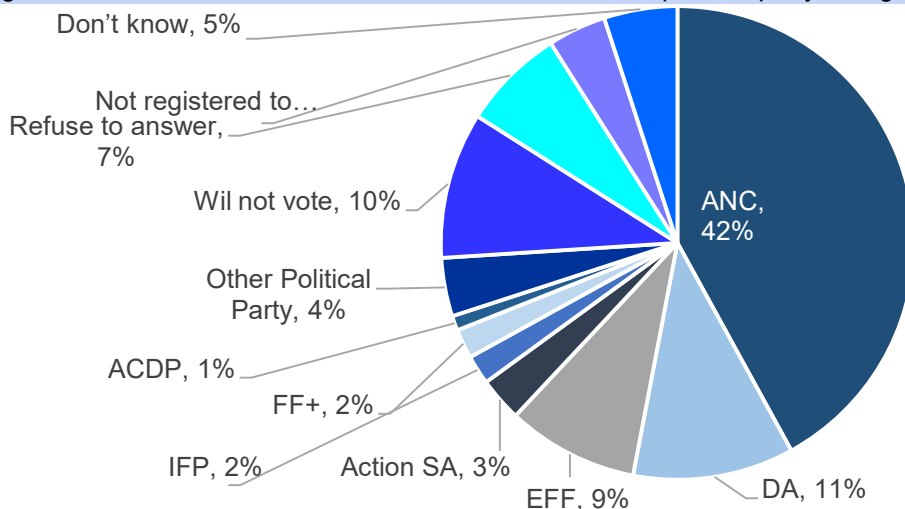


Election note: to soon to call 2024, but ANC elective conference expected to see Ramaphosa remain President

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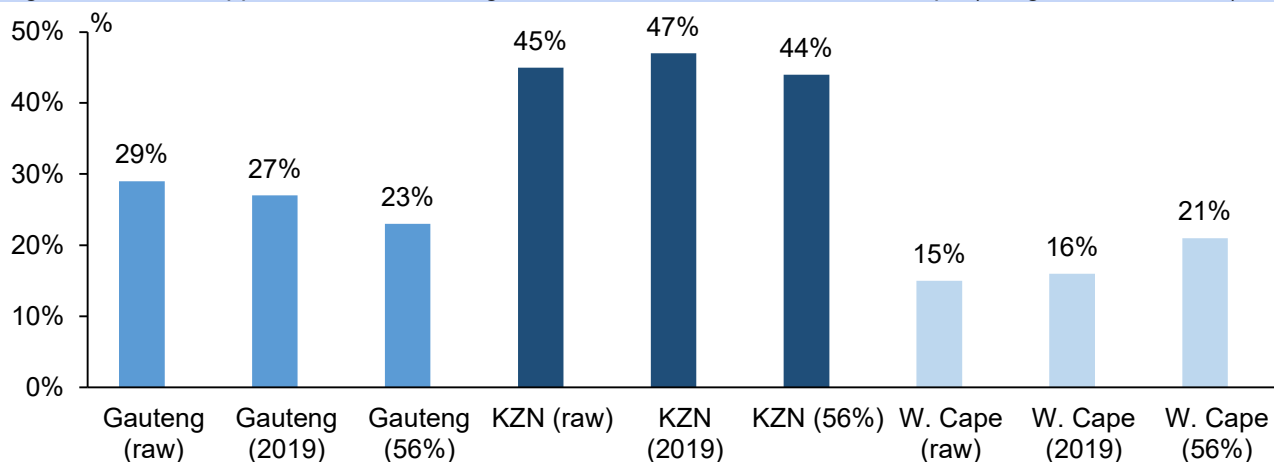
Figure 1: If there were national elections tomorrow, which political party or organisation will you vote for?



Source: Ipsos

- The waning national support for the ANC, at 46% of the vote in 2021's municipal elections, worsened in the latest Ipsos poll, to 42% (modelled on all eligible voters). However, it is too early to call the outcome of the 2024 election with any high degree of confidence and it is key to note survey results vary. Survey variance is due to, among other factors, the assumed turnout of voters, with last year seeing a very low turnout - from 26 million registered voters only 12 million voted (46%) on prevalent voter dissatisfaction.
- Consequently, politicking for the 2024 election, and so for the ANC presidential elective conference, started early this year, with the anti-Ramaphosa camp/s taking aim at the President and his key supporters to weaken his chances in the elective conference, as well as any positive economic measures and results.
- South Africa's frequent key political events, with the national elections interspersed with municipal elections, as well as the leading party (ANC's) elective and policy conferences, lead to political volatility, diverting attention and slowing the implementation of economic reforms, either purposely or inadvertently.

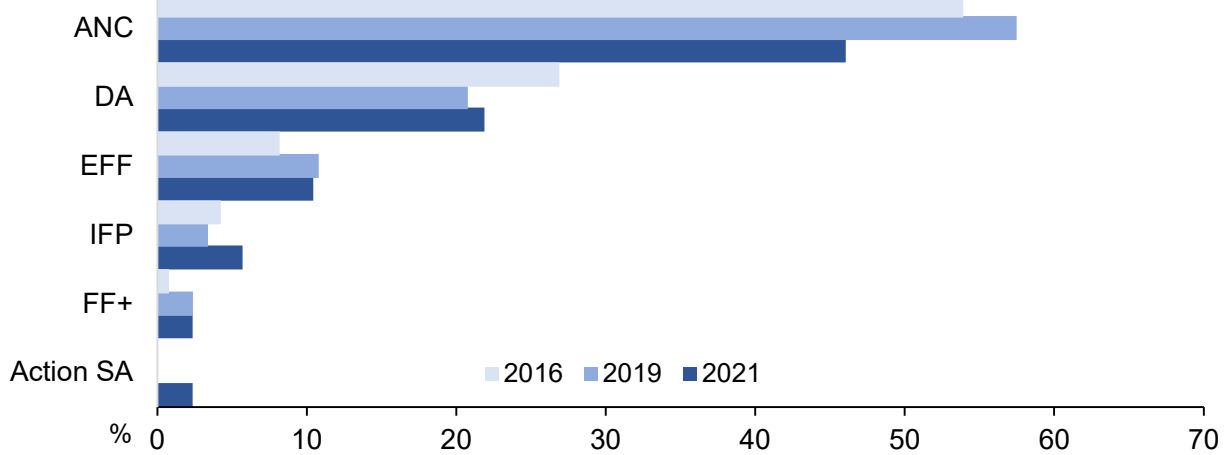
Figure 2: ANC's support levels in Gauteng, KwaZulu-Natal and the Western Cape (margin of error: 4.4%)



Source: Social Research Foundation, August 2022



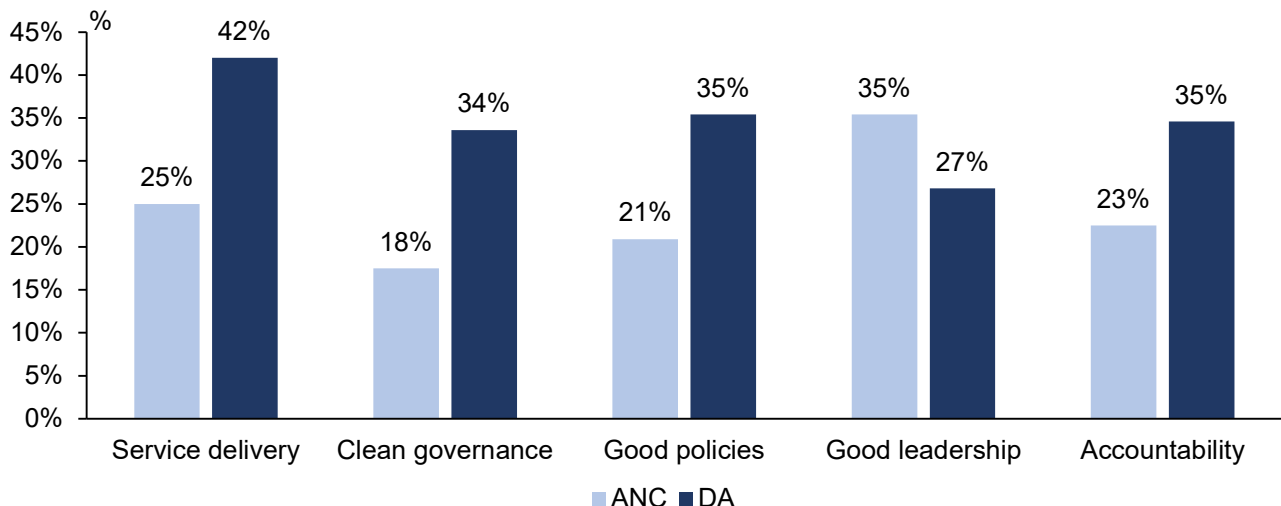
Figure 3: Municipal election results – National comparison 2016, 2019 and 2021



Source: IEC South Africa

- South Africa is a maturing democracy, and as is consistent with most maturing democracies, support for the dominant liberation party has fragmented. The ANC, which reached over 70% national support in the 2000s under Thabo Mbeki, saw overall support fall below 50% in the recent local elections on the legacy effect of the Zuma years, and the negative impact of the revelations of the high levels of state capture and corruption.
- President Ramaphosa marked his current term by seeking to eradicate state capture, corruption, wastage and inefficiencies from government (along with numerous proposed growth-directed reforms). Support for the President has been the highest out of any political leader, and he has been seen as corruption free. A survey last month still found him the best leader for SA out of the three top parties.
- However, a smear campaign against the President and his key Ministers is seen to now be underway as the anti-Ramaphosa faction pushes for new leadership of the ANC and SA, including via slowing or impeding of the implementation of economic reforms.

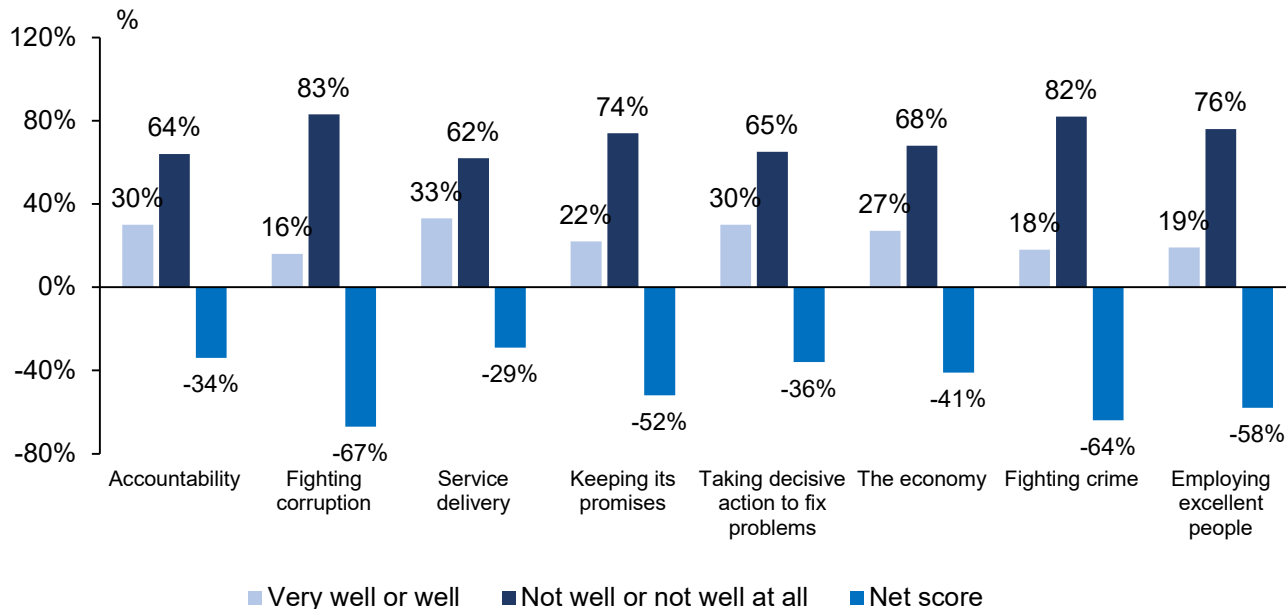
Figure 4: Which of the big 3 parties (ANC, DA, EFF) were best at following core governance issues?



Source: Social Research Foundation, August 2022



Figure 5: How well is the national government doing on the following issues?



Source: Social Research Foundation, August 2022

- ActionSA (ASA) made rapid gains in the municipal election in areas it contested and is expected to do so overall in the 2024 national election too, highlighting the widespread desire for better governance, and an improvement in economic activity and so job creation.
- The necessity of coalitions as ANC party support has waned and many new political parties have sprung up. Coalition's risk persisting and have had the negative consequences of instability in governance in a number of areas to the detriment of both service delivery and infrastructure maintenance.
- However, while coalitions tend to be slow in decision making, with the need to reach a majority consensus, they have the positive attribute of slowing down negative policy changes as well.
- Before the 2024 election, the ANC elective conference has to be passed first, and the political noise is likely to get louder into year end, as the RET faction become increasingly desperate to unseat Cyril Ramaphosa.
- Indications from provincial support show that the incumbent President is likely to maintain a majority support in the ANC elective conference, but this will not deter anti-Ramaphosa factions/s from attempting to unseat him by any means possible.

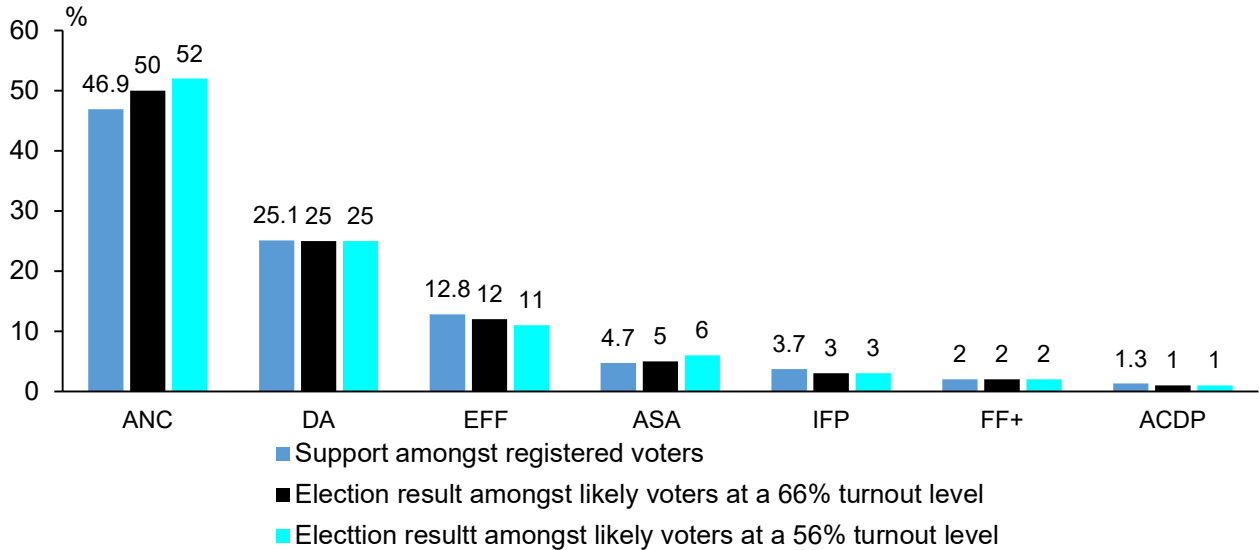
Figure 6: Registered voters and voter turnout, 2000-2021

	Eligible voters	Registered Voters	Voter turnout	Voter turnout (% of registered voters)	Voter turnout (% over -18s)
2000	28 139 437	18 477 932	8 882 734	48.1%	31.6%
2006	29 161 600	21 054 954	10 190 598	48.4%	34.9%
2011	33 668 384	23 709 002	13 664 914	57.6%	40.6%
2016	36 177 300	26 389 063	15 290 820	57.9%	42.3%
2021	40 153 738	26 212 149	11 850 000	45.5%	29.5%

Source: CRA



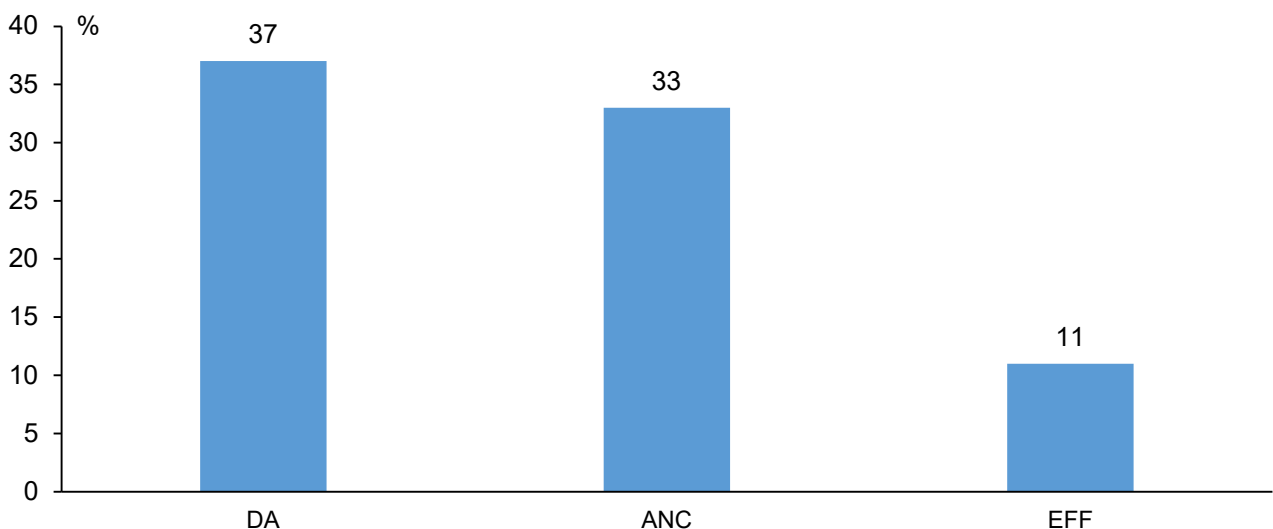
Figure 7: Political support levels by party



Source: Social Research Foundation, August 2022

- The Social Research Foundation’s (SRF) survey by Victory Research between June 27 to July 31 2022, on 3 204 participants, and seen to be “representative of the voting population (that is, it mirrors the voting population and in terms of all demographic indicators: age, race, education, rural/urban, gender, etc)” shows an ANC victory in 2022. That is a 52% majority on a 56% voter turnout.
- Victory Research adds “(i)t is also worth noting that there is nothing predictive about the turnout levels we have chosen. They are just models, of a possibility. Actual turnout on election day is the great unknown. Here we have provided just one model at 2019 levels, about 66%, and one lower, at 56%. Generally, voter apathy is increasing in SA; where it finally lands on the day is impossible to say, but critical.”

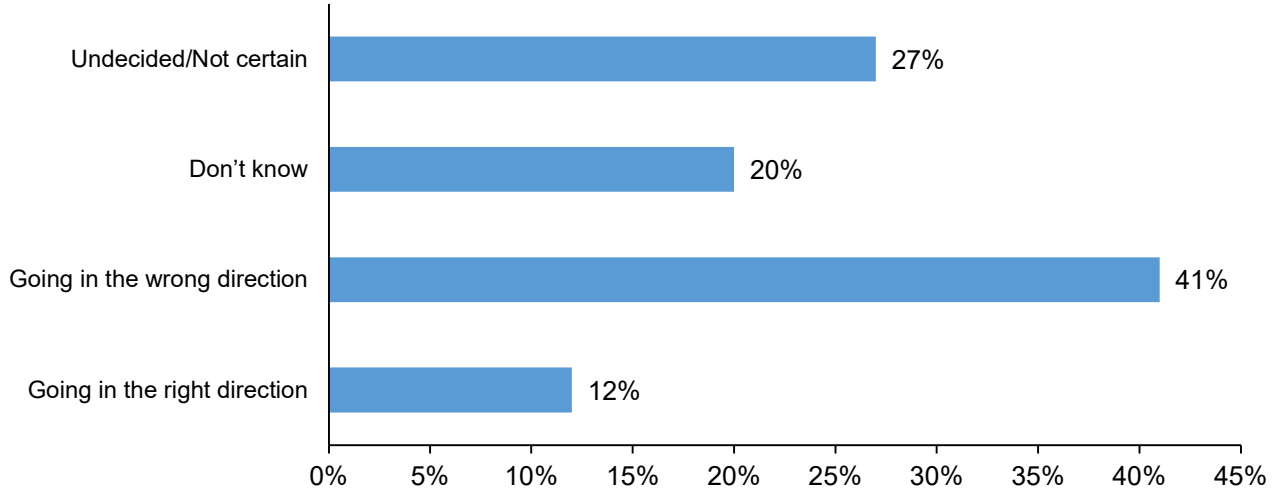
Figure 8: Party support in urban South Africa (%)



Source: Social Research Foundation, August 2022



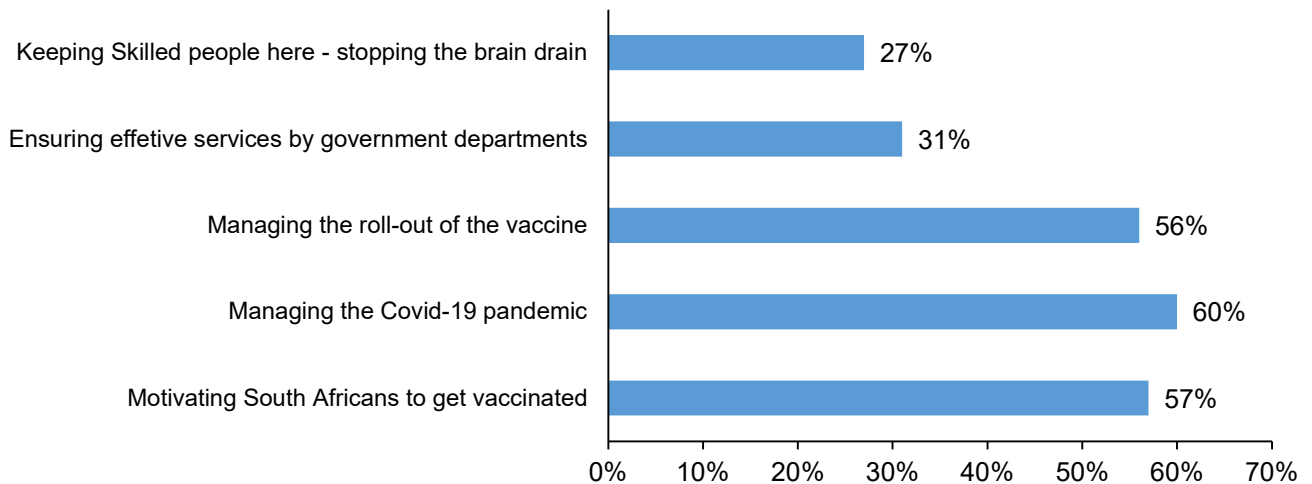
Figure 9: If an election were held tomorrow? Would you say the country is....



Source: Daily Maverick

- The recent progress of operation Vulindlela and the electricity plans are positive, and while they are largely medium to long term in nature, may already have had some sway with the electorate towards to the ANC, on the back of the Ramaphosa's camp, as the Victory Research and SRF results indicate.
- However, there has not been a marked stimulation to South Africa's economic growth from the implementation of large-scale economic reforms, and many reforms lag as the elimination of the bulk of red tape in SA and the heavy regulatory burden, low productivity of civil servants and free market dynamic.
- The ANC still needs to deliver faster economic growth and employment to gain certain traction among voters, particularly given mixed survey results.

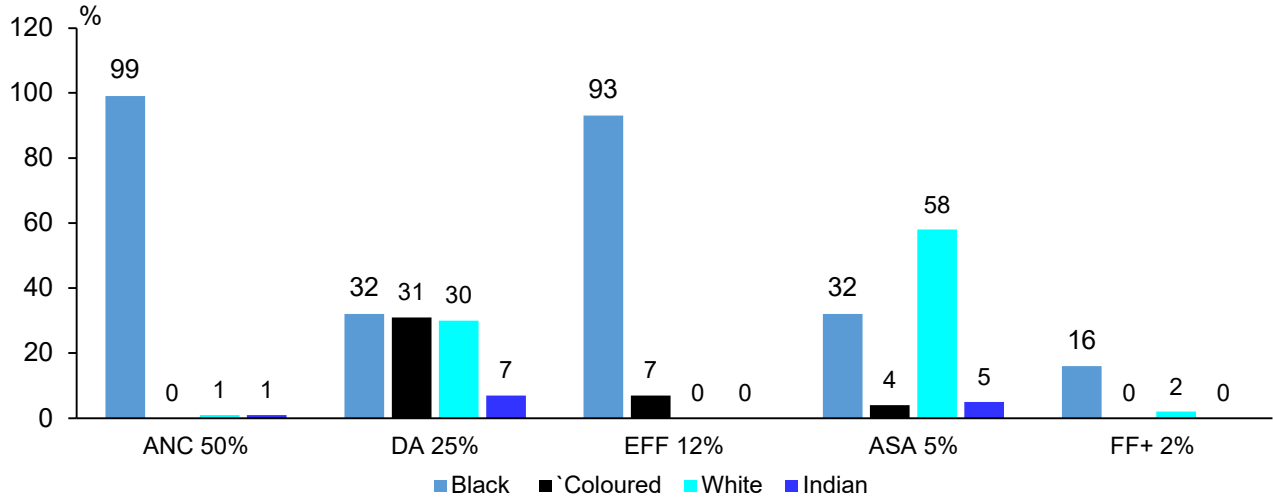
Figure 10: How well do you think the Government is doing...very well, fairly well, not really well or not at all well?



Source: Ipsos

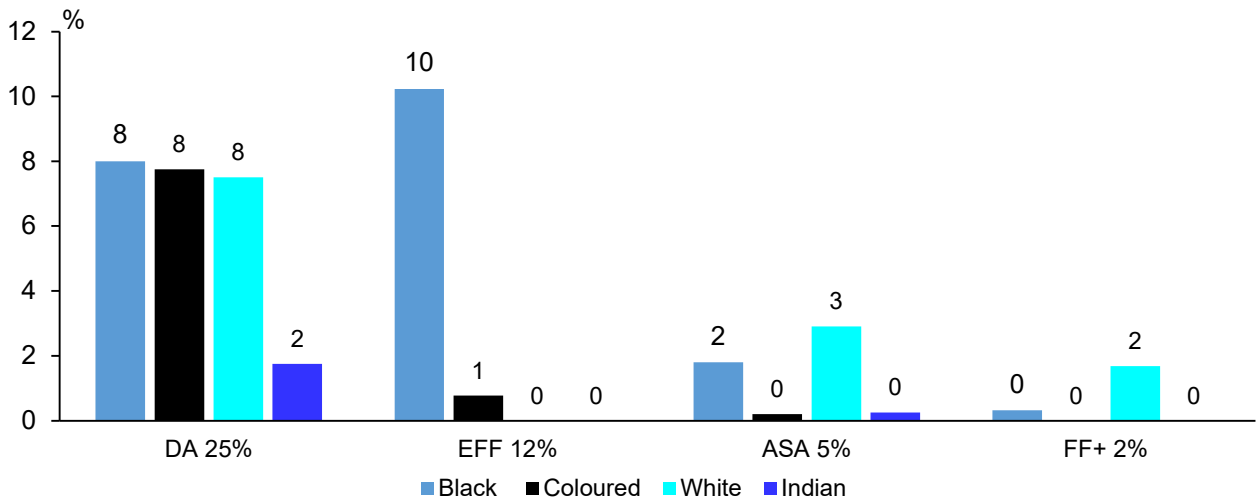


Figure 11: Party support by demographic group (% out of 100)



Source: Social Research Foundation, August 2022

Figure 12: Demographic composition of opposition party support (1% of total support)



Source: Social Research Foundation, August 2022

Figure 13: How do you evaluate...as a political leader on a scale from 0 to 10

0 means you are totally against him and 10 means you are totally in favour of ...as a political leader (these are the average points out of 10)



Source: Ipsos

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