

# 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 a quarterly market research survey conducted by the Institute of Race Relations (IRR) into voter preferences, attitudes and the South African political landscape.*

In line with the IRR's objective to become an authority on political market research, the institute has undertaken its first survey on the electoral landscape, an exercise it aims to replicate every quarter. What follows is a two-part summary of the key political findings: Part A comprises an objective 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 are:

- The EFF is polling at 13%
- The ANC is polling at 52%
- The DA is polling at 23%
- No party currently enjoys a 51% majority in Gauteng
- Land Reform polls worst, as a priority government issue

**Methodology:**

The poll was conducted between 22 August 2018 and 4 September 2018. The sample was fully demographically representative and comprised only registered voters. A total of 978 respondents were questioned. The margin of error is 3.1%. The confidence level is 95%. For the Gauteng sample, the margin of error is 6.2%. 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. A fuller explanation of the methodology is available on request. Those who refused to answer the voting intention question (around 10%) were assigned a preference based on their response to party and party leader favourability questions. The poll was conducted by Victory Research.

**Interpretation:**

This poll is not a prediction. It is a snapshot in time, in this case of the electoral market between 22 August and 4 September 2018. Likewise, the numbers presented in the poll are not absolutely definitive. A 3% margin of error means, for example, the DA – which comes out with 23% – could be on 20% or 26%. And, because the sample for Gauteng is smaller, thus with a 6% margin of error, the possible spread for each party is bigger. A confidence level of 95% means we are confident 95% of the time the findings will never vary more than 3.1 percentage points up or down from reality. When reporting on the poll, it is important to bear these parameters in mind.

## PART A Findings:

### National Landscape:

1. **All Voters:** The poll put national support for the ANC at 52%; it put the DA at 23% and support for the EFF at 13% [See Table 1.1.]
2. **Turnout:** Using the 83% of respondents who indicated they were “highly likely” to vote as a turnout model of 83%, the poll found national support for the ANC rose fractionally to 53%; support for the DA jumped significantly to 27% and dropped fractionally for the EFF, to 12% [See Table 1.1.]
3. **Key Finding:** A significant increase in support for the EFF, more than double its 2014 election result of 6%. That increase has come from the ANC, down significantly from its 2014 election result of 62%. The DA remains stable, fractionally up from its 2014 result of 22%.

Table 1.1: Voting Intention [All Voters]

Q: If a national election was taking place today, which party would you vote for?			
Political Party	All Voters	On 83% Turnout	2014 Election Results
African National Congress (ANC)	52%	53%	62%
Democratic Alliance (DA)	23%	27%	22%
Economic Freedom Fighters (EFF)	13%	12%	6%
Inkatha Freedom Party (IFP)	3%	2%	2%
African Christian Democratic Party (ACDP)	2%	1%	0.5%
Freedom Front Plus (FF+)	1%	1%	0.9%
Congress of the People (COPE)	0%	0%	0.6%
United Democratic Movement (UDM)	0%	0%	1%
African Independent Congress (AIC)	0%	0%	0.5%
Azanian People's Organisation (AZAPO)	0%	0%	0.1%
Minority Front (MF)	0%	0%	0.1%
National Freedom Party (NFP)	0%	0%	1%
Pan Africanist Congress (PAC)	0%	0%	0.2%
Other	2%	1%	-
Undecided	0%	0%	-
Won't vote	2%	0%	-
Refused	0%	0%	-

### Turnout

1. **Turnout:** If one cross-references the turnout model by race, the poll found that of those 83% respondents “highly likely” to vote, the percentage of minority voters jumped from 11% (on a 100%) to 17% (on 83%), which accounts for the spike in the DA’s vote on this turnout scenario. [See Table 1.2.]
2. **Finding:** Lower turnout on Election Day is likely to favour the Democratic Alliance.

Table 1.2: Turnout by Race [All Voters]

Q: What are the chances of you voting in the national elections taking place in 2019? 83% answered “Highly Likely”		
Race	On 100% Turnout	On 83% Turnout
Black	77%	76%
Coloured	9%	5%
Indian	3%	2%
White	11%	17%
Other	0%	0%

### Voting Intention by Race

1. **Black Voters:** The poll found that, among black voters, national support for the ANC stands at 63%; it put the DA at 10% and support for the EFF at 16% [See Table 1.3.]
2. **Minority Voters:** The poll found that, among minority voters, national support for the ANC stands at 14%; it put the DA at 71% and support for the EFF at 1% [See Table 1.3.]
3. **Finding:** The DA dominates the electoral share of the market among minority voters, while its share of black voters appears to have increased, from approximately 6% of all black voters in 2014, to 10%. This is significant and, if the DA can hold onto that growth, it will form the backbone of any potential national increase. Among black voters, the ANC remains dominant, with 63% of the market, but the

EFF has made significant inroads into this share of the electoral pool. Unlike the ANC, which also boasts 14% of minority voters, the EFF's support base almost entirely comprises black voters.

**Table 1.3: Voting Intention [Black Voters/Minority Voters]**

Q: If a national election was taking place today, which party would you vote for?		
Political Party	Black Voters	Minority Voters
African National Congress (ANC)	63%	14%
Democratic Alliance (DA)	10%	71%
Economic Freedom Fighters (EFF)	16%	1%
Inkatha Freedom Party (IFP)	4%	0%
African Christian Democratic Party (ACDP)	1%	2%
Freedom Front Plus (FF+)	0%	3%
Congress of the People (COPE)	0%	1%
United Democratic Movement (UDM)	0%	0%
African Independent Congress (AIC)	0%	1%
Azanian People's Organisation (AZAPO)	0%	0%
Minority Front (MF)	0%	1%
National Freedom Party (NFP)	0%	1%
Pan Africanist Congress (PAC)	0%	0%
Other	2%	2%
Undecided	0%	0%
Won't vote	2%	2%
Refused	0%	0%

#### Gauteng

1. **All Voters:** The poll found support for the ANC in Gauteng is at 46%; it put the DA at 28% and support for the EFF at 17% [See Table 1.4.]
2. **Black Voters:** The poll found that, among black voters in Gauteng, support for the ANC stands at 59%; it put the DA at 12% and support for the EFF at 24% [See Table 1.3.]
3. **Minority Voters:** The poll found that, among minority voters in Gauteng, support for the ANC stands at 2%; it put the DA at 64% and support for the EFF at 0% [See Table 1.3.]
4. **Finding:** The poll found no one party held a majority in Gauteng. In turn, it found that the base of the EFF's support comes from Gauteng. The province is South Africa's most populous and the 17% the EFF has secured in Gauteng will have gone some considerable way towards driving up its national percentage of the vote, to 13%.

**Table 1.4: Voting Intention – Gauteng [All Voters, Black Voters, Minority Voters]**

Q: If a national election was taking place today, which party would you vote for?			
Political Party	All Voters	Black Voters	Minority Voters
African National Congress (ANC)	46%	59%	2%
Democratic Alliance (DA)	28%	12%	64%
Economic Freedom Fighters (EFF)	17%	24%	0%
Inkatha Freedom Party (IFP)	1%	1%	1%
African Christian Democratic Party (ACDP)	1%	0%	4%
Congress of the People (COPE)	1%	0%	3%
African Independent Congress (AIC)	1%	0%	0%
National Freedom Party (NFP)	1%	0%	0%
Pan Africanist Congress (PAC)	1%	1%	0%
Freedom Front Plus (FF+)	0%	0%	0%
United Democratic Movement (UDM)	0%	1%	0%
Azanian People's Organisation (AZAPO)	0%	0%	0%
Minority Front (MF)	0%	0%	0%
Other	1%		
Undecided	0%		
Won't vote	2%		
Refused	0%		

### Party Favourability

1. **EFF Favourability:** The poll found 25% of ANC supporters are “Somewhat” (11%) or “Very Favourable” (14%) towards the EFF. Among DA supporters, just 10% are “Somewhat” (6%) or “Very Favourable” (4%) towards the ANC. [See Table 2.1.]
2. **Black Voters:** The poll found favourability towards the EFF among both ANC and DA voters increases among black voters and drops among minority voters. The poll found 26% of black ANC voters are “Somewhat” (11%) or “Very Favourable” (15%) towards the EFF. 26% of black DA voters are “Somewhat” (17%) or “Very Favourable” (9%) towards the EFF. [See Table 2.2.]
3. **Minority Voters:** For ANC minority voters, just 13% are “Somewhat” (10%) or “Very Favourable” (3%) towards the EFF. For DA minority voters, only 3% are “Somewhat” (2%) or “Very Favourable” (1%) towards the EFF. [See Table 2.2.]
4. **Finding:** Using favourability for the EFF among ANC and DA voters suggests far more affinity for the EFF among ANC supporters than among DA supporters. If one disaggregates the findings by race, it appears both black ANC and DA voters have far more affinity for the EFF than minority voters. This is one explanation for the EFF’s increase in support, at the expense of the ANC.

**Table 2.1: Party Favourability [ANC/DA supporters’ attitude to the EFF: All Voters]**

Q: Rate your feelings towards some people and organizations, with ONE HUNDRED meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and FIFTY meaning not particularly warm or cold. You can use any number from zero to ONE HUNDRED - the higher the number the more favourable your feelings are towards that person or organization. If you've never heard of a person or organisation, or you don't know enough to have an opinion, just tell me and we'll move onto the next one.		
Favourability Towards EFF	ANC Supporters	DA Supporters
Never heard of it	0%	0%
Don't know enough to rate	7%	3%
From 0 to 24 Very Unfavourable	34%	62%
From 25 to 49 Somewhat Unfavourable	11%	13%
<b>Combined: Somewhat/Very Unfavourable</b>	<b>45%</b>	<b>75%</b>
50 Neutral	19%	8%
From 51 to 75 Somewhat Favourable	11%	6%
From 76 to 100 Very Favourable	14%	4%
<b>Combined: Somewhat/Very Favourable</b>	<b>25%</b>	<b>10%</b>

**Table 2.2: Party Favourability [ANC/DA supporters’ attitude to the EFF: Black Voters/Minority Voters]**

Q: Rate your feelings towards some people and organizations, with ONE HUNDRED meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and FIFTY meaning not particularly warm or cold. You can use any number from zero to ONE HUNDRED - the higher the number the more favourable your feelings are towards that person or organization. If you've never heard of a person or organisation, or you don't know enough to have an opinion, just tell me and we'll move onto the next one.				
Favourability Towards EFF	ANC Supporters		DA Supporters	
	Black Voters	Minority Voters	Black Voters	Minority Voters
Never heard of it	0%	0%	0%	0%
Don't know enough to rate	6%	15%	2%	4%
From 0 to 24 Very Unfavourable	34%	37%	33%	75%
From 25 to 49 Somewhat Unfavourable	11%	20%	19%	11%
<b>Combined: Somewhat/Very Unfavourable</b>	<b>45%</b>	<b>57%</b>	<b>52%</b>	<b>86%</b>
50 Neutral	20%	7%	20%	2%
From 51 to 75 Somewhat Favourable	11%	10%	17%	2%
From 76 to 100 Very Favourable	15%	3%	9%	1%
<b>Combined: Somewhat/Very Favourable</b>	<b>26%</b>	<b>13%</b>	<b>26%</b>	<b>3%</b>

### Land

1. **All Voters:** Asked to pick two issues that respondents believed should be top government priorities, “Jobs and Unemployment” was identified as the biggest issue, with 47%. It was followed by “Drugs and drug abuse” (23%), “Crime and Security” (20%), “Corruption” (18%) and “Education” (18%) [See Table 3.1.]
2. **Land Reform:** Land Reform came last as a top priority, with just 6% of respondents identifying it as one of two priority issues.
3. **Black and Minority Voters:** The order of priority is broadly the same when cross referenced by race. “Land Reform” comes out last again for black voters (4%), but jumps slightly among minority voters (to 11%) [See Table 3.2.]

4. **Rural versus Urban:** There is little significant change in the list of priorities by geographic location. “Land Reform” still polls poorly both among rural and urban voters [See Table 3.3.]
5. **Finding:** “Jobs and unemployment” remains the standout and primary concern for voters across all demographics and geographic locations. “Land reform” as a priority polls incredibly poorly across all demographics and the urban and rural divide.

**Table 3.1: Biggest Issues [All Voters]**

Q: Which of the following are the TWO issues you think should be the top priorities for the government?	
Issue	All Voters
Jobs and unemployment	47%
Drugs and drug abuse	23%
Crime and insecurity	20%
Corruption	18%
Education	18%
Illegal immigration	16%
Housing	14%
Basic services like electricity and water	12%
Healthcare	8%
Rising prices	7%
Racism	7%
<b>Land reform</b>	<b>6%</b>
Only one chosen	2%
All	1%
None	0%
Other	2%
Don't know	0%
Refused	0%

**Table 3.2: Biggest Issues [Black Voters/Minority Voters]**

Q: Which of the following are the TWO issues you think should be the top priorities for the government?		
Issue	Black Voters	Minority Voters
Jobs and unemployment	50%	36%
Drugs and drug abuse	26%	10%
Crime and insecurity	19%	23%
Illegal immigration	18%	8%
Education	17%	22%
Corruption	14%	35%
Housing	14%	10%
Basic services like electricity and water	13%	7%
Healthcare	7%	12%
Rising prices	7%	7%
Racism	6%	9%
<b>Land reform</b>	<b>4%</b>	<b>11%</b>
Only one chosen	1%	6%
All	0%	4%
None	0%	0%
Other	2%	0%
Don't know	0%	0%
Refused	0%	0%

**Table 3.3: Biggest Issues [Rural versus Urban: All Voters]**

Q: Which of the following are the TWO issues you think should be the top priorities for the government?							
Issue	Urban				Rural		
	Suburb	Township	City	Informal Settlement	Commercial Farm	Smallholding	Rural or village
Jobs and unemployment	33%	53%	50%	33%	54%	43%	49%
Drugs and drug abuse	12%	26%	4%	24%	22%	15%	29%
Crime and insecurity	22%	15%	15%	13%	19%	30%	27%
Illegal immigration	10%	20%	6%	34%	12%	6%	12%
Education	24%	16%	28%	22%	22%	23%	12%
Corruption	28%	16%	38%	19%	8%	27%	13%
Housing	10%	16%	8%	20%	32%	6%	11%
Basic services like electricity and water	8%	9%	5%	8%	19%	9%	19%
Healthcare	9%	8%	12%	7%	3%	4%	8%
Rising prices	16%	5%	5%	14%	0%	0%	4%
Racism	5%	7%	13%	1%	9%	13%	8%
<b>Land reform</b>	<b>10%</b>	<b>4%</b>	<b>9%</b>	<b>2%</b>	<b>1%</b>	<b>15%</b>	<b>5%</b>
Only one chosen	6%	1%	4%	2%	0%	0%	1%
All	5%	1%	0%	1%	0%	0%	0%
None	0%	0%	0%	0%	0%	0%	1%
Other	0%	2%	4%	0%	0%	9%	3%
Don't know	0%	0%	0%	0%	0%	0%	0%
Refused	0%	0%	0%	0%	0%	0%	0%

## PART B: Analysis

**Summary:** The EFF has surged in national support and is currently polling at 13%. Its support has come at the expense of the ANC, which is at 52%. However, its support is fragile: if turnout drops, EFF support drops in turn, while the DA's support increases from 23% to 27%. Alienated black ANC voters have responded to the EFF's ability to dominate ANC policy and, already favourable to the EFF, chosen to align with it rather than the ANC. One result is that there is no party with a majority in Gauteng. This is a deeply significant finding: It means that the ANC's strategic decision to nullify the EFF by attempting to pander to and adopt its policies has backfired dramatically and around 10% of alienated black ANC voters are now being won over by the EFF on the back of its ability to dominate the ANC. The EFF has been able to do this without having any clear and compelling vision on those priority issues that matter most to voters: jobs, unemployment, education and healthcare. Essentially, there is a public debate vacuum on those issues that matter most to voters, one compounded by an economic crisis. Thus, land reform – a problem that ranks lowest among voters as a priority – has been allowed to overwhelm national debate and, driven by the EFF, be used to frame the ANC as subservient to the EFF's direction and programme of action.

1. The defining characteristic of the current national political landscape is a surge in support for the EFF and, simultaneously, a dramatic decline in support for the ANC, compared to the 2014 election results. The EFF would appear to have grown at the ANC's expense. The DA remains stable, demonstrating some small growth nationally and among black voters.
2. The poll suggests the DA has the potential to grow. Two things point to this: first, its share of black voters has grown from approximately 6% to 10%; second, lower turnout appears to favour the DA and, as turnout has systematically dropped with each national election (it was 73% in 2014), if the party can hold its existing black support together with the high relative turnout of minority voters, means it has the potential to fair significantly better than 23%.
3. The EFF's share of the vote is, however, fragile. This is best illustrated by turnout. The poll suggests a drop in turnout has an inverse effect on EFF and DA support: EFF support drops as DA support climbs. This is because minority voters appear far more inclined to vote than black voters and – equally likely – because the EFF is feeding off alienated and disillusioned ANC voters who are both more likely to switch or stay away.
4. The drop in the ANC's national percentage means no political party currently has a majority in Gauteng. In turn, the bulk of the EFF's support would seem to be built on a very powerful showing in Gauteng, where it is currently polling at 17%.
5. The EFF's ability to feed off alienated black ANC voters is best illustrated by how ANC voters feel about the EFF. Some 26% of ANC voters are somewhat or very favourable towards the EFF, demonstrating that a quarter of ANC voters enjoy an affinity towards the EFF and sympathy for it. It is on this sympathy that the EFF has been able to capitalize.
6. Although issues like jobs and unemployment, drug abuse, crime, education and healthcare dominate the list of priorities for voters, South African public debate has been dominated by land reform – the

issue that ranks lowest among voters as far as priorities are concerned. The EFF has used the lack of any compelling vision on any of the biggest issues on the part of the ANC – decline, economic regression and ubiquitous corruption – to dominate the national debate.

7. The EFF's ability to use land reform in this way – both to drive national debate and to dominate the ANC – has seen its share of the vote spike.
8. In the final analysis, this poll suggests the ANC's strategy of attempting to nullify the EFF by pandering to its policy programme has backfired dramatically, resulting in the EFF eating into a large share of its vote, helping it to bring the ANC below 50% in Gauteng and starting to threaten its national majority in turn.

**Gareth van Onselen**

*Head of Politics and Governance*

SA Institute of Race Relations