

RESULTS FROM WAVE XVII OF TRACKING SURVEYS

15 September 2004



Survey Implementation

- This survey was conducted between 2 September and 9 September 2004, using face to face interviews with 2000 respondents in all 32 provinces.
- Interviews for this survey were completed before news of the bomb in front of the Australian Embassy on 9 September would have reached any but a very small proportion of respondents. This survey therefore does not take into account any impact the bombing may have had on opinions.
- Respondents were selected using multi stage random sampling of eligible voters. The composition of the respondents reflects the rural/urban, men/women and inter-provincial proportions of the Indonesian population.
- The margin of error for the national data is +/-2.2% at a 95% level of confidence.
- Data comparisons in the text relate to earlier IFES tracking surveys
 - Wave I: 13-18 December 2003; 1250 respondents; for national data +/-2.8% margin of error at 95% confidence level
 - Wave II: 12-15 January 2004; 1250 respondents; for national data +/-2.8% margin of error at 95% confidence level
 - Wave III/IV: 26 January – 6 February 2004; 2000 respondents; for national data +/- 2.2% margin of error at 95% confidence level
 - Wave V/VIII: 15 February – 10 March 2004; 4000 respondents; for national data +/-1.55% margin of error at 95% confidence level
 - Wave IX: 21-28 March 2004; 1250 respondents; for national data +/-2.8% margin of error at 95% confidence level
 - Wave X: 7-14 April 2004; 1250 respondents; for national data +/-2.8% margin of error at 95% confidence level
 - Wave XI/XII: 20 April - 8 May 2004; 2000 respondents; for national data +/-2.2% margin of error at 95% confidence level
 - Wave XIII: 14 – 9 June 2004; 1250 respondents; for national data +/-2.8% margin of error at 95% confidence level
 - Wave XIV: 17 – 26 June 2004; 2000 respondents; for national data +/- 2.2% margin of error at 95% confidence level
 - Wave XV: 7 – 14 July 2004; 1250 respondents ; for national data +/-2.8% margin of error at 95% confidence level
 - Wave XVI: 7 – 14 August 2004; 1250 respondents ; for national data +/-2.8% margin of error at 95% confidence level
- 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, Wave XIII, Wave XIV, Wave XV, and Wave XVI is specifically cited in the charts and text. All other data points are from the Wave XVII survey. Regional and other breakdowns reflect data from the Wave XVII survey.



This survey was made possible with support from USAID and UNDP

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



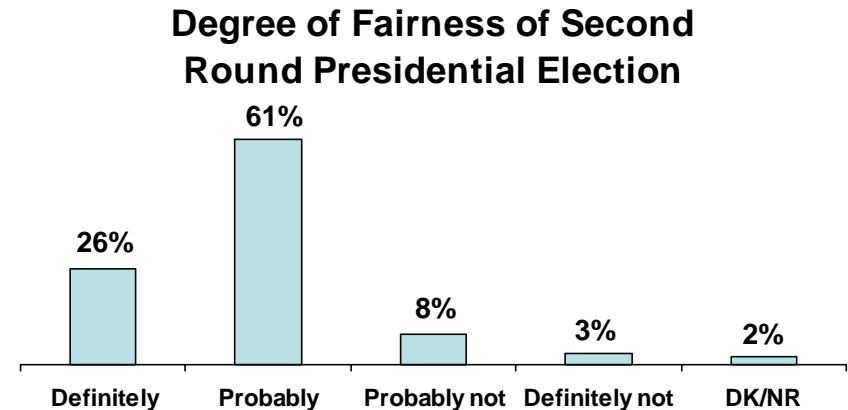
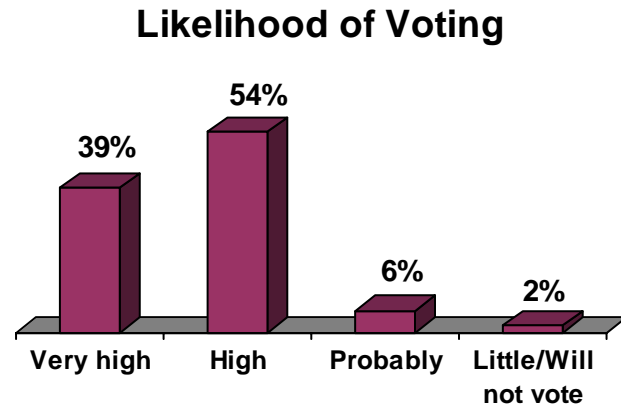
Survey Methodology

- Questionnaires
 - Are field tested with a sample of respondents before the survey is implemented
 - Are carefully constructed to avoid bias, through careful attention to language, order of questions, rotated order of advice of closed responses, etc
 - Contain cross validating questions on contentious issues – e.g. political preferences
- Data collection
 - All field workers are experienced and undertake a training session for each round of the survey
 - Data is cross checked for consistency with other survey organisations
 - Field interviews are strictly supervised – at least a certain % must be witnessed by supervisors and there are call backs to a specified % of respondents.
 - Data is checked for inconsistencies before being double entered, and cleaned
- Samples
 - Are determined by multi stage random sampling and are verified before field work commences
 - Final samples are weighted to reflect the key BPS demographics for Indonesian voting age population – geographic distribution of population, rural/urban split, age breakdown, gender composition, so the survey data is fully representative.
- Timing
 - Tracking surveys in this series are conducted as close as possible to major events
 - As surveys are conducted by face to face interviews in all provinces, there is a time lag between collection of data and, say, voting day
 - Survey data is an accurate snapshot of respondents' views at the time they were interviewed. It is not a prediction of votes at a later voting day.
 - Tracking survey data from 2004 shows that a significant proportion of voters do not make up their minds who to vote for until during the week before, or on, voting day.

Margins of Error

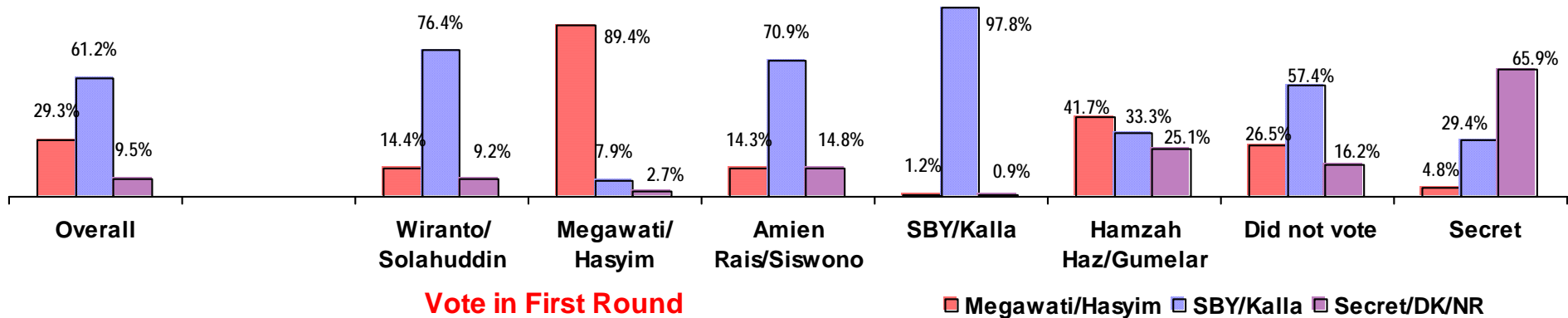
- The margin of error for the national data in this survey is +/-2.2% at a 95% level of confidence.
- Margin of error refers to the reliability of the data at the time it was collected. It is expressed as how much % confidence one can have that surveys undertaken at the same time, using the same questions with different samples, will be within a given % range of the actual survey results.
- A margin of error of +/-2.2% at a 95% confidence level means that, if the same survey question had been asked using 100 different randomly constructed samples of the Indonesian population at the same time, then 95 of these samples would produce results within plus or minus 2.2% of the result reported in the survey.
- Differences between the data collected in this survey and data collected at some later date, by some other method – for example on voting day, are not a 'margin of error' of survey data. These differences are a function of the time period between the dates the different sets of data were collected, and the level of volatility of opinions held by the Indonesian population.

1. Likelihood of Voting in Second Round of Presidential Election



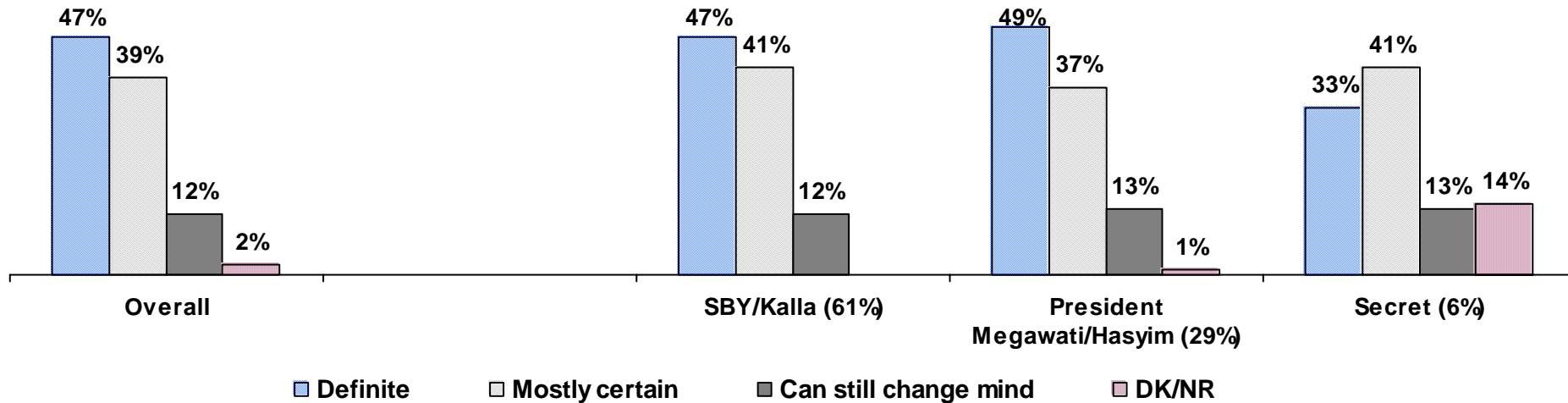
- More than nine in ten Indonesians state that they have a high likelihood of voting in the September 20 second round of the presidential/vice presidential election. Only in Kalimantan (84%) and Sumatra (88%) do less than 90% indicate a high likelihood of voting. It should be noted that the percentage of Indonesians who indicate a high or very high likelihood of voting is significantly higher than the turnout in the first round of the election. This indicates that many of those professing a high likelihood of voting may not vote in the second round of the election.
- There is little significant difference in likelihood of voting between men and women, and among Indonesians of different age groups. Those who report voting for Susilo Bambang Yudhoyono/Jusuf Kalla and President Megawati/Hasyim Muzadi in the first round in July indicate a high likelihood of voting in the second round (each 95%). Those who report having voted for the ticket of Wiranto/Solahuddin Wahid in the first round also report a high likelihood of voting (96%), while lower likelihood of voting is reported by those who voted in the first round for Amien Rais/Yudhohusodo (87%) and Hamzah Haz/Gumelar (83%). The recent announcement by Wiranto on his support for SBY may make the high likelihood of voting by his supporters a significant factor in determining the election outcome.
- There has been a large increase in the percentage of Indonesians aware of the date of the second round of the election since the Wave WVI survey in early August. In that survey, 58% were aware that the second round would be held on September 20. In this early September survey, 75% now know the correct date of the election. Knowledge of the correct date is significantly higher in urban areas (82%) than in rural areas (70%). Regionally, knowledge of the correct date is relatively low in East Java (67%) and the conflict areas of Aceh, Maluku, and Papua (71%).
- There is greater awareness of the ideal way to punch the ballot in the presidential election. Eighty-four percent are aware that the correct way to vote in the second round is to punch the ballot once for their preferred presidential/vice-presidential pair, while 15% say that they would punch the ballot once for a presidential candidate and once for a vice-presidential candidate. While this double punch would be valid if the president and vice-president selected are from the same ticket, it would be invalid if the choices are from competing tickets. Urban residents are more aware than rural residents on the proper way to punch a ballot (88% versus 81%).
- The majority of Indonesians (87%) expect the second round of the election to be definitely or probably fair and honest, while few (11%) expect it to not be fair and honest. Eighty-eight percent of those with a high likelihood of voting expect the election to at the least be probably fair.

2. Current Presidential Preference for Second Round



- When respondents to the survey were asked which presidential ticket they thought they would vote for on 20 September, 61.2% said they intend to vote for SBY/Kalla and 29.3% said they intend to vote for President Megawati/Hasyim. While 6.4% said their choice is secret and 3.1% did not give a definitive response. Unlike the tracking survey before the first round of the election, there is not a significant percentage of Indonesians who say 'secret' or do not give a response (9% versus 17%).
- The percentages of support for both candidates have not changed significantly since the August tracking survey. In the chart above, the professed support for each candidate pair is also broken down by the reported vote of the survey respondents in the first round of the election.
- The President Megawati/Hasyim ticket is the majority choice for those who voted for this ticket in the first round. SBY/Kalla is the majority choice of those who backed this ticket in the first round as well as those who backed Wiranto/Solahuddin and Amien Rais/Yudhohusodo. Three-quarters of Golkar party candidate Wiranto's backers in the first round state that they intend voting for SBY/Kalla in the second round, despite the Golkar party's official support for the President Megawati/Hasyim pair.
- The SBY/Kalla ticket is the majority choice in all regions with the exception of Bali/NTB/NTT where President Megawati/Hasyim are supported by 55% and SBY/Kalla by 28%. In Central Java, 56% name SBY/Kalla and 40% President Megawati/Hasyim. In urban areas, SBY/Kalla are supported by 63% and President Megawati/Hasyim by 25%, while in rural areas the respective percentages are 60% and 32%.
- Support for SBY/Kalla gradually decreases as age increases, from 68% among those under 25 to 46% among those older than 54. On the other hand, support for President Megawati/Hasyim increases as age increases, from 25% among those under 25 to 39% among those older than 54. In all age groups except those over 54, SBY/Kalla have a majority of support. Support for SBY/Kalla increases with level of education while support for President Megawati/Hasyim decreases with level of education.
- Respondents were also asked who they thought would make the best president/vice president pair for Indonesia. The response is very similar to the response to the 'who will you vote for' question: 61.2% name SBY/Kalla while 30.7% name President Megawati/Hasyim and 8% do not report a choice.
- There is an interesting difference in opinions among supporters of the two pairs when they are asked why they think their chosen pair would make the best president/vice president for Indonesia. Among those who name SBY/Kalla, 56% say they choose this pair because it has a clean image and good personality, 17% cite their ability and leadership, 12% because they would take care of common people, and 11% because they feel a change is needed. Among those who support President Megawati/Hasyim, 45% say it is because of the experience of the candidates, 16% because they would take care of the common people, 15% because of personality, and 8% because of leadership ability. SBY/Kalla supporters seem to prefer personality while President Megawati/Hasyim supporters prefer experience.

3. Certainty of Voting for Candidates



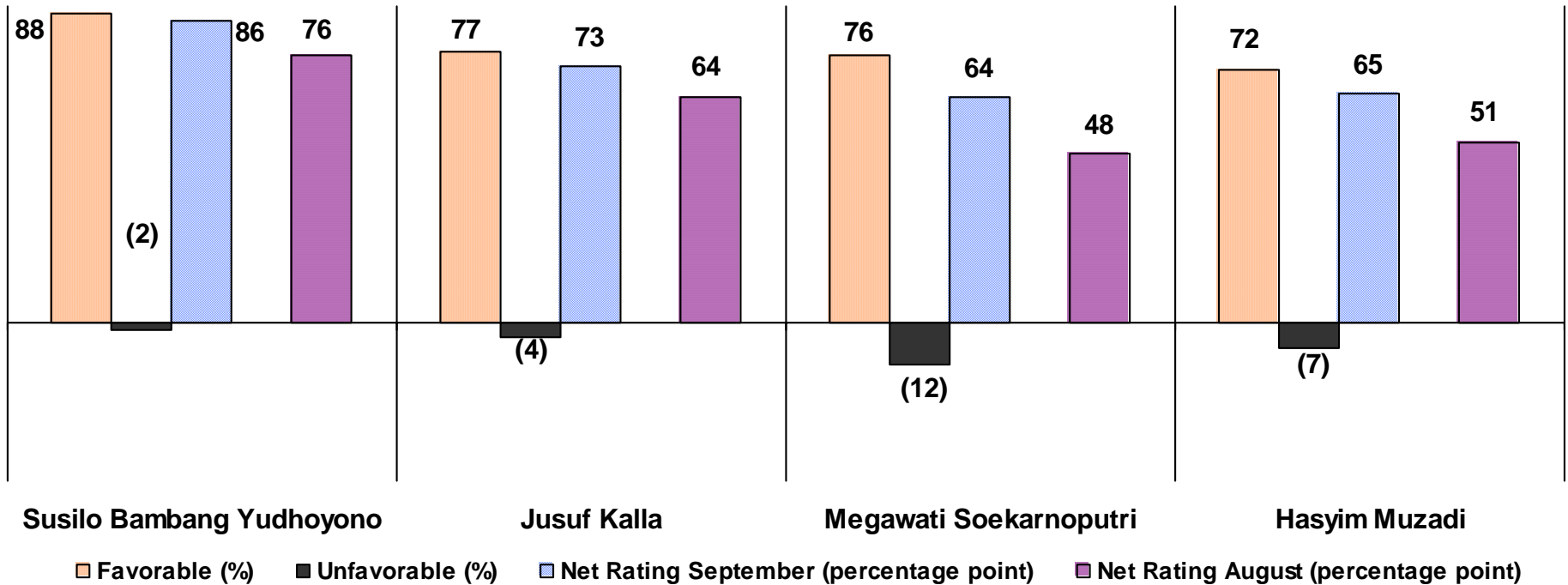
- Forty-seven percent of respondents were definite about their voting choice for the second round of the presidential election. Thirty-nine percent were mostly certain about their choice while 12% can still change their mind. Among those who support SBY/Kalla, 47% were definite about their choice, 41% were mostly certain and 12% can still change their mind. Forty-nine percent of those who support President Megawati/Hasyim were definite, 37% were mostly certain, and 13% can still change their mind.
- Comparing the current voting intentions of those who voted for candidates other than the ones competing in the second round provides some interesting findings. A majority of those who voted for Wiranto and Amien Rais in the first round intend to vote for SBY/Kalla in the second round, while a plurality of those who voted for Hamzah Haz in the first round intend to vote for President Megawati/Hasyim. Among these respondents, those who intend to vote for SBY/Kalla are more likely to be definite in their choice than those who intend to vote for President Megawati/Hasyim. These respondents are also much more likely to say that they can still change their mind if they say they intend to vote for President Megawati/Hasyim than if they say they intend to vote for SBY/Kalla.
- While this data seems to indicate that SBY/Kalla's lead is safe, experience from the first round of the election indicates that in the Indonesian context, anybody who is not definite about their voting choice may change their mind in the final week or two weeks leading up to the election. Significant shifts in voter opinion can take place in a relatively short period, as was shown by the better showing of President Megawati and Wiranto in the first round of the election, compared to respondents indications of their voting intentions in the last survey before voting day.
- One other issue which may have a significant impact on the outcome of the election is the bomb in front of the Australian embassy in Jakarta on September 9. The fieldwork for this survey was being completed when this bombing took place and thus this survey cannot ascertain how public opinion may be changed due to this event.

4. Source of Support for Presidential Candidates

Party Voted for in Parliamentary Election	SBY/Kalla	President Megawati/Hasyim	Secret	DK/NR
GOLKAR	79%	14%	5%	2%
PDIP	18%	78%	3%	1%
PPP	62%	27%	6%	6%
PKB	69%	28%	2%	1%
PD	98%	--	1%	1%
PKS	82%	9%	4%	4%
PAN	71%	18%	7%	5%
PBB	80%	7%	7%	7%
PBR	78%	11%	--	11%
PDS	14%	81%	--	6%
Secret	30%	10%	56%	4%
No Response	40%	27%	17%	17%

- The table above shows the percentage of support each presidential candidate obtains from respondents who report voting for major parties in the April parliamentary elections. The table shows that SBY/Kalla and President Megawati/Hasyim are the clear choice of Indonesians who voted for their parties - PD and PDIP, respectively, in the April parliamentary elections.
- SBY/Kalla are also the clear choice of a majority of those who voted for most other major parties in the April election. SBY/Kalla have majority support among those who voted for PBR, PBB, PKS, PAN, PKB, PPP, and Golkar in the April election. The fact that 79% of those who voted for Golkar intend to vote for SBY/Kalla is a surprise given the fact that Golkar has officially endorsed President Megawati and is actively working for her re-election.
- The support of former president Wahid may be a reason why a majority of PKB voters intend to vote for SBY/Kalla in the second round. PBB and PKS have both officially endorsed SBY/Kalla and majority support for his ticket among these voters is not a surprise.
- President Megawati/Hasyim are officially endorsed by PDI-P, Golkar, PPP and PDS. While a majority of those who supported PDI-P and PDS at the April 5 election intend to vote for President Megawati/Hasyim, a majority of those who supported Golkar and PPP state they intend voting for SBY/Kalla.

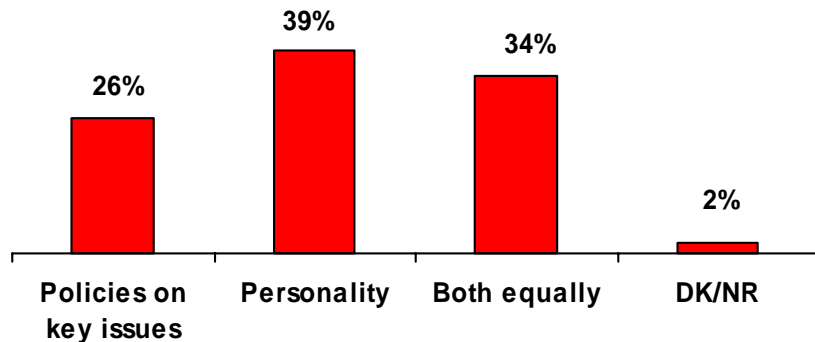
5. Evaluations of Presidential and Vice-Presidential Candidates



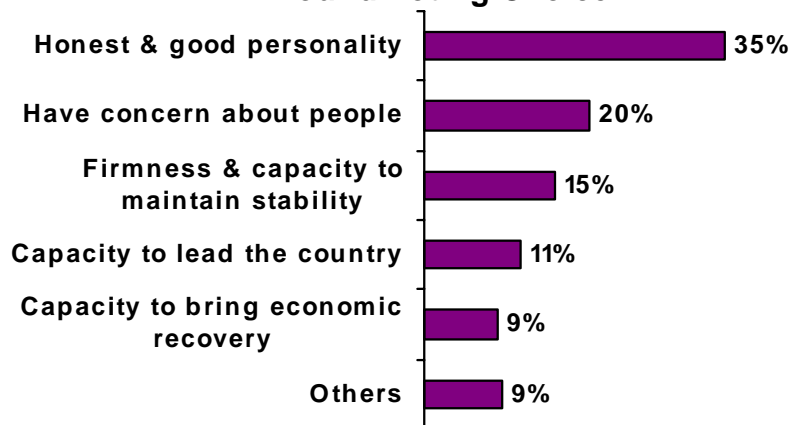
- Respondents to these surveys have been asked whether they have a favorable or unfavorable impression of the presidential and vice-presidential candidates in the presidential election. The figure above provides data on this question from the September survey for the presidential and vice-presidential candidates who will be contesting the second round of the election on 20 September. The figure also provides the net favorability ratings for these candidates from the August survey.
- The favorability ratings for each candidate have increased by more than ten percentage points since the early August survey. As a result, the net rating for each candidate has increased significantly since the early August survey. SBY's net rating has increased from plus 76 to plus 86, Kalla's from plus 64 to plus 73, President Megawati's from plus 48 to plus 64, and Hasyim's from plus 51 to plus 65.
- More of those with a neutral impression of SBY are likely to vote for President Megawati (48%) than SBY (37%). However, among those with a neutral impression of President Megawati, far more say they intend to vote for SBY (76%) than President Megawati (14%). Those with unfavorable impressions of the two presidential candidates are unlikely to vote for that candidate. Among those with an unfavorable impression of President Megawati, 91% intend to vote for SBY/Kalla. Among those with an unfavorable impression of SBY, 63% intend to vote for President Megawati/Hasyim but 36% intend to vote for SBY/Kalla.

6. Candidate's Personality is Most Important Consideration for Voters

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



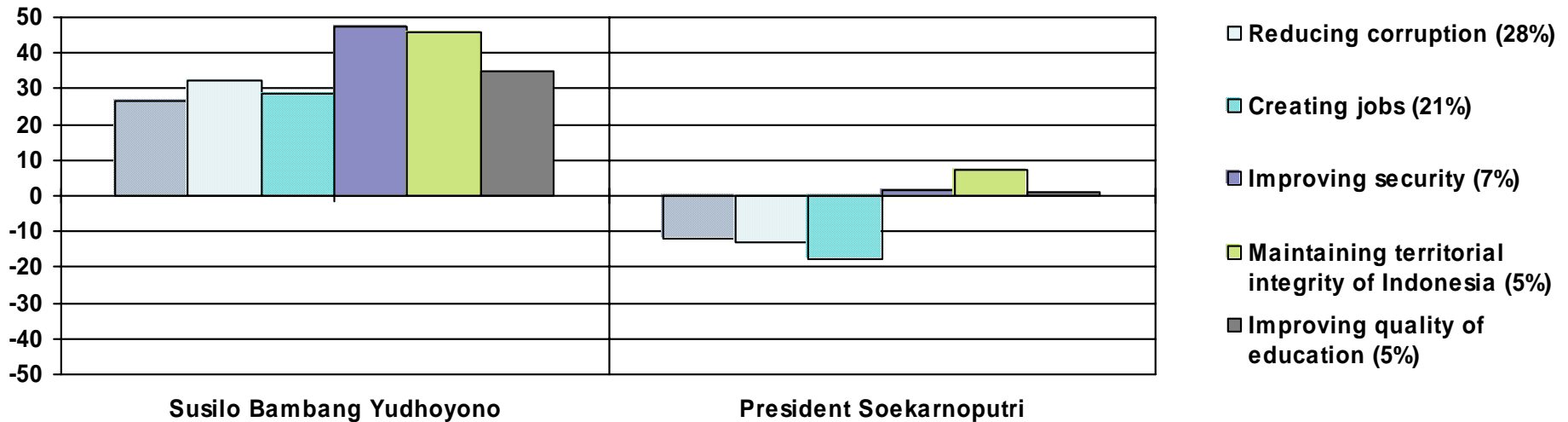
Most Important Considerations for Second Round Voting Choice



- More Indonesians continue to say that a candidate's personality is a more important consideration for them when deciding who to vote for (39%) than the percentage who say that the candidate's policies on key issues is more important (26%). Thirty-four percent say both personality and policies are equally important considerations. Issues are more likely to be listed as more important by those with secondary or higher education (30%) than by those with no education (16%) or with primary-level education (21%).
- There is little difference in citing personality or policies among those who support either President Megawati or SBY. There is a similar lack of difference between those who are definite about their voting choice in the second round and those who are mostly certain. Those who can still change their mind are more likely to stress policies (32%) compared to the overall population. These Indonesians may be waiting for more information on candidates' policies to make a definite choice for the second round election.
- Personality issues are also frequently mentioned when Indonesians list the most important considerations for their choice when voting in the second round. In this question, respondents were not specifically asked whether personality or issues were more important. However, 35% still list honesty and a good personality as their most important consideration when voting, 15% want someone who can maintain stability, and 11% want someone with the capacity to lead the country. Twenty percent want someone who is concerned about the people, while 9% want somebody with the capacity to bring about an economic recovery.
- Those who intend to vote for SBY/Kalla are more likely to mention personality, leadership, and firmness as important considerations (68%) than those who intend to vote for President Megawati (51%). Those who intend to vote for President Megawati are more likely to say they want someone who cares for common people (24%) than those who intend to vote for SBY (17%).

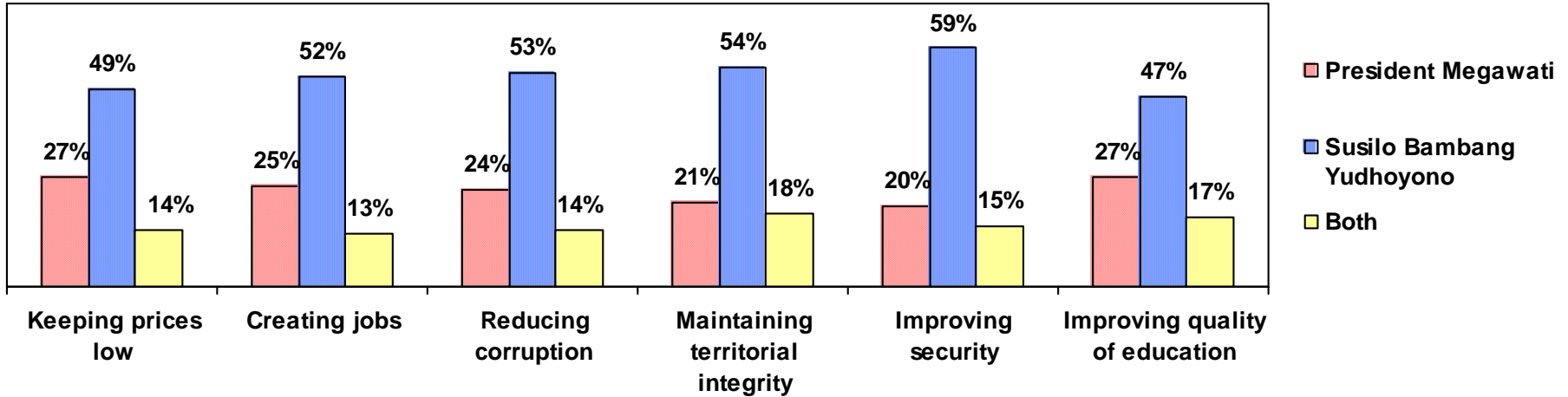
7. Evaluations of Presidential Candidates' Stance on Important Issues

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



- Even though personality dominates voting choice considerations, economic issues are also given importance by many voters. The three dominant issues for Indonesians voters are all economic in nature: keeping prices low (30%), reducing corruption (28%), and creating jobs (21%). Those who intend to vote for President Megawati are more likely to stress keeping prices low (39%) than those who support SBY (25%). Those who say they intend to vote for SBY are more likely to stress reduction in corruption (32%) and job creation (23%) than those who intend to vote for President Megawati (23% and 18%, respectively). One indication of the way that those who say 'Secret' might vote is that these respondents give the same weight to each of these three issues as those who support President Megawati. Among those who keep their vote choice secret, 40% stress keeping prices low, 20% stress reducing corruption, and 16% creating jobs.
- The net ratings for SBY on each issue (% rating his position as good - % rating his stance as poor) are significantly higher than those for President Megawati. SBY has a net rating of plus 26.6 or above on each issue while the highest rating for the president is plus 7.3. On the three key issues for Indonesians, inflation, corruption, and jobs, SBY has an average rating of plus 29, while the president has an average rating of minus 14. The difference between the two net ratings is 43. This is an improvement for Megawati from the late June pre-election survey. In that survey, Megawati's average net rating on these three issues was minus 33. Thus, her average rating has improved by 19 percentage points since the election.
- Some policy issues are regarded by very few Indonesians as the most important issue to be addressed by the presidential candidates, for example: fighting terrorism (0.5%), reducing environmental degradation (0.5%) and improving health care (1.4%).

8. Direct Comparison of Effective Candidate at Addressing Key Issues



- As another way to gauge the candidates' relative standing on key issues, respondents to the survey were given a list of the key issues and asked to assess whether President Megawati or SBY would be more effective at implementing policies in each issue area. The findings for the six main issues are presented in the chart above. Just as in the August issues, for each issue more Indonesians believe that SBY would be more effective implementing policies than President Megawati.
- The largest gap for SBY over President Megawati is on issues dealing with security. Fifty-nine percent believe SBY would be more effective at improving security compared to 20% who cite President Megawati, and 54% think SBY would be better able to maintain Indonesia's territorial integrity while 21% cite President Megawati. On the key economic issues, 53% think SBY would be better to reduce corruption while 24% name President Megawati and on creating jobs, 52% think SBY would be more effective while 25% name President Megawati. On keeping prices low, 49% think SBY would be more effective and 27% President Megawati.
- Comparing the number of times SBY and President Megawati were chosen by each respondent in relation to these issues results in the finding that 32% of Indonesians believe that SBY will be more effective at implementing policies on all of these six issues, an increase from 28% in the August survey. Thirteen percent mention President Megawati on all issues, an increase from 9% on all six issues in the August survey. Fifty percent of Indonesians believe that SBY would be more effective at implementing policies in four or more of these issues. This compares to 20% for President Megawati.
- As was the case in the August survey, the more often a respondent mentions either candidate as being better able to address these six issues, the more likely they would be to vote for the candidate. Among those who choose President Megawati on only one out of six issues, 69% intend to vote for SBY and 23% for President Megawati. For those who mention President Megawati on all six issues, 92% would vote for the President Megawati/Hasyim pair, versus 3% for SBY/Kalla. This pattern also holds for the SBY/Kalla pair. Three issues appears to be the critical number of issues at which a candidate pair attains a majority of votes. For those who choose President Megawati on three issues, 65% would vote for her and 29% for SBY. For those who choose SBY on three issues, 75% intend to vote for SBY and 19% for President Megawati. Among those who name a candidate on only two issues, the candidate gets fewer intended votes than the other candidate.

9. IFES Demographic Data Compared to BPS Electorate Data

Breakout Category	IFES WAVE XVII	SENSUS BPS (2000)*
Rural-Urban		
Rural	57.1	58
Urban	42.9	42
Gender		
Male	49.6	50
Female	50.4	50
Age Group		
< 19 y.o	4	5
20-29 y.o	28	25
30-39 y.o	28	22
40-49 y.o	20	17
> 50 y.o	20	20
Religion		
Islam	88.95	87
Protestant/Catholic	8.25	10
Hindu	2.25	2
Budha	0.2	1

Demography Group		
Aceh/Maluku/Papua	3.0	3.9
Sumatera	19.3	19.1
West Java/Jakarta/Banten	25.8	25.3
Central Java/Yogyakarta	17.0	16.7
East Java	17.0	16.9
Sulawesi	7.2	7.2
Kalimantan	5.5	5.5
Bali/NTB/NTT	5.4	5.4
Education Group		
Elementary & below	45.9	60
Junior high school	19.3	19
High school	26.1	18
University & higher	8.8	4

* Electorate BPS data