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PRO-GROWTH OR PRO-POVERTY: FINDINGS OF IRR POLLING 2025

REPORT 1:
THE POLITICAL STATE OF PLAY AS OF APRIL 2025



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Executive summary

Recent polling by the South African Institute of Race Relations (IRR), conducted in March/April 2025, reveals shifting voter sentiment amid debates over a proposed VAT hike and the uneasy dynamics within the multi-party Government of National Unity (GNU).

Key Findings

- 1. DA overtakes ANC:** For the first time in IRR polling, the Democratic Alliance (DA) registers a marginal lead (30.3%) over the African National Congress (ANC at 29.7%), reflecting mounting public dissatisfaction with the ANC's insistence on raising VAT. The DA's participation in the GNU, coupled with its prominent opposition to the tax hike, appears to have boosted its national appeal.
- 2. ANC support contracts:** After forming the GNU in 2024, the ANC initially regained some goodwill in polling but has now dropped below 30% under the impact of the recent VAT hike.
- 3. DA's breakthrough among black voters:** The DA's support among black voters has surged from 5% to 18%, indicating that concrete issues, like opposing higher VAT, can transcend the long-held view of the DA as primarily serving minority or middle-class interests. This signals a potential realignment if socio-economic concerns remain at the forefront of the political debate.

Context and Implications

The polling coincided with parliamentary wrangling over the VAT hike, a policy affecting every South African. This high-stakes, bread-and-butter issue crystallised broader frustrations with South Africa's ANC-led economic underperformance over recent years.

Although the GNU was intended to encourage collaborative governance, the ANC's behaviour within the multi-party arrangement, recently and prominently its unilateral tabling of the Budget without sufficient consensus, has eroded confidence in the coalition.

Looking ahead, the findings suggest that parties face a pivotal choice: focus on growth-oriented policies or on race-based redistribution battles. The DA's historic lead may only endure if it can keep the national conversation focused on economic opportunities and tangible benefits for citizens. Conversely, the ANC could rebound if it shifted towards the pro-growth pragmatism of its past while successfully deploying its once-formidable campaign machinery.

Ultimately, whichever party convincingly champions tangible improvements in the socio-economic circumstances of South African voters is poised to capture and consolidate their support in the next electoral cycle.

Introduction

The 2025 annual IRR opinion survey was conducted from 27 March 2025 to 3 April 2025 to gauge the public's views on South Africa's socio-political and economic landscape, almost a year after the 2024 elections that left no party with a parliamentary majority. This led to the formation of a multi-party national coalition government, a government of national unity (GNU) comprising the African National Congress (ANC), Democratic Alliance (DA), Inkatha Freedom Party (IFP), Patriotic Alliance (PA), Freedom Front Plus (FF+), United Democratic Movement (UDM), Rise Mzansi, Al Jama-ah, Good, and the Pan Africanist Congress (PAC).

The IRR survey covered a range of issues from political support, policy preferences, perceptions on race relations, views on electoral reform, to perceptions of wealth ownership by race. The findings of the survey will be published in multiple parts. This report presents the IRR's findings on political support. The following reports will cover policy preferences and race relations.

The timing of the survey coincided with a period of unprecedented parliamentary and political debate over the issue of an increase in South Africa's rate of Value-Added Tax (VAT) from 15% to 15.5% in the 2025/2026 financial year, and from 15.5% to 16% in the 2026/2027 financial year.

With the ANC losing its parliamentary majority in 2024, and the GNU bloc forming in Parliament to support and sustain a multi-party cabinet under President Cyril Ramaphosa, the 2025/2026 National Budget became the first of its kind to be tabled in Parliament by the Minister of Finance without clear majority support.

The Budget was tabled in contravention of the GNU's founding agreement, the Statement of Intent (SOI) negotiated between the ANC and the DA in June 2024. Clauses 18 and 19 of the SOI create a so-called "sufficient consensus" mechanism whereby the "GNU shall take decisions in accordance with" the agreement of parties "to the GNU representing 60% of seats in the National Assembly". The threshold of 60% of GNU seats in the National Assembly was supposed to mean that any governmental decision needed the support of both the ANC and the DA. The wording of clauses 18 and 19 is such that the tabling of the National Budget by the Minister of Finance, Enoch Godongwana, needed the support of the DA to be in line with the SOI.

On 19 February, with the National Assembly already seated to hear Godongwana deliver the 2025/2026 Budget Address, last-minute negotiations in Cabinet, especially on the issue of raising VAT, were unsuccessful. In an unprecedented move, the Address was delayed to 12 March to allow time for further negotiations between the GNU parties. However, these too proved unsuccessful. No sufficient consensus was reached on the matter of raising VAT, yet Godongwana proceeded to introduce the National Budget to the National Assembly. This was a significant breach of the GNU's SOI.

Focus now moved to whether the tabled Budget could gain majority support at the various committee and plenary stages required for it to be fully adopted. The first such procedural checkpoint was for the National Assembly's Standing Committee on Finance to adopt Godongwana's proposed fiscal framework that included the raising of VAT.

The Committee did so on 1 April 2025, with two GNU parties, the ANC and IFP, as well as an opposition party, ActionSA, voting in favour, with the DA, a GNU party, and two opposition parties, uMkhonto weSizwe (MK) and the Economic Freedom Fighters (EFF), opposed.

The next step in the parliamentary process was for the National Assembly as a whole to either adopt or reject the report from the Committee. By a vote of 194 to 182, the National Assembly adopted the report on 2 April.

Both these votes were widely covered and discussed in South African media, the parties for and against gaining significant attention. This was a period of heightened political debate over GNU decision making, culminating in the DA's opposing a budget tabled by the government of which it was a member.

By happenstance, the fieldwork of the IRR's 2025 opinion poll was being carried out at the same time, placing the political judgements asked of respondents in a unique context. Of further note is the fact that 2025 is a non-election year in which no national, provincial or local government election are expected to take place. As such, registered voters, the class of participants in the IRR's survey, are under less pressure to contemplate or declare political party support. However, given the intense political debate at the time of the survey, the results are likely more politicised than is usually the case with polling carried out in non-election years.

The subject of the political debate also matters in understanding the polling data. VAT is, after all, a tax paid by almost all South Africans on almost all transactions. It is therefore not a policy abstraction, but something that affects South Africans on a daily basis, from the poorest to the richest. As such, the political judgements made by respondents are more visceral and deep-seated, and also subject to the emotively charged environment of a national debate on a bread-and-butter issue.

Parties seemingly benefitting from this context would do well to seek a similar level of intensity on similar issues at the time of the next general election, whereas parties seemingly suffering detriment from the political environment at the time of the survey would do well to seek the neutralisation of the issues that fed into a period of negative judgement on them when voters again approach the ballot box in the local government elections, scheduled for late 2026 or early 2027, and the next expected national and provincial elections in 2029.

The findings in this report are perhaps the strongest indication of the fundamental dividing line South Africa faces: pro-growth policies and politics on the one side versus pro-poverty policies and politics on the other. As the findings herein show, there is a significant weight of opinion on the pro-growth side of the scale. For both the public at large and political parties seeking to win the battle for public sentiment, this report contains the clearest indications that the route to success is the path of economic growth.

Survey objectives

- This report and upcoming additional reports sought to answer critical questions, including:
- How do South Africans perceive their current quality of life compared to five years ago, and how do they view their prospects for the next five years?
- What are the public's views on the political state of play in the country almost a year after the paradigm-shifting 2024 national and provincial elections?
- Which socio-economic issues do citizens believe require the most urgent government attention?
- How do South Africans balance preferences for business-driven economic growth versus state-led interventions?
- How do South Africans assess race relations and inter-group cooperation?

Answers on these areas offer important insights into the direction South Africa's political actors ought to take in terms of pro-growth or pro-poverty policies to achieve popular success.

Methodology

The IRR's 2025 opinion poll was designed to ensure accurate, representative, and reliable insights into the views of South Africans.

A total of 807 respondents participated in the poll, comprising a diverse demographic cross-section. The results have a margin of error of $\pm 4\%$ at a 95% confidence level, indicating that the findings are highly reliable and represent public opinion within this range.

Data were collected using Computer-Assisted Telephonic Interviews (CATI), a reliable method that ensures consistency in questionnaire administration and minimises interviewer bias. The survey was limited to registered voters, ensuring the data reflected the electorate's views. It is important to note that no turnout scenarios were applied.

Analysis and findings

The 2025 IRR opinion poll provides a snapshot of South African public sentiment at a unique moment of economic pressures and political fluidity.

The findings indicate a clear desire for political and policy decisions aimed at fostering economic growth as the means by which South Africans believe they can see their material circumstances improve. In terms of the political state of play, the poll finds a general rise in support for major parties recently positioned in opposition to higher VAT, and a general fall in support for major parties considered most associated with the recent introduction of higher VAT.

Overall, the notion of a collaborative multi-party government maintains support, in preference to ANC-only governance as prevailed from 1999 to 2024. (South Africa was governed by a constitutionally mandated multi-party government from 1994 to 1997 and by an ANC-IFP coalition government from 1997 to 1999.)



Public impatience with the GNU

In September/October 2024, 51.8% of registered voters expressed approval of a GNU that included the DA and excluded MK and the EFF. At the time, only 26.6% preferred the inverse – a GNU of which MK and the EFF were members and the DA was not. That gap has since narrowed sharply, from 25.2 percentage points to 9.9 points. As of the latest data, support for a DA-inclusive GNU has declined by 3.3 points to 48.5%, while support for a GNU including MK and the EFF has surged by 12 points to 38.6%.

This trend may seem counterintuitive, given the simultaneous rise in support for the DA, MK, and the EFF. While all three parties opposed the tax increase and were rewarded for it, another important trend is layered on top of this factor: the public is also becoming increasingly disillusioned with the functioning of the current GNU itself.

Support for the current governing arrangement, comprising most prominently the ANC, DA, IFP, and PA, has dropped slightly, from 62.9% approval to 58.3%, while disapproval has risen markedly from 28.8% to 37.3%. This erosion of confidence in the GNU's effectiveness suggests that dissatisfaction is not aimed narrowly at specific parties, but more broadly at the coalition's ability to deliver under the current balance of power.

These developments lend further weight to a working interpretation of the shifting coalition preferences: a section of registered voters, while increasingly supportive of the DA's policies and approach, are losing faith that the ANC can or will work meaningfully with the DA in a power-sharing arrangement. The VAT hike may have crystallised a growing belief that, even when the DA is correct on substance, it cannot move the ANC from within. In contrast, voters may perceive MK and the EFF, despite their policy unpopularity, as actors capable of disrupting ANC inertia or complacency.

This suggests that GNU preferences are being driven less by ideological alignment and more by perceived effectiveness and pressure dynamics. Voters may not want MK and the EFF in government for their ideas, but rather because they are seen as capable of compelling concessions from an increasingly mistrusted ANC. The decline in support for the current GNU reinforces this theory: the public does not merely want cooperation or stability – they want urgency, change, and responsiveness. The fact that the current GNU has been slow to deliver substantive reforms and tangible results, despite having ostensibly adopted a pro-growth intent, supports this conclusion.

In this light, support for a GNU including MK and the EFF may reflect a tactical mindset of some voters reaching a point of urgency and impatience with the current ANC-dominated GNU. While voters endorse the DA's policy stance, as reflected in its growing support and consistent support more aligned with the DA than the ANC, to be discussed in future polling reports, they also judge that the DA, as it currently operates within the GNU, lacks the leverage needed to extract change from the ANC. MK and the EFF, in contrast, are likely considered more aggressive and even feared by the ANC, and that fear is, for some voters, now politically useful in seeing changes come in their material circumstances.

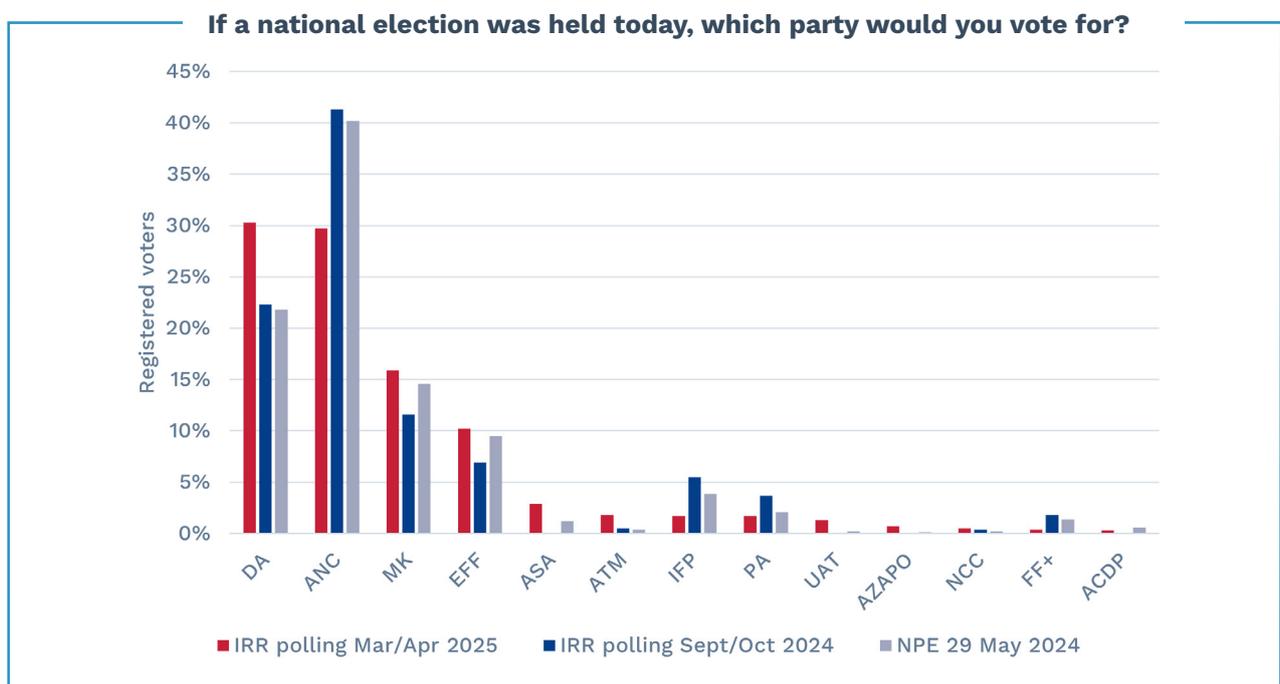
In short, the coalition preferences appear to reflect not ideological drift, but strategic realism or even desperation from a segment of voters who want a GNU that can shift the ANC’s posture from uncontested control to power sharing. In a political moment defined more by socio-economic stress than identity politics, disruptive leverage may now carry more value than policy alignment in the public’s short-term coalition calculus. While this interpretation remains an inference rather than a proven finding, it offers a coherent explanation for why support for a DA-inclusive GNU is falling, even as support for the DA itself continues to rise.

The rise of the DA as SA’s largest party – if...

The political dominance of the ANC is in decline and the DA has fully entered the territory of potentially becoming the leading party in a future multi-party government. This is the core finding of the IRR’s 2025 polling on the political state of play in South Africa as of April 2025. However, this is a provisional conclusion. The shift identified in the polling can solidify into a new political landscape where the ANC is firmly out of majority or near-majority territory and in a fierce contest with the DA for being South Africa’s largest party and the leading party in future governments; or it can prove temporary, followed by a reassertion of the ANC as the natural leader of multi-party government-formation agreements for the foreseeable future. Herein lies the big “if” of these findings ahead of the 2026/7 local government and the 2029 national and provincial elections.

The formation of the GNU initially helped the ANC stabilise and even improve its support, rising from 40.18% of the vote in May 2024 to 41.3% support in IRR 2024 polling carried out in September and October 2024. However, as of April 2025, the ANC’s support amongst registered voters has fallen to 29.7%. For the first time in IRR polling, the DA has become the most popular party in South Africa.

Like the ANC, the DA initially saw a modest increase in support following the formation of the GNU. IRR polling from September and October 2024 showed the party rising marginally, from 21.8% of the vote in May 2024 to 22.3% by the latter months of 2024. As of April 2025, however, the DA’s support has risen significantly to 30.3%, overtaking the ANC by 0.6% points.



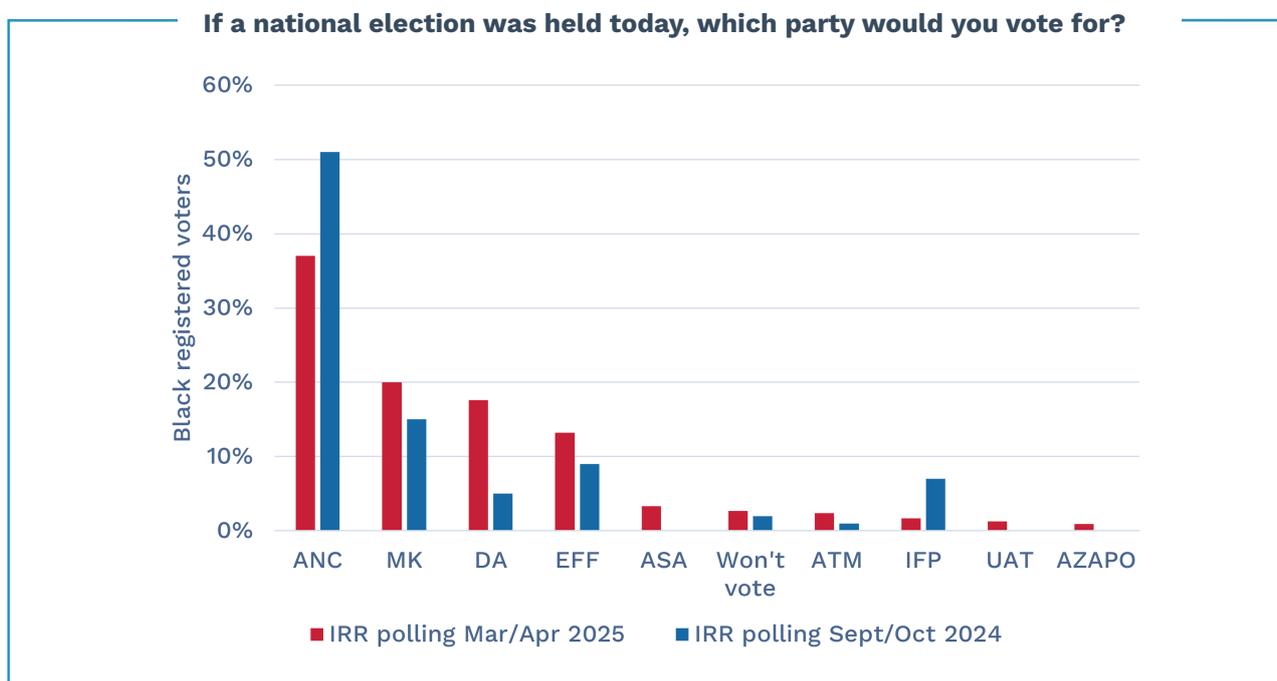
From this remarkable shift in political support, the DA has proved able to benefit both from its position within the GNU and its opposition to unpopular policy directions forced onto the GNU by the ANC.

The ANC, on the other hand, has lost the initial goodwill it had gained through its role as a constructive founding party to the GNU. This loss of goodwill is likely due to the fact that the party has not used its time in the GNU to moderate its policy stances to resemble the still-remembered pro-growth pragmatism of the Mbeki years, as will be shown in the rest of this report. Instead, the party has doubled down on its commitment to unpopular anti-growth policies such as the National Health Insurance (NHI) scheme and expropriation without compensation (EWC), with the VAT increase an aggravating contributor.

It is probable that the simplicity of the VAT debate, and the clarity of positioning of the two largest parties, has played a significant role in shifting sentiment and support in the DA's favour. Voters feel more directly affected by a tax increase than by grand policies such as the Basic Education Laws Amendment Act, the NHI and EWC, other areas of significant policy disagreement between the ANC and the DA.

The simplicity of the binary on VAT, along with the creeping dissatisfaction with the ANC's policy direction, has pushed dissatisfaction with the party beyond the acceptability threshold of its own historic base.

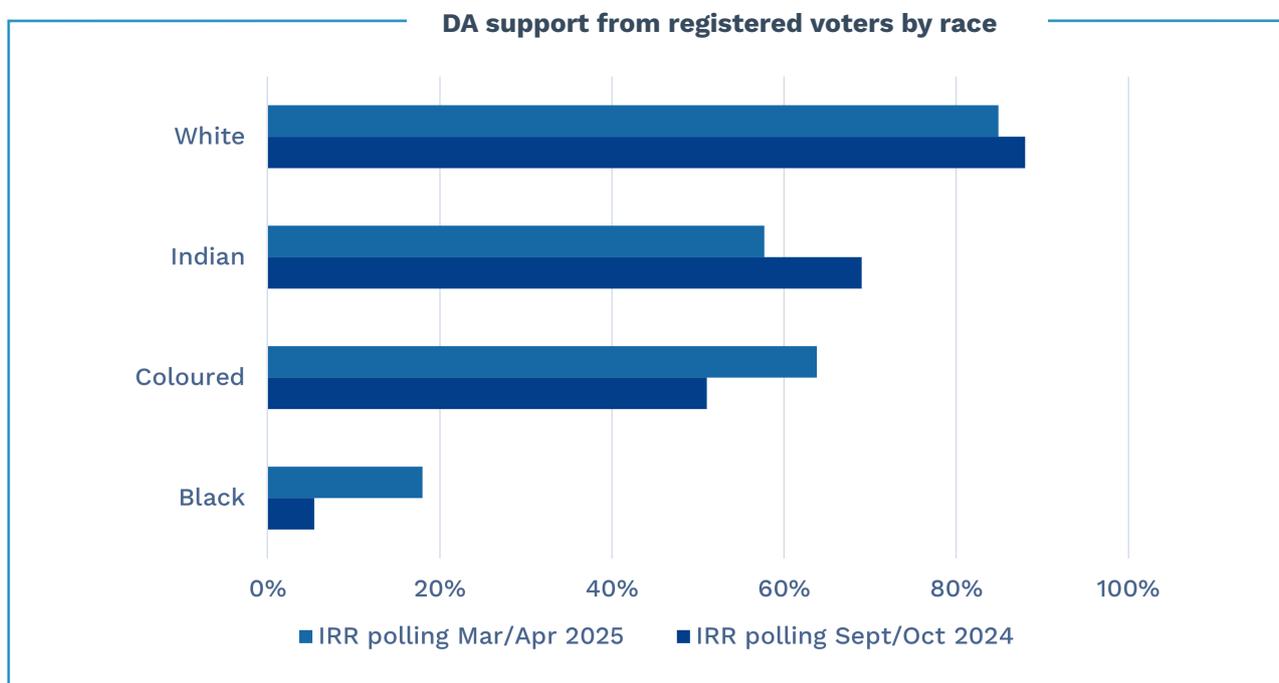
Conversely, the DA's clarity of position on the VAT issue has likely overcome long-held suspicions of socio-economic favouritism towards middle-class minorities that have made the party broadly unacceptable to especially black voters. Where historically, around 4% of black voters have supported the DA at election time, and this had risen to 5.4% in the IRR's 2024 polling, the DA as of April 2025 enjoys the support of an historic 18% of black voters. This means the DA's support amongst black voters is now 50% of that of the ANC where, historically, it has been closer to 10%. The DA has now also overtaken the EFF in terms of support from black registered voters and is, behind MK and the ANC, the third most popular party in this category. While the ANC remains the most popular party among black registered voters, its support in this category has fallen from 51% in 2024 to 37% in April 2025.



It is of particular significance that between September/October 2024 and March/April 2025, black registered voters shifted towards parties that opposed the VAT increase (with the singular exception of ASA). Support for the MK, DA, and EFF rose, while that for the ANC and IFP declined markedly.

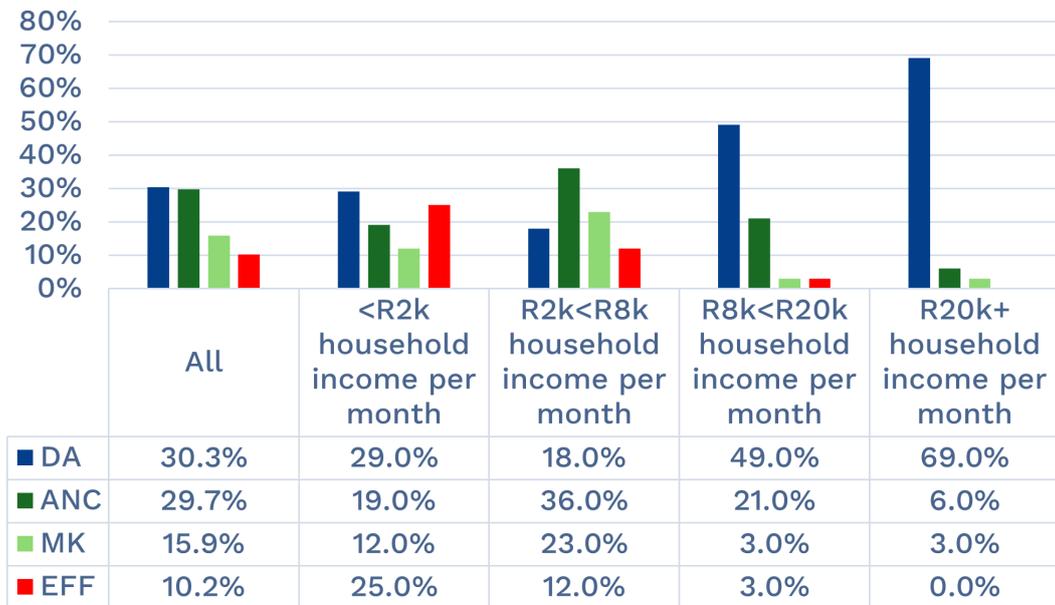
The DA therefore seems to have achieved what it had been seeking to do for the last two decades: maintaining the overall support of its historic minority support base, while extending its appeal to black South Africans. It is telling that while the party had tried various identity-based ideological appeals in the past, it has been on the broadly non-racial socio-economic grounds of opposition to higher VAT along with its seeming reasonable and moderate proposals to achieve economic growth, that it has managed to accomplish this demographic breakthrough.

As the current VAT debate cools, support for the DA from those black registered voters is likely to drop. Yet it is clear that some boundary has been crossed for the DA to move a significant number of black South Africans to consider voting for it.



The DA polled highest in three of four household income brackets, as shown in the chart below. The ANC received the highest support level only in the R2,000 to R8,000 bracket, where it has the support of 36%, MK 23%, the DA 18%, and the EFF 12% of respondents. However, in all other household income brackets, the DA secures more support than the ANC.

ANC, DA, MK, and EFF support from registered voters by monthly household



The unique political environment of this poll makes it dangerous to project its findings into the future as fact. Reality is more complex and the rational assessment is that this snapshot of the DA taking a national lead is indicative of where politics could lead if the driving narrative of South African politics becomes that of economic growth and the empowered consumer able to earn and build wealth. It represents a departure from what has been – for the last few decades at least – a contest of political parties trying to outdo each other on ambitious promises of wealth extraction and redistribution with distinct racial undertones.

What makes the VAT debate moment unique in our politics is that it did not fit neatly into pre-existing narratives of race-based grievance, as might have been the case on an issue like EWC. On the VAT issue, the polling data show, there has been no obvious racial dividing line. Given the absence of a convenient racial narrative, socio-economic motivations have stepped in to redefine the scope of the political debate – and, accordingly, the victor.

The question facing all political parties now is whether this moment of politics revolving around questions of the economy and personal incomes will be extended. If so, the DA has the opportunity to build on a unique moment of the national debate to create a more lasting realignment of politics.

The caveats of a non-election year apply. It should not be assumed that the ANC’s support will remain below 30%. Recall that reputable polling prior to the 2024 national and provincial elections had indicated an ANC near 30%. But by the day of the vote, the ANC’s support had recovered to above 40%, with indications that an ANC result of 45% or above would have been a possible had it not been for the controversial signing of the NHI into law by Cyril Ramaphosa on 15 May 2024.

As such, the historic low of 29.7% registered by the ANC in the current polling can be lifted should the party still possess the formidable campaigning and messaging machinery that secured six consecutive parliamentary majorities since 1994. Had the policy radicalism of the ANC on such things as the NHI been moderated by consideration of what the public were telling the party, even a seventh parliamentary majority might have been achieved. A second-place ANC in a non-election year, in short, is unlikely to remain docile when the next campaign gets underway.

Whatever the success of such a future campaign effort by the ANC might be, it is clear is that its support has softened dramatically. Should the political debate remain on terms of socio-economic opportunity where the ANC has proved politically weak, its core support could contract further, towards 20-25% nationally.

The IFP and PA likely both suffer from being seen to support the VAT increase, declining from 5.5% and 3.7% respectively in September/October 2024 polling to 1.7% each in April 2025. For the PA, this represents a something of a return to the level of support it achieved at the ballot box in 2024. However, this conclusion is not strongly supported because the percentages are close to the margin of error.

If correct, however, this would represent a serious relapse for the IFP as the country heads into the 2026/7 local government elections. The IFP would be hoping to continue its decade of gradual recovery to 1994-levels of national support. The IFP's drop in support of roughly 4 points roughly equals MK's gain, 11.6% in the September/October 2024 polling to 15.9% in March/April 2025. The EFF, one of the most parties most prominent in opposing the VAT increase alongside MK and the DA, has recovered from 6.9% in September/October 2024 to 10.2%.

The FF+ appears to be the victim of an ascendant DA, being reduced from 1.8% in September/October 2024 to 0.4% in March/April 2025 (with the caveat that these percentages are lower than the margin of error and therefore uncertain). This makes uncomfortable reading for the party's new leader, Corné Mulder, as the party is likely to remain overshadowed by the political tensions between the DA and the ANC, and the question of the former's continued participation in the GNU.

The party with the most significant upwards movement, despite its position as having supported the adoption of the fiscal framework and the incorporated VAT increase, is ASA on 2.9%, up from 0% in September/October 2024. The party has probably benefitted from its boosted political prominence amidst the parliamentary contest over the National Budget. Having recently engaged in negotiations with the ANC, the risk for ASA is that its prominence-driven support is subsumed into the negative public perception of the ANC, should the ANC fail to revert political course to a more popular Mbeki-era pro-growth pragmatism.

Framing the future of the political debate

If the DA, or indeed any party, including an ANC seeking electoral redemption, aligns itself convincingly with these pro-growth priorities, the current moment would represent a lasting realignment. Conversely, if racial redistribution reasserts itself as the central framing of political debate, the ANC could yet regain lost ground thanks to its political and campaigning machine at the time of the next elections.

South Africa's political future depends significantly on whether economic growth or racial redistribution defines the terms of South Africa's political contest. The DA's breakthrough as the leading party in IRR polling illustrates the impact of a shift in the national debate to questions of socio-economic progress, driven by the intensity of the conflict over the VAT increase. But only sustained framing of politics along these lines can permanently displace the ANC's historical advantage.

If the ANC chose to revert to the socio-economic pragmatism that saw it deliver a growing economy, rising employment, and increased service and welfare delivery – as in the first half of the 2010s – then it would likely deny the DA or any other opposition party the ability to claim the mantle of the party that can lead South Africa to a future of rising prosperity and job creation through economic growth. After all, it was this that secured the ANC 69.7% of the vote in 2004 – more than double the support it received in the April 2025 polling.

How could a political party interested in defining South African politics along socio-economic lines succeed – be it either an ANC seeking electoral rejuvenation or a DA seeking to transform a conditional lead into a more sustained one?

The IRR's 2025 polling sheds further critical insight on this potential realignment. Long-standing assumptions by the ANC and political commentators – that race-based redistribution forms the core political preference among voters – now appear fundamentally flawed. Three aspects of the polling data reinforce this conclusion:

1. Voter perceptions of their quality of life (past and future expectations);
2. Ranked national policy priorities; and
3. Specific policy approvals.

Upcoming IRR reports, to be published over coming weeks, will detail these and other points.



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