



Nairobi, Kenya

1 August, 2017

Ipsos' Pre-Election

SPEC (Social, Political, Economic and Cultural) Survey:

1st Media Release:

Election Issues

Main Topics:

Voter Registration Status

Household Economic Conditions

Kenya's Direction

Security Issues

Presidential Election Vote-Preferences

Introduction

This is the 1st Media Release of Ipsos' fourth national SPEC survey for 2017. Fieldwork was conducted between 22–30 of July. For this survey, an increased sample of 4,308 was used, covering all 47 counties.

Suggested Story Headlines:

'Uhuru/Ruto maintain narrow lead with just one week left'

'Most voters have verified their registration status'

'Kenyans observe many violations of 'free and fair' elections, but still much prefer a multi-party political system to any of the alternatives'

Important Note – Recent Events:

During and after fieldwork, several developments occurred whose (full) impact may not be reflected in some of the results reported in this survey. Among them are:



- President Kenyatta fails to appear at debate with Raila Odinga (24 July)
- NASA leaders claim Jubilee plans to use the military to rig the election, together with ballot-stuffing using secretly printed presidential ballots (28 July)
- IEBC announces that only one agent per party will be allowed in polling stations (24 July)
- Cleaning of Voters' Register (Early July)
- IEBC announces that it will not provide in-progress presidential vote totals as constituency results are announced, but only the final total, since constituency results will be in the public domain (26 July)
- Raila Odinga and other NASA leaders allege plot by Jubilee to deploy the Military to help 'steal' the election
- President Kenyatta Uhuru rebukes Raila Odinga for accusing the Military of being used for pro-Jubilee electoral purposes on the basis that if the latter wins, he would expect this same Military to serve him as Commander-in-Chief (26-28 July)
- Body of IEBC ICT Chief Chris Musando found murdered along with that of an unknown woman, and his body identified two days later, the day he was to lead a demonstration of the IEBC's election technology (29, 31 July)

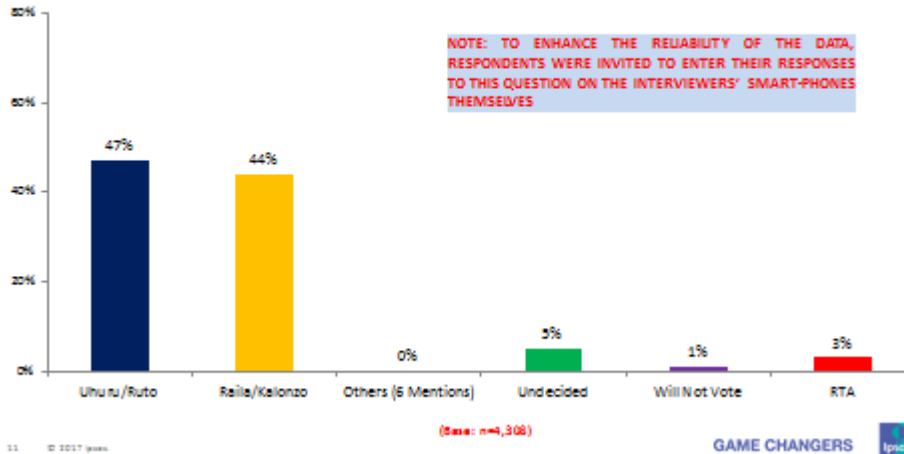
1) Main Finding: Presidential Contest

The main finding from this survey is that there has been almost no measurable change since mid-July when Ipsos released the results from its previous survey, conducted during 3-12 July. The only notable change is the 1 percent drop in those stating they are "undecided", and the increase in Raila Odinga's rating by this same margin. However, the fact that there remains a significant proportion of those in this response-category (5 percent) suggests that how this category of registered voters eventually vote – if they do, in fact, go to their polling stations on August 8 – as well as the variable-distribution of voter turnout overall, could result in either of the top two candidates winning the presidential election.



"If elections were held today, whom would you vote for as president and deputy-president?" (Single Response, Unprompted): *by Total*

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Other Key Findings:

2) Voters' Registration Status

1. While the vast majority of Kenyans who register to vote (about 70 percent of all adults) do so where they currently live (86%), most of the others do so in the original/rural homes (7%), the highest proportion in regional terms being Nairobi-dwellers where only just over one-third report being registered just where they are living (70%).
2. Regarding their voter registration status, the vast majority (89%) report having gone back to their polling stations to confirm that their names are in the Register, with almost all who did (99%) having confirmed this to be the case. In addition, more than one-third (36%) state that they were able to obtain such confirmation by sending an SMS to the IEBC-dedicated number for the purpose.
3. Taking into account all such factors, more than nine-in-ten respondents (94%) indicated they are "certain" they will find their names on the Register when they go to their polling stations on 8 August, with only a handful (1%) "not certain at all" about this.

3) Change in Household Economic Conditions (Last Three Months, Five Years) and Kenya's Direction



Results for questions about the respondents' household economic conditions over both the "last three months" and "since the last election in 2013) show

(continued) modest improve, since the low point in Ipsos' May survey. This is so even if quite large gaps remain between Jubilee and NASA supporters in this regard, with the former considering themselves decidedly better off.

The same applies to the question about Kenya's direction. Although half (50%) perceive it to be "wrong", six time more Jubilee supporters consider it to be "right" as those of NASA (66% vs. 11%). For this measure, too, the overall figures represent a significant improvement, especially since May, when Ipsos found almost three-quarters of all Kenyans perceiving the country's direction as "wrong" (71%).

4) Security and Election Integrity Issues

1. Asked about the "main threat" to security in their localities, the vast majority cite "thieves and robbers" and "jobless youth", with only a small minority making reference to the current heightened political atmosphere in identifying "political rivals" (4%).
2. With specific reference to any election-related violence so far, slightly more than one-in-ten (12%) report its occurrence, with slightly more NASA supporters reporting this than those of Jubilee (17% and 9%, respectively).
3. Looking forward, there is rather more concern with violence stemming from the national, presidential contest than from any of the county/local ones, with more concern for the former type expressed by residents of Nairobi (38%).
4. Regarding confidence in election-related institutions and officials, the IEBC and the KDF score highest, though as noted above, the fact that the survey was completed just before the mysterious (and brutal) death of IEBC ICT Manager Chris Msando may mean the high ratings for the former have since decreased, at least somewhat. As such, the steady increase in the proportion who express "a lot of confidence" in the IEBC, especially since January, may have been affected by this murder.

It is also evident that international election observes inspire more confidence than domestic ones.



5. Confidence in the Supreme Court to deliver a fair judgment in the event of an election petition is modest, with only about half of all respondents (48%) assured of this. Once again, moreover, gap between Jubilee and NASA supporters on this issue is considerable (61% vs. 36%, respectively).
6. Asked if they were aware of “anything in this area” that might undermine a ‘free and fair’ election, relatively few said they are (12%), but again, rather more NASA than Jubilee supporters expressing this concern (17% vs. 9%).
7. Among the relatively few who had witnessed any such violations so far (13%), most frequently mentioned were “rigged party nominations” and “vote-buying” (30% and 26%, respectively), though “discrimination” during the voter registration exercise (15%) and the “buying of ID cards” (to prevent people from voting) also received considerable mentions.

5) Political Party Alignment

1. In terms of political party alignment, no statistical change is evident since Ipsos’ previous survey, with Jubilee maintaining a slight advantage (45% vs. 41%). In terms of the main reasons for such alignment, far more of Jubilee supporters cited the Government’s development record, while many more of NASA supporters stated their approval of their coalition’s Manifesto.
2. Notwithstanding the fact that as of now nearly nine-in-ten express support for some political party or coalition, a clear majority of Kenyans, including such supporters, say they do not think “any political party” actually represents “the interests of ordinary Kenyans” (58%).

6) Awareness of Presidential Candidates and Vote-Preferences

1. Nearly all Kenyans (98%) are aware of the two main presidential candidates, though the figures are far lower for the other six, ranging from A. Dida (35%) to P. Gichira (2%).
2. As noted above, Uhuru/Ruto still lead Odinga/Musyoka (47%vs. 44%), though given the minimal support expressed for the other six candidates (hardly 0.5%), no second round run-off appears likely, unless the race between these top contenders tightens even more than has already, or the gap is overcome through greater voter turnout on the NASA side.

Regional variations are considerable, with Jubilee leading by far in Central and parts of the parts of the Rift Valley, while NASA enjoys much more



support in Nyanza and Coast. (Splitting Eastern into “Upper” and “Lower” and Rift Valley into “Central” and “Pastoralists” parts of this vast region reveals more of such contrasts.

3. A small but significant proportion of Kenyans report having changed their minds about their presidential vote “in the last two months” (5%), suggesting that even now, some vote-shifting may still occur before August 8.
4. Several possible outcome-variations, based on such factors as the actual probability that those registered will actually be able to vote, level of certainty of voting, the variation in the turnout levels across the political divide in the last (2013) election, and the impact of a hypothetical reverse of this advantage in NASA’s favor in this one. None revealed a difference of more than a few percent to Jubilee’s advantage, and even a turnout advantage for NASA equal to that which Jubilee enjoyed in 2013 (4%) would be enough to yield victory (though reducing the gap from 4% to 2%). This is true whether the calculations are performed with or without the “undecideds” and other undeclared voters in such calculations.

Overall, the small but significant advantage enjoyed by Jubilee (of 4%) remains unchanged from Ipsos’ previous (early July) survey.

7) Ballot-Choice Correlations

While far more of those who feel their households’ economic conditions have improved since the last election expressed an intention to vote for the incumbent Jubilee president, and the same applies to those who consider the country to be headed in the “right direction”, there are substantial proportions holding contrary views who say they will vote for him, nevertheless. This suggests that Kenyan voters’ choices reflect far more than just issues relating to material well-being.

8) Kenyans’ Preferred Political System

However frequent the complaints heard about corruption, violations of ‘free and fair’ electoral practice, and other governance ills, Kenyans give overwhelming support (74%) to “multi-party democracy’ as opposed to any of the other main alternatives: single-party rule, military rule, one-man civilian dictatorship. As such, at least based on public opinion, it is within the current basic framework of political competition and exercise of authority by the



winners that Kenyans will forge their future, seeking to better their own lives and those of the next generations.

Concluding Comment:

Notwithstanding Jubilee's advantage, given the close gap between the two leading presidential candidates, the outcome of the election cannot be predicted on the basis of this survey's results. This is so not just because of the possible impact of campaigns and other events during the remaining days, but also due to the ultimate decision of those reporting to be as yet "undecided", and the possible variations in voter turnout.

At the same time, given the minimal support expressed for all the other six candidates, a second round, run-off contest appears far less likely than it did in the 2013 election.

Survey Methodology

The target population for this survey was Kenyans identified (and largely confirmed) as registered voters, of whom **4,308** living in urban and rural areas, spread across 47 counties were interviewed. Those selected for and willing to participate in the survey interviews had three language-options: English, Swahili and Somali.

The margin-of-error attributed to sampling and other random effects for the entire sample is +/- 1.5% with a 95% confidence level (though higher for all sub-sections of the sample that are reported (i.e., by region, self-identified political alignment, etc.). For demographic details of the sample, see the accompanying PowerPoint document.)

Fieldwork was conducted during 22-30 July, 2017. Data was collected through face-to-face interviews using hand-held devices (smart phones).

For further clarification or comments, please contact:

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