

# THE CRITERION REPORT

The Criterion Report is a quarterly market research survey conducted by the Institute of Race Relations into voter preferences, attitudes and the South African political landscape.



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*The Criterion Report is home to the findings and insights drawn from market research conducted by the South African Institute of Race Relations (IRR) into voter preferences, attitudes and the nature of the South African political landscape.*

**IRR February 2019 Election Poll**

**In line with the IRR's objective to become an authority on political market research, the Institute has undertaken its second full survey of the electoral landscape, to supplement the first full survey carried out in September 2018, and a "snap poll" carried out in December 2018.**

The IRR's February Election Poll was in the field during the last two weeks of February 2019. Below is a summary of national Voting Intention (that is, party political support), as well as Voting Intention in Gauteng and the Western Cape and various turnout scenarios nationally and provincially.

This analysis comprises a two-part summary of the key political findings of the IRR's February 2019 Election Poll: Part A comprises an overview of the data and what it says. Part B comprises the IRR's own analysis of those findings and some of what it believes are the key insights to be drawn from them.

The banner headline findings of the IRR's 2019 February Election Poll are:

**1. NATIONAL BALLOT: ANC rejuvenation slows and declines, EFF growth remains high**

- The ANC currently stands on 54.7% nationally, down 1.3 percentage points from December (56%). That is down 7.4 percentage points from the 62.1% it secured in 2014. On a 71% turnout scenario, support for the party increases to 55%.
- The DA currently stands on 21.8% nationally, up 3.1 percentage points from December (18%). That is down 0.4 percentage points from the 22.2% it secured in 2014. On a 71% turnout scenario, support for the party increases to 24%.
- The EFF currently stands on 12.2% nationally, up 1.2 percentage points from December (11%). That is up 5.9 percentage points from the 6.3% it secured in 2014. On a 71% turnout scenario, support for the party decreases to 11%.

**2. GAUTENG PROVINCIAL BALLOT: ANC well below a majority, EFF growth remains high**

- The ANC currently stands on 41.6%, down 12 percentage points from the 53.6% it secured on the provincial ballot in 2014. On a 69.5% turnout scenario, support for the party increases to 47%.
- The DA currently stands on 32.4%, up 1.6 percentage points from the 30.8% it secured on the provincial ballot in 2014. On a 69.5% turnout scenario, support for the party increases to 36%.
- The EFF currently stands on 18.2%, up 7.9 percentage points from the 10.3% it secured on the provincial ballot in 2014. On a 69.5% turnout scenario, support for the party drops to 11%.

**3. WESTERN CAPE PROVINCIAL BALLOT: DA majority on a knife edge; some growth for smaller parties**

- The DA currently stands on 50.1%, down 9.3 percentage points from the 59.4% it secured on the provincial ballot in 2014. On a 74.7% turnout scenario, support for the party increases to 54%.
- The ANC currently stands at 33.9%, up 1 percentage point from the 32.9% it secured on the provincial ballot in 2014. On a 74.7% turnout scenario, support for the party drops to 30%.
- Support for the ACDP currently stands at 3.5% and at 2.8% for the FF+, both up from the 1% and 0.6% they secured respectively on the provincial ballot in 2014. The results for both parties do fall within the margin of error and should be treated with caution.

**4. PARTY SUPPORT BY RACE: The DA's support base remains most racially diverse**

- A breakdown of the ANC's support base (54.7%) by race, shows that it comprises: 96.2% black voters, 1.1% white voters, 2.2% Coloured voters and 0.5% Indian voters.
- A breakdown of the DA's support base (21.8%) by race, shows that it comprises: 27.3% black voters, 36.0% white voters, 28.0% Coloured voters and 8.6% Indian voters.
- A breakdown of the EFF's support base (12.2%) by race, shows that it comprises: 98.1% black voters, 0.4% white voters, 1.3% Coloured voters and 0.1% Indian voters.
- 68% of all black voters indicated they would vote ANC, compared to 16% for the EFF and 8% for the DA.
- 71% of all white voters indicated they would vote DA, compared to 5% for the ANC and 0% for the EFF.
- 67% of all Coloured voters indicated they would vote DA, compared to 13% for the ANC and 2% for the EFF.
- 72% of Indian voters indicated they would vote DA, compared to 10% for the ANC and 1% for the EFF.

**The IRR will undertake a full political survey every quarter. The next such full quarterly survey will be conducted in April 2019. The IRR's intention is to publish the results the week before the 8 May 2019 election.**

## TECHNICAL DETAIL

### Methodology:

The poll was conducted between 12 and 26 February 2019. The sample was fully demographically representative and comprised only registered voters. A total of 1,611 respondents were questioned. The national margin of error is 3.3%. Supplementing this were two fully demographically representative sub-samples for Gauteng (sample size: 502 registered voters) and the Western Cape (sample size: 405 registered voters). The margin of error for the Gauteng sub-sample was 3.8%, and for the Western Cape sub-sample, 5.9%. The confidence level is 95%. The poll was conducted telephonically, using a single frame, random digit-dialling sampling design. Briefly: The sampling frame consists of every potential cell phone number in existence in South Africa, from which a probability sample is drawn. This approach ensures that every number stands an equal chance of being included in the study, which is the most basic condition that must be met for survey results to be generalizable to the population from which a sample is drawn. Those who were “undecided” in response to the voting intention question (around 7%) were assigned a preference based on their response to party favourability questions. The poll was conducted by Victory Research. A fuller explanation of the methodology is available on request.

### Turnout:

As part of the poll, we generated a number of potential turnout scenarios. Any poll, in and of itself, represents a 100% turnout scenario, as every respondent’s opinion is recorded. But, on Election Day, inevitably not every voter goes to the polls. In 2014, there was a 73.5% turnout. In 2019, turnout is likely to be lower, a trend which is typical of maturing democracies and of electoral environments with high levels of discontent (which drives up voter apathy). We have thus generated four additional turnout scenarios for our numbers: 79.5%, 73.3%, 70.9% and 65.4%. Four turnout scenarios were also generated for Gauteng and Western Cape respectively. These were done by assigning a probability of voting to each respondent based on their responses to several questions designed to measure their likelihood of voting, and excluding those least likely to vote.

### Interpretation:

**This poll is not a prediction.** It is a snapshot in time, in this case of the electoral market between 12 and 26 February 2019. Likewise, the numbers presented in the poll are not absolutely definitive. A 3.3% margin of error means, for example, the DA – which comes out with 22% – could be on 18.7% or 25.3%. A confidence level of 95% means we are confident 95% of the time the findings will never vary more than 3.3 percentage points up or down from reality. When reporting on the poll, it is important to bear these parameters in mind. Finally, the most valuable aspect of any poll is its ability to identify trends and patterns, particularly over time. One should thus avoid ascribing absolute authority to any given single, isolated finding.

### Background:

The IRR’s September 2018 poll put the ANC on 52%, the DA on 23% and the EFF on 13% (once undecided voters had been allocated). Our December 2018 “snap poll” put the ANC on 56%, the DA on 18% and the EFF on 11% (undecided voters allocated). Since then, a number of significant events will have had some impact on the electoral marketplace. Among them: The final voter registration weekend took place on 26 and 27 January, the Zondo Commission of Inquiry continues to produce a range of alarming allegations with regards to corruption, Eskom’s debt and inability to consistently produce electricity has again resulted in load-shedding and a number of political parties, including the ANC, DA and EFF, have delivered their election manifestos. In turn, with the President having announced that the election will be held on 8 May, parties are now allowed to publicly advertise their offer via election posters (radio and television adverts will follow now that the date has been gazetted), which will have the steady effect over the coming months of reducing the number of undecided voters. None of these factors, in and of themselves, are likely to have impacted definitively on the support for any one party – precedent suggests it takes much time for a single scandal or event to fully manifest in a change in voting behaviour – but each is likely to have had some impact.

### National and Provincial Ballot Questions:

Unlike the IRR’s September and December 2018 polls, our February 2019 Election Poll asked voters to choose which party they support both nationally and provincially. This allowed us to gauge national voting sentiment and to distinguish it, in Gauteng and the Western Cape, from provincial voting sentiment. As the provincial ballot will determine provincial power on 8 May for both those provinces, this analysis presents Voting Intention for both ballots separately, and the provincial ballot is the best indicator of party support of the two, in those two respective provinces.

**PART A: FINDINGS**

**1. National Voting Intention and Turnout Scenarios**

**Purpose of Question:** Designed to give an indication of where political support stands for each respective party at national level, at a given moment in time. Turnout scenarios tell you what happens when those voters who are least likely to vote on Election Day are removed from the results. As the turnout level drops, you can see which party gains or loses support and, thus, how committed or enthusiastic each party's support base is.

**TABLE 1.1: National Voting Intention [All Voters/Undecided Voters Allocated]**

Q: If a national election was taking place today, which party would you vote for?					
Political Party	September 2018	December 2018	February 2019	Increase/Decrease	2014 Election
African National Congress (ANC)	52%	56%	54.7%	-1.3	62.1%
Democratic Alliance (DA)	23%	18%	21.8%	+3.1	22.2%
Economic Freedom Fighters (EFF)	13%	11%	12.2%	+1.2	6.3%
Inkatha Freedom Party (IFP)	3%	3%	2.7%	-	2.4%
Freedom Front Plus (FF+)	1%	1%	1.7%	-	0.9%
United Democratic Movement (UDM)	0%	0%	0.8%	-	1.0%
African Christian Democratic Party (ACDP)	2%	2%	0.7%	-	0.5%
National Freedom Party (NFP)	0%	0%	0.6%	-	1.6%
Pan Africanist Congress (PAC)	0%	0%	0.6%	-	0.2%
Good Movement (GM)	-	-	0.6%	-	-
Congress of the People (COPE)	0%	0%	0.4%	-	0.6%
Agang South Africa (ASA)	0%	0%	0.1%	-	0.3%
African Independent Congress (AIC)	0%	0%	0.0%	-	0.5%
Azanian People's Organisation (AZAPO)	0%	0%	0.0%	-	0.1%
Minority Front (MF)	0%	0%	0.0%	-	0.1%
African Transformation Movement (ATM)	-	-	0.0%	-	-
Other	2%	3%	0.8%	-	-
Undecided	0%	0%	0.3%	-	-
Won't vote	2%	0%	1.6%	-	-
Refused	0%	1%	0.6%	-	-

**Key Findings:**

- Support for the ANC, which grew between September (52%) and December (56%), has since slowed and slightly reversed. The ANC is down 1.3 percentage points from December to currently stand at 54.7% nationally.
- Support for the DA has recovered from December (18%), up by 3.1 percentage points to stand at 21.8% nationally. Still not where it was in September, when it stood at 23%, but improved upon over the short term.
- Support for the EFF is up slightly from December (11%) by 1.2 percentage points, to currently stand at 12.2% nationally. Like the DA, it is not yet back to its September level, of 13%, but also improved upon over the short term.
- Support for all the smaller parties falls within the margin of error (3.3%), and so should be read with caution, but it appears that the Freedom Front Plus has grown its support from 2014, albeit it off a small base. New parties like the Good Movement registered 0.6% nationally, while the African Transformation Movement, along with a range of other smaller parties, did not register any national support.

**TABLE 1.2: National Voting Intention [All Voters/Undecided Voters Not Allocated]**

Q: If a national election was taking place today, which party would you vote for?					
Political Party	September 2018	December 2018	February 2019	Increase/Decrease	2014 Election
African National Congress (ANC)	47%	51%	49.4%	-1.6	62.1%
Democratic Alliance (DA)	20%	17%	19.2%	+2.2	22.2%
Economic Freedom Fighters (EFF)	10%	11%	11.1%	+0.1	6.3%
Inkatha Freedom Party (IFP)	3%	3%	2.4%	-	2.4%
Freedom Front Plus (FF+)	1%	1%	1.6%	-	0.9%
United Democratic Movement (UDM)	0%	0%	0.8%	-	1.0%
Pan Africanist Congress (PAC)	0%	0%	0.6%	-	0.2%
African Christian Democratic Party (ACDP)	2%	2%	0.6%	-	0.5%
Good Movement (GM)	-	-	0.6%	-	-
National Freedom Party (NFP)	0%	0%	0.5%	-	1.6%
Congress of the People (COPE)	0%	0%	0.4%	-	0.6%
Agang South Africa (ASA)	0%	0%	0.1%	-	0.3%
African Independent Congress (AIC)	0%	0%	0.0%	-	0.5%
Azanian People's Organisation (AZAPO)	0%	0%	0.0%	-	0.1%
Minority Front (MF)	0%	0%	0.0%	-	0.1%
African Transformation Movement (ATM)	-	-	0.0%	-	-
Other	0%	1%	0.5%	-	-
Undecided	4%	10%	6.8%	-	-
Won't vote	2%	5%	1.6%	-	-
Refused	10%	0%	4.0%	-	-

TABLE 1.3: National Elections Turnout History [As of 28 February 2019]

Election Year	Registered Voters	Increase/Decrease	Valid Votes	Increase/Decrease	Turnout Percentage
1999	18,172,751		16,228,462		89.30%
2004	20,674,926	+2,502,175	15,863,558	-364,904	76.73%
2009	23,181,997	+2,507,071	17,919,966	+2,056,408	77.30%
2014	25,388,082	+2,206,085	18,654,771	+734,805	73.48%
2019	26,789,953	+1,401,871	-	-	-

**Key Findings:**

- The best predictor of turnout is history. According to the Independent Electoral Commission (IEC), national turnout dropped from 77.3% in 2009, to 73.5% in 2014. There is much evidence to suggest that pattern of decline will continue, and likely define the 2019 election.
- One indicator is the number of new registrations, which have, as of 28 February 2019, dropped in comparison to previous elections. To date, there have been some 1.4m new registrations since 2014. That is markedly less than the 2.2m new voters registered between 2009 and 2014, and the 2.5m new voters registered between 2004 and 2009.
- There are some mitigating factors. First, there has only been one official registration weekend this year. Second, the IEC has been struggling to comply with a constitutional court order that it verify the physical address of every registered voter. Nevertheless, a lower number of new registrations is also symptomatic of greater voter apathy and, as things stand, there is a strong case to be made that the final turnout percentage for 2019 will be lower than it was in 2014 (73.5%).

TABLE 1.4: National Turnout Scenarios: December 2018 [All Voters/Undecided Voters Allocated]

<i>Q: If a national election was taking place today, which party would you vote for?</i>					
Political Party	December 2018 Turnout Scenarios				
	100%	78%	75%	71%	69%
African National Congress (ANC)	56%	60%	58%	60%	59%
Democratic Alliance (DA)	18%	20%	21%	20%	22%
Economic Freedom Fighters (EFF)	11%	11%	11%	11%	10%
Inkatha Freedom Party (IFP)	3%	3%	3%	3%	3%
African Christian Democratic Party (ACDP)	2%	2%	2%	2%	2%
Freedom Front Plus (FF+)	2%	2%	2%	2%	2%

TABLE 1.5: National Turnout Scenarios: February 2019 [All Voters/Undecided Voters Allocated]

<i>Q: If a national election was taking place today, which party would you vote for?</i>					
Political Party	February 2019 Turnout Scenarios				
	100.0%	79.5%	73.3%	70.9%	65.4%
African National Congress (ANC)	54.7%	55%	55%	55%	54%
Democratic Alliance (DA)	21.8%	23%	24%	24%	24%
Economic Freedom Fighters (EFF)	12.2%	11%	11%	11%	11%
Inkatha Freedom Party (IFP)	2.7%	3%	3%	3%	3%
Freedom Front Plus (FF+)	1.7%	2%	2%	2%	2%
United Democratic Movement (UDM)	0.8%	1%	1%	1%	1%
African Christian Democratic Party (ACDP)	0.7%	1%	1%	1%	1%

**Key Findings:**

- As in December, we generated four turnout scenarios at national level: 79.5%, 73.3%, 70.9% and 65.4%.
- Through all four scenarios, the ANC's vote share remains relatively stable at around 55%, only dropping to 54% at the lowest turnout scenario (65.4%). This is a consequence of its vote share having marginally declined nationally.
- The DA fairs better as the turnout percentage drops, moving from 23% to 24%. Although this represents a marginal improvement upon its national vote share at 100% turnout, lower turnout would seem to be the difference between it achieving more or less than it did in 2014.
- The EFF is the only party of the big three that would appear to be "squeezed" by a lower turnout level, although marginally, as it drops from 12.2% to 11%.

## 2. Gauteng Voting Intention: Provincial and National Ballot and Turnout Scenarios

**Purpose of Question:** Designed to give an indication of where political support stands for each respective party at national level, at a given moment in time. Turnout scenarios tell you what happens when those voters who are least likely to vote on Election Day are removed from the results. As the turnout level drops, you can see which party gains or loses support and, thus, how committed or enthusiastic each party's support base is.

**TABLE 2.1: Gauteng Voting Intention [All Gauteng Voters/Provincial Ballot/Undecided Voters Allocated]**

Q: If a national election was taking place today, which party would you vote for?					
Political Party	September 2018	December 2018	February 2019	Increase/Decrease	2014 Election
African National Congress (ANC)	-	-	41.6%	-	53.6%
Democratic Alliance (DA)	-	-	32.4%	-	30.8%
Economic Freedom Fighters (EFF)	-	-	18.2%	-	10.3%
Pan Africanist Congress (PAC)	-	-	1.8%	-	0.3%
Freedom Front Plus (FF+)	-	-	1.3%	-	1.2%

### Key Findings:

- On the Gauteng provincial ballot, the ANC is currently on 41.6%, well below the 53.6% it secured in 2014 and, with that, below the 50% it needs to secure an outright majority.
- Support for the DA stands at 32.4%, marginally up from the 30.8% it secured on the provincial ballot in 2014.
- Support for the EFF stands at 18.2% on the provincial ballot, a significant increase from the 10.3% it secured in 2014. Its growth in Gauteng, South Africa's most populous province, is likely underpinning the party's national growth in turn.

**TABLE 2.2: Gauteng Turnout Scenarios: February 2019 [All Gauteng Voters/Provincial Ballot/Undecided Voters Allocated]**

Q: If a national election was taking place today, which party would you vote for?					
Political Party	Gauteng February 2019 Turnout Scenarios				
	100.0%	77.5%	70.7%	69.5%	61.1%
African National Congress (ANC)	41.6%	45%	47%	47%	44%
Democratic Alliance (DA)	32.4%	35%	37%	36%	38%
Economic Freedom Fighters (EFF)	18.2%	14%	11%	11%	13%
Pan Africanist Congress (PAC)	1.8%	0%	0%	0%	0%
Freedom Front Plus (FF+)	1.3%	2%	2%	2%	2%

### Key Findings:

- We generated four turnout scenarios for the Gauteng provincial ballot: 77.5%, 70.7%, 69.5% and 61.1%.
- In 2014, turnout in Gauteng on the provincial ballot was 72.97%.
- As turnout drops, the ANC does recover some of its lost vote share, moving to as high as 47% on a 69.5% turnout. That, however, is still below its 2014 performance (53.6%) and 3% short of a 50% majority.
- The DA's vote share improves systematically as turnout drops, to between 35% and 38%, a range that would see it improve significantly on its 2014 performance on the provincial ballot (30.8%).
- As happened nationally, the EFF's vote share would seem most susceptible to being "squeezed" down as turnout drops. It falls all the way down to 11% at a 69.5% turnout level.

**TABLE 2.3: Gauteng Voting Intention [All Gauteng Voters/National Ballot/Undecided Voters Allocated]**

Q: If a national election was taking place today, which party would you vote for?					
Political Party	September 2018	December 2018	February 2019	Increase/Decrease	2014 Election
African National Congress (ANC)	46%	48%	46.7%	-1.3	54.9%
Democratic Alliance (DA)	28%	25%	26.5%	+1.5	28.5%
Economic Freedom Fighters (EFF)	17%	12%	17.9%	+5.9	10.3%

### Findings:

- The IRR's September and December polls did track Gauteng support on the national ballot, so it is possible to draw some comparisons.
- The ANC remains relatively stable at between 46% and 48% and, as of February, currently stands at 46.7%. That is significantly down from the 54.9% it secured nationally in Gauteng in 2014 and mirrors its decline on the provincial ballot.
- The DA is fractionally down from the 28.5% it secured in 2014, and currently stands at 26.5%. There is a significant difference between the DA's support on the Gauteng provincial ballot (32.4%) and on the Gauteng national ballot (26.4%), which suggests that around 6% of Gauteng voters will consider splitting their provincial ballot in favour of the DA at provincial level.
- The EFF has exceeded the 17% it secured in Gauteng in September, and currently stands at 17.9%, also significantly up from the 12% it secured in December.

### 3. Western Cape Voting Intention: Provincial and National Ballot and Turnout Scenarios

**Purpose of Question:** Designed to give an indication of where political support stands for each respective party at national level, at a given moment in time. Turnout scenarios tell you what happens when those voters who are least likely to vote on Election Day are removed from the results. As the turnout level drops, you can see which party gains or loses support and, thus, how committed or enthusiastic each party's support base is.

**TABLE 3.1: Western Cape Voting Intention [All Western Cape Voters/Provincial Ballot/Undecided Voters Allocated]**

Q: If a national election was taking place today, which party would you vote for?					
Political Party	September 2018	December 2018	February 2019	Increase/Decrease	2014 Election
Democratic Alliance (DA)	-	-	50.1%	-	59.4%
African National Congress (ANC)	-	-	33.9%	-	32.9%
African Christian Democratic Party (ACDP)	-	-	3.5%	-	1.0%
Freedom Front Plus (FF+)	-	-	2.8%	-	0.6%
Good Movement (GM)	-	-	2.5%	-	-
United Democratic Movement (UDM)	-	-	2.0%	-	0.5%
Economic Freedom Fighters (EFF)	-	-	1.0%	-	2.1%

**Key Findings:**

- On the Western Cape provincial ballot, the DA enjoys a fractional majority, and currently stands at 50.1%. That is significantly down from its 2014 result, when it secured 59.4%.
- The ANC is marginally up from the 32.9% it secured on the provincial ballot in 2014, and currently stands at 33.9%.
- Results for all the smaller parties are well within the margin of error for this sample (5.9%) and so should be treated with caution. Having taken that into consideration, both the ACDP and the FF+ both appear to have grown slightly. The ACDP is currently on 3.5%, up from the 1% it secured in 2014 and the FF+ is currently on 2.8%, up from the 0.6% it secured in the province in 2014. The Good Movement is currently on 2.5% on the Western Cape provincial ballot.

**TABLE 3.2: Western Cape Turnout Scenarios: February 2019 [All Western Cape Voters/Provincial Ballot/Undecided Voters Allocated]**

Q: If a national election was taking place today, which party would you vote for?					
Political Party	Western Cape February 2019 Turnout Scenarios				
	100.0%	83.0%	80.3%	76.0%	74.7%
Democratic Alliance (DA)	50.1%	55%	55%	53%	54%
African National Congress (ANC)	33.9%	29%	29%	30%	30%
African Christian Democratic Party (ACDP)	3.5%	4%	4%	4%	4%
Freedom Front Plus (FF+)	2.8%	3%	3%	3%	4%
Good Movement (GM)	2.5%	2%	2%	2%	2%
United Democratic Movement (UDM)	2.0%	2%	2%	3%	3%
Economic Freedom Fighters (EFF)	1.0%	1%	1%	1%	1%

**Key Findings:**

- We generated four turnout scenarios for the Western Cape provincial ballot: 83.0%, 80.3%, 76.0% and 74.7%.
- In 2014, turnout in the Western Cape on the provincial ballot was 72.76%.
- The DA's vote share improves systematically as the turnout level drops. At a turnout level of 74.7%, it stands on 54%.
- The ANC's vote share is "squeezed" down marginally as the turnout level drops, down to 30% at a 74.7% turnout level.
- Both the ACDP and the FF+ appear to benefit marginally from a lower turnout level, both increasing to 4% at a turnout level of 74.7%.

**TABLE 3.2: Western Cape Voting Intention [All Western Cape Voters/National Ballot/Undecided Voters Allocated]**

Q: If a national election was taking place today, which party would you vote for?					
Political Party	September 2018	December 2018	February 2019	Increase/Decrease	2014 Election
Democratic Alliance (DA)	-	-	45.6%	-	57.3%
African National Congress (ANC)	-	-	35.7%	-	34.0%
Economic Freedom Fighters (EFF)	-	-	3.6%	-	2.3%

**Key Findings:**

- On the national ballot, as on the provincial ballot, the DA is currently on 45.6%, significantly below the 57.3% it secured in 2014.
- The ANC is currently on 35.7%, marginally up from the 34.0% it secured in 2014.
- The EFF performs far better on the national ballot than it does on the provincial ballot, although off a very low base. It is currently on 3.6%, marginally up from the 2.3% it secured in 2014.



#### 4. National and Provincial Voting Intention by Race

**Purpose of Question:** To enable you to gauge how the different racial demographic groups (a) split when it comes to national voting intention and (b) split when breaking down individual party support by race.

**TABLE 4.1: National Voting Intention by Race [All Voters/By Race/Undecided Voters Allocated]**

Q: If a national election was taking place today, which party would you vote for?						
Political Party	September 2018		December 2018		February 2019	
	Black Voters	Minority Voters	Black Voters	Minority Voters	Black Voters	Minority Voters
African National Congress	63%	14%	69%	12%	68%	9%
Democratic Alliance	10%	71%	6%	61%	8%	70%
Economic Freedom Fighters	16%	1%	14%	0%	16%	1%

**Key Findings:**

- 68% of all black voters indicated they would vote ANC, compared to 16% for the EFF and 8% for the DA.
- 70% of all minority voters indicated they would vote DA, compared to 9% for the ANC and 1% for the EFF.

**TABLE 4.2: National Voting Intention by Race [All Voters/By Race/Undecided Voters Allocated]**

Q: If a national election was taking place today, which party would you vote for?					
Political Party	Poll	Black Voters	White Voters	Coloured Voters	Indian Voters
	September 2018	63%	3%	24%	34%
	December 2018	69%	4%	13%	36%
African National Congress	February 2019	68%	5%	13%	10%
	September 2018	10%	79%	67%	47%
	December 2018	6%	71%	55%	39%
Democratic Alliance	February 2019	8%	71%	67%	72%
	September 2018	16%	1%	1%	0%
	December 2018	14%	1%	0%	0%
Economic Freedom Fighters	February 2019	16%	0%	2%	1%

**Key Findings:**

- 68% of all black voters indicated they would vote ANC, compared to 16% for the EFF and 8% for the DA.
- 71% of all white voters indicated they would vote DA, compared to 5% for the ANC and 0% for the EFF.
- 67% of all Coloured voters indicated they would vote DA, compared to 13% for the ANC and 2% for the EFF.
- 72% of Indian voters indicated they would vote DA, compared to 10% for the ANC and 1% for the EFF.

**TABLE 4.3: National Party Support by Race [All Voters/Undecided Voters Allocated/By Race]**

Political Party	Poll	Percentage	Black Voters	White Voters	Coloured Voters	Indian Voters
	September 2018	52%	94%	2%	4%	1%
	December 2018	56%	95%	1%	2%	2%
African National Congress	February 2019	54.7%	96.2%	1.1%	2.2%	0.5%
	September 2018	23%	31%	37%	25%	5%
	December 2018	18%	33%	40%	23%	4%
Democratic Alliance	February 2019	21.8%	27.3%	36.0%	28.0%	8.6%
	September 2018	13%	98%	1%	1%	0%
	December 2018	11%	99%	1%	0%	0%
Economic Freedom Fighters	February 2019	12.2%	98.1%	0.4%	1.3%	0.1%

**Key Findings:**

- As of February, a breakdown of the ANC's support base (54.7%) by race, shows that it comprises: 96.2% black voters, 1.1% white voters, 2.2% Coloured voters and 0.5% Indian voters.
- As of February, a breakdown of the DA's support base (21.8%) by race, shows that it comprises: 27.3% black voters, 36.0% white voters, 28.0% Coloured voters and 8.6% Indian voters.
- As of February, a breakdown of the EFF's support base (12.2%) by race, shows that it comprises: 98.1% black voters, 0.4% white voters, 1.3% Coloured voters and 0.1% Indian voters.

**TABLE 4.4: Gauteng Voting Intention by Race [All Gauteng Voters/Provincial Ballot/By Race]**

Q: If a national election was taking place today, which party would you vote for?					
Political Party	Percentage	Black Voters	White Voters	Coloured Voters	Indian Voters
African National Congress	41.6%	53%	8%	11%	10%
Democratic Alliance	32.4%	17%	77%	79%	67%
Economic Freedom Fighters	18.2%	24%	2%	1%	0%

**Key Findings:**

- 53% of black Gauteng voters indicated they would support the ANC on the provincial ballot, compared to 24% for the EFF and 17% for the DA.



## EMBARGOED AGAINST DELIVERY

- 77% of white Gauteng voters indicated they would support the DA on the provincial ballot, compared to 8% for the ANC and 2% for the EFF.
- 79% of Coloured Gauteng voters indicated they would support the DA on the provincial ballot, compared to 11% for the ANC and 1% for the EFF.
- 67% of Indian Gauteng voters indicated they would support the DA on the provincial ballot, compared to 10% for the ANC and 0% for the EFF.

**TABLE 4.5: Western Cape Voting Intention by Race** [All Western Cape Voters/Provincial Ballot/By Race]

<i>Q: If a national election was taking place today, which party would you vote for?</i>					
Political Party	Percentage	Black Voters	White Voters	Coloured Voters	Indian Voters
Democratic Alliance	50.1%	13%	76%	63%	0%
African National Congress	33.9%	79%	7%	13%	100%
Economic Freedom Fighters	1.0%	2%	1%	1%	0%

**Key Findings:**

- 79% of black Western Cape voters indicated they would support the ANC on the provincial ballot, compared to 13% for the DA and 2% for the EFF.
- 76% of white Western Cape voters indicated they would support the DA on the provincial ballot, compared to 7% for the ANC and 1% for the EFF.
- 63% of Coloured Western Cape voters indicated they would support the DA on the provincial ballot, compared to 13% for the ANC and 1% for the EFF.
- 100% of Indian Western Cape voters indicated they would support the ANC.

**PART B: ANALYSIS**

- The ANC's general decline from 2014 (as of February, it is down 7.4 percentage points from the last election) can be almost exclusively attributed to the EFF. The ANC and the EFF are locked in a battle for between 5% and 10% of alienated black ANC voters. Where those voters end up on 8 May will go some way towards determining the fate of these two parties. It is clear those 5% to 10% of alienated black ANC voters are fluid and have, to one degree or another, shifted between the ANC and EFF over the past five months.
- Initially, and on the back of Jacob Zuma's disastrous electoral impact, they had shifted almost entirely to the EFF. In September, the party was on 13%. The ANC managed to claw some of that support back in the last two months of 2018, reducing the EFF to 11% in December and increasing its own standing to 56% that month. As things stand, on the back of much bad news over the past two months (Bosasa and Stage 4 load-shedding among them), some of those voters have started to shift back to the EFF, at the ANC's expense.
- As of February, the ANC thus looks like it will battle to reach its internal national election target of 60%. However, it is still possible, with a good campaign over the coming two months, to once again win back some of those alienated but fluid voters it has lost to the EFF.
- The EFF appears to be the only opposition party able to make direct and significant inroads into the ANC's support.
- The backbone of the EFF's national support is to be found in Gauteng, and that same national trend is at its most profound in this province, where the EFF currently stands at 18.2% on the provincial ballot and the ANC on 41.6%. That is not just a huge gap to make up before 8 May, if the ANC wishes to win the province with an outright majority, but represents a massive 12 percentage point decline from the 53.6% the party secured on the provincial ballot in 2014.
- The DA is currently on 21.8%, suggesting it is slowly managing to recover some lost ground (it was on 18% in December), but the party's internal national election target of 27% is looking far off as of February.
- The DA remains relatively stable and its support, it would seem, is locked in a band of between 20% and 24%. Its greatest challenge is the Western Cape which, together with Gauteng, comprised 62.4% of all DA support in 2014. The party's decline in that province (the DA is currently on 50.1% on the provincial ballot) has meant the DA's primary challenge is getting its base to turn out, rather than to grow in new markets. Its ability to invigorate its supporters in the Western Cape will be one of the key differences between it being able to grow nationally, albeit marginally, and staying relatively stable at around 22%.
- By contrast, the DA seems set for some small growth in Gauteng.
- The situation in Gauteng is intriguingly balanced, as of February. Even on a lower turnout scenario, the ANC fails to get to 50%. All three big parties – the ANC, DA and EFF – appear to be able to form a majority coalition: The ANC and the EFF; the EFF and the DA; and even the ANC and the DA.
- The ANC has more longstanding problems in Gauteng than the EFF, however. The ANC's vote share in Gauteng has remained relatively unchanged ever since 1994, at around 2.5m votes. Faced now with both discontent and apathy, the party's historical inability to grow its share of the electoral pool means it is disproportionately affected by a change in voting intention towards it, in that province. Thus, its challenge, like the DA's in the Western Cape, is not only to win back and reinvigorate its base (primarily from the EFF), but to try and grow beyond that. As things stand, the latter seems unlikely.
- The situation in the Western Cape is equally finely balanced. The DA has, to a degree, been suffering a torture by a thousand bites. In the wake of its internal incoherence and infighting over the last two years, it appears the number of voters it has systematically consolidated under its banner from other smaller parties over the last two decades have returned to those parties. As a result, although within the margin of error, both the ACDP and FF+ have a good showing on the Western Cape provincial ballot. Likewise, the advent of the Good Movement, which, although only polling at 2.5% on the provincial ballot, could, together with parties like the ACDP and FF+, be the difference between the DA being able to retain its majority or not.
- It is a total indictment of the ANC in the Western Cape, in much the same way as one could argue it is for the DA nationally, that given the DA's problems in that province, it seems to have failed fundamentally as an opposition party to make significant inroads into the DA's vote share.

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