

RESULTS FROM WAVE XIV OF TRACKING SURVEYS

1 July 2004



Methodology

- Waves I, II, IX, and X surveys were conducted using face-to-face interviews with 1250 respondents (each wave), selected by multi-stage random sampling of eligible voters throughout each of the 32 provinces of Indonesia. The Wave III survey was conducted in half the sampled locations throughout the country in 16 provinces with 1000 respondents, and the Wave IV survey was conducted in the rest of the sampled locations, in the other 16 provinces, with 1000 respondents. Each of the Waves V to VIII surveys were conducted in 8 different provinces with 1000 respondents in each Wave, for a national total of 4000 respondents covering all provinces. The Wave XI survey was conducted in half the sampled locations throughout the country in 16 provinces with 1000 respondents, and the Wave XII survey was conducted in the rest of the sampled locations, in 15 provinces, with 1000 respondents. The Wave XIII survey was conducted in 31 provinces with 1250 respondents. The province of Maluku was omitted from the Wave XII and Wave XIII surveys due to security problems. The Wave XIV survey was conducted in 32 provinces with 2000 respondents.
- The composition of the data in Wave I, Wave II, Waves III and IV combined, Waves V through VIII combined, Wave IX, Wave X, Waves XI and XII combined, Wave XIII, and Wave XIV reflects the rural/urban, men/women and inter-provincial proportions of the Indonesian population.
- The margin of error for the national data for each wave in Waves I, II, IX, X, and XIII is +/- 2.8% at a 95% confidence level. The margin of error for each of the combined Waves III/IV, Wave XI/XII, and Wave XIV data is +/- 2.2% at a 95% confidence level. The margin of error for the combined Waves V through VIII data is +/-1.55% at a 95% confidence level.
- For Wave I, the face-to-face interviews were conducted between 13 and 18 December 2003. For Wave II, the interviews were conducted between 12 and 15 January 2004. For Wave III, the interviews were conducted between January 26 and February 1. For Wave IV, the interviews were conducted between February 1 and 6. For Wave V, the dates of interviews were February 15-19; for Wave VI, February 21-25; for Wave VII, February 27-March 2; for Wave VIII, March 6-10 (the day before the commencement of the election campaign). For Wave IX, face-to-face interviews were conducted between March 21 and 28, 2004. For Wave X, face-to-face interviews were conducted between April 7 and 14, 2004. For Wave XI, face-to-face interviews were conducted between April 20 and 27. For Wave XII, face-to-face interviews were conducted between May 1 and 8. For Wave XIII, face-to-face interviews were conducted between June 4 and 9. For Wave XIV, face-to-face interviews were conducted between June 17 and 26.
- In this report, any data from the Wave I, Wave II, Waves III/IV, Waves V through VIII surveys, Wave IX, Wave X, Waves XI/XII, and Wave XIII is specifically cited in the charts and text. All other data points are from Wave XIV survey. Regional breakdowns reflect data from the Wave XIV survey.



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Fieldwork for these surveys was managed and conducted by *Polling Center*



1. Likelihood of Voting in Presidential Election

	OVERALL	If in First Round...		If in Second Round...	
		No Presidential Candidate from Party that Represents Aspiration	No Presidential or Vice-Presidential Candidate from Party that Represents Aspiration	No Presidential Candidate from Party that Represents Aspiration	No Presidential or Vice-Presidential Candidate from Party that Represents Aspiration
Very High/High	91%	82%	81%	80%	79%
Probably	7%	14%	15%	16%	16%
Very Little/Little/Will Not Vote	2%	3%	3%	3%	3%

- Ninety three percent of Indonesians are now aware that there will be presidential elections in July. More than ninety percent of Indonesians in the late June survey express a high willingness to vote in this election, the highest percentage recorded to date in the IFES surveys. Seven percent say that they will probably vote in the election, and 2% say there is little or no chance of them voting. The percentage of Indonesians indicating a high likelihood of voting has also gone up significantly in cases where a respondent's favored party may not have a presidential or vice-presidential candidate in the elections. Close to 80% or more say there is a high likelihood of them voting even in the case of their party not being represented through a candidate in the election, compared to 75% or fewer in the early June survey. Respondents in Kalimantan continue to lag those in other regions of the country in indicating a high likelihood of voting in the presidential election (78%).

- There continues to be a need for voter education that emphasizes the proper method for punching the ballot in the presidential election. One-third of those aware of the presidential election (33%) do not know how to correctly punch the ballot in the election (one punch for the preferred presidential/vice-presidential pair). This is a slight improvement over the 39% who were unaware of the correct way to punch the ballot in the early June survey. Among those highly likely to vote, 32% are not aware of the proper way to punch the ballot. Given the limited amount of time remaining for voter education efforts, this findings may necessitate polling station officials being diligent about informing a voter of the correct way to vote. Respondents in Kalimantan are least likely to know how to punch the ballot (47%). There has been an increase since the early June survey in the percentage of respondents who know how to punch the ballot in Sumatra (excluding Aceh, 64% versus 48% in early June) and Sulawesi (67% versus 52%).

- Of those aware of the presidential elections, a majority (63%) are unaware of the correct method by which a presidential/vice-presidential pair could win the election in the first round. This percentage has not changed significantly from the early June survey. Only 5% of respondents in Kalimantan are aware of the correct method for election in the first round and 13.3% are aware in the conflict areas of Aceh, Maluku and Papua.

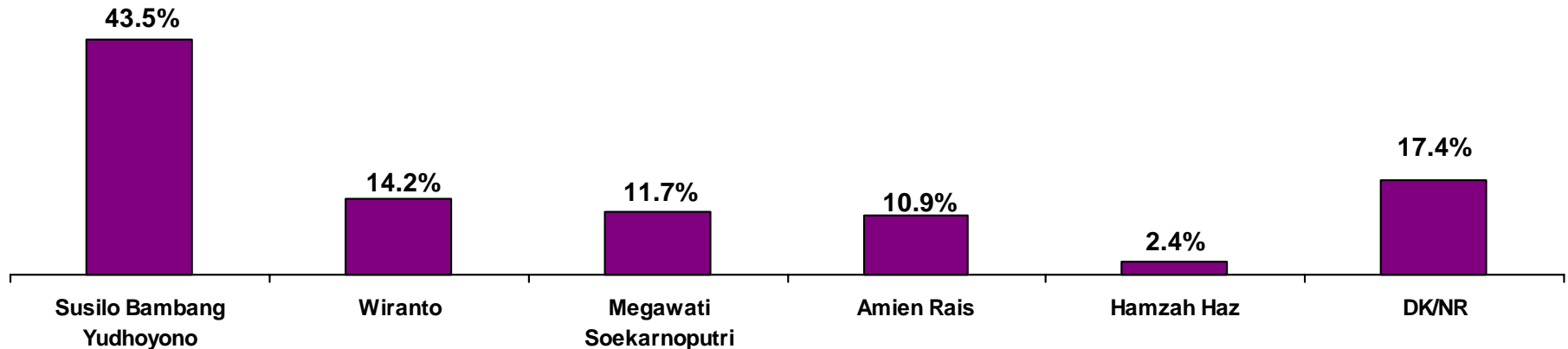
- Thirty five percent of those aware of the presidential elections incorrectly expect that whichever candidate pair wins the most votes at the July election is automatically elected President/Vice President. This includes 41% of those who state they intend to vote for Wiranto/Wahid, 43% of those who intend to vote for Megawati/Hasyim, and 37% of those who intend to vote for SBY/Kalla. On the other hand, only 18% of those intending to vote for Amien Rais/Yudohusono have this incorrect expectation, whilst 57% of intending voters for this ticket are aware of the correct framework for a first round win.

- Among those aware that a candidate pair has to win more than 50% of the national vote and more than 20% in at least half the provinces, to win the presidency in the first round, over three quarters (79%) are aware that the top two vote-getting pairs in the first round move on to a second round in September.

- Ninety-one percent of Indonesians report that they have received their voters card for the presidential election. This percentage is much higher than the percentage that reported receiving their voter cards in the last IFES survey before the parliamentary elections in April (40%). Currently, respondents in the conflict areas of Aceh, Maluku and Papua are least likely to have received their voter cards (81%).

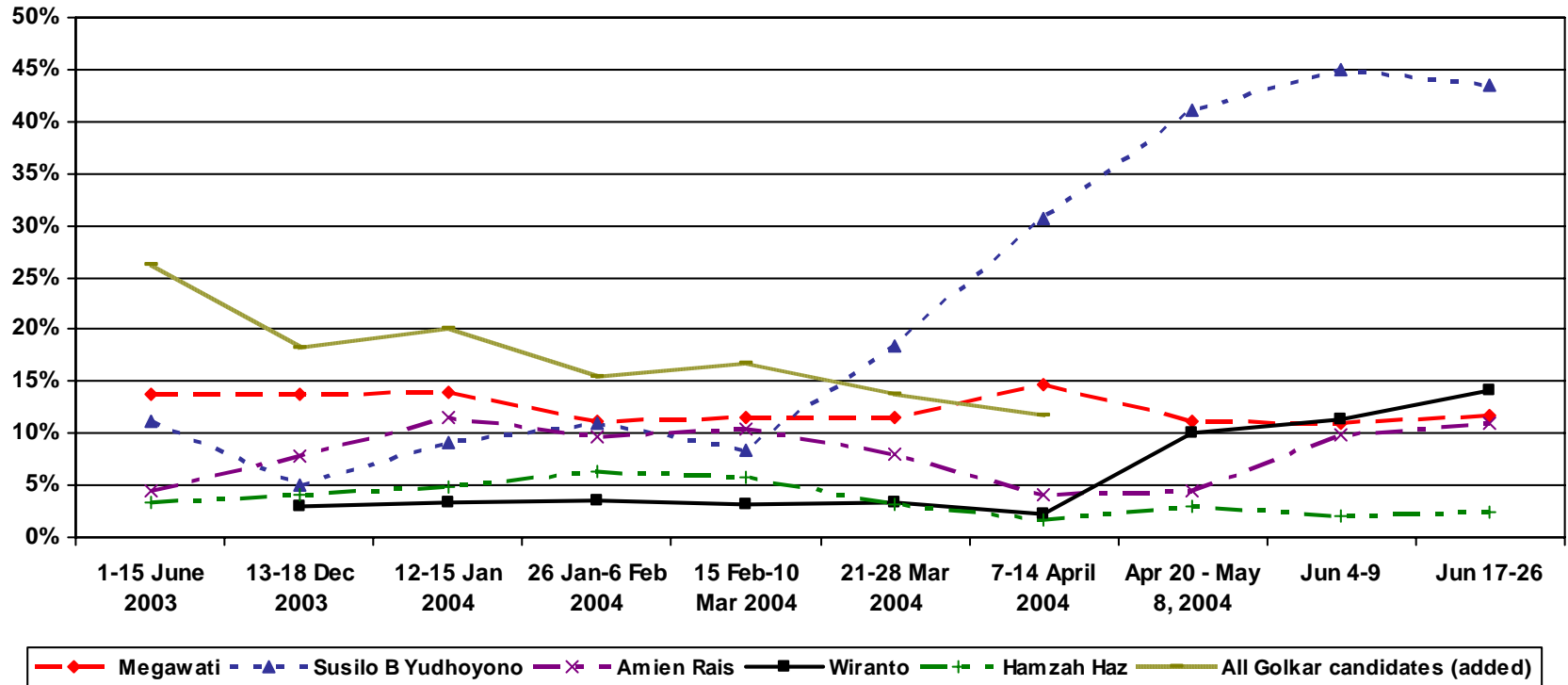
- Eighty-four percent of Indonesians believe that the presidential election will, at the very least, probably be free and fair. Ten percent do not think the election will be free and fair.

2. Presidential Candidate Preference



- The data from this late June survey shows that Susilo Bambang Yudhoyono (SBY) is thought to be the best president for Indonesia by far more Indonesians than any other candidate and looks certain to finish with the most votes in the July election. There is, however, a close contest between former General Wiranto, President Megawati, and Amien Rais for the critical second position in the election. SBY continues to be favored by more Indonesians than the other four candidates combined (43.5% versus 39.2%).
- Those who name SBY as their candidate of choice do so because of his personal characteristics and reputation. When asked to give multiple reasons why they prefer a particular candidate, 39% of SBY supporters prefer him because he is respectable, 37% because he has a good personality, 31% because he is firm, and 22% because he is honest. Wiranto supporters are more likely to cite factors emblematic of his experience as a general: firm (34%), military background (30%), good personality (22%), can provide security (17%), and respectable (12%). President Megawati is primarily preferred because of her experience in government (32%), her good personality (20%), the fact that she is a woman (14%), and because she can solve economic problems (13%). Amien Rais' supporters look to his reputation as a democratic reformer. Forty-four percent of his supporters cite the fact that he is honest, has a good personality (30%), professional (20%), and is democratic (19%).
- Respondents were also asked which president/vice-president pair they intend to vote for in the presidential election. The responses to this question are not much different from those to the question asking about the best president for Indonesia. The SBY/Jusuf Kalla pair is picked by the most Indonesians (44.4%), followed by Wiranto/Solahuddin Wahid (13.8%), President Megawati/Hasyim Muzadi (12.5%), Amien Rais/Siswono Yudohusodo (10.8%), and Hamzah Haz/Agum Gumelar (2.1%). Nine percent say their voting choice is secret and 7% do not know for whom they would vote.
- Given the survey's national data margin of error of +/-2.2%, this current data on intended voting support for the candidate pairs does not give a clear indication of which pair may obtain the second highest number of votes in the first round of the election, and thus be eligible to contest a second round, if there is one.
- The SBY/Kalla pair is the clear top choice in all regions of the country except Bali/NTB/NTT. In this region, 29% of respondents pick SBY/Kalla, 29% select President Megawati/Muzadi and 21% select Wiranto/Wahid. This is a large change from the early June survey when 59% selected SBY/Kalla and only 9% selected President Megawati/Muzadi. The SBY/Kalla pair's largest support is in Sulawesi (62%), East Java (48%), Central Java (including Central Java and Yogyakarta, 46%), and Western Java (including West Java, Banten and Jakarta, 45%). As in previous surveys, there is not much disparity in support for particular candidates between men and women with a nearly equal percentage of each gender most likely to support the SBY/Kalla pair (45% men, 44% women). President Megawati/Muzadi are supported by 13% of women and 12% of men.
- Of those who name a candidate pair as one they intend to vote for in the July election, the vast majority (80%) are definite or mostly certain that they will vote for this pair. Among those who presently intend to vote for SBY/Kalla, 86% are definite or mostly certain to vote for the pair. This compares to 85% for those naming President Megawati/Muzadi, 78% for those supporting Wiranto/Wahid, 82% for Amien Rais/Yudohosodo, and 88% for Hamzah Haz/Agum Gumelar.

3. Timeline of Support for Presidential Candidates



Note: For "All Golkar candidates", Sri Sultan Hamengkubuwono X is not included for surveys after 10 March 2004, and Jusuf Kalla is not included in surveys after 28 March 2004

- The graph above shows the support for presidential candidates in IFES surveys since June 2003. The graph indicates that in this survey, Susilo Bambang Yudhoyono (SBY) has suffered his first drop in support since the February-March survey. The drop in support is small (from 45% to 43.5%) and does not seem to endanger the possibility of SBY finishing with the most votes in the first round of the presidential election. The slight drop in support and the attendant drop in momentum does, however, lessen any possibility that SBY might win the election in the first round. This possibility will depend upon whether nearly half of those 14% of Indonesians who are highly likely to vote in the presidential election but are undecided about who they consider the best president for the country, vote for SBY.
- The level of support for Wiranto has gone up from 11.4% in the early June survey to 14.2% in this survey. This has allowed Wiranto to put some space between himself and the other aspirants for the second slot in a second round election, President Megawati and Amien Rais. This is the third straight survey that support for Wiranto has increased and his support is now, for the first time, higher than the combined support for Golkar candidates in the April, pre Golkar candidate selection, survey.
- In contrast to the support for Wiranto, President Megawati's support remains fairly constant and at basically the same level as in the previous two surveys. The stagnation in support for the President has allowed Amien Rais to approach the same of level of support, with gains in the last two surveys.

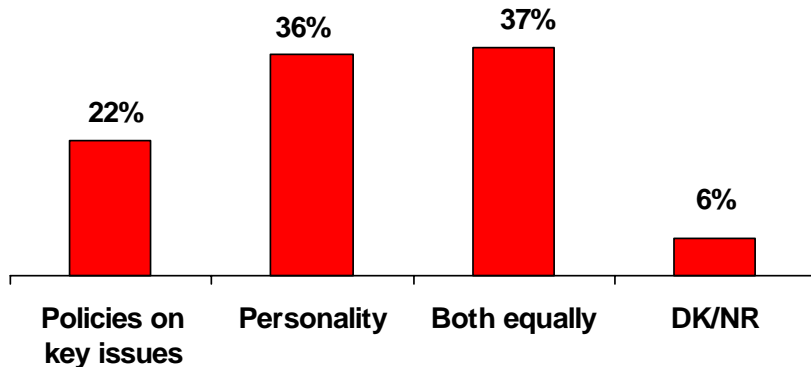
4. Source of Support for Presidential Candidates

Party Voted For at Parliamentary Elections	Support for Presidential Candidates among Each Party's Voters					
	Susilo Bambang Yudhoyono	Megawati Soekarnoputri	Wiranto	Amien Rais	Hamzah Haz	DK/NR
GOLKAR	39.1%	5.1%	38.4%	5.1%	1.1%	11.2%
PDIP	22.3%	59.2%	3.8%	1.2%	-	13.5%
PPP	39.4%	3.0%	7.1%	10.1%	26.3%	14.1%
PKB	47.4%	5.9%	18.4%	2.6%	2.6%	23.1%
PD	87.3%	2.4%	3.2%	2%	-	5.1%
PKS	40.2%	1.0%	7.2%	39.2%	2.1%	10.3%
PAN	14.7%	0.9%	2.6%	71.6%	0.9%	9.3%
PBB	48.6%	2.7%	10.8%	18.9%	5.4%	13.6%
PBR	52.2%	4.3%	17.4%	26.1%	-	-
PDS	33.3%	33.3%	22.2%	-	-	11.2%
Other Parties	59.1%	6.0%	10.4%	9.6%	1.7%	13.2%
Secret	36.1%	6.4%	7.1%	4.9%	1.9%	43.6%
No Response	23.8%	2.4%	2.4%	4.8%	2.4%	64.2%

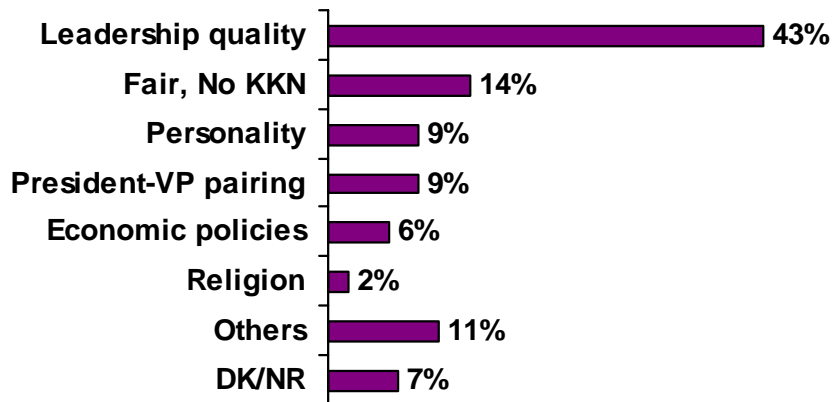
- The table above shows the percentage of support each presidential candidate obtains from respondents who report voting for a particular party in the April parliamentary elections. The table shows that SBY is the clear choice of Indonesians who voted for most other parties beside SBY's party, PD, in the April parliamentary elections. The exceptions to this pattern are the parties of SBY's opponents in the presidential election. A relatively small majority of PDI-P voters support President Megawati (59.2%), while Amien Rais is second only to SBY in the percentage of support he receives from his own party (71.6%). None of the other candidates, however, has nearly the breadth of support as SBY.
- There has been a change in the pattern of support of Golkar voters since the early June survey which may partially explain the slight gains made by Wiranto since the early June survey and the slight loss in support suffered by SBY. In the early June survey, 45% of Golkar voters supported SBY while 29% supported Wiranto. In this survey, 39.1% of Golkar voters support SBY and a nearly equal 38.4% support Wiranto. Wiranto's consolidation of support in his own base has helped him increase his support. If Wiranto can continue to consolidate his support among Golkar voters in the remaining days before the election, he may further narrow the gap to SBY.
- However, in the last week of campaigning before the election, under KPU rules, SBY is scheduled to campaign in parts of southern Sumatra, West Java, DKI Jakarta and Central Java. In the western parts of Java (West Java, Banten, Jakarta), 32% of Intending Wiranto voters indicate that they could change their minds about who to vote for, and 21% of intending Megawati voters and 24% of intending Amien Rais voters in western Java are similarly uncertain. During this last week of campaigning Wiranto is scheduled to campaign in northern Sumatra, Megawati in Kalimantan and parts of Sulawesi, and Amien Rais in Papua, Maluku and parts of Sulawesi. In these areas only in Kalimantan is there a relatively large number of intending voters for SBY who indicate they can change their minds (20%).
- Wiranto has not been able to consolidate his support among those who voted for PKB, in the April elections. SBY garners 47.4% support among PKB voters while Wiranto has the support of 18.4% of PKB voters. These numbers are essentially unchanged from the early June survey.

5. Rationale for Voting Decision in Presidential Election

Which is More Important, Candidate's Policy on Key Issues or Personality?



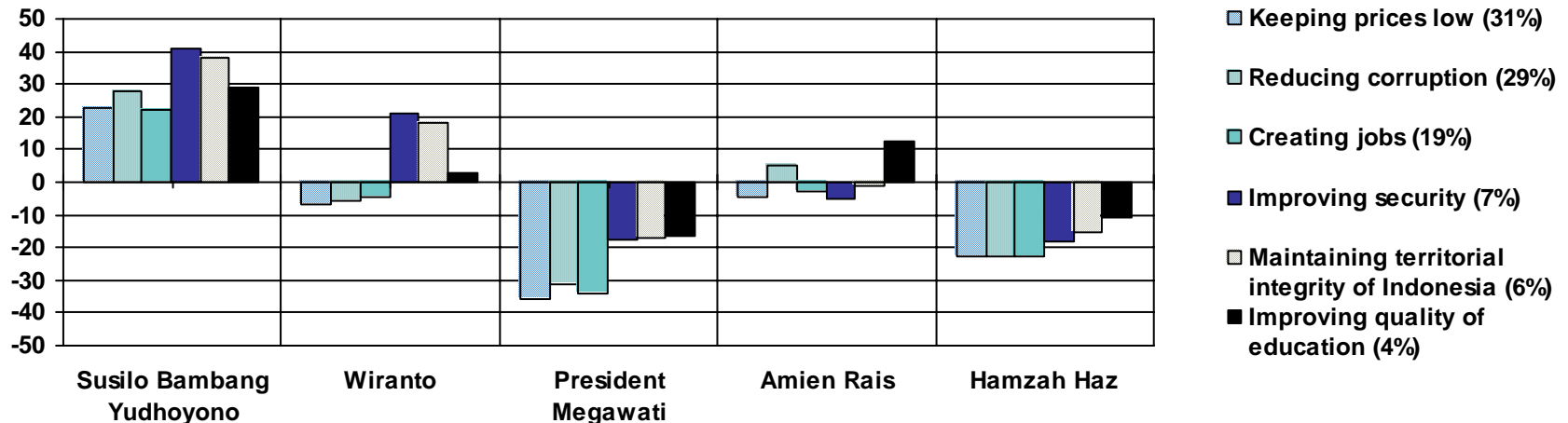
Most Important Consideration When Voting



- A candidate's personality is a more important attribute for more Indonesians when considering who they will vote for (36%) than is the candidate's policies on key issues (22%). The percentage who cite personality has gone up from 31% in the early June survey to 36% in this survey, while the percentage of respondents who cite both has gone down from 43% to 37%. Forty-three percent of those who think President Megawati would make the best president for Indonesia cite personality as the more important attribute. Thirty-six percent of SBY supporters cite personality while 33% of Wiranto's supporters do the same. Twenty-seven percent of Wiranto's supporters are likely to think that issues are more important compared to those who support Amien Rais (25%), SBY (22%), and President Megawati (20%).
- On another question where respondents were asked to state their most important consideration when voting in the presidential election, the personal profile of candidates is stated much more often than other considerations. Forty-three percent of Indonesians consider leadership quality of a presidential candidate the most important consideration when making their voting decision. Fourteen percent say that their most important consideration is whether the candidate is not corrupt, and 9% consider a candidate's personality most important. Nine percent also consider the presidential-vice presidential ticket as being an important factor, while economic policies are an important factor for 6% of the respondents.
- A substantial proportion of the supporters of each of the candidates cite leadership qualities as their most important consideration when voting. Forty-seven percent of SBY's supporters say this compared to 46% of Wiranto's and President Megawati's supporters. Among Amien Rais' supporters, 40% cite leadership qualities but 26% also cite the fact that a candidate has no corruption. The VP pairing is most important for supporters of Wiranto (15%) and SBY (11%) while it is not very important for supporters of Amien Rais (5%).

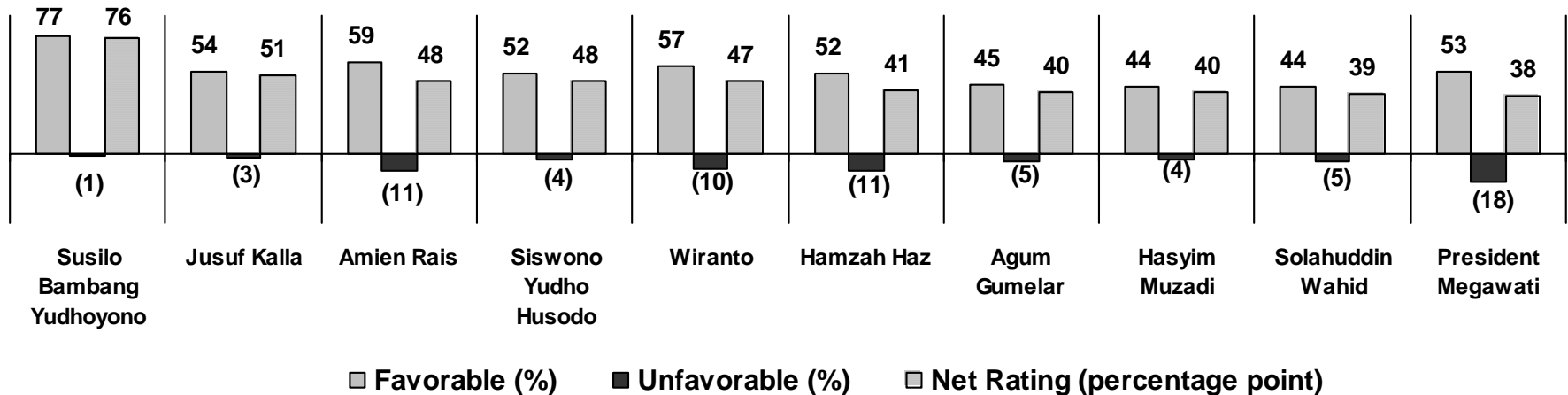
6. Evaluations of Presidential Candidates' Stance on Important Issues

Net Ratings on Candidate's Stance on Each Issue (% Good - % Poor)



- Corruption and inflation continue to be two issues of importance for Indonesians with the approach of the presidential elections. When given a list of key issues facing Indonesia and asked which issue was most important for the presidential candidates to address, respondents were most likely to mention keeping prices low (31%), followed by reduction in corruption (29%), job creation (19%), improvement in security (7%), maintaining the territorial integrity of Indonesia (6%), and improving the quality of education (4%). Other issues of fighting terrorism, health services and the environment were regarded as most important by less than 1% of respondents.
- Respondents were next asked to evaluate the stance of each presidential candidate on each of these issues as either good, average, or poor. The chart above reports on the net ratings for each candidate on each issue. The net rating is simply derived by taking the percentage who evaluate a candidate's stance as good on a particular issue minus the percentage who evaluate the candidate's stance as poor.
- SBY is the only candidate to have positive rating on each issue. However, the net positive rating on each issue for SBY has fallen between 2 and 5 percentage points since the early June survey. On the opposite side, President Megawati has negative ratings on each issue, although there has been a slightly positive trend in her net ratings on each issue since the early June survey. Hamzah Haz also receives negative ratings on each issue.
- Wiranto and Amien Rais receive mixed evaluations. While Wiranto receives negative ratings for reducing corruption, creating jobs, and keeping prices low, he receives relatively high positive ratings for maintaining the territorial integrity of Indonesia and improving security. Amien Rais receives positive ratings in reducing corruption and improving the quality of education and receives slight negative ratings on the other important issues.
- Indonesians are more likely to have opinions on the policy stances of President Megawati than the other candidates. On average 7% of respondents do not provide an opinion on the President's stance on important issues. This compares to 14% for SBY, 16% for Hamzah Haz, and 17% each for Amien Rais and Wiranto.

7. Evaluations of Presidential and Vice-Presidential Candidates



- With the exception of the favorability rating for President Megawati, there have only been minor changes in the favorability ratings of the presidential and vice-presidential candidates from the early June survey to this survey. The general trend from the early June survey to this survey has been a slight increase in the favorability ratings for a candidate. The only candidates not to increase their favorability ratings since early June are Wiranto (constant at plus 47) and Hamzah Has (constant at plus 41). The favorability rating for President Megawati has experienced the largest jump (from plus 31 to plus 38). For the other candidates, favorability ratings have increased between 1 and 3 points.
- The strength of the SBY/Kalla ticket is evidenced by the fact that they have the two highest favorability ratings in this survey. This pair has a combined favorability rating of plus 127. This compares to a combined rating of plus 96 for Amien Rais/Yudohusodo, plus 86 for Wiranto/Wahid, plus 81 for Hamzah Haz/Gumelar, and plus 78 for President Megawati/Muzadi.
- It should not be a surprise that the presidential/vice-presidential pairs have more voter support among those who have a favorable opinion of the presidential candidate than among Indonesians as a whole. The only ticket for which there is not a large difference in support is for the Hamzah Haz/Gumelar ticket (3.3% support among those with a favorable opinion of Hamzah Haz versus 2.1% among all Indonesians). For SBY/Kalla these percentages are 51.2% versus 44.4%, for Wiranto/Wahid 20.8% versus 13.8%, for President Megawati/Muzadi 19.3% versus 12.5%, and for Amien Rais/Yudohusodo 16.7% versus 10.8%. The large gap in favorable opinions between SBY and the other presidential candidates, as well as the fact that SBY and Kalla are the only two candidates with a net favorability rating of over 50%, further indicates the strength of their electoral position.