



Citizen's Voice Index

FOURTH REPORT – FINDINGS THROUGH SEPTEMBER 30TH, 2018
A NEW WAY TO TRACK PUBLIC SENTIMENT IN REAL TIME



Orange Door Research

SUMMARY

This is the final Citizen's Voice Report, tracking citizen views on critical election-related issues facing Zimbabwe. The Magamba Network launched the Citizen's Voice Index with Orange Door Research in February, to measure changing public opinion in real-time, using daily mobile phone surveys. A total of 10,308 people completed the daily survey between February and September, at the rate of 43 respondents per day over that time period.

In addition to the daily surveys, we also conducted two additional surveys, one in June and one in August. Each survey included 500 respondents, separate from the daily survey. These additional surveys provide us a more in-depth picture of how the election shaped Zimbabweans' views on key issues facing the country.

Following the election, we added three new questions to the daily survey:

1. Do you think the Presidential election was free and fair?
2. Who do you think won the Presidential election?
3. Are you more or less optimistic about the future of Zimbabwe following the election?

A total of 1,482 people responded to these election-related questions over the course of late August and September. Of these, 56% believed the elections were free and fair, while 54% believed that Emerson Mnangagwa won the election. 45% of these respondents were more optimistic following the election, 31% were less optimistic, while 24% answered that their level of optimism had not changed.

Two other recent trends stand out. First, respondents in August and September are more concerned about both the economy and improving basic services,



compared to survey respondents from previous months.

Second, people's views on how best to make their voice heard have changed. Before the election, the majority of respondents said that voting was the best way to do so – following the election, a majority of respondents said that either working with civil society or interacting directly with Government officials was the best way to make their voice heard.

When asked which groups best represent their interests, 27% of respondents to the daily survey

chose religious groups, 27% chose civil society, 22% chose political parties, and 14% chose social movements. (The rest answered “none”.) That said, civil society does seem to have a broad base of support - according to the results of the June one-off survey, 62% of respondents trust civil society, while the August one-off survey found that 65% trusted civil society.

Looking at responses from the entirety of the daily survey, we see a consistent optimism about people’s ability to shape the country. Overall, 66% of all respondents to the daily survey believe they can influence key issues. This optimism is all the more striking, given that the majority of respondents also believe that the situation in Zimbabwe has deteriorated over the last five years, with 52% saying that it has gotten worse, 28% saying that it has remained the same, and only 21% saying that it has improved.

SURVEY METHODOLOGY AND DEMOGRAPHICS

Orange Door Research has conducted 10,308 daily surveys in Zimbabwe since early February 2018. We collected approximately 1,300 completed surveys per month using automated SMS mobile phone surveys, at the rate of roughly 43 surveys per day. Respondents were contacted via SMS from a panel of potential respondents who had earlier agreed to participate in surveys through the GeoPoll platform in exchange for a small incentive payment equivalent to \$0.50 worth of airtime credit.

Of the 10,308 people who completed the daily survey, 64% chose to answer in English, 33% in Shona, and 4% in Ndebele. 19% of respondents were aged 15 to 24, 38% were aged 25 to 34, and 43% were aged 35 or older. To date, 58% of respondents were men, and 42% were women. We have collected survey responses from each province, proportional to that provinces share of the national population.

For the June survey, 51% of respondents were female, and 49% were male. 23% of respondents were aged 15 to 24, 35% were 25 to 34, and 42% were 35 or older. For the August survey, 51% of respondents were female, and 49% were male. 18% were aged 15 to 24, 39% were 25 to 34, and 43% were 35 or older. Both the June and August surveys were conducted in English and Shona, and covered all provinces.

SURVEYS CONDUCTED SINCE FEBRUARY 2018

10,308 DAILY SURVEYS IN TOTAL

1,300 SURVEYS PER MONTH

43 SURVEYS PER DAY

We use Iterative Proportional Fitting to address any skew, to re-weight our survey to more accurately reflect the relevant national or sub-national demographics (i.e. to address the relative under-representation of women in the survey). From this we can derive an accurate margin of error. The 95% confidence interval is + / - 2% per month for the daily survey. The margin of error for the June and August surveys, which had a smaller sample size, was +/- 4%.

KEY FINDINGS

1. The Election

We added a number of election-related questions to the daily SMS survey in late August. Between late August and September, 1,482 people responded to these questions. 56% of these respondents believed that the election was free and fair, while 44% did not. There was an interesting difference based on the respondent's language preference. 50% of respondents who chose to take the survey in English through the election was free and fair, compared to 67% of those respondents who chose to take the survey in Shona.

There was also a distinction between male and female respondents. 51% of male respondents believed that the election was free and fair, compared to 63% of female respondents. We also saw a slight variation in terms of age. 60% of respondents aged 15 to 24 believed that the election was free and fair, compared to 56% of respondents aged 25 to 34, and 55% of respondents aged 35 and older.

We also asked respondents who they believe won the election. 54% said Emerson Mnangagwa, while 46% said Nelson Chamisa. (The rest either answered that they did not know, or chose "other").

WHO DO YOU BELIEVE WON THE ELECTION?

54%

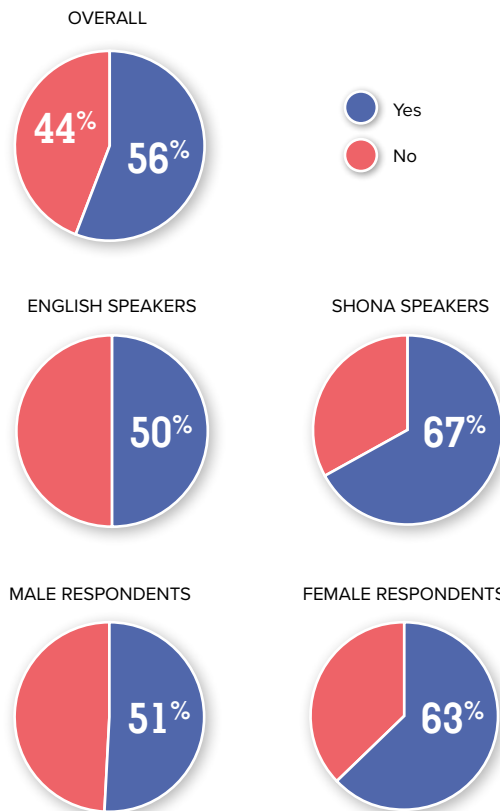
EMERSON MNANGAGWA

46%

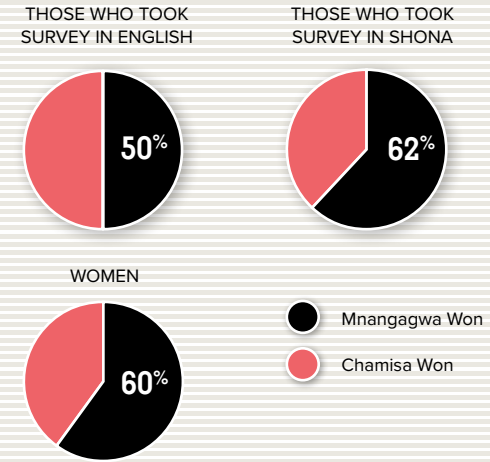
NELSON CHAMISA

Respondents who took the survey in English were less likely to say Mnangagwa won, compared to those who took the survey in Shona (50% to 62%). Women were also somewhat more likely than men to say that Mnangagwa won (60% to 50%). 60% of respondents aged 15 to 24 believed that Mnangagwa, compared to 53% of respondents aged 25 to 34, and 54% of respondents aged 35 and older.

WAS THE ELECTION FREE AND FAIR?



DID MNANGAGWA WIN THE ELECTION?

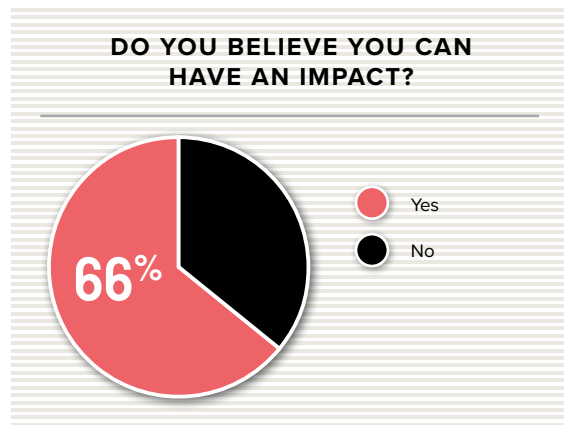


Not surprisingly, the vast majority of people who thought that Chamisa won did not believe the election was free and fair (91%), while the vast majority of people who thought that Mnangagwa won did believe it was free and fair (91%).

These findings are directionally in-line with the results from the one-off survey of 500 respondents that we conducted in mid-August. In the August survey, 59% of respondents stated that Emerson Mnangagwa won the election, while 41% believe that Nelson Chamisa won. In the August survey, we also saw that English speakers were less likely than Shona speakers to say that Mnangagwa won (56% to 67%), while women were more likely than man to say that Mnangagwa won (71% to 47%).

2. Ability to Influence Key Issues

Respondents remained optimistic about their ability to influence key issues in the country. In the June survey, 67% of respondents reported that they could have an impact on critical issues facing the country. In the August survey, 64% of respondents reported that they could have an impact on critical issues facing the country. This is in line with the findings from the daily survey, in which an overall average of 66% of respondents between February and September believed that they could have an impact.



RESPONDENTS WHO BELIEVE THEY CAN HAVE AN IMPACT

72%
MEN

58%
WOMEN

Looking specifically at the daily survey, male respondents were more likely than female respondents to believe they can have an impact (72% to 58%). Those who took the survey in English are also more likely to believe they can have an impact compared to those who took the survey in Shona (69% to 61%). Similarly, older respondents are slightly more likely to believe they can have an impact (66% of those aged 25 to 34 and 68% of those aged 35 or older, compared to 63% of those aged 15 to 24).

3. Has the Situation in Zimbabwe Improved or Deteriorated?

There are two ways to look at this question. First, we can see whether people are more or less optimistic following the election.

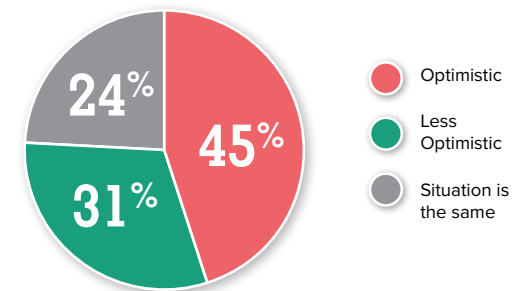
Overall, 45% of respondents are more optimistic about the future of Zimbabwe following the election, while 31% are less optimistic, and 24% believe the situation is the same. That said, only 16% of respondents who thought that Chamisa won are more optimistic about the future of Zimbabwe following the election (52% are less optimistic, and 32% believe the situation is the same). This compare to 68% of respondents who thought that Mnangagwa won who are more optimistic about the future of Zimbabwe following the election (15% are less optimistic and 18% believe the situation is the same).

Second, we can see whether, overall, people believe that the situation in Zimbabwe has improved or deteriorated over the last five years.

Looking at the cumulative results from the daily survey (covering February through September), 52% of respondents say that it has gotten worse over the last five years, and 21% say that it has improved, with the rest saying that it has stayed the same.

That said, there is a significant divergence between English and Shona-speaking respondents. 63% of English-speaking respondents say that the situation has gotten worse, and 13%

ARE YOU OPTIMISTIC ABOUT THE FUTURE OF ZIMBABWE?



say it has gotten better (the rest say that it has stayed the same.) By comparison, 31% of Shona respondents say the situation has gotten worse, and 35% say it has gotten better (the rest say that it has stayed the same.).

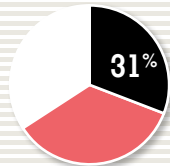
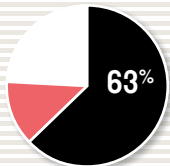
Respondents' main concerns focused on the economy and corruption. Looking at the tracking results from the daily survey, the percentage of respondents who believe that the economy is the most critical issue facing Zimbabwe has increased dramatically since the election, as

HAS THE SITUATION IN ZIMBABWE IMPROVED OR DETERIORATED?

52% WORSE **21%** BETTER

THOSE WHO TOOK SURVEY IN ENGLISH

THOSE WHO TOOK SURVEY IN SHONA

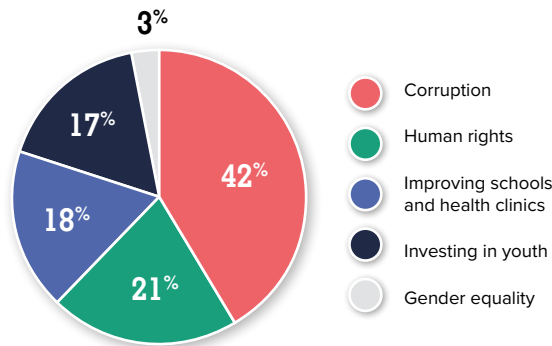


- Situation worse
- Situation Better
- Stayed the Same

has the percentage of respondents who believe that improving basic services is important.

Looking at the language breakdown from the daily survey, there is a significant distinction between those who took the survey in English and Shona, with those who took the survey in English more concerned about the economy, and those who took the survey in Shona more concerned about corruption and improving basic services.

WHAT IS THE MOST IMPORTANT ISSUE TO YOU PERSONALLY?

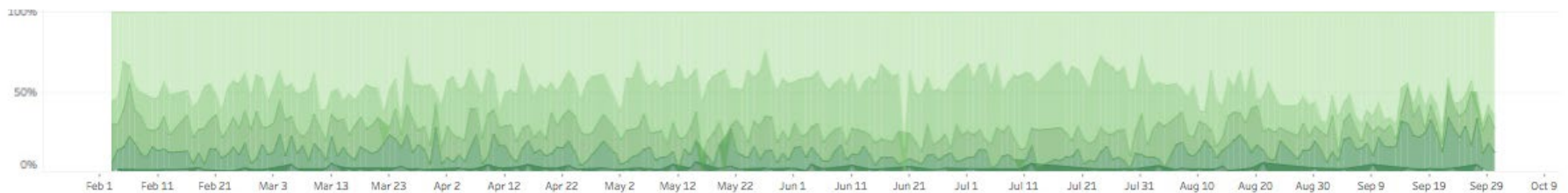


When asked what the most important issue to you personally, 42% of respondents in the daily survey said corruption, followed by human rights (21%), improving schools and health clinics (18%), investing in youth (17%) and gender equality (3%). Again, there was a distinction between those who took the survey in English and Shona. 50% of those who took it in English listed corruption as their main concern, compared to 32% of those who took it in Shona. Shona respondents, however, were far more concerned about human rights (40%, compared to 12% of those who took the survey in English).

4. Which group best represents your interests?

Looking at the cumulative results from the daily surveys, 27% of all respondents said religious groups, 27% said civil society and NGOs, followed by political parties (22%) and social movements (14%). 9% of respondents answered none of the above.

Those who took the survey in English were significantly more likely than those who took



- Economic situation
- Free and Fair Elections
- Corruption
- Improving basic services
- Other

WHICH GROUP BEST REPRESENTS YOUR INTERESTS

27% RELIGIOUS GROUPS

27% CIVIL SOCIETY & NGOs

22% POLITICAL PARTIES

14% SOCIAL MOVEMENTS

9% NONE OF THE ABOVE

the survey in Shona to say that civil society best represented their interests (31% to 18%). They were also more likely to say that religious groups best represented their interests (30% to 23%).

That said, those who took the survey in Shona were more likely than those who took the survey in English to say that political parties best represent their interests (26% to 20%). Similarly, they were also more likely to say that social movements best represent their interests (22% to 11%).

32% of female respondents stated that religious groups represented their interests, compared to only 24% of male respondents. On the other hand, male respondents were more likely to say that civil society (28% of men and 24% of women) and political parties (25% of men and 18% of women) represented their interests.

The one-off survey in June took a slightly different approach, measuring the extent to which respondent's trust civil society organizations. When asked "do you trust civil society orga-

nizations to represent your interests." 62% of respondents said yes, and 38% said no.

These findings were mirrored in the August one-off survey, in which 65% of respondents said they trust civil society to represent their interests. Interestingly, in August we did not see the same differences between those who took the survey in English compared to Shona, nor between male and female respondents.

Finally, as noted above, people's views on how best to make their voice heard have changed. Before the election, the majority of respondents said that voting was the best way to do so – following the election, a majority of respondents said that either working with civil society or interacting directly with Government officials was the best way to make their voice heard.

