

**MAY  
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# **PRO-GROWTH OR PRO-POVERTY: FINDINGS OF IRR POLLING 2025**

*REPORT 2:  
POLICY PREFERENCES OF REGISTERED VOTERS*

A blue-tinted background image showing a close-up of hands holding a white ballot paper, with a ballot box visible in the foreground. The image is partially obscured by the text and logo at the top.

**HERMANN PRETORIUS**

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# Executive summary

Recent polling by the South African Institute of Race Relations (IRR), conducted in March/April 2025, reveals a clear national majority, across demographic lines, in favour of policies that prioritise merit, value-for-money government spending, the expansion of choice in key services, and protected property rights. These findings position the South African registered voter very much in opposition to key government policies and adopted laws, particularly employment equity targets and expropriation without compensation.

## Key Findings

- 1. Job creation remains top national priority:** Reinforcing a multi-year pattern in IRR polling, unemployment and job creation rank highest as the preferred national priority.
- 2. Merit trumps race:** A large majority of 84% support merit-based appointments to all jobs. This figure combines those who favour merit-only appointments (30.5%) and those who favour merit-based appointments with special training for people from previously disadvantaged groups (53.5%).
- 3. Value-for-money trumps race-based procurement targets:** A large majority of 81.7% want the state to buy from the best-priced supplier. This figure combines those who favour purely value-for-money procurement with no racial considerations (54.1%) and those who support value-for-money procurement with racial considerations acting merely as tiebreakers where two companies offer equal value for money (27.6%).
- 4. Property rights trump expropriation without compensation:** A substantive majority of 68.1% oppose the Expropriation Act signed into law by President Cyril Ramaphosa in early 2025.
- 5. Work trumps welfare:** A large majority of 77.8% favour a government focus on job creation over expanded welfare support and grants.
- 6. Choice trumps state-controlled empowerment policies:** A large majority of 76.3% believe tax-funded voucher-based systems for housing, education, and health care would be more effective empowerment policies than current affirmative action and employment equity policies.
- 7. ANC policy out of step with majority of its remaining supporters:** On all policies investigated in this report, ANC government policies are out of step with the preferences of notable majorities (65-79%) of self-identified ANC supporters:
  - 73% favour merit-based appointments to all jobs over race-based targets or quotas;
  - 65% favour public procurement based on value-for-money considerations over racial targets;
  - 79% oppose the Expropriation Act – which is higher than the national average;
  - 78% favour a government focus on job creation over expanded welfare support and grants; and
  - 77% believe tax-funded voucher-based systems for housing, education, and health care would be more effective empowerment policies than current affirmative action and employment equity policies.

# Introduction

This report is the second instalment in the IRR's 2025 opinion-survey series. While *Report 1: The Political State of Play as of April 2025* explored shifting party support amid the VAT-hike debate, this report drills down into the policy preferences that underpin those political movements and are likely to shape the political debate heading into the 2026/7 local government elections and the 2029 national and provincial elections.

The IRR's 2025 survey was conducted from 27 March to 3 April 2025 to gauge the public's views on South Africa's socio-political and economic landscape. The survey investigated attitudes on hiring rules, government procurement, a governmental focus on welfare versus work, education, housing, and health-care funding, and perceptions of the Expropriation Act's impact on property rights. The overriding theme of the responses, across race, age, province, and party allegiance, is a substantial endorsement of merit-based, growth-focused, choice-driven policy.

While it is important to note that, as set out at some length in *Report 1* of this series, the IRR's 2025 public opinion survey was conducted at a time of intense political debate and national focus on the particular dividing line of parties in favour of increased VAT and those opposed, the findings on policy preferences in this report appear mostly unaffected by the circumstances that made the immediate political situation extraordinary. Most of the questions discussed in this report have featured in previous annual IRR surveys. It is therefore possible to assess many of these findings over a longer period, which broadly supports the conclusion that the policy preferences they reveal represent public opinion beyond the febrility of the immediate political situation.

## Survey objectives

This report, its predecessor on the state of political play as of April 2025, and upcoming additional reports, seek to answer critical questions relating to South Africa's political and socio-economic condition, 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?

Survey responses offer important insights into the choices South Africa's political actors, in formal and informal politics, face when assessing whether pro-growth or pro-poverty policies will gain popular approval.

# 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.

*\*For further methodological information on the representativity of the survey sample, see addendum A*

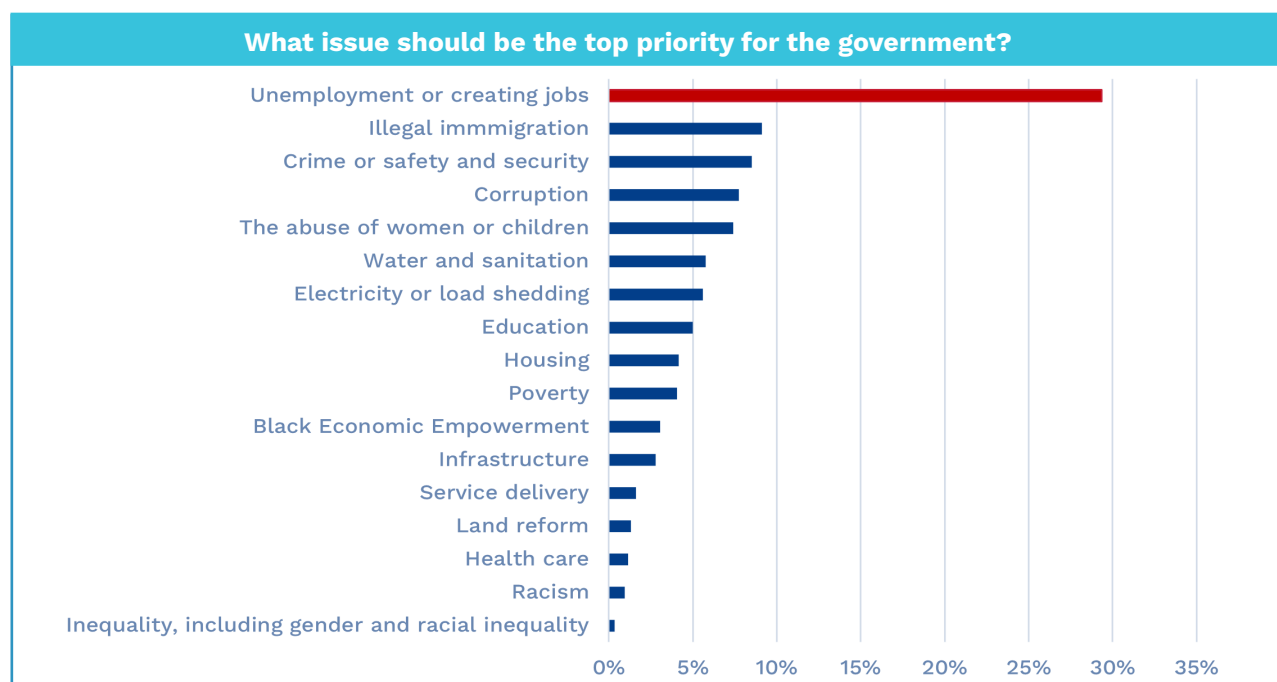
## Analysis and findings

*This report makes various inferences from the findings of its predecessor, and it is therefore prudent to revisit its key findings here:*

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.*

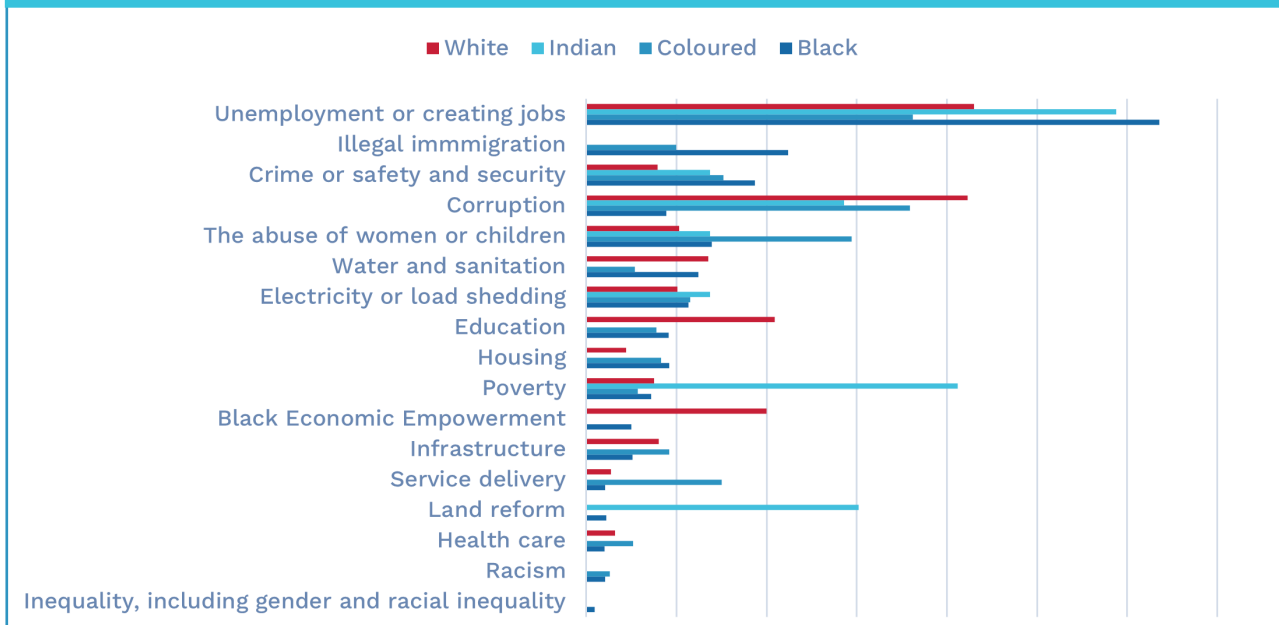
## Job creation remains top national priority

Continuing a multi-year pattern in IRR polling on policy priorities, the most important issue for South Africans remains that of unemployment and job creation. 29,4% of all registered voters identified it as one of two chosen issues that ought to be the government's top priority – with the next highest-ranked issues, such as illegal immigration (9.1%), crime or safety and security (8.5%), corruption (7.8%), and the abuse of women and children (7.4%), all falling more than twenty percentage points behind.



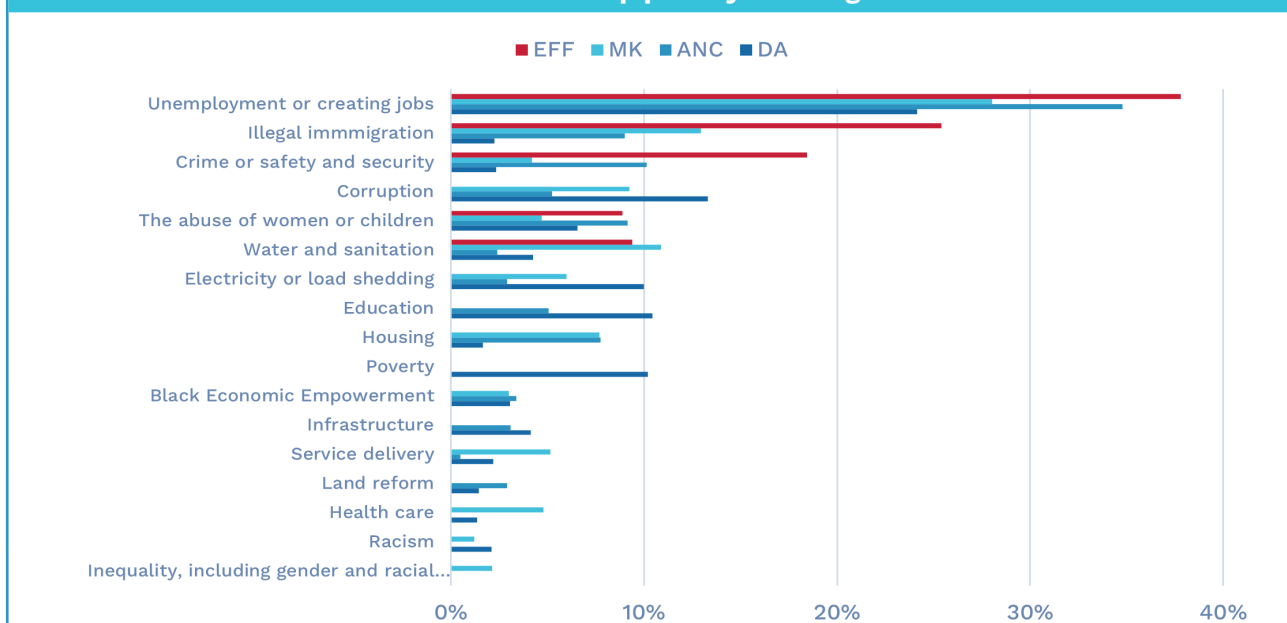
Such is the dominance of jobs and unemployment as the number one issue that it is the top priority across 27 out of 28 respondent breakdowns by race, age, gender, education, employment status, and household income – with only those without any formal schooling ranking the issue (perhaps understandably) below education and poverty. Although smaller subsample sizes within each socio-economic identity group increase the margins of error when analysed in isolation, it is nonetheless striking that unemployment and job creation consistently emerge as the top priority across all segments of the population.

### What issue should be the top priority for the government?



The data further show that unemployment dwarfs every other concern inside the supporter bases of all four major parties, though the intensity of the issue varies appreciably, ranging from roughly a quarter of DA identifiers (24.2%) to more than a third of EFF (37.8%) and ANC (34.8%) voters. Because no other single issue anywhere in the matrix attracts even 20% of a party's supporters, crime among EFF voters (18.5%) and illegal immigration among EFF voters (25.4%) aside, the party that persuades the broader electorate that it owns the job-creation agenda will command the only truly mass-salience issue in South African politics.

### What issue should be the top priority for the government?



For the ANC, whose own voters place unemployment 10 percentage points ahead of their next priority and whose credibility on tackling unemployment has declined since the 2004 elections, losing the job-creation debate risks bleeding support to rivals. Whichever party can convincingly link its brand to credible large-scale job creation will not merely win a policy argument, but seize the only issue capable of reshuffling loyalty across the partisan spectrum.



As notable as the importance of job creation is, so, too, is the relative unimportance of inequality, racism, health care, and land reform as priority issues.

These are subjects on which the ANC has expended significant political capital in recent years. The survey findings suggest that this emphasis is largely disconnected from what actually animates South Africans in general, and even the party's own supporter in particular. Among self-identified ANC voters none of these four issues registers above 3%: health care and racism fail to elicit even a single mention in this survey, inequality is likewise absent, and land reform attracts just 2.9%. By contrast, more than a third of ANC voters (34.8%) single out unemployment and job creation as their top concern, with crime and safety (10.2%), illegal immigration (9%), and the abuse of women and children (9.2%) forming the next tier of priorities among registered voters.

Considering these findings against the party's sustained commitment to the National Health Insurance (NHI) scheme, the Expropriation Act and expropriation without compensation (EWC), and employment equity target and punitive intensifications, the ANC seems to be investing scarce political capital in themes that rank near the bottom of the priority lists of all registered voters as well as its own supporters, while neglecting the problems that its own voters overwhelmingly want addressed. If the ANC hopes to retain and energise its remaining supporters, re-centring its messaging on job creation, personal security, and the everyday cost-of-living pressures that flow from corruption and poor service delivery would appear far more politically prudent than continuing to foreground health, land, racism, and inequality debates that currently resonate with only a tiny fraction of its supporters.

The first report in this series on the IRR's 2025 opinion polling established that, within a context of an intense political focus on bread-and-butter socio-economic issues, the ANC saw its support fall to below 30%. However, the report also noted that "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". The low priority rankings of what could reasonably be considered core ANC issues over recent years and the target of political investment over long periods of time, likely contributed to compromising the ANC's ability to maintain voter support when the issue of its proposed VAT increase electrified the national political debate to the party's cost. The longer-term erosion of the ANC's connection to the socio-economic aspirations of ordinary South Africans, driven by the party's focus on low-order priority issues, in all likelihood laid the groundwork for this substantial collapse in support, triggered by the unpopularity of a) VAT increase.

That the single issue of job creation sits at the very top of every racial cohort and of the supporter bases of four ideologically distinct parties is notable for three reasons.

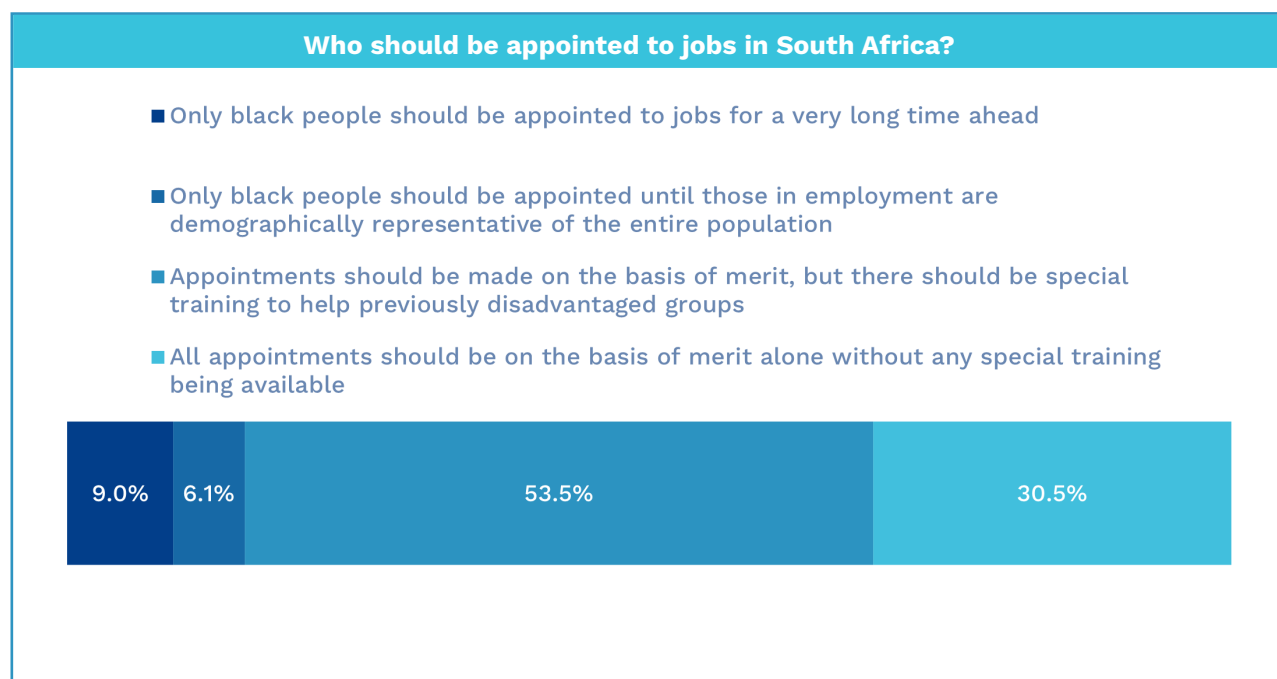
First, it shows that what are assumed to be the country's deepest lines of cleavage, race and partisan identity, do not predict what people worry about most; an economy that still leaves nearly one-in-three adults officially unemployed has created a cross-cutting "valence" issue that voters judge on simple competence rather than on ideology or identity. When black, coloured, Indian and white respondents, and pluralities of DA, ANC, MK and EFF supporters alike, tell pollsters that job creation outranks every other concern, they are signalling that the party seen as capably delivering work will be rewarded even by voters who may disagree with it on redistribution, redress, or identity politics.

Second, it narrows future political competition down to one question: “Who can put South Africans to work?” Parties that habitually mobilise around race-based redress (ANC, EFF), corruption-free governance (DA), or anti-establishment grievance (MK) cannot assume those narratives will keep their own bases loyal if rival parties make a more credible employment offer. The fact that unemployment takes a double-digit lead over every other issue inside each party’s base means that slipping on jobs is not a marginal risk; it strikes at the core utility voters expect from their political home.

Third, the unanimity exposes a widening gap between elite discourse and mass priorities. Issues that often dominate parliamentary debate and media commentary, inequality, racism, health, land, barely register in double digits for any group or party. Unless they are convincingly tied to job creation, continued emphasis on them spends political capital where voters see little immediate payoff. In short, the consensus around jobs is noteworthy because it turns employment into something of a sole yardstick by which the entire electorate, across race and across party loyalties, intends to judge political performance, forcing every party to make job creation not just a promise but the organising principle of political strategy.

## Merit trumps race

If job creation is the destination voters urgently want the government to reach, merit-based hiring is the road they want it to travel. Asked how posts should be filled, 84% of registered voters prefer merit: 30.5% insist on merit alone, while 53.5% back merit supplemented by additional training for historically disadvantaged applicants. Only 16% support any version of race-first hiring.

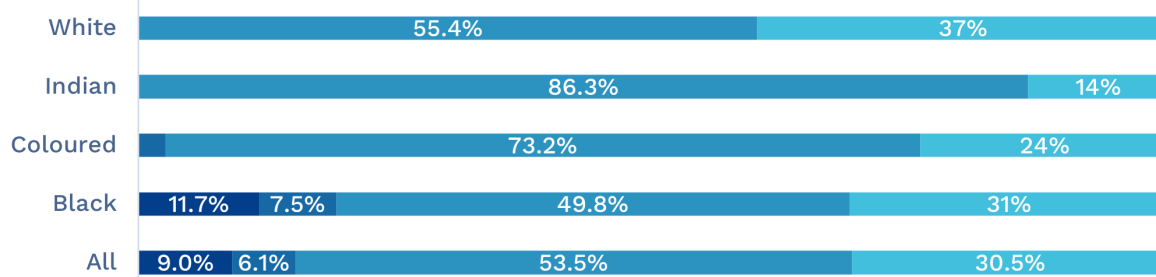


This preference is not exclusive to any particular demographic – it consistently cuts across every social and political divide measured.

Among racial groups, merit-based appointments attract overwhelming backing: 81% of black respondents, 97% of coloured respondents, 92% of white respondents, and the entire Indian subsample favour merit-driven hiring.

### Who should be appointed to jobs in South Africa?

- Only black people should be appointed to jobs for a very long time ahead
- Only black people should be appointed until those in employment are demographically representative of the entire population
- Appointments should be made on the basis of merit, but there should be special training to help previously disadvantaged groups
- All appointments should be on the basis of merit alone without any special training being available

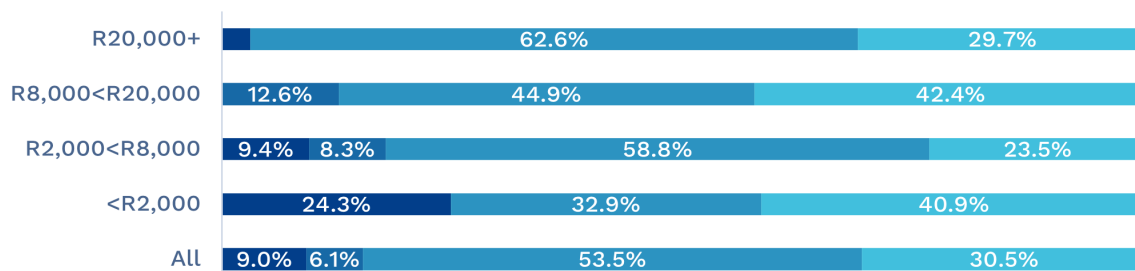


Similarly, income does not significantly alter voter preferences; even among households earning less than R2,000 per month, almost three-quarters (74%) reject race-exclusive hiring. Education levels likewise offer no sanctuary for racial quotas, with merit commanding at least 80% support from voters regardless of whether their education stopped at primary school or extended to university graduation.

### Who should be appointed to jobs in South Africa?

#### By monthly household income

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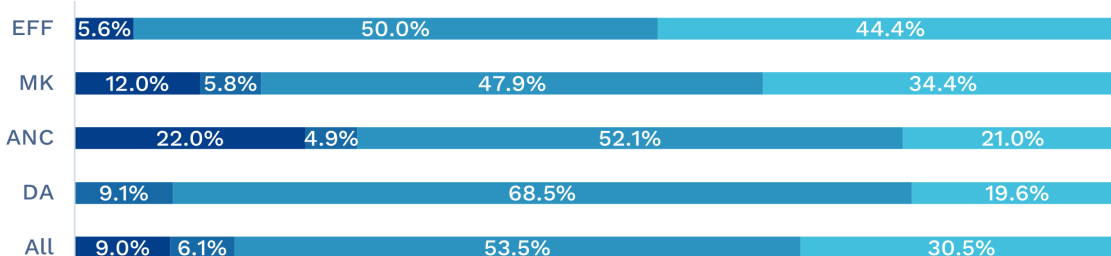


Party affiliation confirms the breadth of this consensus. Merit appeals strongly even among those identifying with parties typically associated with racialised politics: 73% of ANC supporters, 88% of DA voters, and a remarkable 94% of EFF supporters prefer merit-based hiring. Supporters of MK also endorse merit at 82%.

## Who should be appointed to jobs in South Africa?

### By political party support

- Only black people should be appointed to jobs for a very long time ahead
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Two conclusions follow from these findings.

First, quotas represent a distinctly minority viewpoint. No demographic subgroup, whether delineated by race, income, education, or party affiliation, registers more than 25% explicit support for permanent racial set-asides. Voters' instincts are unmistakable: equip individuals with skills, then let qualifications and competence determine who succeeds.

Second, the ANC finds itself starkly out of step with its own voter base on an issue in which it has already invested significant political capital. By all indications, the party seems intent on investing even more in the issue of race-based employment equity targets despite its ranking as a low-order priority. For all the ANC's continued commitment to and tightening of employment-equity targets and threats of penalties for companies failing racial audits, only one in five of its voters favours race-led hiring.

Politically, this creates a mirror-image scenario within the jobs debate. Any party successfully linking a credible job-creation strategy to an unambiguous commitment to merit-based appointments will align itself with the electorate's twin priorities: employment and merit-based fairness.

## Value for money trumps race-based procurement targets

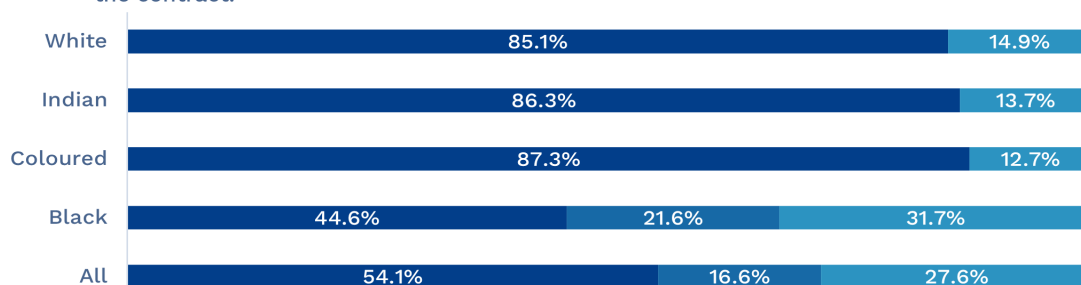
If merit is the compass South Africans choose for hiring, value for money is the touchstone they set for public purchasing. Asked how government should spend the billions it tenders each year, fully 81.7% of registered voters insist that the state pick the best-priced supplier. A clear majority, 54.1 %, want procurement decided purely on cost and quality, while 27.6% accept that race may enter the equation only as a tie-breaker when two bids offer identical value. Just 16.6% would pay a premium for racial targets, and the remainder declined to express a view.

Support for value-for-money buying crosses all demographic boundaries. Three-quarters of black respondents (76.3%) prefer value to racial preference, as do nine in ten or more coloured, Indian and white voters, where the two value-driven options together reach or approach unanimity. Income makes little difference: even in households scraping by on less than R2,000 a month, the entire subsample backs value-for-money; enthusiasm rises again to 97% among those earning above R20,000. Education follows the same upward gradient; roughly three-quarters of voters without formal schooling already prize value, and support climbs steadily to effectively 100% among university graduates.

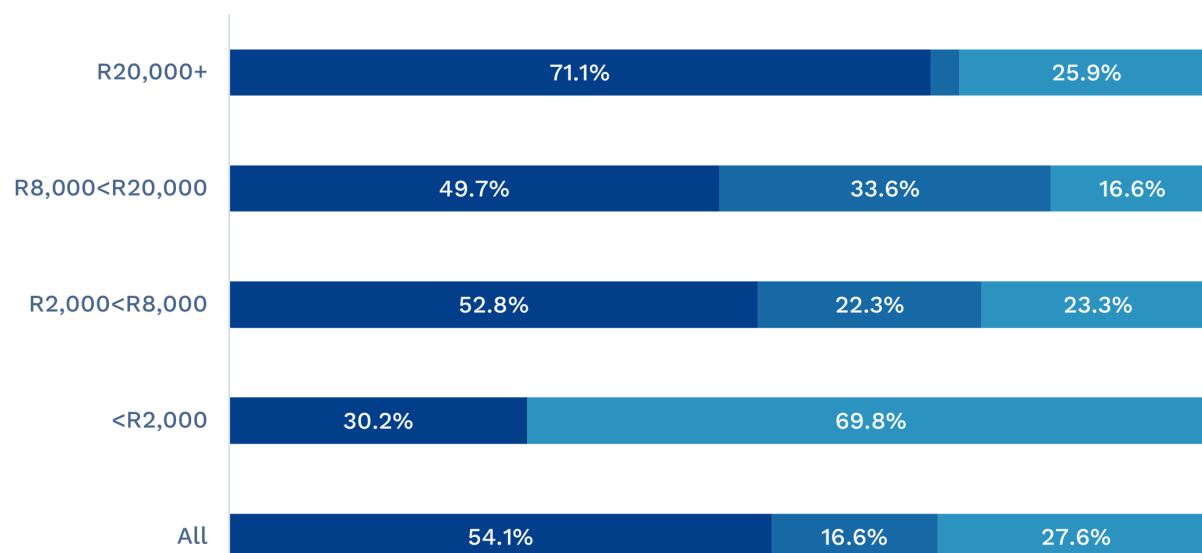
### The government spends over a trillion rand per year buying goods and services. How should it decide who to buy from?

#### By race

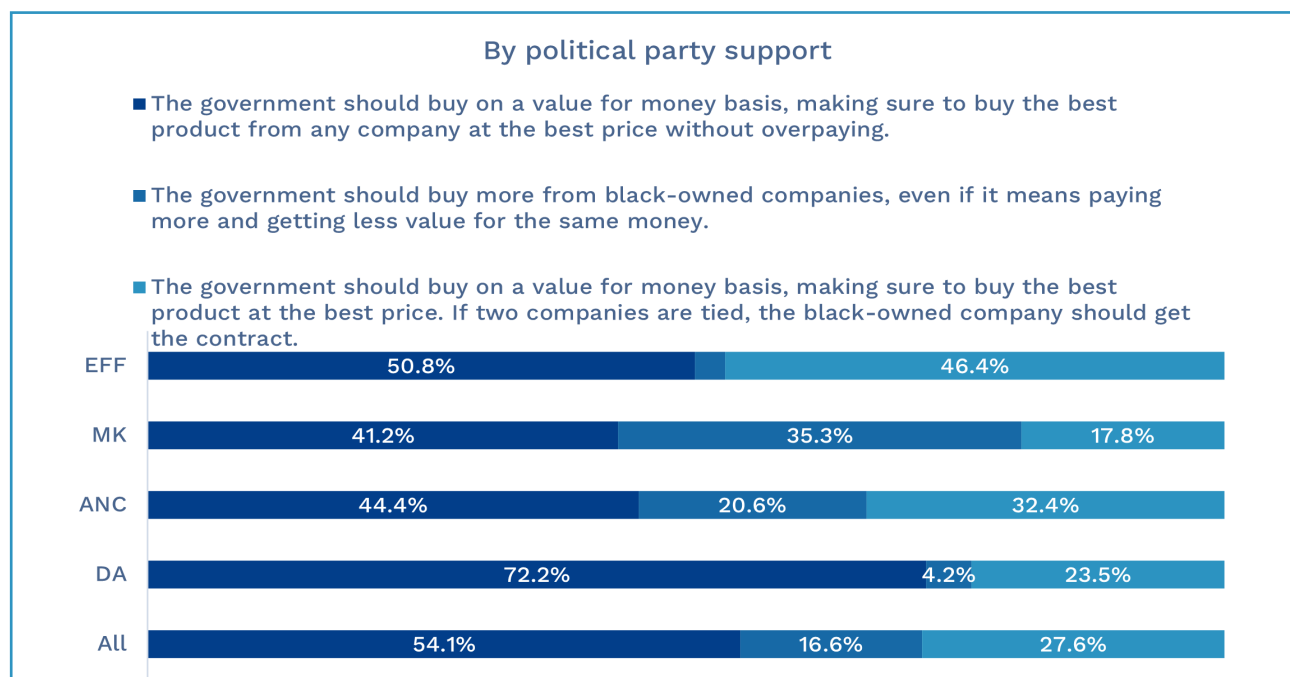
- The government should buy on a value for money basis, making sure to buy the best product from any company at the best price without overpaying.
- The government should buy more from black-owned companies, even if it means paying more and getting less value for the same money.
- The government should buy on a value for money basis, making sure to buy the best product at the best price. If two companies are tied, the black-owned company should get the contract.



#### By monthly household income



Party allegiance offers no safe harbour for costlier, race-led purchasing. Among self-identified ANC supporters, 65% favour value-for-money procurement, dwarfing the 30% who would give price-beating advantage to black-owned firms. The figures swell to 96% among DA voters and 97% among EFF voters, while even within MK, whose anti-establishment, race-based, and grievance-driven rhetoric might have been expected to elicit sympathy for BEE indulgence in this context, almost 60% still place value first.



Two conclusions follow from these findings.

First, the electorate does not view public procurement as an instrument for social engineering but as a lever to stretch scarce tax rands, improve service delivery and, by lowering input costs, free resources for job creation. Second, the governing party again risks colliding with its own base. The ANC has spent years tightening racial set-asides inside the procurement regime and has written explicit demographic targets into law. Yet barely two in five of its remaining supporters back such a course; almost twice that share want tenders awarded on price and quality alone.

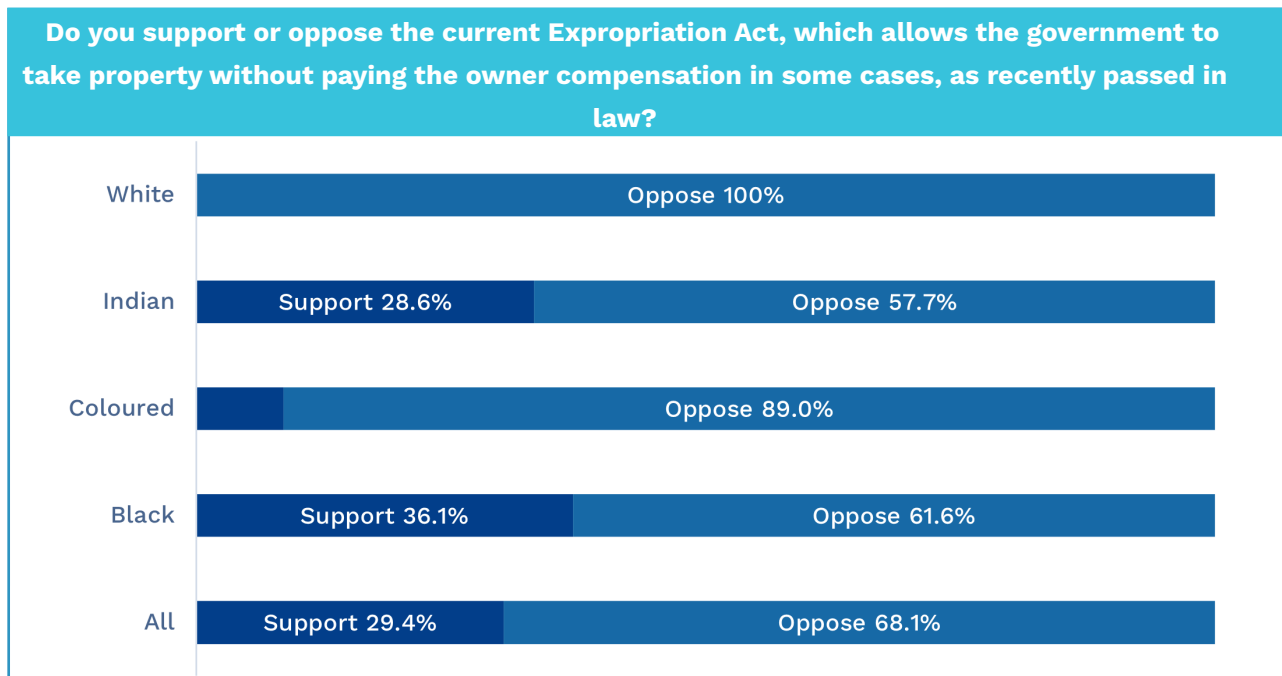
Politically the lesson mirrors that of merit-based hiring. A party able to link a credible job-creation agenda to an unambiguous commitment to cost-efficient, corruption-proof procurement will occupy the same broad centre ground as the voters. Conversely, parties that continue to anchor procurement policy to race risk shouldering not just the fiscal burden of higher prices but the electoral cost of ignoring a preference that unites the country as surely as the quest for work itself.

## Property rights trump expropriation without compensation

When voters turn from questions of merit and value to the security of what they own, the message is no less emphatic: South Africans want the power to seize property kept well away from government. Asked whether they support or oppose the new Expropriation Act, which empowers the state to take land “without owner compensation”, fully 68.1% of registered voters reject the law, while just 29.4% back it and a marginal 1.4% remain undecided.

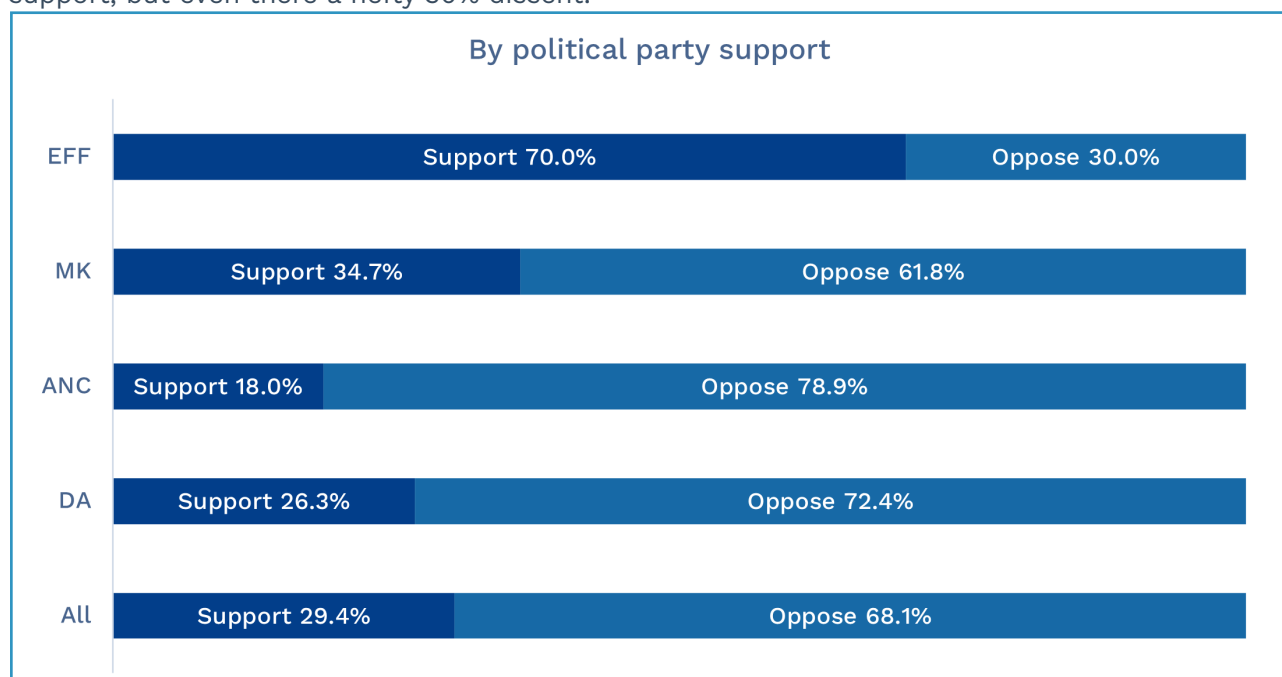
That verdict comes despite limited familiarity with the measure: only 14% describe themselves as “very familiar” with the Act, while twice as many (37.5%) admit to being “very unfamiliar”. Even so, the instinct for property security cuts sharply across the electorate.

Among racial groups the majority against expropriation is unmistakable. Black voters oppose the Act by 62% to 36%, coloured voters by 89% to 8%, Indian voters by 58% to 29%, and white voters by a unanimous 100%.



Household income makes little difference: opposition already stands at 61% among those living on less than R2,000 a month and climbs steadily to 80% in the R20,000-plus bracket. Education follows the same gradient, rising from roughly two-thirds among respondents without formal schooling to more than four-fifths among university graduates.

Party allegiance again shows the governing party adrift from its own voters. 79% of ANC supporters oppose the Act, as do 72% of DA voters and 62% of MK voters. Only the EFF base, perhaps predictably, breaks the pattern among major parties on the issue, with 70% expressing support, but even there a hefty 30% dissent.



Two conclusions follow from these findings.

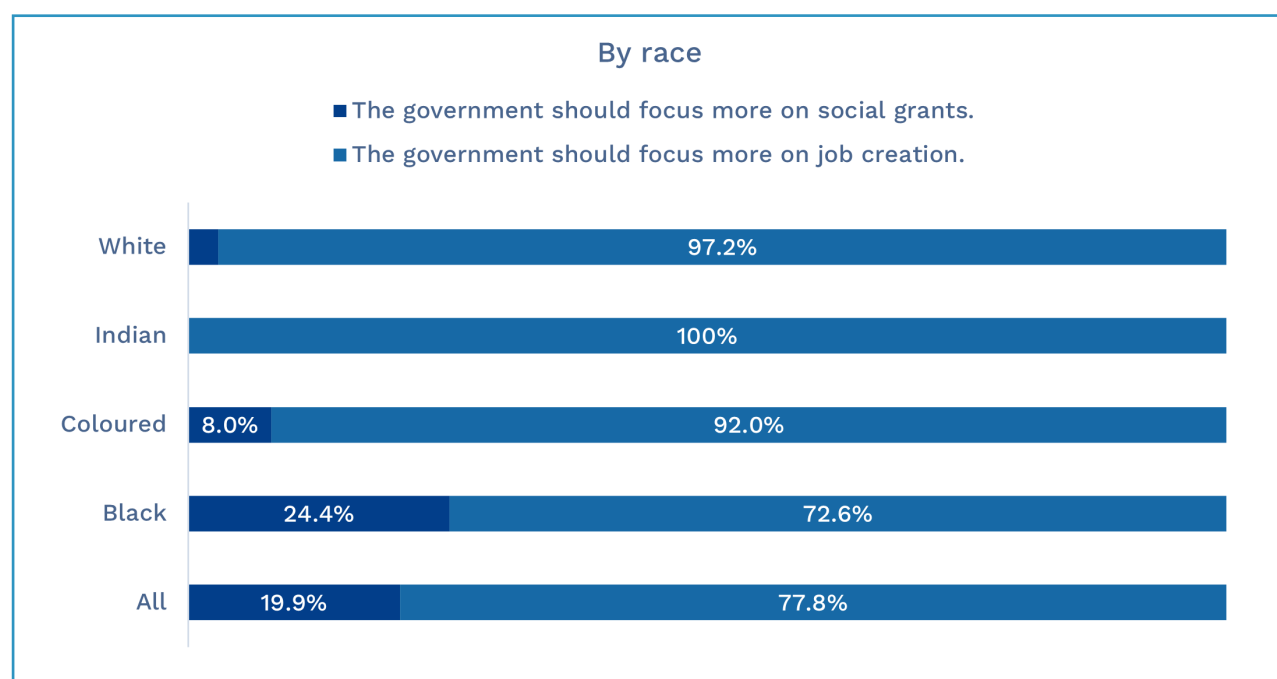
First, the electorate sees secure property rights as integral to prosperity and personal freedom; proposals to enable uncompensated seizures provoke resistance every bit as broad-based as is the demand for merit and value-for-money.

Second, the ANC has staked political capital on a policy its own supporters repudiate by almost four to one. Any party able to pair a credible jobs plan with an unambiguous defence of property rights will stand on the same ground as the overwhelming majority of South Africans, leaving those who cling to expropriation having to shoulder both the economic cost and the electoral risk of a deeply unpopular crusade.

## Work trumps welfare

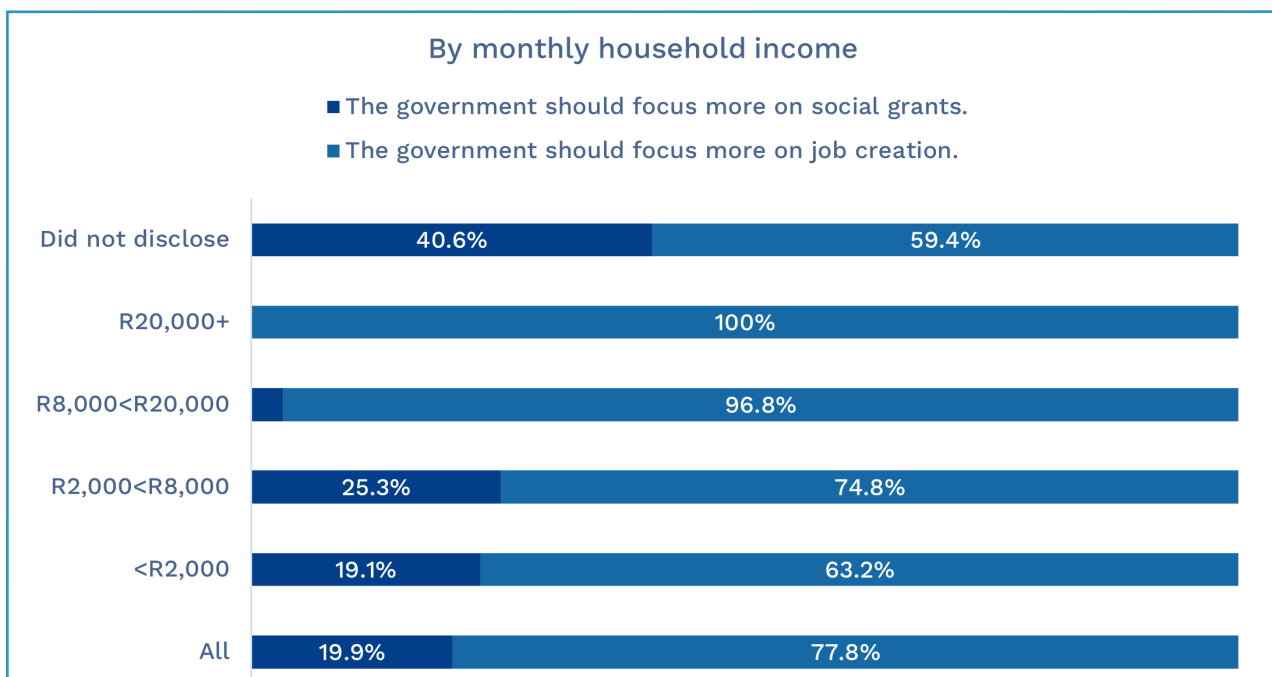
Having signalled their preference for merit in hiring and value in public purchasing, voters draw the same hard-edged line when asked whether government should concentrate on raising employment or expanding welfare. Fully 77.8% of registered voters choose job creation, combining those who “strongly” back a jobs-first approach (76.3%) with the smaller share who lean that way (1.5%). Barely 19.9% favour enlarged grants, and an indifferent 2.3% decline to take sides.

The instinct for work over welfare is broad-based yet not uniform. Among racial groups, even the cohort most supportive of social grants, black South Africans, backs jobs by 72.6% to 24.4%. The tilt accelerates to 92% among coloured voters, 97% among whites, and to 100% of Indian registered voters – a number possibly distorted by the relative size of the particular subsample.

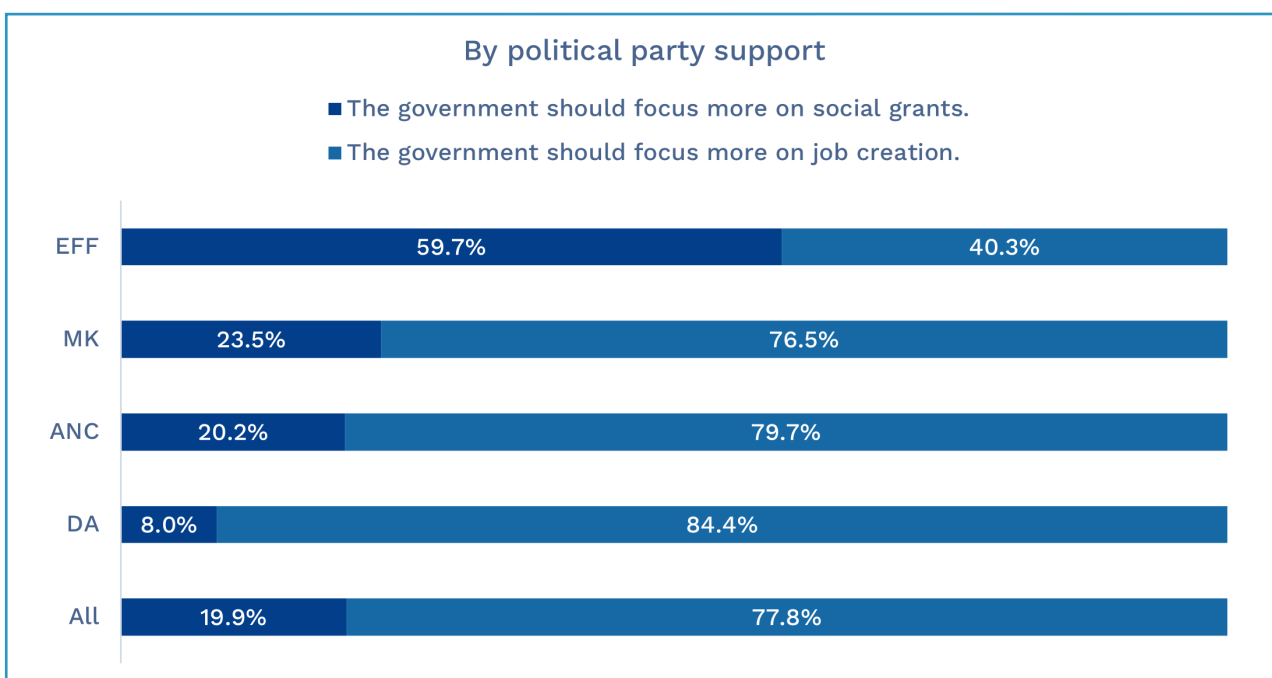


Material circumstance tempers enthusiasm but never reverses it. Households living on less than R2,000 a month still favour employment by nearly two to one (63.2% to 32.4%); backing rises through the income ladder to 96.8% in the R8,000–R20,000 bracket and reaches unanimity among those earning more than R20,000.





The more revealing split is partisan. Almost four-in-five ANC supporters (79.7%) want government to prioritise jobs, as do 84.4% of DA voters and 76.5% of MK voters. Support collapses only inside the EFF base, where 59.7% prefer larger grants and just 40.3 % opt for jobs. ActionSA's backers divide 56:44 in favour of employment, while every smaller party in the survey, size of such subsamples acknowledged, records overwhelming support for a jobs-first agenda.



Three primarily political conclusions follow from these findings.

First, the electorate's appetite for state welfare has limits: voters want opportunity, not dependency. Even among South Africans who would stand to benefit most from an expanded social-grant regime, the majority believe the surest route out of poverty is work.

Second, the ANC's embrace of a permanent Basic Income Grant (BIG) pits its policymaking against its own constituents. With four in five of the party's remaining voters already impatient for jobs, a pro-BIG agenda risks alienating the very cohort it hopes to retain, especially if the grant is funded by further tax hikes or borrowing that strangles growth.

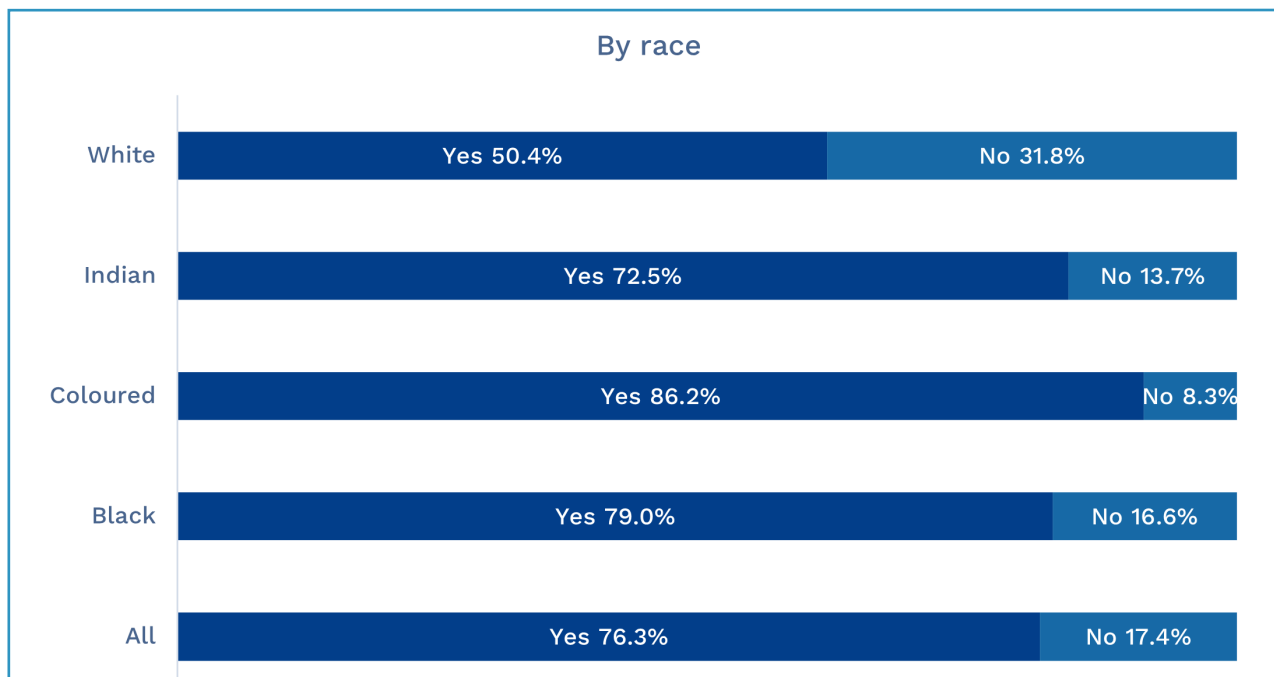
Third, the ANC's political rivals have an opening to define themselves around productive inclusion. The DA can reinforce its brand by coupling its anti-VAT stance with a relentless focus on employment; MK can broaden its insurgent appeal by framing jobs as the ultimate act of "taking back" economic power; even the EFF faces pressure from its own growth-oriented minority. A coalition that marries credible job creation with the public's demand for merit and value stands to inherit the broad centre of South African politics, leaving parties that gamble on welfare expansion exposed to both fiscal reality and electoral rejection.

## Choice trumps state-controlled empowerment policies

When voters are asked to choose between two distinct empowerment approaches—keeping the current framework of affirmative action and employment equity, or redirecting the same tax funding into portable vouchers for schooling, housing, and health care—the appeal of vouchers is remarkably broad. Across South Africa, the preference for voucher-based empowerment over traditional state-managed AA and BEE policies emerges not as a fringe view but as a solid and consistent majority position. The data show overwhelming support for education vouchers (85.5%), health care vouchers (84.2%), and housing vouchers (83.8%). Even when the comparison is made directly – whether a package of vouchers would do more to help people get ahead than AA/BEE – the result remains clear: 76.3% choose vouchers, with only 17.4% preferring to stick with the status quo and just 5.4% undecided.

Support holds across racial groups, though there are notable differences in intensity. Black respondents back vouchers for education at 87.3%, health care at 87.7%, and housing at 86.0%, with nearly four out of five (79.0%) saying vouchers would be more empowering than AA/BEE. Coloured voters are even more emphatic, with support for each voucher type exceeding 94%, and 86.2% favouring vouchers over race-based policies. Indian South Africans mirror this enthusiasm, with over 86% supporting individual voucher types, though preference for vouchers over AA/BEE dips slightly to 72.5%. Among white voters, support is more cautious but still solid: 64.8% for education vouchers, 56.2% for housing, and 50.4% favouring vouchers overall when directly compared to AA/BEE.

**In your opinion, would tax-funded vouchers for schooling, health care, and housing be more effective in helping you to get ahead than current AA and BEE policies, which focus on management posts, ownership deals, and preferential tenders?**



Generational patterns on the issue of voucher-based empowerment as opposed to current state-controlled policies are also revealing. Young voters aged 18–24 are almost unanimously behind vouchers, both in general and relative to AA/BEE (83.5%). While support softens slightly in the 25–34 bracket, it peaks among voters aged 35–44, where more than 90% back each type of voucher and 89.1% prefer them overall. Even among older voters, aged 65 and up, voucher support still outweighs alternatives, despite higher levels of uncertainty and residual support for race-based policies.

In terms of residential patterns, voucher support is strongest in precisely the areas most exposed to the limitations of AA/BEE: townships, informal settlements, and rural areas. In townships, support for education and health-care vouchers exceeds 86%, and 88.0% say vouchers would help more than current race-based rules. Informal settlements show unanimous support for education and housing vouchers, with clear majorities for vouchers overall. By contrast, most of the resistance comes from urban centres, central business districts, suburbs, and other areas where patronage and quota-based advantage have historically clustered.

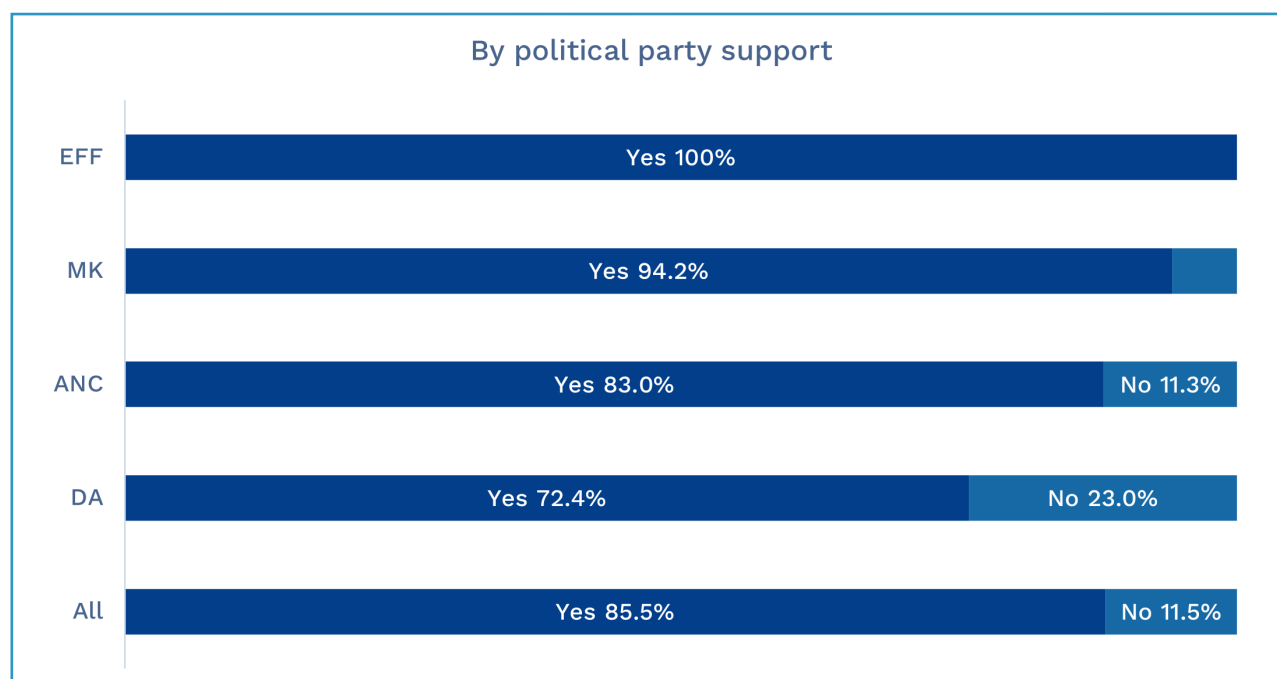
Education levels tell a similar story. South Africans with minimal formal education back vouchers at rates around 90%, and support remains high among those with some secondary schooling. Matriculants fall close to national averages, while university graduates show strong backing for vouchers, suggesting disillusionment with how race-based empowerment has played out in practice for ‘born free’ generations.

Across the labour market, too, voucher support is convincing. The unemployed and economically disengaged back vouchers at rates above 80%, clearly reflecting disappointment with the promise of empowerment through quotas. But so do informal workers, small business owners, and those in the formal sector, pointing to a shared belief across economic classes that vouchers offer a more direct, usable path to progress than regulation-heavy policies from above.

The income data drive the point home. Among the poorest households, those earning less than R2,000 a month, voucher support reaches as high as 95.2%, upending assumptions that the most economically vulnerable would be the most loyal to race-based empowerment systems. Even in higher-income brackets, voucher support remains strong, with only slightly more respondents expressing uncertainty.

Party affiliation sharpens the political stakes. Among ANC supporters, 77.3% say they prefer vouchers to AA/BEE. DA voters, while somewhat more mixed on individual voucher types, nonetheless prefer the voucher approach overall (69.5%). MK supporters are especially emphatic on issue-particular vouchers, supporting education vouchers (94.2%), health-care vouchers (89.4), and housing vouchers (95.7%) at rates consistently above the already high national average. Taken together, these findings suggest a major opportunity for parties to successfully champion practical, user-focused empowerment strategies over the status quo focus on management posts, ownership deals, and preferential tenders.

**In your opinion, would tax-funded vouchers for schooling, health care, and housing be more effective in helping you to get ahead than current AA and BEE policies, which focus on management posts, ownership deals, and preferential tenders?**



On the issue of empowerment policy, the ANC faces a disquieting reality: its policy commitments are increasingly out of step with remaining voter base. The continued enforcement of mostly race-based AA and BEE policies, despite their growing unpopularity, risks undermining the party's long-made claim to be the primary political mover of majority upliftment. If the ANC fails to act to bridge this divergence on where the locus of empowerment policy must sit, whether at the level of bureaucracy or the citizen as consumer, the party is at an increasing risk of being seen less as a liberator capable of delivering greater socio-economic opportunity than as the guardian of an outdated, elite-serving model based on racial preferences that further feeds 'cadre fatigue'.

This brings a unique set of political risks and opportunities for the major parties. For the ANC, staying the course with AA/BEE may alienate the very voters those policies were meant to empower, especially younger black South Africans, those in poorer households, and people outside the formal economy. For opposition parties, especially those willing to take a firm pro-voucher stance, the opportunity to draw support across lines of race, class, generation, and geography has rarely been clearer.

Ultimately, South Africans are unlikely to take sides on a voucher-based empowerment system with ideology in mind. Much more likely is that their preference has been shaped by their lived experience of empowerment policies. And the verdict is unmistakable: individual choice wins over state control as an option to change the failing status quo. Parties that recognise this, and build real policy alternatives around it, are best placed to define the next chapter of South Africa's democratic story.

## Conclusion

South Africans could hardly speak more clearly: they want policies and politics that unlock job creation, reward merit, hunt for every cent of value, safeguard what people own, and put real choices on such vital issues as education, housing, and health care directly into their hands. Across race, age, income and party lines this consensus is overwhelming. Parties, policymakers, businesses, and citizens now face a straightforward choice: realign around that centre of gravity or persist with projects voters regard as wasteful, unfair, or threatening?

For the ANC the warning lights flash red. Its signature platforms of race-based quotas, procurement, expropriation without compensation, and, increasingly floated over recent years, a permanent Basic Income Grant, are opposed by most South Africans and, more worryingly for the ANC, by roughly three quarters of its own diminished supporters.

Unless the party rewrites its economic script around large-scale job creation, clean and competitive tendering, secure property rights and choice-based citizen-level empowerment, it risks turning a 2024 electoral defeat into a 2026/7 rejection followed by a wholesale 2029 rout. In such circumstances, an ANC result similar to that of the Canadian Progressive Conservative Party in 1993 is on the cards: a collapse from around 40% support to below 20% and a corresponding loss of parliamentary seats. A rapid policy pivot, halting implementation of the Expropriation Act followed by its substantive amendment, easing employment-equity policies, targets, and penalties, shelving overly ambitious new welfare initiatives like a BIG until economic growth creates fiscal headroom, and backing some forms of pilot voucher programmes, would do more to rebuild trust than any new slogan or old narrative and set the party on course to at least some electoral rehabilitation and stability.

The DA is on the whole broadly aligned with much of public sentiment on property rights, value-for-money procurement, and merit-driven employment. Its strategic gap is a combination of credibility and accessibility: the party must build on what voters perceived as a successful utilisation of its position in government and Parliament to oppose the proposed increase in VAT.

Failure to ‘break through’ on other similarly simple bread-and-butter issues, most crucially job creation, will mean the VAT episode risks becoming an aberration instead of a new political paradigm of genuine competition between the DA and the ANC for the pole position in South African politics.

Yet, the DA could not attempt such a fundamental alteration of the political status quo in a manner that seemed exclusionary. This would risk pitting the DA’s traditional middle-class base against less well-off voters with socio-economic aspirations and frustrations. The VAT issue was, as it were, simple: it could unite both aspirational voters and middle-class voters on the socio-economic defensive with limited risk of conflicting interests. However, the more complex arguments of economic policies risk paralysing the DA’s message either in platitudes lacking substance or substance lacking emotive messaging appeal.

The party’s next step should be to bundle its anti-tax, pro-growth stance with an unambiguous promise to legalise choice-driven empowerment like national voucher schemes, slash red tape for small firms, and ring-fence infrastructure budgets from patronage – capitalising on ‘cadre fatigue’. Voters would need to see the DA as a credible party of job creation and a party capable of constructing what would effectively be a new South African identity: an identity founded on a South African *Wirtschaftswunder* (meaning “economic miracle”, a phrase coined to describe the rebuilding of the West German and Austrian economies after the Second World War).

MK has tapped into frustration with ANC failures on service delivery, but its rhetoric flirts with the same confiscatory instincts that most of its supporters reject when asked to make policy judgements. Herein we see the fact that, despite the importance of policy positions, voters, like consumers, are often irrational decision makers who do not read the fine print, but feel comfortable making judgements on less substantive considerations, such as the narrative ability of a charismatic leader like Jacob Zuma. The party can solidify its insurgent appeal by coupling its anti-establishment narrative, personified by Zuma, to a defence of those essential tools of economic participation already accepted by its own supporters: property rights, a merit-first civil-service ethos, and township-level voucher experiments that demonstrate immediate benefit. Otherwise, MK risks repeating the ANC’s misalignment from the opposite flank.

For policymakers in government and Parliament, the findings in this report suggest a workable cross-party reform package, subject to the political will to act on it: repeal or suspend the most damaging elements of the Employment Equity Amendment Act, amend procurement rules to make price and quality decisive, guarantee market-related compensation in any expropriation, pilot education, housing and health-care vouchers in high-unemployment districts, and prioritise infrastructure that directly lowers the cost of doing business. Such steps would align a governing agenda, with limited compromise on ideological holy cows, with electorate preference while still allowing room for targeted, transparent redress.

Business leaders, along with organised labour and civil-society groups, wield the leverage to accelerate a shift to such a renewed pro-growth consensus. They should anchor every engagement with government in the new polling arithmetic: South Africans want merit, value and choice, not paternalistic socio-economic engineering. Companies can commit publicly to open hiring competition and disclose the benefits of value-first procurement. The outstanding question is whether corporate South Africa recognises the soft power it holds – and is prepared to wield it.

Finally, ordinary citizens and voters possess the ultimate enforcement power. They can demand that local councillors, MPs, and party branches sign clear pledges on job creation, property security and choice-based empowerment, and they can withhold support from anyone who dithers. Community forums, social-media campaigns, and voter-education drives that foreground the pro-growth consensus (pro-jobs, pro-merit, pro-value for money, pro-property rights, and pro-empowerment choice) set out in this report will make it harder for political or economic elites to deflect debate back to low-salience ideological turf.

South Africa therefore stands at a hinge moment. A broad electoral mandate is now convincingly in political play for a pro-growth, merit-driven, choice-oriented policy settlement – and its electoral benefit. Parties and policymakers who embrace it are likely to find public goodwill, private-sector buy in, investment, and civil-society partnerships lining up behind them. Those who cling to a command-and-quota paradigm risk not only prolonged economic stagnation but a decisive and calamitous electoral reckoning.

# Addendum A

## Sampling method

The survey employed a random digit-dialling (RDD) method, targeting mobile phone users. The sampling frame included all possible mobile numbers in South Africa, ensuring that every registered voter had an equal probability of selection. This approach is critical for generalisability and reduces potential biases associated with predefined lists.

## Sample size and screening

A total of 807 respondents participated in the p, comprising a diverse demographic cross-section. The design effect (DEFF) of 1.5589 was applied to the analysis, accounting for sample design complexities.

The survey was limited to registered voters, ensuring the data reflected the electorate's views. It is important to note that no turnout scenario is applied.

## Data Collection

Data was collected using Computer-Assisted Telephonic Interviews (CATI), a reliable method that ensures consistency in questionnaire administration and minimises interviewer bias.

## Margin of error and confidence level

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.

## Questionnaire design

The survey questionnaire was carefully structured to ensure clarity, relevance, and balance. Key design features included:

1. Structure: Questions were grouped thematically, covering governance, economic priorities, race relations, and quality of life.
2. Neutral language: Wording was neutral to avoid influencing respondents' answers.
3. Follow-up questions: Where necessary, follow-ups addressed uncertainty (e.g., "If you had to choose, which party would you support?" for undecided voters).



## Data weighting

To ensure the sample accurately reflected the national population, the data were weighted according to key demographic factors, including:

- Age
- Gender
- Province
- Urban *versus* rural residency

This weighting process ensures that findings are representative of South Africa's multifaceted and demographically complex electorate.

## Respondent demographics

The survey sample of registered voters represents a diverse cross-section of South African society, ensuring the findings reflect the nation's socio-economic, geographic, and cultural diversity. Below is a detailed overview of the demographic distribution. To the extent that racial categories are used, these have been done purely on the basis of respondents' own racial self-classification.

### Geographic distribution

Respondents were drawn from all nine provinces, with the highest representation from Gauteng (23.5%) and KwaZulu-Natal (19%). Smaller contributions came from the Northern Cape (1.5%) and Free State (7.2%).

Province	% of Respondents
Gauteng	23.5%
KwaZulu-Natal	19%
Eastern Cape	12.5%
Limpopo	12.1%
Western Cape	10.7%
Free State	7.2%
Mpumalanga	7.1%
North West	6.5%
Northern Cape	1.5%

Respondents were drawn from the full range of residential area types, with the highest coming from tribal land and township areas, 37.1% and 30.3% respectively.

Residential area type	% of Respondents
Tribal land	37.1%
Township	30.3%
Suburb	18%
Informal	6.7%
Central Business District (CBD)	6.4%
Commercial farm	1.4%
Smallholding	0.1%

## Age and gender

The survey skewed toward older respondents, with 35.2% aged between 45 and 64, and 18.9% aged 65 or older. This focus reflects the predominance of older and therefore registered voters.

Age Group	% of Respondents
18–24	3.4%
25–34	14.2%
35–44	28.3%
45–64	35.2%
65+	18.9%

## Language

isiZulu speakers formed the largest language group (22%), followed by isiXhosa (18.9%) and Afrikaans (12.4%).

Home Language	% of Respondents
isiZulu	22%
isiXhosa	18.9%
Afrikaans	12.4%
Sesotho	12.2%
English	10.5%
Other languages	24%

## Employment and income

Employment data revealed that 39.7% of respondents were seeking work, while 15.7% were retired and 15.6% were employed in the formal sector. Income levels varied, with the largest group earning between R2,000 and R8,000 per month (57.7%).

Income Level	% of Respondents
<R2 000	13%
R2 000<R8 000	57.7%
R8 000<R20 000	10.1%
R20 000+	13%
Did not disclose	6.1%

The socio-economically diverse respondent pool set out above ensures a robust and representative dataset, allowing for nuanced analysis of South Africans' perceptions across regions, age groups, and socio-economic statuses.



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