000 (33%) ★

05 3,171,000 (24%) ★

04 1,676,000 (13%) ★

03 860,000 (7%)

02 224,000 (2%)

01 18,000 (0%)

GENDER

FEMALE
7,285,000 (56%)

MALE
5,786,000 (44%)

TOTAL SOUTH AFRICANS

13.07-million
35%

GT ★ 3,835,000 (29%)
LM ★ 1,593,000 (12%)
MP 1,348,000 (10%)
NW 964,000 (7%)
FS 718,000 (5%)
KZ ★ 1,688,000 (13%)
NC 263,000 (2%)
EC ★ 2,067,000 (16%)
WC 594,000 (5%)
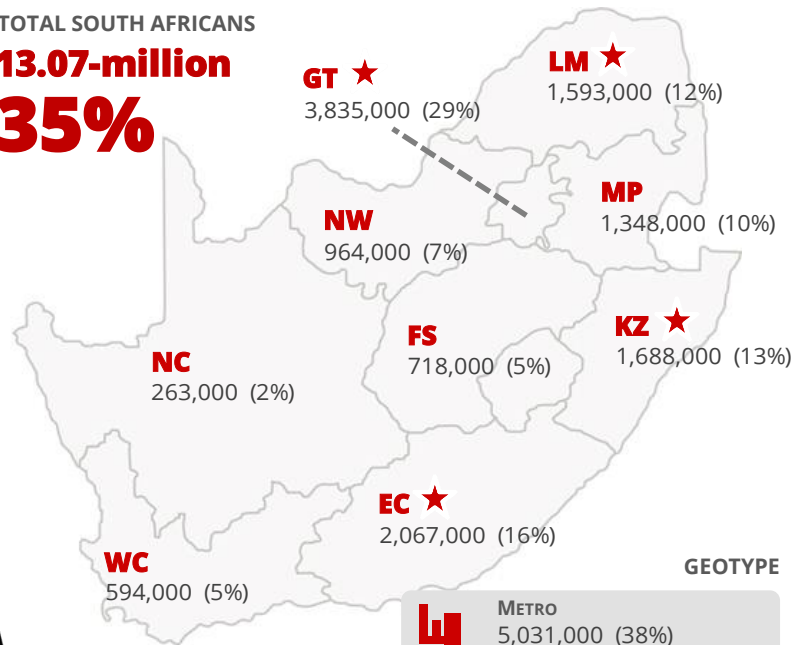
GEOTYPE

METRO
5,031,000 (38%)
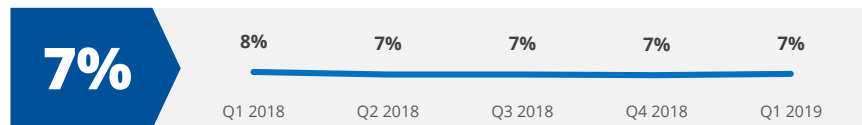
URBAN
3,063,000 (23%)
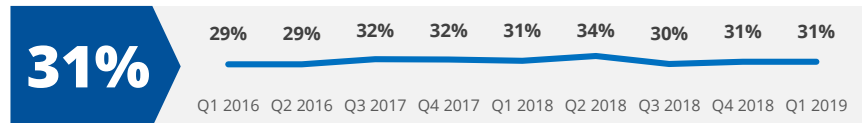
RURAL
4,976,000 (38%) ★

ANC

AFFINITY TOWARDS THE DA

- The number of South Africans who feel close to the DA has remained flat at 7%. Similarly, those who are favourable towards the party has remained stable at 31%.

- While the proportion of citizens who prefer the DA has been dropping off since the period of the *#ZumaMustFall* campaign, it has remained stable between 12% and 14% for over a year. In conjunction with this, those who both like and prefer the DA has also remained unchanged.

- The info-graphic overleaf shows the demographic profiles of South African adults who feel closest to the DA, highlighting that:

  - The DA enjoys the highest level of support among the upper middle-class.
  - The largest constituency within the DA is African, followed by an equal split between Coloured and White South Africans. This makes the DA the most racially diverse of all the political parties.
  - Their main base of support is Metro areas.
  - Unsurprisingly, the two provinces where the majority of their supporters reside are Western Cape and Gauteng.

FEEL CLOSE TO THE PARTY

7%

Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
8%	7%	7%	7%	7%

LIKE THE PARTY

31%

Q1 2016	Q2 2016	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
29%	29%	32%	32%	31%	34%	30%	31%	31%

PREFER THE PARTY

14%

Q1 2016	Q2 2016	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
18%	18%	19%	19%	16%	12%	12%	13%	14%

LIKE & PREFER THE PARTY

12%

Q1 2016	Q2 2016	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
17%	16%	17%	18%	14%	11%	10%	11%	12%

25

Citizen Surveys

DEMOGRAPHIC PROFILE: Q1 2019
SOUTH AFRICAN ADULTS (18+) WHO FEEL CLOSEST TO DA

POPULATION GROUP

BLACK 1,135,000 (41%)	★
COLOURED 789,000 (28%)	★
INDIAN 59,000 (2%)	
WHITE 791,000 (29%)	★

AGE GROUP

18-24	338,000 (12%)
25-34	671,000 (24%) ★
35-44	789,000 (28%) ★
45-54	418,000 (15%)
55+	558,000 (20%) ★

LIVING STANDARDS MEASURE

10	434,000 (16%)	
09	330,000 (12%)	★
08	233,000 (8%)	
07	426,000 (15%)	★
06	852,000 (31%)	★
05	321,000 (12%)	★
04	78,000 (3%)	
03	76,000 (3%)	
02	22,000 (1%)	
01		

GENDER

♀	**FEMALE** 1,328,000 (48%)
♂	**MALE** 1,445,000 (52%)

TOTAL SOUTH AFRICANS
2.77-million
7%

- **GT** ★ 730,000 (26%)
- **LM** 247,000 (9%)
- **NW** 57,000 (2%)
- **MP** 321,000 (12%)
- **NC** 113,000 (4%)
- **FS** 120,000 (4%)
- **KZ** 106,000 (4%)
- **EC** 243,000 (9%)
- **WC** ★ 837,000 (30%)
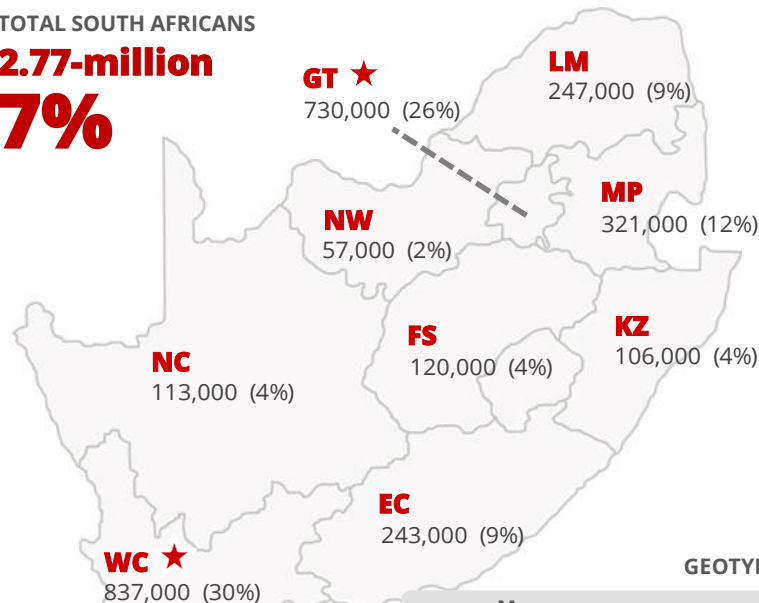
GEOTYPE

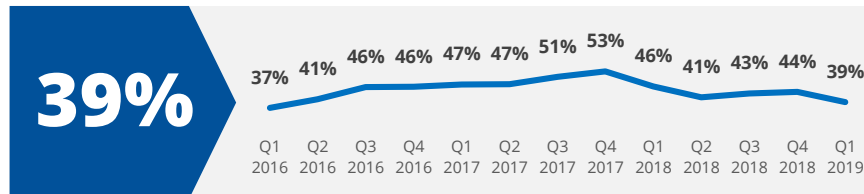|		
METRO 1,447,000 (52%)	★
URBAN 915,000 (33%)	
RURAL 412,000 (15%)	

DA
ONE NATION. ONE FUTURE.
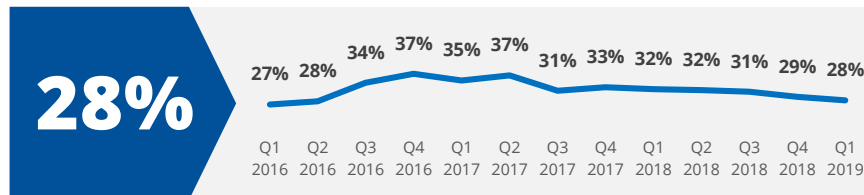
PERFORMANCE OF DA LEADER
MMUSI MAIMANE

- Between 2016 and 2017, Mmusi Maimane's performance score with respect to improving the image of the DA soared to 53%.

- However, since the fall of Zuma, and Ramaphosa taking the helm of the country, Maimane's ratings have declined significantly and is presently at 39%.

- Maimane's favourability ratings have followed a similar trend. It is currently at 28%, the lowest it has been since the beginning of 2016.

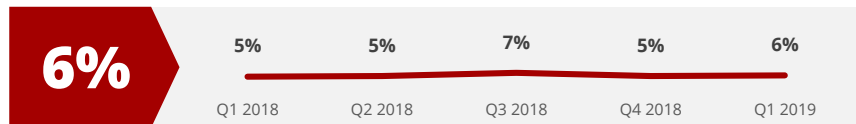**LEADER IS IMPROVING THE PARTY'S IMAGE AMONGST VOTERS**

39%

	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
	37%	41%	46%	46%	47%	47%	51%	53%	46%	41%	43%	44%	39%

LEADER'S FAVOURABILITY RATING

28%

	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
	27%	28%	34%	37%	35%	37%	31%	33%	32%	32%	31%	29%	28%

AFFINITY TOWARDS THE EFF

- The proportion of South African adults who feel close to the EFF has remained flat since the beginning of 2018.

- While the EFF has been increasing in popularity over time , its growth has remained relatively unchanged over the past 12 months.

- Preference for the EFF, has also remained relatively unchanged, while those who both like and prefer the party follows the same trend.

- The info-graphic overleaf shows the demographic profiles of South African adults who feel closest to the EFF:

  - Most notably, 97% of EFF supporters are African and two-thirds are male.

  - While the majority of their support comes from the working class, they also have a significant constituency among the lower-middle class.

  - The EFF appeals to younger South Africans - over two-thirds of their supporters are under 35 years of age.

FEEL CLOSE TO THE PARTY

6%

5%	5%	7%	5%	6%
Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019

LIKE THE PARTY

28%

15%	19%	20%	23%	23%	31%	29%	29%	28%
Q1 2016	Q2 2016	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019

PREFER THE PARTY

10%

8%	12%	9%	11%	9%	9%	11%	10%	10%
Q1 2016	Q2 2016	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019

LIKE & PREFER THE PARTY

10%

7%	11%	8%	10%	8%	9%	10%	10%	10%
Q1 2016	Q2 2016	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019

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DEMOGRAPHIC PROFILE: Q1 2019

SOUTH AFRICAN ADULTS (18+) WHO FEEL CLOSEST TO EFF

POPULATION GROUP

BLACK
2,107,000 (97%) ★

COLOURED
42,000 (2%)

INDIAN
6,000 (0%)

WHITE
11,000 (1%)

AGE GROUP

18-24 812,000 (37%) ★

25-34 681,000 (31%) ★

35-44 354,000 (16%) ★

45-54 259,000 (12%)

55+ 61,000 (3%)

LIVING STANDARDS MEASURE

10 46,000 (2%)

09 58,000 (3%)

08 216,000 (10%)

07 308,000 (14%)

06 701,000 (32%) ★

05 527,000 (24%) ★

04 206,000 (10%)
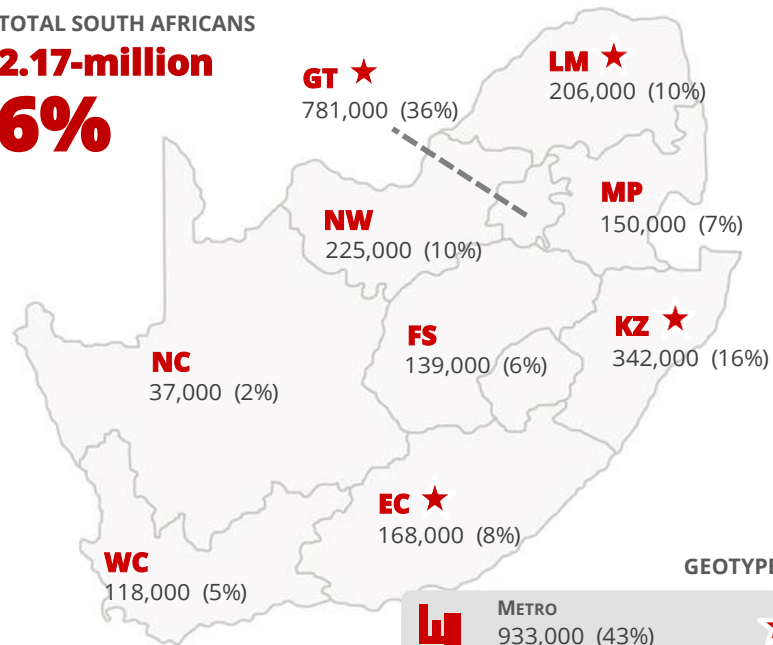
03 40,000 (2%)

02

01

GENDER

FEMALE
746,000 (34%)

MALE
1,421,000 (66%) ★

TOTAL SOUTH AFRICANS

2.17-million

6%

GT ★ 781,000 (36%)

LM ★ 206,000 (10%)

NW 225,000 (10%)

MP 150,000 (7%)

NC 37,000 (2%)

FS 139,000 (6%)

KZ ★ 342,000 (16%)

EC ★ 168,000 (8%)

WC 118,000 (5%)

GEOTYPE

METRO
933,000 (43%) ★

URBAN
528,000 (24%)

RURAL
706,000 (33%)
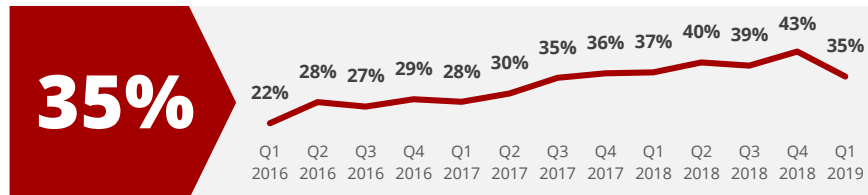
EFF ECONOMIC FREEDOM FIGHTERS

PERFORMANCE OF EFF LEADER
JULIUS MALEMA

- Malema's growing favourability score is significant, nearly doubling from a base of 16% in the first quarter of 2016 to 30% in the final quarter of 2018.

- Julius Malema's efforts at improving his party's image have been successful, especially when viewed over time: from 22% in Q1 of 2016 to 35% in the current quarter.

LEADER IS IMPROVING THE PARTY'S IMAGE AMONGST VOTERS

35%

Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
22%	28%	27%	29%	28%	30%	35%	36%	37%	40%	39%	43%	35%

LEADER'S FAVOURABILITY RATING

27%

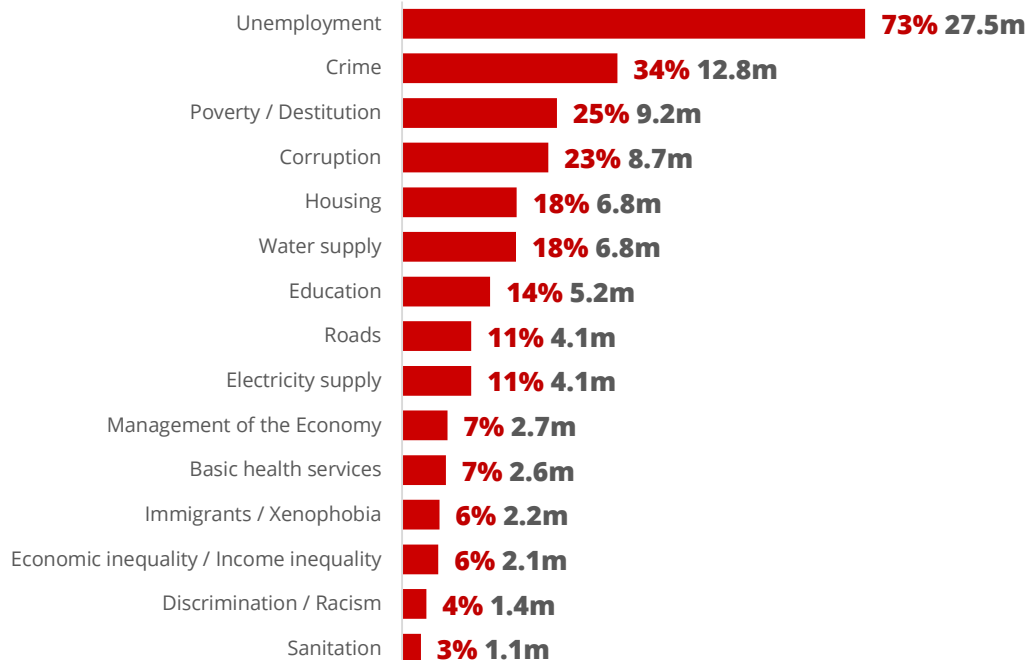| Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
16%	21%	20%	22%	19%	22%	25%	25%	25%	31%	29%	30%	27%

30

MOST IMPORTANT PROBLEMS FACING SOUTH AFRICA
Q1 2019

- According to South Africans the most pressing issues requiring proactive attention, amongst a plethora of others, are unemployment, crime and corruption, poverty and destitution and basic service delivery.

- Unemployment, which remains stubbornly high at around 27%, was considered to be biggest problem facing the country – as expressed by 27.5-million (73%) of South Africans.

- It is followed by Crime (34%), Poverty / Destitution (25%) and Corruption (23%).

- The delivery of basic services (Housing, Water Supply, Roads, Electricity) and Education continue to be burning issues, as is evident by the increasing footprint of service delivery protests around the country.

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

Problem	Percentage	Millions
Unemployment	73%	27.5m
Crime	34%	12.8m
Poverty / Destitution	25%	9.2m
Corruption	23%	8.7m
Housing	18%	6.8m
Water supply	18%	6.8m
Education	14%	5.2m
Roads	11%	4.1m
Electricity supply	11%	4.1m
Management of the Economy	7%	2.7m
Basic health services	7%	2.6m
Immigrants / Xenophobia	6%	2.2m
Economic inequality / Income inequality	6%	2.1m
Discrimination / Racism	4%	1.4m
Sanitation	3%	1.1m

31

POLITICAL PARTY ASSOCIATION
WHICH POLITICAL PARTY IS ASSOCIATED WITH SOLVING THE MOST IMPORTANT PROBLEMS FACING SOUTH AFRICA

- We asked South Africans which political parties they believe to be best at solving the most critical problems facing the country, in order to determine their relative positioning.

- The perceptual map shows that the ANC is most closely associated with providing basic services (water, housing, electricity, maintaining roads). This is unsurprising as the ANC is the governing party.

- In line with their election manifesto and public ranting, the EFF is strongly associated with reducing corruption.

- The perceptual positioning of the DA, however, reflects a lack of clear policy and direction, with no strong links to any of the country's critical challenges.

- Nonetheless, the most significant insight from this perceptual map is that none of the political parties are seen to be able to solve the most burning issues, such as unemployment, crime and poverty.

POLITICAL PARTY ASSOCIATION
WHICH POLITICAL PARTY IS BEST AT... ?

STRONG ASSOCIATION

Creating jobs

None

Reducing poverty

Don't Know

Maintaining roads

DA

Reducing crime

Providing water

STRONG ASSOCIATION   WEAK ASSOCIATION   STRONG ASSOCIATION

Providing electricity

Reducing income inequality

ANC

Reducing corruption

Providing housing

EFF

Improving education

STRONG ASSOCIATION

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SECTION FIVE

VOTER READINESS MODEL
TURNOUT SCENARIOS
POLITICAL PARTY ELECTORAL PERFORMANCE ESTIMATES
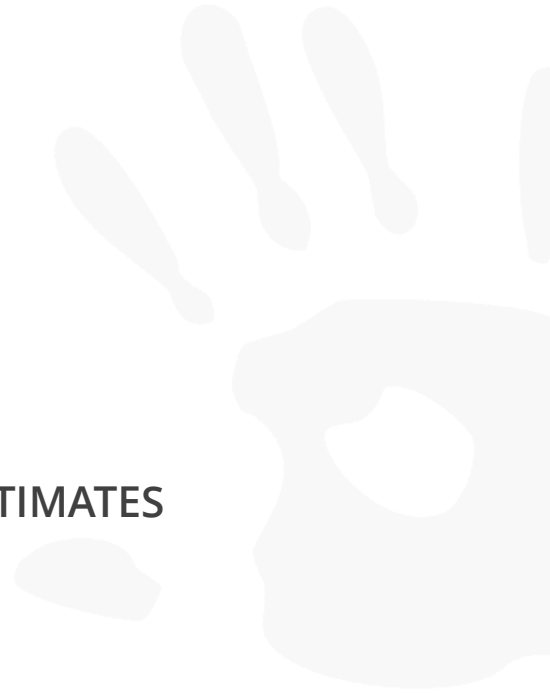
VOTER READINESS MODEL

- In the first iteration of the model we examined the impact of voter registration challenges, voting-day challenges and the motivation to vote in order to establish the impact these factors may have on voter turnout.

- After President Ramaphosa declared 8 May 2019 as the election date, voter registration was closed in March 2019.

- This second iteration of the VRM model was adjusted accordingly, to account for registration closing – which simplified the model parameters significantly.

  - With registration challenges out of the way, voters either know for certain, or believe they are registered to vote.

  - Voter motivation was established by asking *"how much do you want to vote in the election...?"*

  - The voting day challenges were assessed by determining the ease of getting to the polling station, as the main voting day challenge.

VOTER READINESS MODEL (VRM)

READY VOTERS

Citizens who are/believe they are registered to vote, are motivated to vote and find it **very easy** to get to the polling station (the main voting day challenge).

LIKELY VOTERS

Citizens who are/believe they are registered to vote, are motivated to vote and will find it **fairly easy** to get to the polling station (voting day challenge).

CHALLENGED VOTERS

Those who are motivated to vote but likely to encounter **difficulty** in getting to the polling station.

UNMOTIVATED VOTERS

Those who are not yet motivated to vote, regardless of whether they will face voting day challenges.
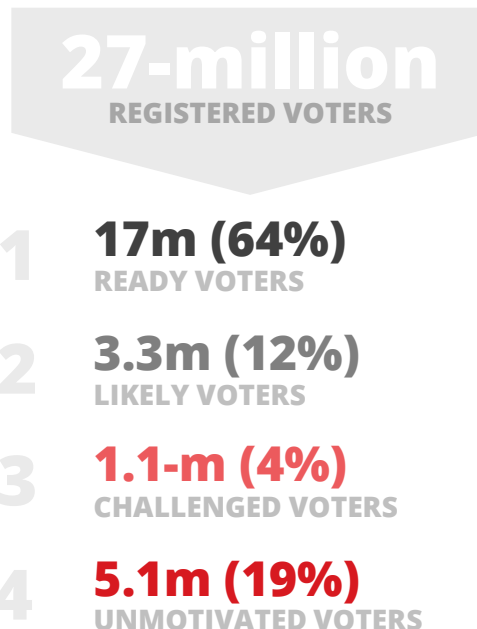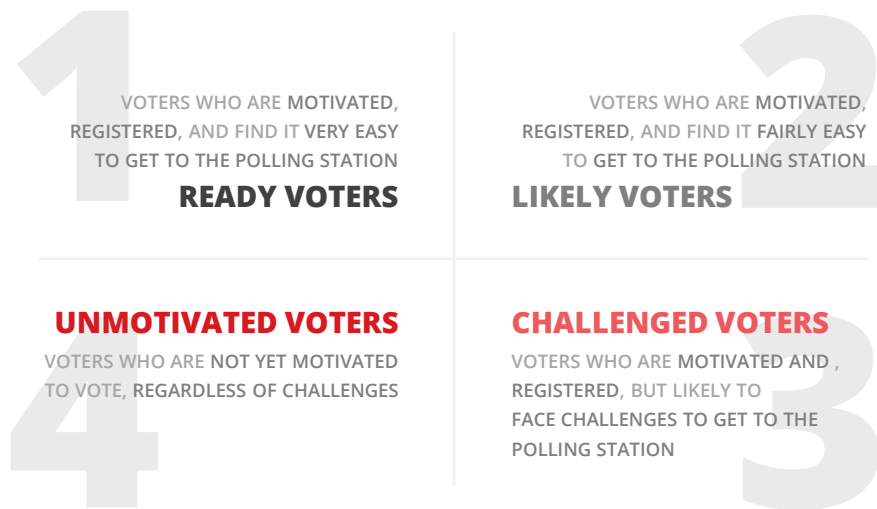
34

VOTER READINESS MODEL
FOUR VOTER SEGMENTS - MARCH 2019

- In order to estimate voter turnout, we took into account all preceding preconditions: motivation to vote, registration status, and the voting-day challenge (getting to the polling station). Collectively this allowed us to divide Registered Voters into four segments:

- The IEC reports that there are just under 26.8-million registered voters, while the SACS measures 26.5-million voters who claim to be registered.

1

VOTERS WHO ARE **MOTIVATED**, **REGISTERED**, AND FIND IT **VERY EASY** TO GET TO THE POLLING STATION
READY VOTERS

2

VOTERS WHO ARE **MOTIVATED**, **REGISTERED**, AND FIND IT **FAIRLY EASY** TO GET TO THE POLLING STATION
LIKELY VOTERS

UNMOTIVATED VOTERS
VOTERS WHO ARE **NOT YET MOTIVATED** TO VOTE, **REGARDLESS OF CHALLENGES**

4

CHALLENGED VOTERS
VOTERS WHO ARE **MOTIVATED AND**, **REGISTERED**, BUT LIKELY TO **FACE CHALLENGES TO GET TO THE POLLING STATION**

3

27-million
REGISTERED VOTERS

1 **17m (64%)**
READY VOTERS

2 **3.3m (12%)**
LIKELY VOTERS

3 **1.1-m (4%)**
CHALLENGED VOTERS

4 **5.1m (19%)**
UNMOTIVATED VOTERS

35

ESTIMATED VOTER TURNOUT

TOTAL VOTER POPULATION (MARCH 2019)

- In a scenario where the entire voter base (i.e. 37-million South Africans aged 18+) were to vote tomorrow:

  - The ANC would receive 52% of the vote (19.4-million);

  - The DA would receive 17% of the vote (6.4-million);

  - The EFF would receive 11% of the vote (4.2-million); and

  - Roughly 5% (1.7-million) would vote for the smaller parties.

- The undecided vote is of significance in modelling potential election results as undecided citizens constitute 14% (5.3-million people).

- Since it is unlikely that entire voter population will go to the polls, it is necessary to model potential voter turnout scenarios, using the VRSM model.

TOTAL VOTER TURNOUT

ALL SOUTH AFRICAN ADULTS (18+) REGISTERED TO VOTE

51%
13.5m

18%
4.8m

11%
2.9m

6%
1.7m

14%
3.7m

26.5m

■ ANC ■ DA ■ EFF ■ OTHER PARTY ■ UNDECIDED

36
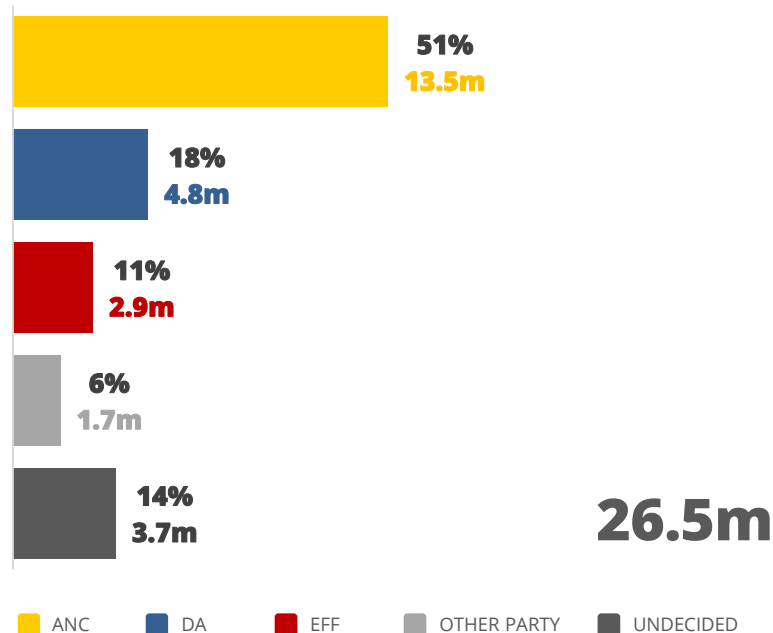
ESTIMATED VOTER TURNOUT
## SCENARIO ANALYSIS (MARCH 2019)

The **High Voter Turnout scenario** assumes that all motivated voters **80% (21.0-million)** go to polls, irrespective of challenges facing them.

The **Medium Voter Turnout scenario** assumes *Ready*, *Likely*, and those *Challenged* voters who can overcome voting day challenges, will vote. This place voter turnout at **76% (20-million voters).**

The **Low Voter Turnout scenario** assumes only *Ready* and *Likely* voters will vote, which results in a **64% turnout (17-million voters)**.
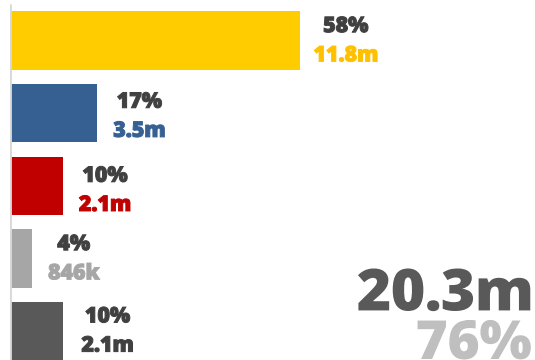
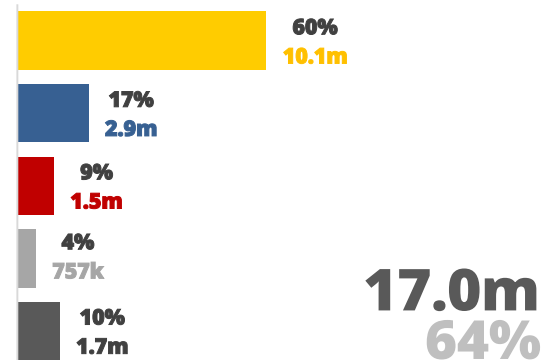### HIGH VOTER TURNOUT
REGISTERED + MOTIVATED VOTERS

56%
12.1m

17%
3.6m

10%
2.2m

5%
1.0m

12%
2.5m

21.4m
80%
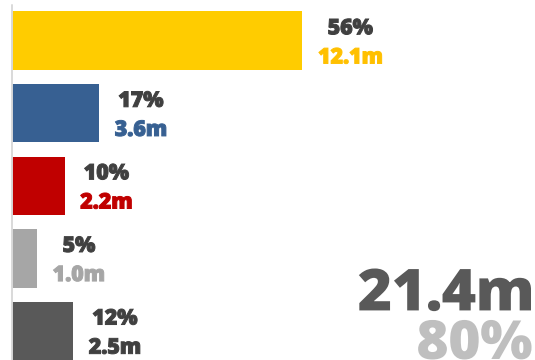
MEDIUM VOTER TURNOUT
REGISTERED + MOTIVATED VOTERS WHO CAN FAIRLY EASILY GET TO A POLLING STATION

58%
11.8m

17%
3.5m

10%
2.1m

4%
846k

10%
2.1m

20.3m
76%

LOW VOTER TURNOUT
REGISTERED + MOTIVATED VOTERS WHO CAN VERY EASILY GET TO A POLLING STATION

60%
10.1m

17%
2.9m

9%
1.5m

4%
757k

10%
1.7m

17.0m
64%

■ ANC ■ DA ■ EFF ■ OTHER PARTY ■ UNDECIDED

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SIDE-BY-SIDE COMPARISON OF SCENARIOS

SCENARIO ANALYSIS (MARCH 2019)

TOTAL VOTER TURNOUT
ALL REGISTERED VOTERS

51%
13.5m

18%
4.8m

11%
2.9m

6%
1.7m

14%
3.7m

26.5m

HIGH VOTER TURNOUT
REGISTERED AND MOTIVATED VOTERS
IRRESPECTIVE OF CHALLENGES

56%
12.1m

17%
3.6m

10%
2.2m

5%
1.0m

12%
2.5m

21.4m
80%

MEDIUM VOTER TURNOUT
REGISTERED, MOTIVATED, CAN EASILY /
VERY EASILY GET TO A POLLING STATION

58%
11.8m

17%
3.5m

10%
2.1m

4%
846k

10%
2.1m

20.3m
76%

LOW VOTER TURNOUT
REGISTERED, MOTIVATED, VERY EASILY
GET TO A POLLING STATION

60%
10.1m

17%
2.9m

9%
1.5m

4%
757k

10%
1.7m

17.0m
64%

ANC DA EFF OTHER PARTY UNDECIDED

38

SCENARIOS: POLITICAL PARTIES AND VOTER SUPPORT
IF THE GENERAL ELECTION WAS HELD TOMORROW WHO WOULD YOU VOTE FOR?

- Respondents were presented with a blind mock ballot on a computer tablet and asked to select the party they would vote for (simulating the voting day experience in terms of the ballot and confidentiality) .
  - The ten biggest political parties were listed, with an option for 'other political party' .
  - Respondents, who after going through the exercise, could not choose a political party, were recorded as 'undecided'.

> **The voter turnout scenarios look at the proportion of respondents who believe they are registered (26.5-million). The IEC reports that 26.75-million* have registered to vote**
> www.elections.org.za/content/Voters-Roll/Registration-statistics/

VOTER TURNOUT SCENARIOS AND PARTY SUPPORT

- Using the Voter-Readiness Model (VRM), we set about analysing various voter turnout scenarios, based on the outcome of the mock ballot votes.

- If voters who are registered and motivated to vote and would find it very or fairly easy to get to the polling station, what would the election results look like?

- Since there was no 'undecided' category on the ballot we reallocated undecided voters, using two factors, i.e. party preference and partisanship:
  - Party Preference - imputed by comparing the scores of the party favourability scales, and allocating undecided voters to the party they rated highest in terms of favourability.
  - Partisanship – determined from the political party they felt closest to.

- Undecided voters were allocated to the party they had the highest preference for and felt closest to.

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KEY INSIGHTS
IF THE GENERAL ELECTION WAS HELD TOMORROW WHO WOULD YOU VOTE FOR?

TURNOUT SCENARIOS

- Voter turnout is likely to have the largest effect on the performance of political parties at the polls.

- We observe that the higher the voter turnout, the lower the proportion of votes garnered by the ruling party, the ANC. The beneficiaries from a higher voter turnout is the EFF and, to a less extent, the DA.

UNDECIDED VOTERS

- Undecided voters account for 14% (3.7-million) of all registered voters and will be key to determining the performance of the three major political parties at the polls.

- In the Medium, and Low Turnout scenarios, the proportion of undecided voters drops to 10%, whereas in the High Turnout scenario it is 12%.

UNMOTIVATED VOTERS

- The proportion of unmotivated voters has increased from February to March. Unmotivated voters are the least likely to turn out at the polls, irrespective of challenges they may face.

- If these unmotivated voters (or a portion thereof) were to decide at the last minute to cast their ballot, the electoral performance of the ANC would suffer.

- One of the imperatives for the opposition DA and EFF is therefore to attempt to motivate voters to the polls, as they stand to benefit the most.

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ALLOCATION OF THE UNDECIDED VOTERS
IMPUTATION METHODOLOGY

ALLOCATING UNDECIDED VOTERS

- In order to reasonably allocate the undecided voters we have used two factors:

  - Party Preference - calculated from the question "How much do you like or dislike…" which is measured on a scale ranging from 0 to 10. Preference is then imputed by comparing the "like / dislike" scores, where the party that achieves the highest rating is deemed to be the preferred party.

  - Partisanship is determined by asking the question "Which political party do you feel close to (or closest to)?"

- We allocated the undecided voters to a party where they expressed a Party Preference and / or Partisanship.

  - Partisanship is applied as a superordinate allocating factor.

TURNOUT SCENARIO AND UNDECIDED VOTERS

- Voter turnout scenarios impacts upon the proportion of undecided voters (3.7-million or 14% of the registered voter base).

  - In both the Low and Medium Turnout scenarios, 10% are undecided while in the High turnout scenario 12%. It appears that the higher the voter, the higher the proportion of undecided voters.

- Therefore the more determined the potential voter is to cast their ballot, the more likely they are to have a specific political party in mind.

- Applying the methodologies of imputation of undecided voters as well as voter turnout scenarios, we trended the estimated political party electoral performance over time (from December 2018 until March 2019).
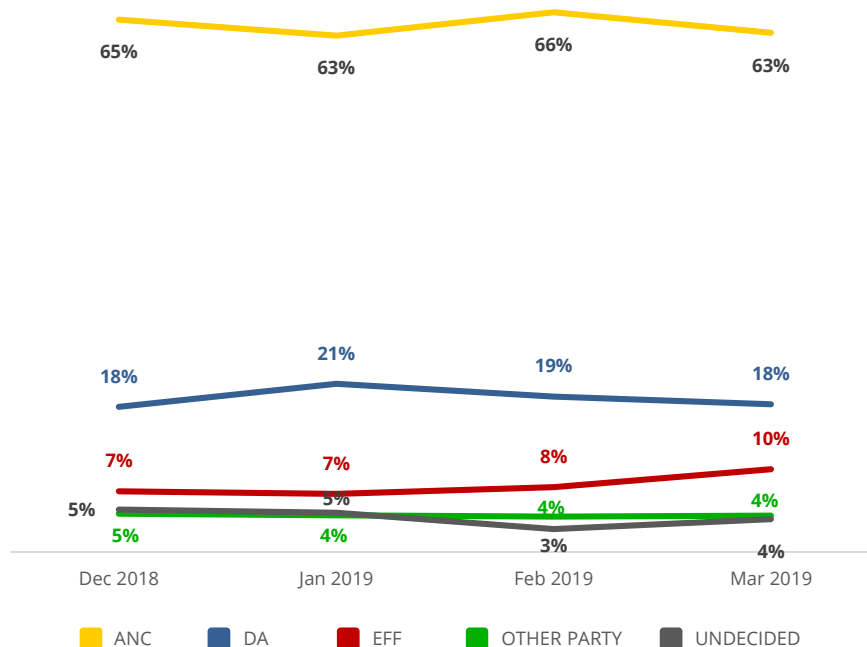
41

LOW VOTER TURNOUT SCENARIO
TRENDED ELECTORAL PERFORMANCE (DEC 2018 – MAR 2019)

- The Low Voter Turnout (at 64%, or 17-million voters), trended from December 2018 until March 2019, shows that:
  - The ANC hovers between 65% and 63%.
  - The DA, after increasing slightly from 18% in December to 21% in January, drops to 19% in February and 18% in March.
  - The EFF has a small but steady increase in support, going up to 10% in March 2019.
- When comparing the Medium Turnout Scenario (20-million voters) to the Low Turnout Scenario (17-million), we can infer that the lower the voter turnout, the better it is for the ruling party.

LOW VOTER TURNOUT SCENARIO
64% (17-MILLION)

ANC: 65% · 63% · 66% · 63%
DA: 18% · 21% · 19% · 18%
EFF: 7% · 7% · 8% · 10%
OTHER PARTY: 5% · 4% · 4% · 4%
UNDECIDED: 5% · 5% · 3% · 4%

Dec 2018 | Jan 2019 | Feb 2019 | Mar 2019

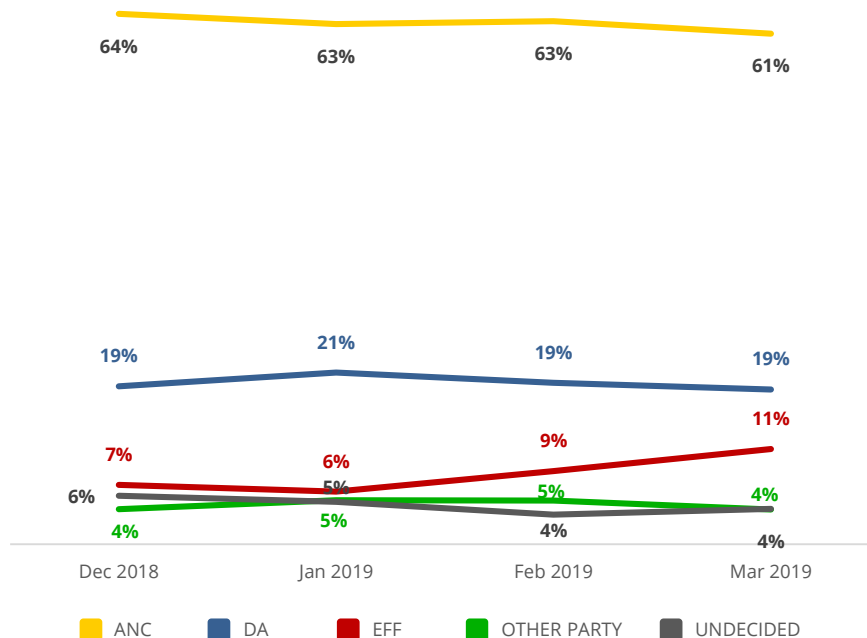ANC   DA   EFF   OTHER PARTY   UNDECIDED

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MEDIUM VOTER TURNOUT SCENARIO

TRENDED ELECTORAL PERFORMANCE (DEC 2018 – MAR 2019)

- The Medium Voter Turnout (at 77%, or 20-million voters), trended from December 2018 until March 2019, shows that:
  - The ANC drops from 64% in December down to 61% in March.
  - The DA, after a slight increase in estimated electoral performance in January, returns to 19% in February and March respectively .
  - The EFF shows a steady increase in support to 9% in February and 11% in March 2019.
- Undecided voters, were they to cast their vote, may still have a significant impact on the electoral outcome – since they are neither partisan nor prefer a particular party, many of them may decide to cast their ballot in favour of other smaller parties.
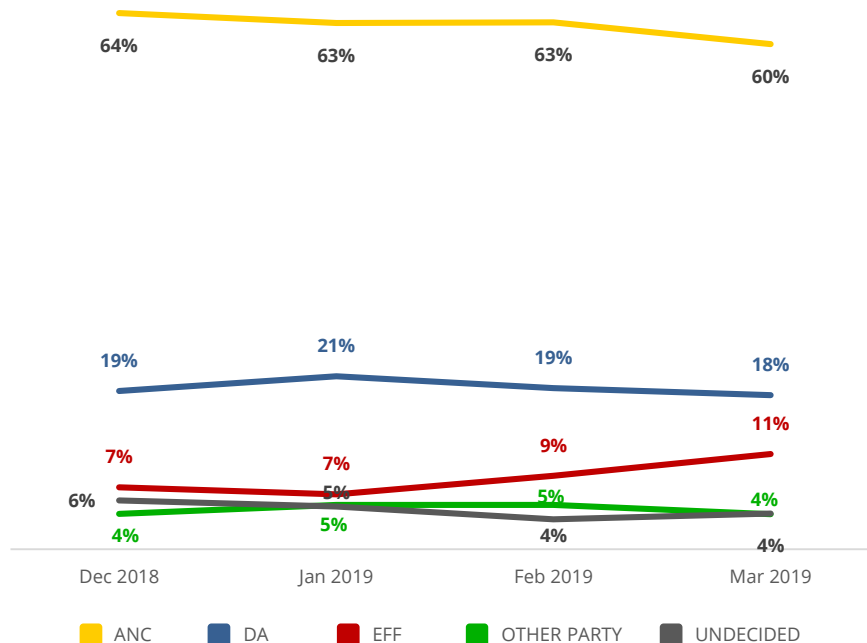
MEDIUM VOTER TURNOUT
77% SCENARIO (20-MILLION)

	Dec 2018	Jan 2019	Feb 2019	Mar 2019
ANC	64%	63%	63%	61%
DA	19%	21%	19%	19%
EFF	7%	6%	9%	11%
OTHER PARTY	4%	5%	5%	4%
UNDECIDED	6%	5%	4%	4%

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HIGH VOTER TURNOUT SCENARIO
TRENDED ELECTORAL PERFORMANCE (DEC 2018 – MAR 2019)

- The High Voter Turnout (at 81%, or 21-million voters), trended from December 2018 until March 2019, shows that:
  - The ANC drops from 64% in December to 60% in March.
  - The DA, after seeing an increase in their estimated electoral performance in January, drops to 18% in March.
  - The EFF shows a steady increase in support to 9% in February and 11% in March 2019.
- In this scenario, undecided voters would also have a significant impact on the electoral outcome, if they were to cast their vote.

HIGH VOTER TURNOUT
81% SCENARIO (21-MILLION)

64%   63%   63%   60%

19%   21%   19%   18%

11%

7%   7%   9%

6%   5%   5%   4%

4%   5%   4%   4%

Dec 2018   Jan 2019   Feb 2019   Mar 2019

■ ANC   ■ DA   ■ EFF   ■ OTHER PARTY   ■ UNDECIDED
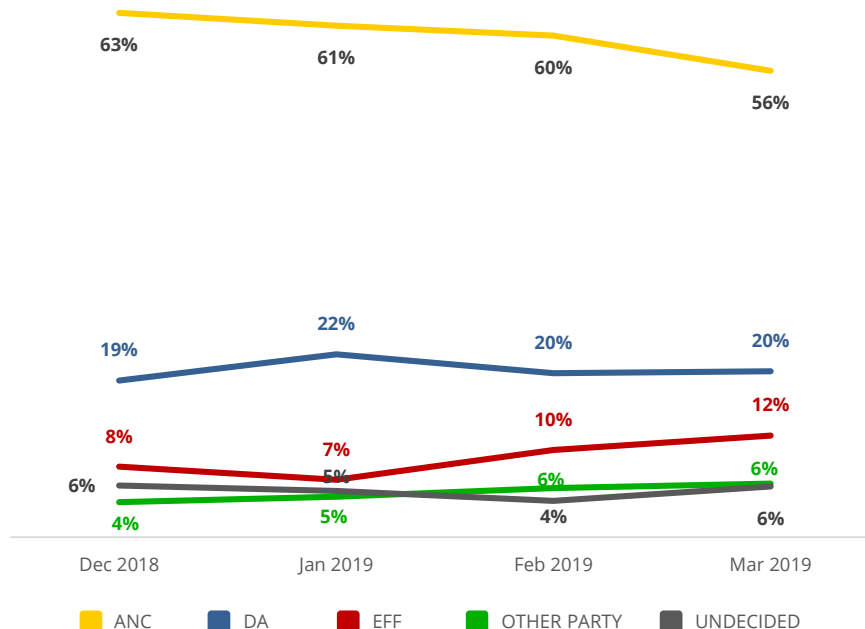
44

TOTAL VOTER TURNOUT SCENARIO
TRENDED ELECTORAL PERFORMANCE (DEC 2018 – MAR 2019)

- In some countries voting is compulsory. This analysis applies the 'Total Voter Turnout scenario' to see what the electoral performance would be if all registered voters (100% or 27-million registered voters) turned up at the polls.

- The trended analysis from December 2018 until March 2019, shows that:
  - The ANC drops from 63% in December to 56% in January.
  - The DA's performance increases to 22% in January, but then drops to 20% in February and remains at that level in March.
  - The EFF declines to 7% in January, but grows to 10% in February and 12% in March.

- This turnout scenario results in the lowest electoral performance score for the ANC (56%) and supports the hypothesis that a lower voter turnout favours the ruling party.

- However, it is also worth noting that the EFF and other minority parties are the main beneficiaries in this scenario.

**TOTAL VOTER TURNOUT
100% SCENARIO (27-MILLION)**

Chart: ANC 63% (Dec 2018), 61% (Jan 2019), 60% (Feb 2019), 56% (Mar 2019)
DA 19%, 22%, 20%, 20%
EFF 8%, 7%, 10%, 12%
OTHER PARTY 4%, 5%, 6%, 6%
UNDECIDED 6%, 5%, 4%, 6%

ANC | DA | EFF | OTHER PARTY | UNDECIDED

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SECTION SEVEN

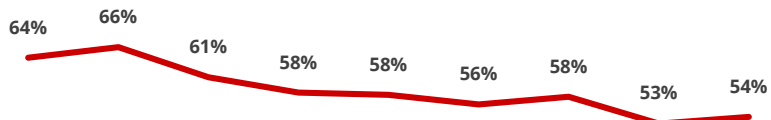## TRUST IN INSTITUTIONS

TRUST IN INSTITUTIONS

RELIGIOUS LEADERS

- Over the past two years, there has been a slow-but-steady decline in trust in religious leadership in general, with this trend continuing in the current quarter to 54%.

TRADITIONAL LEADERS

- Trust in traditional leadership follows a similar trend to religious leadership, and is currently at 42%.

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

Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
64%	66%	61%	58%	58%	56%	58%	53%	54%

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

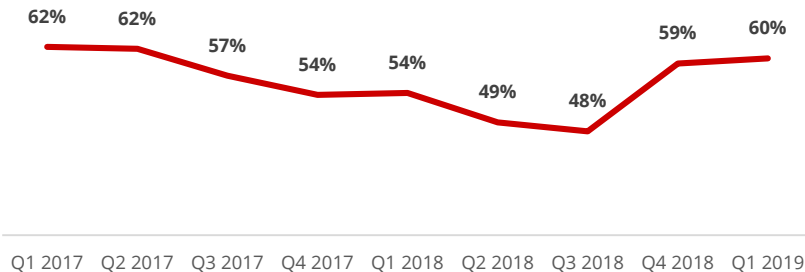| Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
45%	47%	45%	44%	42%	35%	35%	36%	42%

47
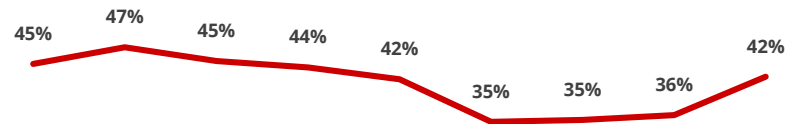
TRUST IN INSTITUTIONS

ELECTORAL COMMISSION (IEC)

- In Q1 of 2018, trust in the IEC grew noticeably (to 60%), after a steady decline over time. It maintained this level of trust in the first quarter of 2019, as the IEC ramped up it's engagement with the public in the leadup to the election.

CONSTITUTIONAL COURT

- Trust in the Constitutional Court has been relatively stable over the past 12 months and currently at 59%.

TRUST IN: ELECTORAL COMMISSION (IEC)
HOW MUCH TRUST, IF ANY, DO YOU HAVE IN… ?

Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
62%	62%	57%	54%	54%	49%	48%	59%	60%

TRUST IN: CONSITUTIONAL COURT
HOW MUCH TRUST, IF ANY, DO YOU HAVE IN… ?

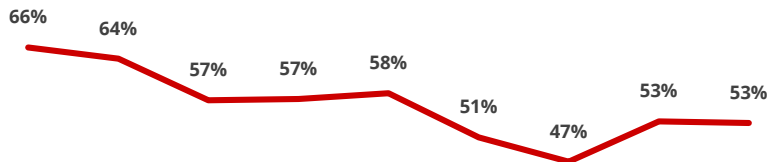| Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
68%	65%	65%	65%	66%	58%	56%	59%	59%

48
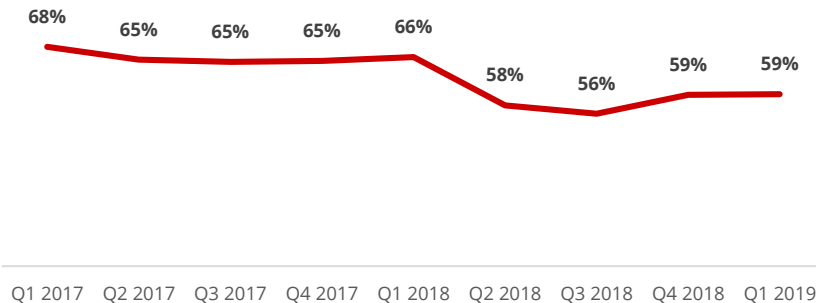
TRUST IN INSTITUTIONS

PUBLIC PROTECTOR

- Busisiwe Mkhwebane was appointed by President Zuma in October 2016. Since then trust in the Public Protector's office dropped from a high of 66% in the beginning of 2017 to 47% in Q3 2018. However , it returned to 53% in Q4 of 2018 and has remained stable over the past two quarters.

TRUST IN: PUBLIC PROTECTOR
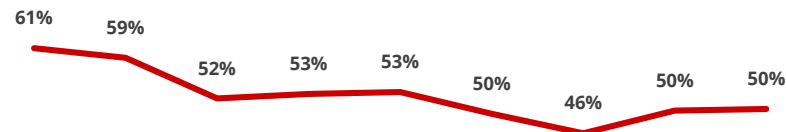**HOW MUCH TRUST, IF ANY, DO YOU HAVE IN... ?**

Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
66%	64%	57%	57%	58%	51%	47%	53%	53%

NATIONAL PROSECUTING AUTHORITY

- Trust in the NPA has been severely undermined under the directorship of Shaun Abrahams. The growth in trust from it's low point in Q3 2018 could be linked to Advocate Shamila Batohi, the new head of the NPA appointed by President Ramaphosa.

TRUST IN: NATIONAL PROSECUTING AUTHORITY
HOW MUCH TRUST, IF ANY, DO YOU HAVE IN... ?

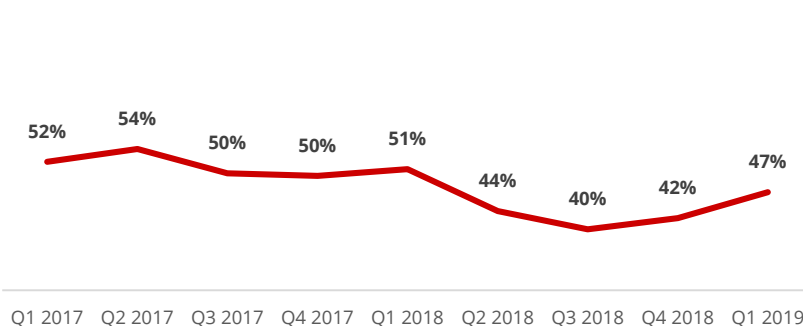| Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
61%	59%	52%	53%	53%	50%	46%	50%	50%

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TRUST IN INSTITUTIONS

SOUTH AFRICAN POLICE SERVICE

- While trust in SAPS has been declining steadily since Q4 of 2016, the most significant drop has during the course of 2018, where it reached a low of 40%. Subsequently trust in SAPS increased in Q1 2019 to 47%.

TRUST IN: SOUTH AFRICAN POLICE SERVICE
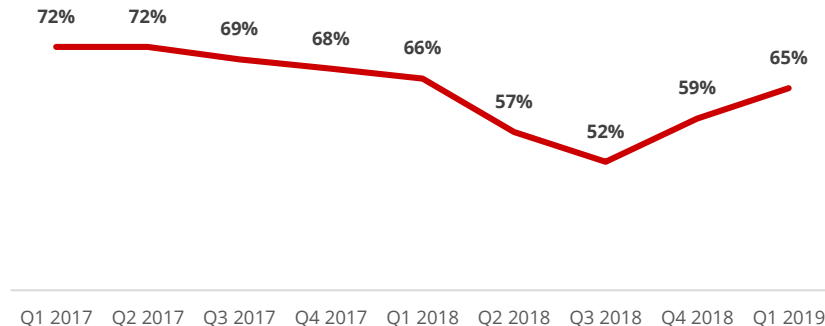HOW MUCH TRUST, IF ANY, DO YOU HAVE IN... ?

52%	54%	50%	50%	51%	44%	40%	42%	47%
Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019

SOUTH AFRICAN NATIONAL DEFENCE FORCE

- The SANDF has in general enjoyed more public trust than the South African Police Service has. While trust in the SANDF has declined since Q1 of 2017, trust started to grow in Q4 2018. In Q1 2019, the SANDF held "Armed Forces Day", and trust in the SANDF continued to grow in this quarter to 68%.

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

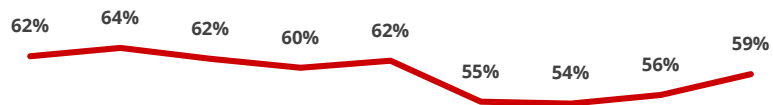|								
72%	72%	69%	68%	66%	57%	52%	59%	65%
Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019

50

TRUST IN INSTITUTIONS

SOUTH AFRICAN REVENUE SERVICE

- While trust in SARS declined throughout 2017 and 2018 it has increased slightly during this quarter, to 59%.

SOUTH AFRICAN BROADCASTING CORPORATION

- Despite the spate of financial mismanagement, corruption, and state capture allegations, roughly two-thirds (67%) of South Africans still trust the SABC. This level of trust has been consistent over time, possibly because the public did not experience any disruptions in broadcasting as a result of the internecine struggles taking place at the SABC.
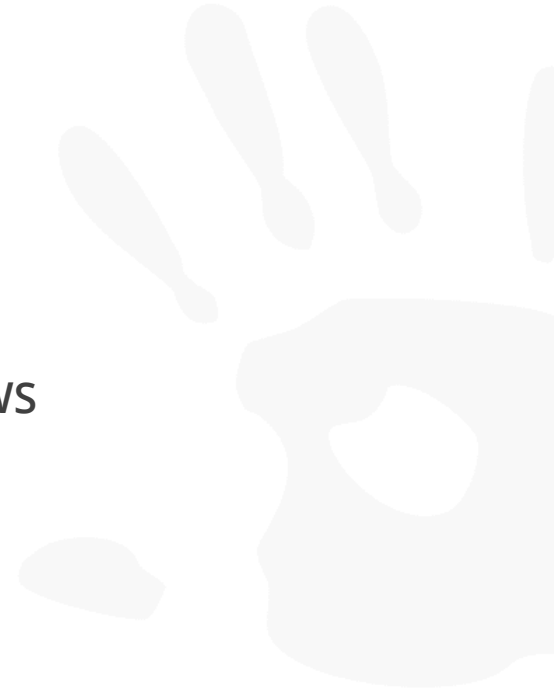
TRUST IN: SARS
HOW MUCH TRUST, IF ANY, DO YOU HAVE IN… ?

Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
62%	64%	62%	60%	62%	55%	54%	56%	59%

TRUST IN: SABC
HOW MUCH TRUST, IF ANY, DO YOU HAVE IN… ?

Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
64%	67%	66%	65%	68%	64%	63%	66%	67%

51
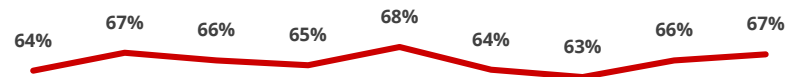
SECTION EIGHT
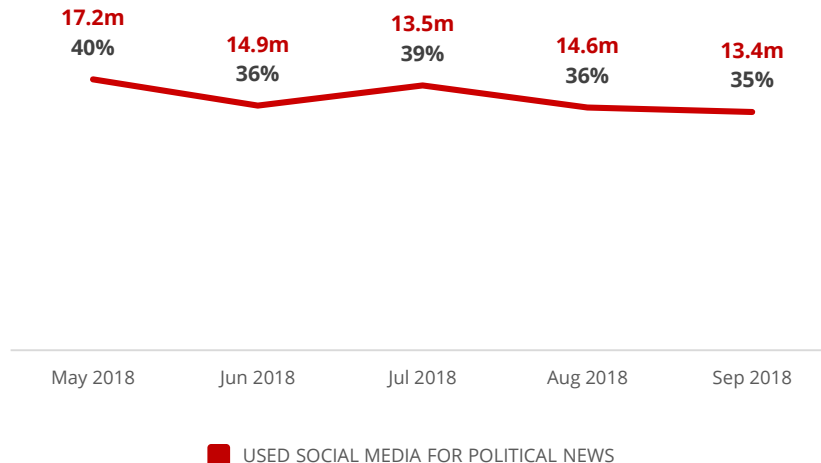
USING SOCIAL MEDIA FOR POLITICAL NEWS

USING SOCIAL MEDIA FOR POLITICAL INFORMATION

- Citizen Surveys has worked directly within the Mobile Telecommunications industry. Over a period of 9 years, Citizen Surveys ran one of the largest national probability surveys, Mobile Tracker, measuring citizen's telecommunications behaviour – including their usage of data and social media platforms.

  - In Q2 2018, approximately 57% (22.1-million) South African's used data, with the vast majority accessing the internet using their cellphones.

  - More than Facebook and Twitter, WhatsApp is the most frequently used communications App in South Africa, an unmediated platform.

- In terms of using social media platforms for political news, in May 2018 – at the height of Ramaphoria –nearly 40% of South African adults (or 14.9-million South Africans aged 18 years and older) received news on political matters about South Africa from social media platforms such as Facebook and Twitter.

- As the months went on, however, the proportion of South African adults who received news on political matters from social media declined in general, reaching a low of 35% (13.1-million) in September 2018.

USING SOCIAL MEDIA FOR POLITICAL NEWS
APRIL – SEPTEMBER 2018

17.2m 40%	**14.9m** 36%	**13.5m** 39%	**14.6m** 36%	**13.4m** 35%
May 2018	Jun 2018	Jul 2018	Aug 2018	Sep 2018

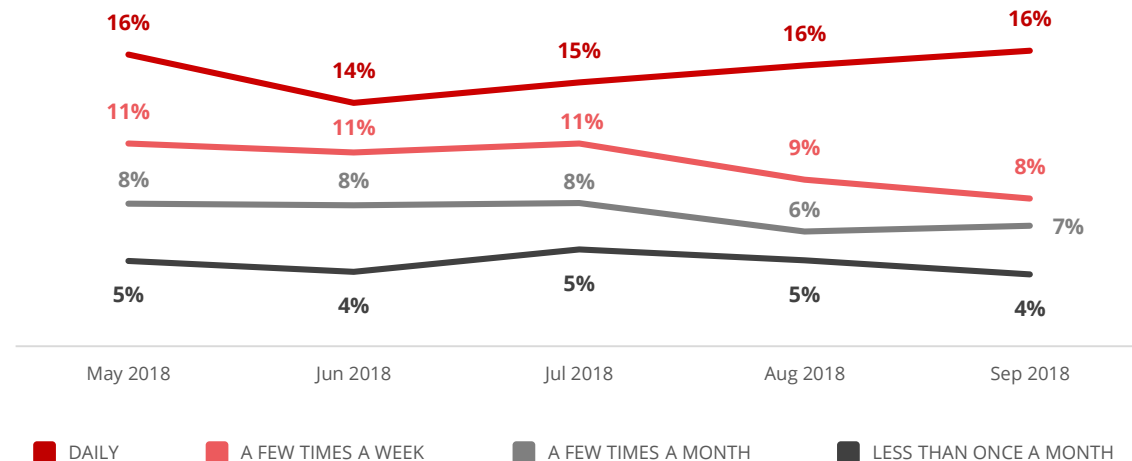🟥 USED SOCIAL MEDIA FOR POLITICAL NEWS

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USING SOCIAL MEDIA FOR POLITICAL INFORMATION
FREQUENCY OF USE

- In May 2018, 27% of South African adults (10.2-million people) used social media platforms for political news frequently (i.e. every day or a few times a week).

- While the proportion of those South Africans who used social media daily declined to a low point in June 2018, it has since steadily grown back to 16% in September 2018.

- The proportion of South Africans who used social media a few times a week remained relatively stable, but declined from July 2018 onwards.

- Those who use social media a few times a month have declined steadily over time, while those who use it less than once a month have remained somewhat stable since May 2018.

FREQUENCY OF USING SOCIAL MEDIA FOR POLITICAL NEWS
APRIL – SEPTEMBER 2018

Legend:
- DAILY
- A FEW TIMES A WEEK
- A FEW TIMES A MONTH
- LESS THAN ONCE A MONTH

Daily: May 2018 16%, Jun 2018 14%, Jul 2018 15%, Aug 2018 16%, Sep 2018 16%
A few times a week: May 2018 11%, Jun 2018 11%, Jul 2018 11%, Aug 2018 9%, Sep 2018 8%
A few times a month: May 2018 8%, Jun 2018 8%, Jul 2018 8%, Aug 2018 6%, Sep 2018 7%
Less than once a month: May 2018 5%, Jun 2018 4%, Jul 2018 5%, Aug 2018 5%, Sep 2018 4%

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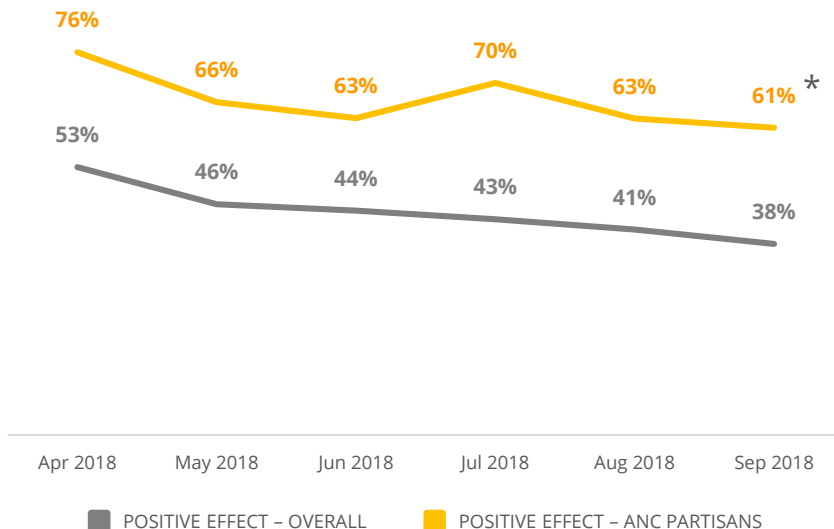# USING SOCIAL MEDIA FOR POLITICAL INFORMATION
IMPACT OF USING SOCIAL MEDIA ON OPINIONS OF THE ANC

- In April 2018, of those who engage with Social Media, 53% noted that the news had a positive effect on their opinion of the ANC.
  - However, as the months passed, this proportion dropped.
- ANC partisans are those South African adults who "feel closest to the ANC".
- For ANC partisans, news about the ANC is more likely to have a positive effect on their option of the ANC.*

EFFECT ON OPINIONS OF THE ANC

DOES POLITICAL NEWS FROM FACEBOOK / TWITTER HAVE A POSITIVE EFFECT, NO EFFECT, OR NEGATIVE EFFECT ON YOUR OPINION OF THE ANC ?

Apr 2018   May 2018   Jun 2018   Jul 2018   Aug 2018   Sep 2018

■ POSITIVE EFFECT – OVERALL   ■ POSITIVE EFFECT – ANC PARTISANS

EFFECT ON ANC PARTISANS
Q3 2018

POSITIVE EFFECT
64%

NO EFFECT
12%

NEGATIVE EFFECT
4%

* The base sizes reflected in the partisan measure are small, and indicative at a monthly level, however.
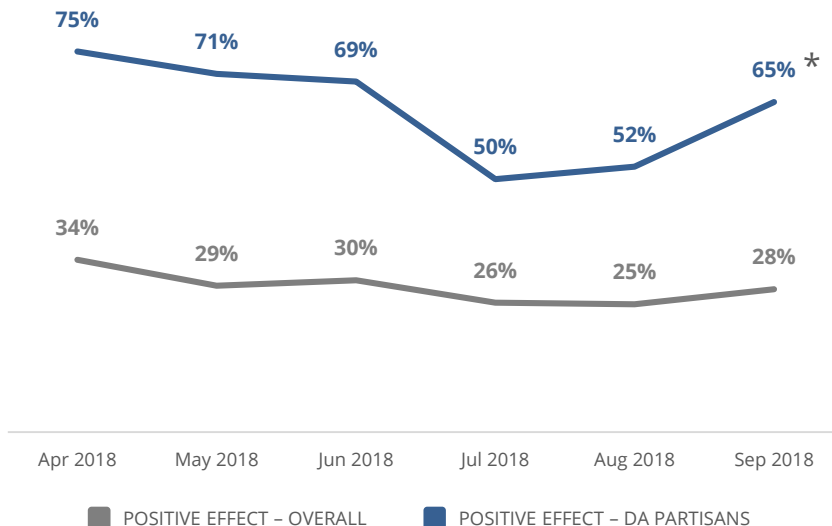
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USING SOCIAL MEDIA FOR POLITICAL INFORMATION
IMPACT OF USING SOCIAL MEDIA ON OPINIONS OF THE DA

- For DA partisans, news about the DA is more likely to have a positive effect on their option of the party.*

- What is interesting to note is that the proportion of DA partisans who said "No effect" is the highest of all three of the major political parties.
  - On the other hand, those partisans who said that it would have a "Positive effect" is also the lowest proportion.

EFFECT ON OPINIONS OF THE DA

DOES POLITICAL NEWS FROM FACEBOOK / TWITTER HAVE A POSITIVE EFFECT, NO EFFECT, OR NEGATIVE EFFECT ON YOUR OPINION OF THE DA ?

75%   71%   69%   65% *
                       50%   52%

34%   29%   30%   26%   25%   28%

| Apr 2018 | May 2018 | Jun 2018 | Jul 2018 | Aug 2018 | Sep 2018 |

■ POSITIVE EFFECT – OVERALL   ■ POSITIVE EFFECT – DA PARTISANS

EFFECT ON DA PARTISANS

Q3 2018

POSITIVE EFFECT
56%

NO EFFECT
36%

NEGATIVE EFFECT
8%

* The base sizes reflected in the partisan measure are small, and indicative at a monthly level, however.
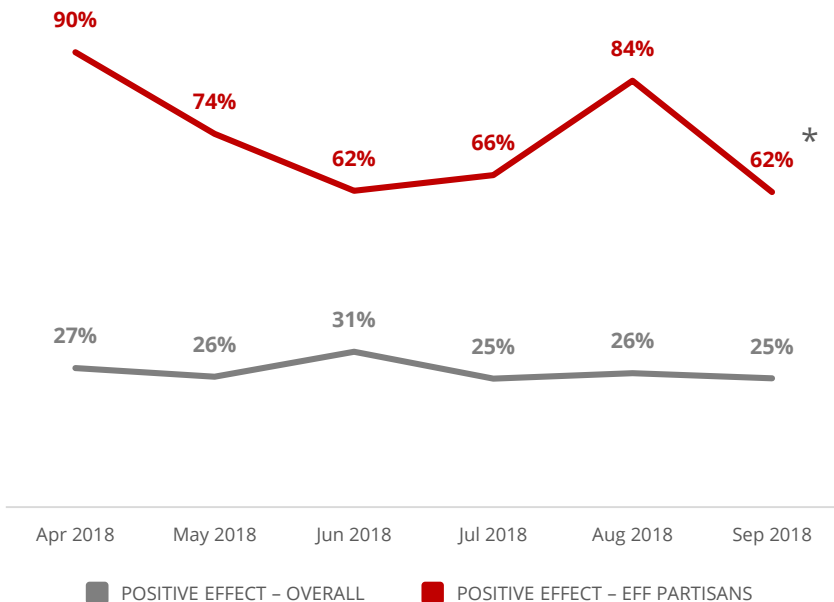
USING SOCIAL MEDIA FOR POLITICAL INFORMATION
IMPACT OF USING SOCIAL MEDIA ON OPINIONS OF THE EFF

- For EFF partisans, news about the EFF is more likely to have a positive effect on their option of the EFF.*

- Interestingly, the proportion of EFF partisans who said "Negative effect" is the highest amongst all three major parties.

- While these results are presented at a monthly level, they are indicative rather than definitive.

- Applying quarterly weights allows for a higher resolution, but the pattern remains relatively consistent.

EFFECT ON OPINIONS OF THE EFF

DOES POLITICAL NEWS FROM FACEBOOK / TWITTER HAVE A POSITIVE EFFECT, NO EFFECT, OR NEGATIVE EFFECT ON YOUR OPINION OF THE EFF ?

90% 74% 62% 66% 84% 62% *

27% 26% 31% 25% 26% 25%

Apr 2018   May 2018   Jun 2018   Jul 2018   Aug 2018   Sep 2018

■ POSITIVE EFFECT – OVERALL   ■ POSITIVE EFFECT – EFF PARTISANS

EFFECT ON EFF PARTISANS
Q3 2018

POSITIVE EFFECT
72%

NO EFFECT
14%

NEGATIVE EFFECT
14%

* The base sizes reflected in the partisan measure are small, and indicative at a monthly level, however.

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SECTION NINE

EXPROPRIATION OF LAND WITHOUT COMPENSATION

POLARISING THE NATION
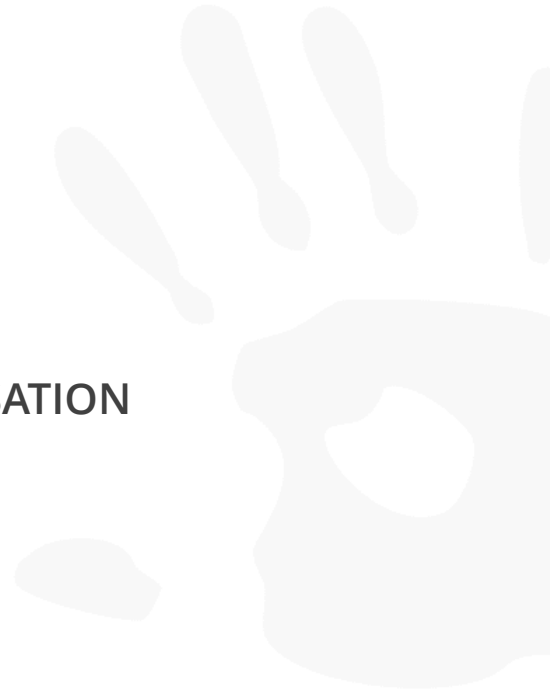
LAND EXPROPRIATION
AGREEMENT AND DISAGREEMENT

- The question of land expropriation without compensation is extremely polarising, splitting South Africa down the middle with the majority of South Africans holding extremely strong views, both in favour and against.

- In Q2 of 2018, 10.4-million (28%) of South African adults strongly agreed; in Q3 of 2018, this grew to 12.2-million (33%).

- Even more people strongly disagreed with expropriation of land without compensation in Q2 of 2018, however, at 11.5-million (31%), and this grew to 13-million (35%) in Q3 of 2018.

- Overall, there are more people who strongly disagree than strongly agree, by a margin of nearly 800,000.

LAND EXPROPRIATION

TO WHAT EXTENT DO AGREE OR DISAGREE THAT GOVERNMENT HAS THE RIGHT TO TAKE LAND WITHOUT PAYMENT AND TO REDISTRIBUTE IT TO PEOPLE WHO WERE DISADVANTAGED UNDER APARTHEID?

Q2 2018 | Q3 2018

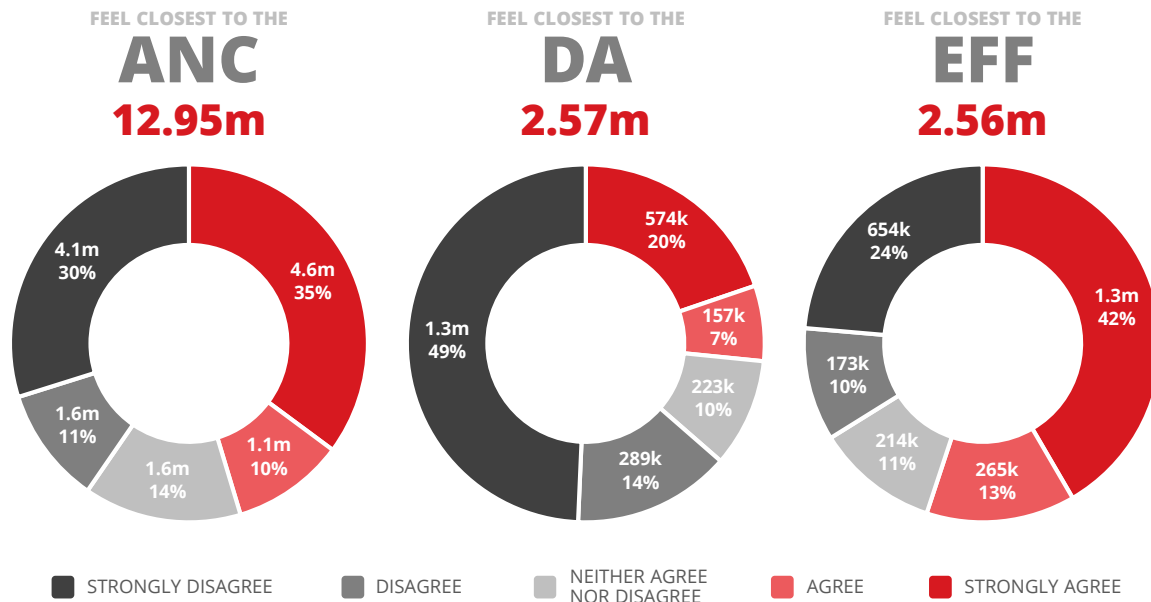|	Q2 2018		Q3 2018
STRONGLY AGREE	10.4m	28%	STRONGLY AGREE — 33% / 12.2m
AGREE	4.5m	12%	AGREE — 9% / 3.4m
NEITHER AGREE NOR DISAGREE	6.8m	18%	NEITHER AGREE NOR DISAGREE — 13% / 4.7m
DISAGREE	3.9m	10%	DISAGREE — 10% / 3.8m
STRONGLY DISAGREE	11.5m	31%	STRONGLY DISAGREE — 35% / 13.0m

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LAND EXPROPRIATION
AGREEMENT AND DISAGREEMENT, BY PARTISANSHIP

- We ask "Which political party do you feel closest to?" in order to gauge partisanship.

- We see that 4.1-million (30%) of ANC supporters strongly disagree with land expropriation, while 4.6-million (35%) strongly agree. Once more we observe the divisiveness of the issue – even amongst ANC supporters – in favour of the strongly disagree camp.

- As expected, 1.3-million (49%) DA supporters strongly disagree with expropriation of land without compensation, while only 574,000 (20%) strongly agree.

- For the EFF, 1.3-million (42%) of its partisan supporters strongly agree, while 654,000 (24%) strongly disagree with expropriation of land without compensation.

LAND EXPROPRIATION: Q3 2018
TO WHAT EXTENT DO AGREE OR DISAGREE THAT GOVERNMENT HAS THE RIGHT TO TAKE LAND WITHOUT PAYMENT AND TO REDISTRIBUTE IT TO PEOPLE WHO WERE DISADVANTAGED UNDER APARTHEID?

FEEL CLOSEST TO THE
ANC
12.95m

4.1m 30%
4.6m 35%
1.6m 11%
1.6m 14%
1.1m 10%

FEEL CLOSEST TO THE
DA
2.57m

574k 20%
157k 7%
1.3m 49%
223k 10%
289k 14%

FEEL CLOSEST TO THE
EFF
2.56m

654k 24%
1.3m 42%
173k 10%
214k 11%
265k 13%

■ STRONGLY DISAGREE   ■ DISAGREE   ■ NEITHER AGREE NOR DISAGREE   ■ AGREE   ■ STRONGLY AGREE

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DEMOGRAPHIC PROFILE: Q3 2018

SOUTH AFRICAN ADULTS (18+) WHO STRONGLY AGREE WITH LAND EXPROPRIATION

POPULATION GROUP

BLACK
11,258,000 (92%) ★

COLOURED
517,000 (4%)

INDIAN
158,000 (1%)

WHITE
277,000 (2%)

AGE GROUP

18-24 2,397,000 (20%) ★

25-34 3,906,000 (32%) ★

35-44 2,347,000 (19%)

45-54 1,632,000 (13%)

55+ 1,927,000 (16%)

LIVING STANDARDS MEASURE

10	260,000 (2%)
09	706,000 (6%)
08	805,000 (7%)
07	1,607,000 (13%) ★
06	4,207,000 (34%) ★
05	2,526,000 (21%) ★
04	1,278,000 (10%)
03	539,000 (4%)
02	247,000 (2%)
01	35,000 (0%)

GENDER

FEMALE
5,906,000 (48%)

MALE
6,304,000 (52%)

TOTAL SOUTH AFRICANS

12.21-million
33%

GT ★ 3,828,000 (31%)

LM 1,003,000 (8%)

NW 758,000 (6%)

MP 1,186,000 (10%)

FS 875,000 (7%)

KZ ★ 2,447,000 (20%)

NC 195,000 (2%)

EC 1,187,000 (10%)

WC 731,000 (6%)

POLITICAL PARTY SUPPORTER

ANC	DA	EFF
4,598,000	574,000	1,252,000
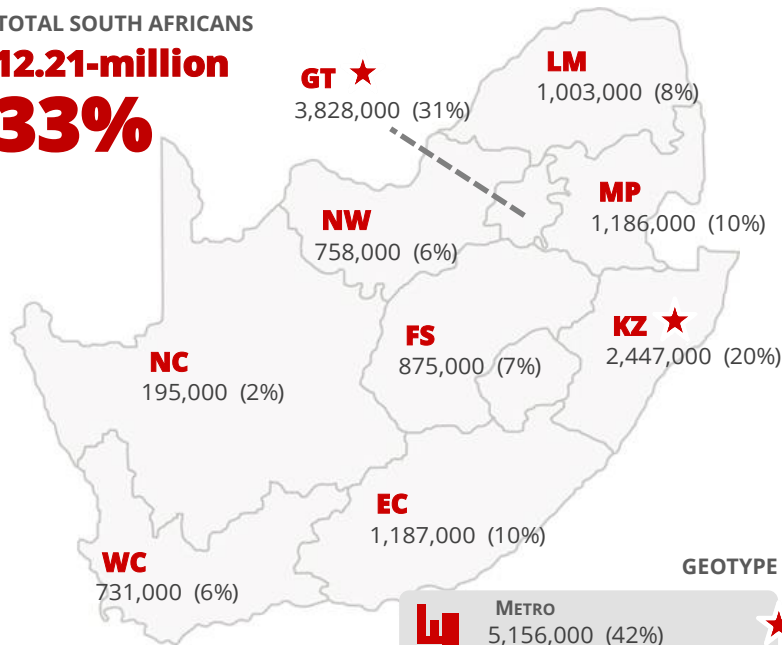
GEOTYPE

METRO
5,156,000 (42%) ★

URBAN
3,155,000 (26%)

RURAL
3,899,000 (32%)

DEMOGRAPHIC PROFILE: Q3 2018

SOUTH AFRICAN ADULTS (18+) WHO STRONGLY DISAGREE WITH LAND EXPROPRIATION

POPULATION GROUP

BLACK
8,568,000 (66%) ★

COLOURED
1,825,000 (14%) ★

INDIAN
456,000 (4%)

WHITE
2,116,000 (16%) ★

AGE GROUP

18-24 2,284,000 (18%)

25-34 3,526,000 (27%) ★

35-44 2,497,000 (19%)

45-54 2,038,000 (16%)

55+ 2,621,000 (20%) ★

LIVING STANDARDS MEASURE

10 1,090,000 (8%)

09 1,195,000 (9%) ★

08 1,017,000 (8%) ★

07 1,766,000 (14%) ★

06 3,631,000 (28%) ★

05 2,283,000 (18%) ★

04 1,217,000 (9%)

03 455,000 (4%)

02 256,000 (2%)

01 56,000 (0%)

GENDER

FEMALE
6,887,000 (53%)

MALE
6,079,000 (47%)

TOTAL SOUTH AFRICANS

12.97-million
35%

GT ★
3,590,000 (28%)

LM
838,000 (6%)

MP
552,000 (4%)

NW
688,000 (5%)

KZ ★
2,240,000 (17%)

FS
435,000 (3%)

NC
401,000 (3%)

EC ★
1,714,000 (13%)

WC ★
2,508,000 (19%)

POLITICAL PARTY SUPPORTER

ANC	DA	EFF
4,064,000	1,323,000	654,000
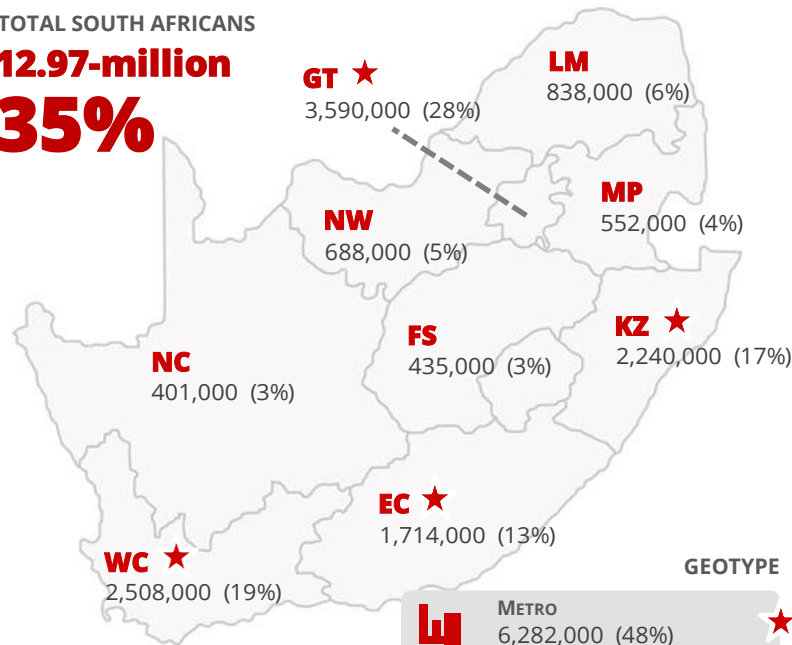
GEOTYPE

METRO
6,282,000 (48%) ★

URBAN
2,748,000 (21%)

RURAL
3,936,000 (30%)

SECTION TEN

POLITICAL LEADERS' ELECTION CAMPAIGN ACTIVITY

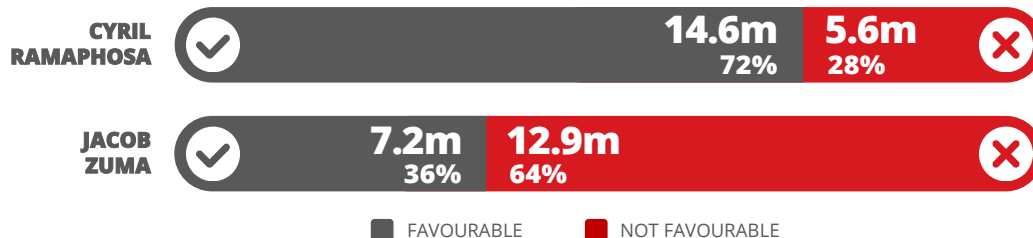# POLITICAL LEADERS' ELECTION CAMPAIGN ACTIVITY
CYRIL RAMAPHOSA AND JACOB ZUMA (JANUARY 2019)

- We asked respondents *"If the National Election was held tomorrow, who would you vote for?"*

  - Respondents were then given a computer tablet and asked to cast their vote, simulating a ballot.

- We then examined the favourability ratings of both President Ramaphosa and ex-President Zuma among those 20.1-million people who would vote for the ANC.

- Roughly 14.6-million (72%) of these ANC supporters viewed Ramaphosa favourably, while 7.2-million (36%) viewed Zuma favourably, and some seeing both favourably.

- In terms of preference, 13.1-million (65%) of the 20.1-million ANC supporters preferred Ramaphosa over Zuma. Interestingly, 2.9-million (15%) preferred them equally.
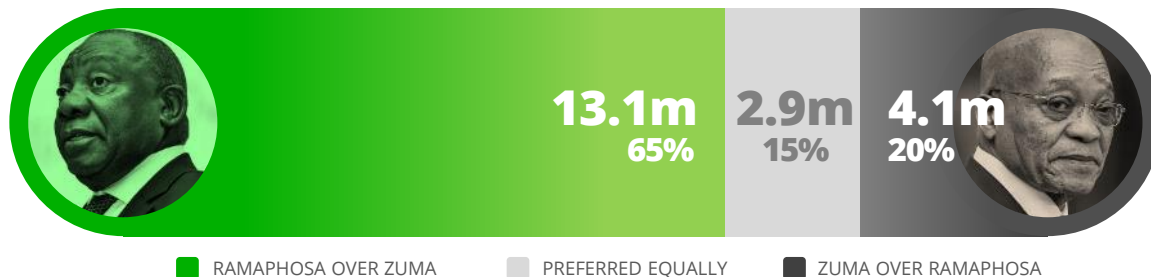
FAVOURABILITY AMONGST POTENTIAL ANC VOTERS
IF THE ELECTIONS WERE HELD TOMORROW, 20.1m PEOPLE WOULD VOTE FOR THE ANC

CYRIL RAMAPHOSA ✓ 14.6m 72% | 5.6m 28% ✗

JACOB ZUMA ✓ 7.2m 36% | 12.9m 64% ✗

◼ FAVOURABLE   ◼ NOT FAVOURABLE

PREFERENCE AMONGST ANC SUPPORTERS
JANUARY 2019

13.1m 65% | 2.9m 15% | 4.1m 20%

◼ RAMAPHOSA OVER ZUMA   ◻ PREFERRED EQUALLY   ◼ ZUMA OVER RAMAPHOSA
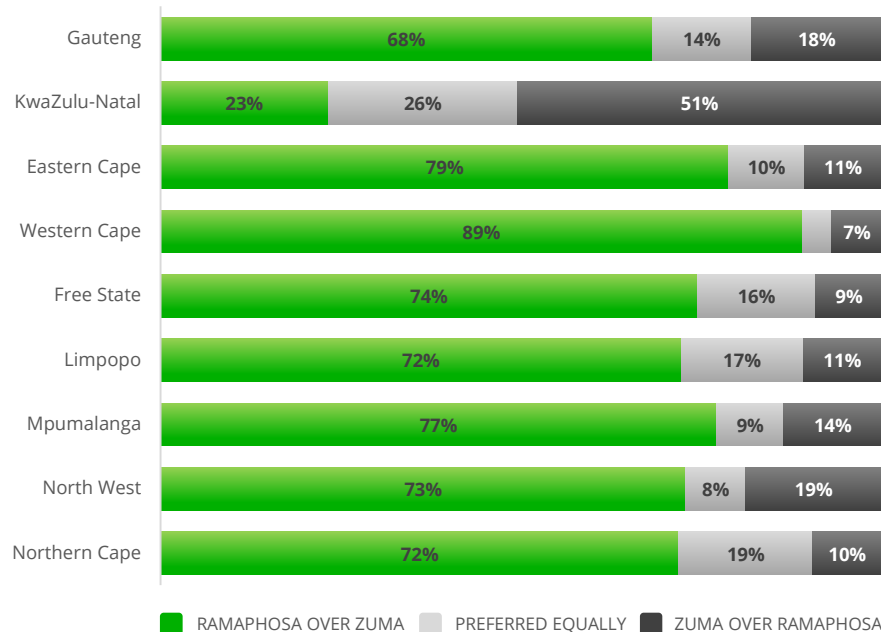
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POLITICAL LEADERS' ELECTION CAMPAIGN ACTIVITY

CYRIL RAMAPHOSA AND JACOB ZUMA (JANUARY 2019)

- In terms of preferences across the provinces, Ramaphosa is preferred in all provinces except for KwaZulu-Natal, where 51% of ANC supporters prefer Zuma over Ramaphosa.

- It is worth noting the following in the provinces where Ramaphosa is preferred over Zuma:

  - Ramaphosa enjoys the highest preference amongst ANC supporters in the Western Cape (89%), which is also the province with the lowest preference for Zuma.

  - Ramaphosa has a lower level of support in Gauteng (68%), compared to the other provinces.

PREFERENCE AMONGST ANC SUPPORTERS

JANUARY 2019

Province	RAMAPHOSA OVER ZUMA	PREFERRED EQUALLY	ZUMA OVER RAMAPHOSA
Gauteng	68%	14%	18%
KwaZulu-Natal	23%	26%	51%
Eastern Cape	79%	10%	11%
Western Cape	89%		7%
Free State	74%	16%	9%
Limpopo	72%	17%	11%
Mpumalanga	77%	9%	14%
North West	73%	8%	19%
Northern Cape	72%	19%	10%

■ RAMAPHOSA OVER ZUMA   ■ PREFERRED EQUALLY   ■ ZUMA OVER RAMAPHOSA

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POLITICAL LEADERS' ELECTION CAMPAIGN ACTIVITY

CYRIL RAMAPHOSA AND JACOB ZUMA (JANUARY 2019)

- The SACS also asked about the effect that ex-President Zuma would have on the voting behaviour of ANC supporters, were he to be deploying on the ANC's campaign trail.

- Of the 20.1-million ANC supporters, 6.7-million (34%) would be more likely to vote for the ANC if Zuma was on the campaign trail.

- Some 10.6-million (53%) would be less likely to vote for the ANC in this scenario, however, which is an important finding.

JACOB ZUMA'S EFFECT ON ANC SUPPORTERS

JANUARY 2019

10.6m (53%)
LESS LIKELY
TO VOTE FOR
THE ANC

2.8m (14%)
NO EFFECT

6.7m (34%)
MORE LIKELY
TO VOTE FOR
THE ANC

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POLITICAL LEADERS' ELECTION CAMPAIGN ACTIVITY

MMUSI MAIMANE AND HELEN ZILLE (JANUARY 2019)

- We asked respondents *"If the National Election was held tomorrow, who would you vote for?"*

  - Respondents were then given a computer tablet and asked to cast their vote, simulating a ballot.

- We then examined the favourability ratings of both DA Leader Mmusi Maimane and former-Western Cape Premier Helen Zille among the 6.4-million people who would vote for the DA.

- Roughly 3.8-million (59%) of these DA supporters viewed Maimane favourably. Helen Zille enjoyed higher levels, however, with 4.5-million (70%) viewing her favourably.

- Roughly 2.0-million (30%) of the 6.4-million DA supporters preferred Maimane over Zille. On the other hand, 3.4-million (52%) DA supporters preferred Zille over Maimane.

FAVOURABILITY AMONGST POTENTIAL DA VOTERS

IF THE ELECTIONS WERE HELD TOMORROW, 6.4m PEOPLE WOULD VOTE FOR THE DA

	FAVOURABLE	NOT FAVOURABLE
MMUSI MAIMANE	3.8m 59%	2.6m 41%
HELEN ZILLE	4.5m 70%	2.0m 30%

■ FAVOURABLE   ■ NOT FAVOURABLE

PREFERENCE AMONGST DA SUPPORTERS

JANUARY 2019

2.0m 30%   1.1m 17%   3.4m 52%

■ MAIMANE OVER ZILLE   ■ PREFERRED EQUALLY   ■ ZILLE OVER MAIMANE

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POLITICAL LEADERS' ELECTION CAMPAIGN ACTIVITY

CYRIL RAMAPHOSA AND JACOB ZUMA (JANUARY 2019)

- In terms of preferences across the two provinces where the DA has a strong voting presence:

  - In the Western Cape, 62% of DA supporters prefer Zille over Maimane, while 22% prefer the two equally, and 15% prefer Maimane over Zille.

  - In Gauteng, 39% of DA supporters prefer both figures equally, followed closely by 38% who prefer Zille over Maimane.

- Given these levels of preference for Zille, it is unsurprising that her presence would mean that 3.7-million (58%) DA supporters are more likely to vote for the DA.

- This is most likely due to her long association with the party, especially as its leader. As a result, the two are closely-associated.

PREFERENCE AMONGST DA SUPPORTERS

JANUARY 2019

Gauteng	23%	39%	38%
Western Cape	15%	22%	62%

■ MAIMANE OVER ZILLE   ■ PREFERRED EQUALLY   ■ ZILLE OVER MAIMANE
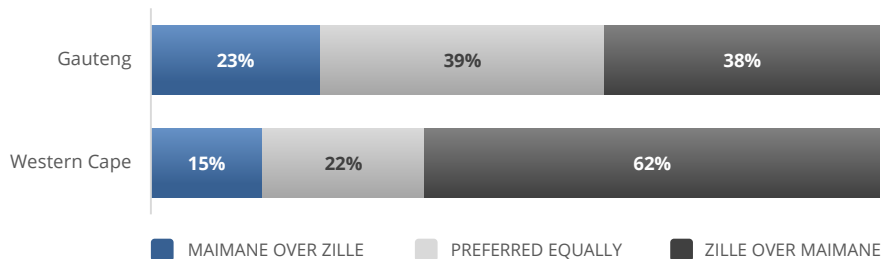
HELEN ZILLE'S EFFECT ON DA SUPPORTERS

JANUARY 2019

1.9m (29%)
LESS LIKELY
TO VOTE FOR
THE DA

841k (13%)
NO EFFECT

3.7m (58%)
MORE LIKELY
TO VOTE FOR
THE DA

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