



The 2022 Elections: Presidential Contest

#TIFA2022ElectionsPoll

November Omnibus Survey | 1st Release | 19th November 2021

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Introduction and Summary Findings

- ❑ All the findings included in this 1st Release are taken from the national survey TIFA Research conducted between 7th and 13th November, 2021. The survey covered a variety of important economic, political, and social welfare public issues. Subsequent releases will include such additional material.
- ❑ In designing the survey, TIFA has taken note of the fact that since our last such survey in June, 2021, a number of events have occurred relating to several of these issues and which therefore have likely affected public opinion. They include an apparent easing of the virulence of the Covid-19 situation, in part a reflection of increasing vaccination up-take. This improvement is also reflected in the recent improvement in the economy, with Treasury reporting a 10% improvement in GDP, even if in Kenya, as elsewhere globally, there remains a considerable gap between current economic conditions and the pre-Covid normality.
- ❑ Most media coverage during this period, however, has been on the unfolding 2022 election scenario, with almost incessant meetings, pronouncements, and public rallies, especially by the two most prominent likely candidates, DP William Ruto and former Prime Minister Raila Odinga, even if the latter has not yet formally announced his candidacy (which has been planned for December 9).
- ❑ As in the past, TIFA invites queries about the data presented in this Release and the methodology employed to obtain it. Suggestions as to how future surveys on these and related issues can make an even more positive contribution to public understanding and policy formulation regarding various challenges Kenyans face are likewise welcome.

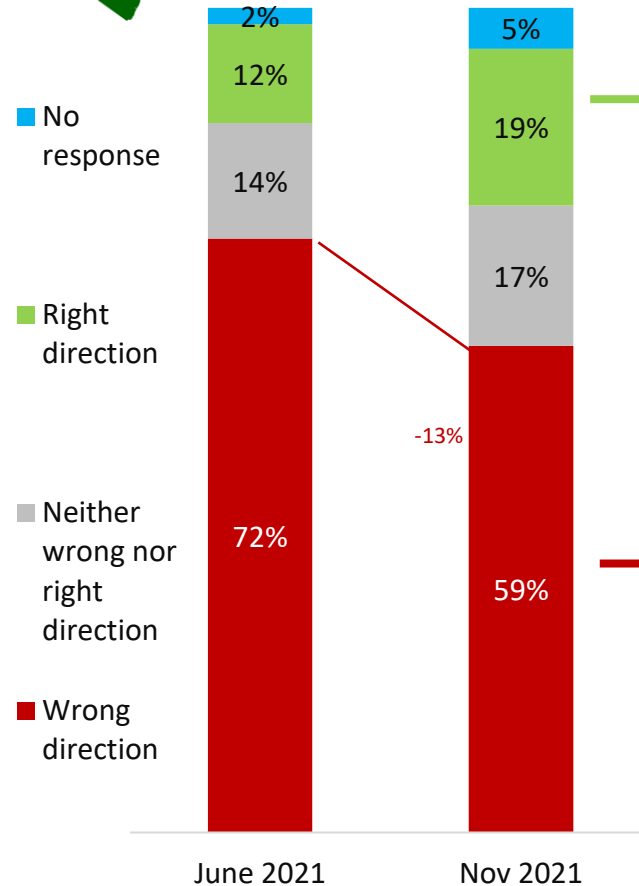


Summary Findings

(Direction the country is heading)



Direction that the Country is heading



- There is a decline in the proportion of Kenyans who feel that the country is heading in the wrong direction (from 72% to 59%)

Reasons - Right Direction (Nov 2021)

- 14% peace
- 13% leadership
- 9% infrastructure
- 8% cost of living (reduction)
- 8% Covid-19 management



Reasons - Wrong Direction (Nov 2021)

- 40% high cost of living
- 11% unemployment
- 9% poor leadership
- 8% political divisions: 2022 campaigns
- 8% corruption




Summary Findings

(Problems facing Kenyans & current earnings)

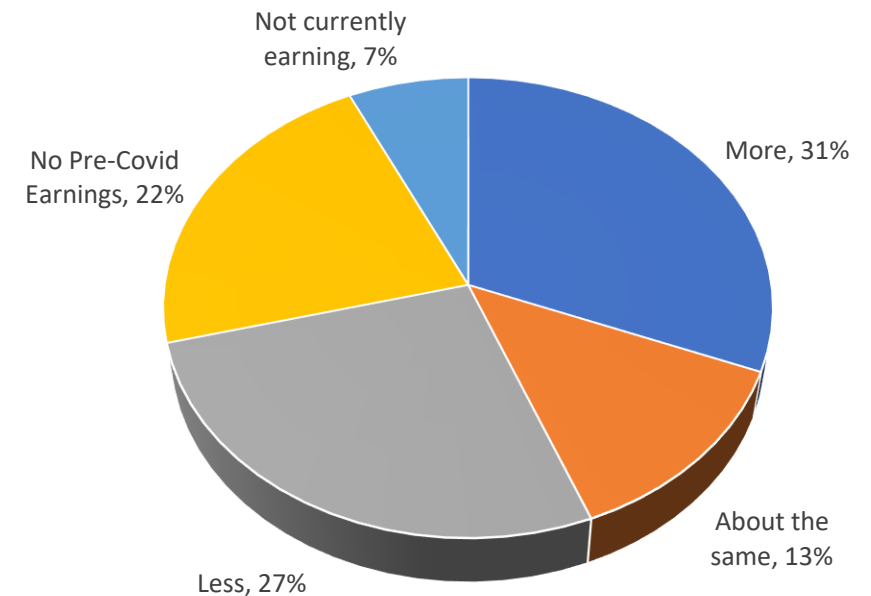


- There is an increase in the mentions of high cost of living and famine/hunger as problems facing Kenyans.
- There is a decline in the mentions of Covid-19 as a problem facing Kenyans and this could be attributed to lower positivity rates and easing on restrictions.
- At least 31% of Kenyans are earning more than what they earned before Covid-19.

Problems facing Kenyans (national level)		
	June 2021	Nov 2021
		
High cost of living	27%	↑ 31%
Unemployment	27%	28%
Corruption	12%	10%
Covid-19	16%	↓ 8%
Famine /Hunger	4%	↑ 8%

*top 5 problems

Current earnings in comparison with pre-Covid earnings



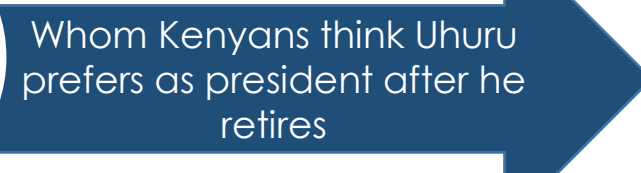
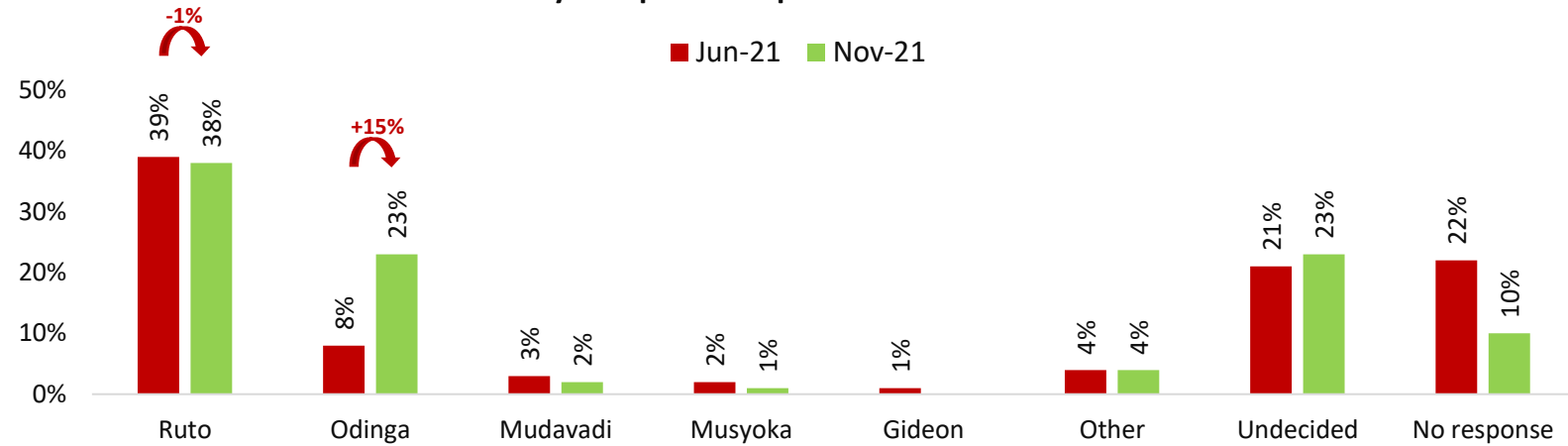
Summary Findings

(Presidential candidate choice: Kenyans' and Uhuru's)



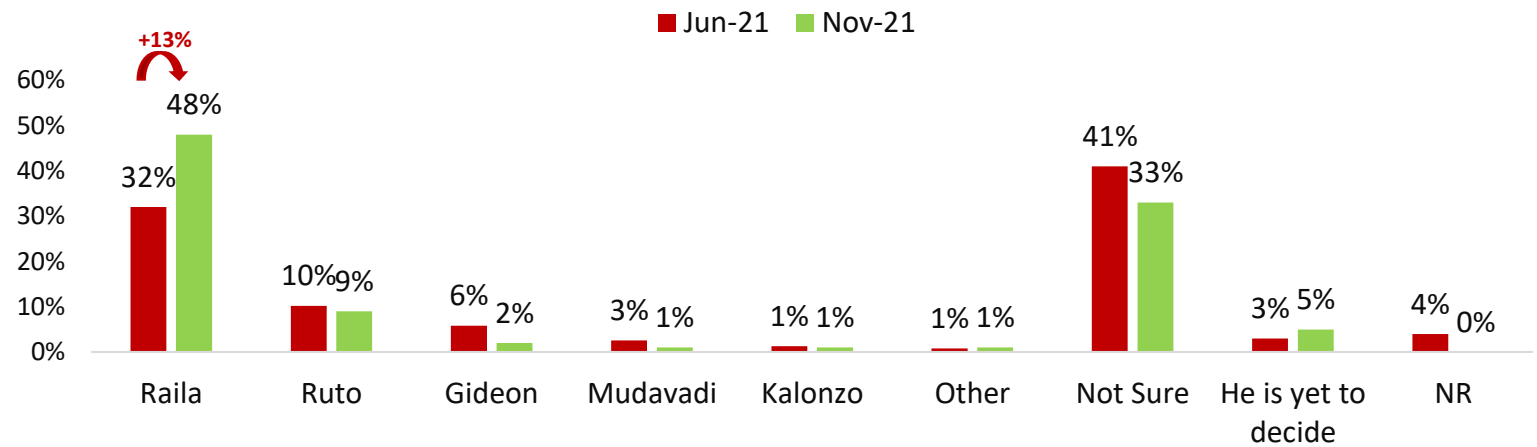
- ☐ Marginal decline in Ruto's support
- ☐ 15% increase in Raila's support

Kenyans' preferred presidential candidate



- ☐ 13% increase in the perception that Uhuru would prefer Raila to succeed him.

Uhuru's perceived preferred successor



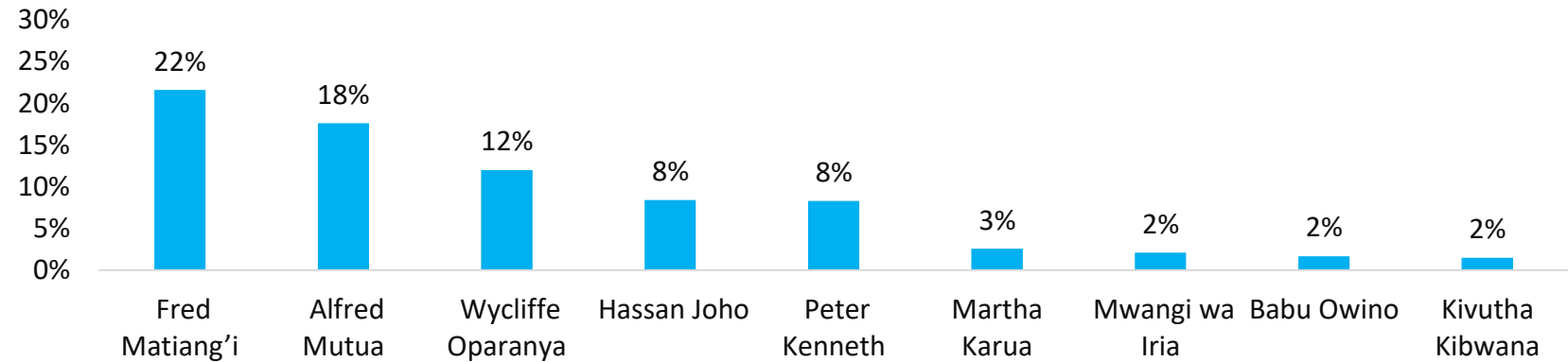
Summary Findings

(Emerging future presidential aspirants & political party preference)



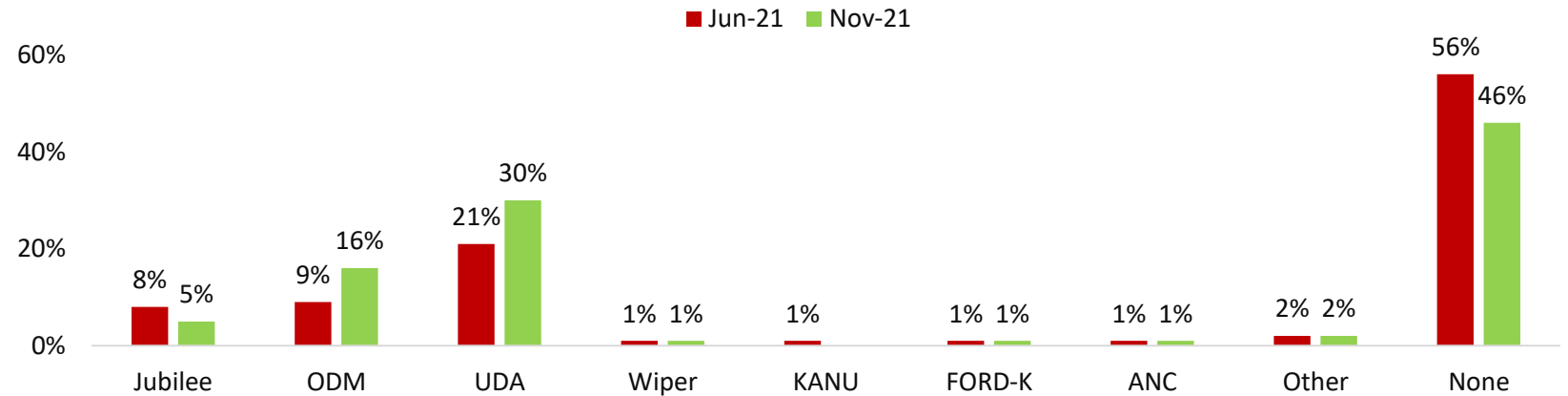
Emerging future presidential aspirants

Political leaders with perceived presidential potential (2027 onwards)



Political party preference

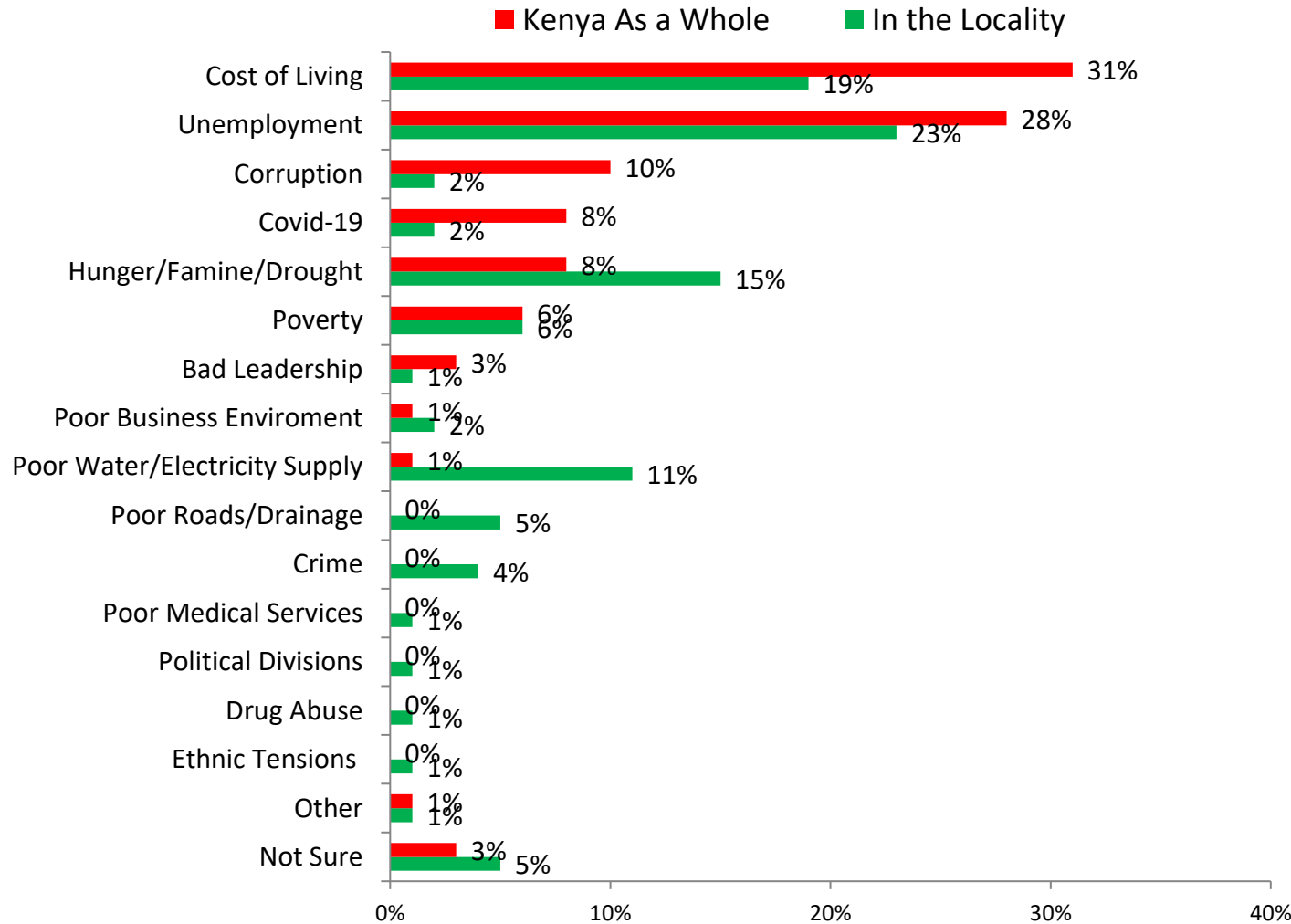
Political party preference



Section One: Socio-Economic Issues

- Household Economics: Monthly Earnings/Compared to Before Covid-19
- Main Problems/Challenges Facing Kenya as a Whole/Most People in the Locality
- Kenya's Direction and Main Reasons (for Right/Wrong Direction)

Main Problems/Challenges: Nationally/Locality (by total)



- ❑ The overwhelming perception of Kenyans as to the country's current challenges are economic at both the national and local levels, with the cost-of-living and unemployment being the most frequent mentions for each.
- ❑ However, a greater variety of problems is mentioned locally, presumably based on more direct knowledge. These include especially infrastructure issues (water, electricity, roads/drainage) as well as crime in particular.
- ❑ Conversely, some challenges identified at the national level receive few or no mentions in a local context, such as corruption, Covid-19 and poor leadership.

Base = all respondents

Current Monthly Earnings: Compared to Pre-Covid Monthly Earnings



- ❑ In comparing current and pre-Covid monthly income, it is evident that among those now earning anything, about two-thirds of those in all income categories are earning either more or about the same as they were before Covid-19 arrived in the country, with more in each category reporting that they are now earning “more” than “the same” as before.
- ❑ Still, with about one-third in each category still earning “less” than they were before the arrival of Covid-19, it is clear that the economy, while improving, is yet to fully recover from the pandemic’s serious economic impact.

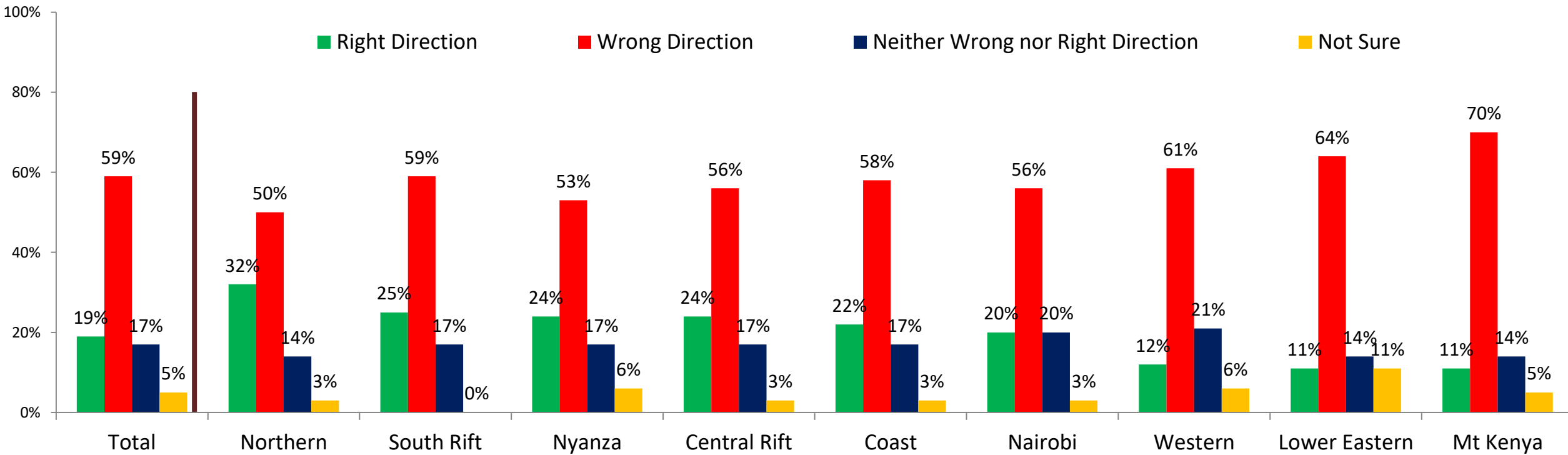
Comparison With Pre-Covid Earnings	Current monthly earnings							
	Total	Nothing	Less than 1,000/-	More than 1,000/- up to 5,000/-	More than 5,000/- up to 10,000/-	More than 10,000/- up to 20,000/-	More than 20,000/- up to 50,000/-	More than 50,000/-
More	31%	9%	43%	47%	46%	44%	36%	41%
About the same	13%	4%	19%	15%	16%	19%	25%	26%
Less	27%	11%	35%	32%	32%	31%	34%	30%
No Pre-Covid Earnings	22%	70%	3%	4%	5%	4%	5%	0%

Q: About how much, if anything, are you currently earning each month?

Q: “And if you were earning anything before Corona virus, was it more, less, or about the same each month as you are earning now?”

Kenya's Perceived Direction (by total, zone)

- For Kenya as a whole, about one-in-five (19%) consider Kenya's current direction as the "right" one, while more than half (59%) say the country is moving in "the wrong direction."
- In regional terms, more residents of the pastoralist areas (i.e., Northern and South Rift) give the most positive assessments on this matter (32% and 25%, respectively) whereas residents in Lower Eastern and Mt. Kenya regions are the most negative about the country's current direction ("wrong direction: 64% and 70%, respectively).

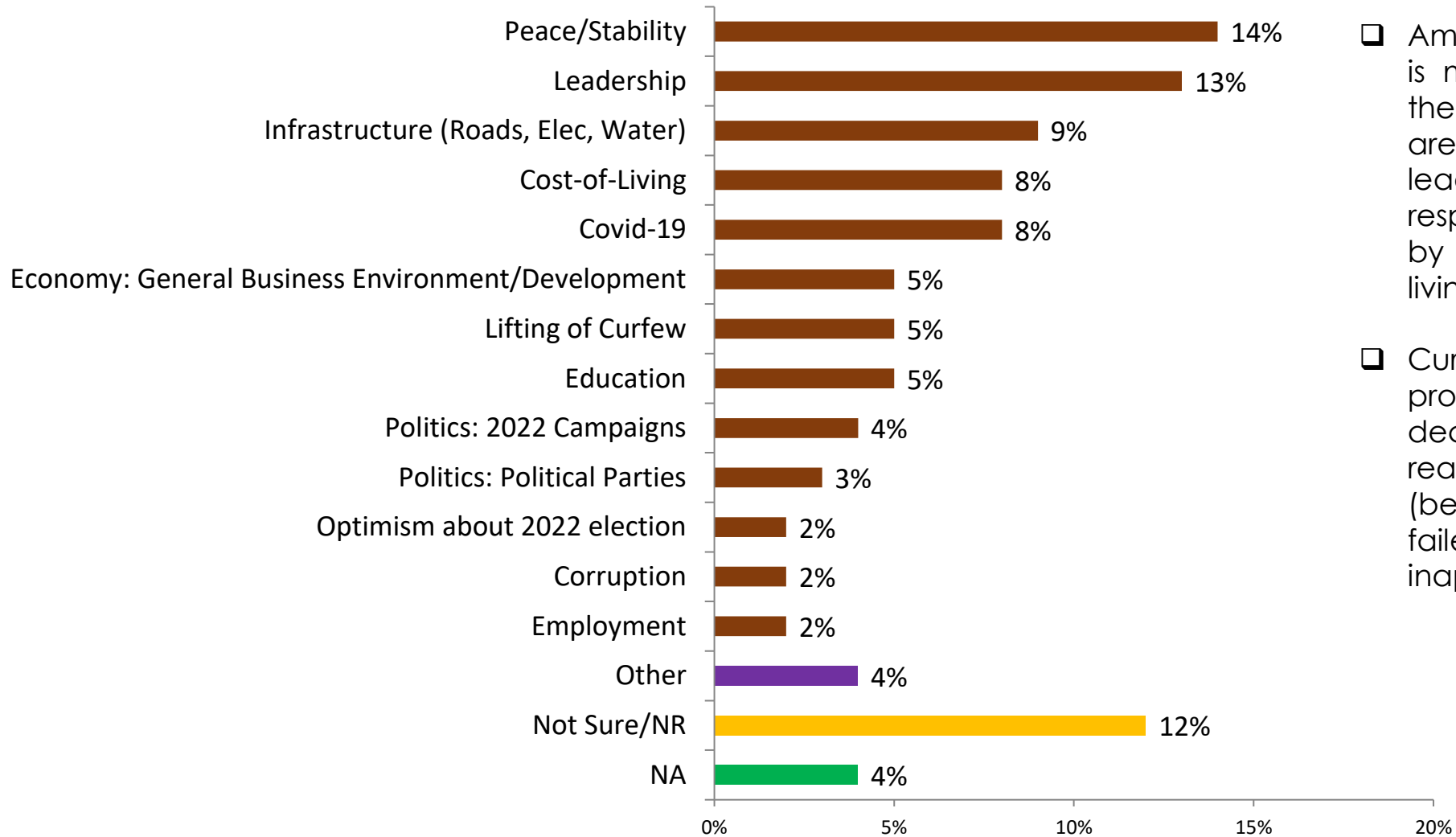


Q. "Overall, would you say that the country is currently moving in the...?" READ OUT "RIGHT" AND "WRONG DIRECTION: ONLY

Base = all respondents

Main Reasons for Right Direction

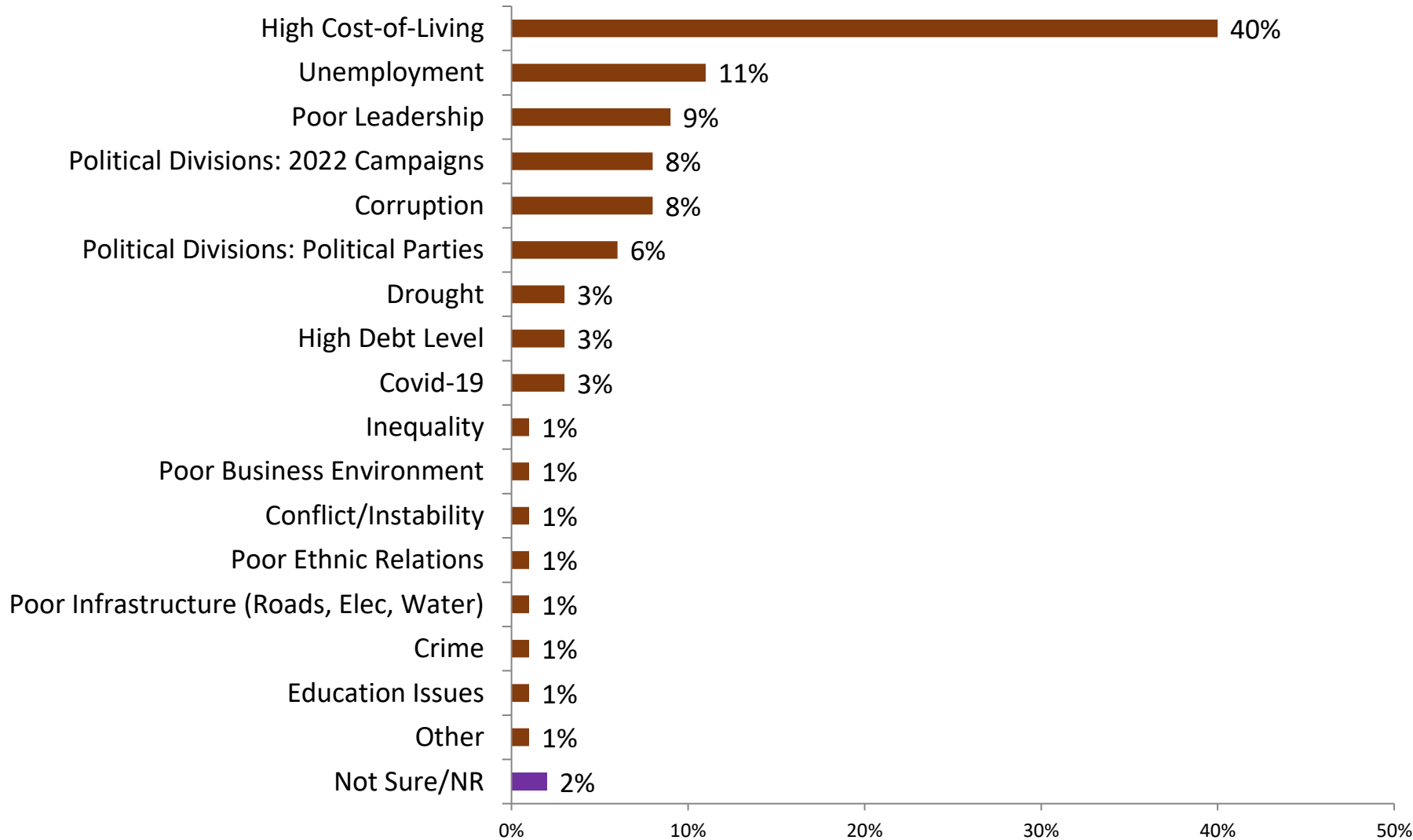
(by those saying Kenya is headed in the right direction)



- Among those who feel the country is moving in “the right direction”, the two most frequent mentions are peace/stability and leadership (14% and 13%, respectively). These are followed by “infrastructure”, the cost-of-living, and Covid-19.
- Curiously, perhaps, a significant proportion (16%) were unable (or declined) to mention any specific reason for holding this positive view (being either “not sure” or who failed to respond or gave inapplicable responses).

Main Reasons for Wrong Direction

(by those saying Kenya is headed in the wrong direction)



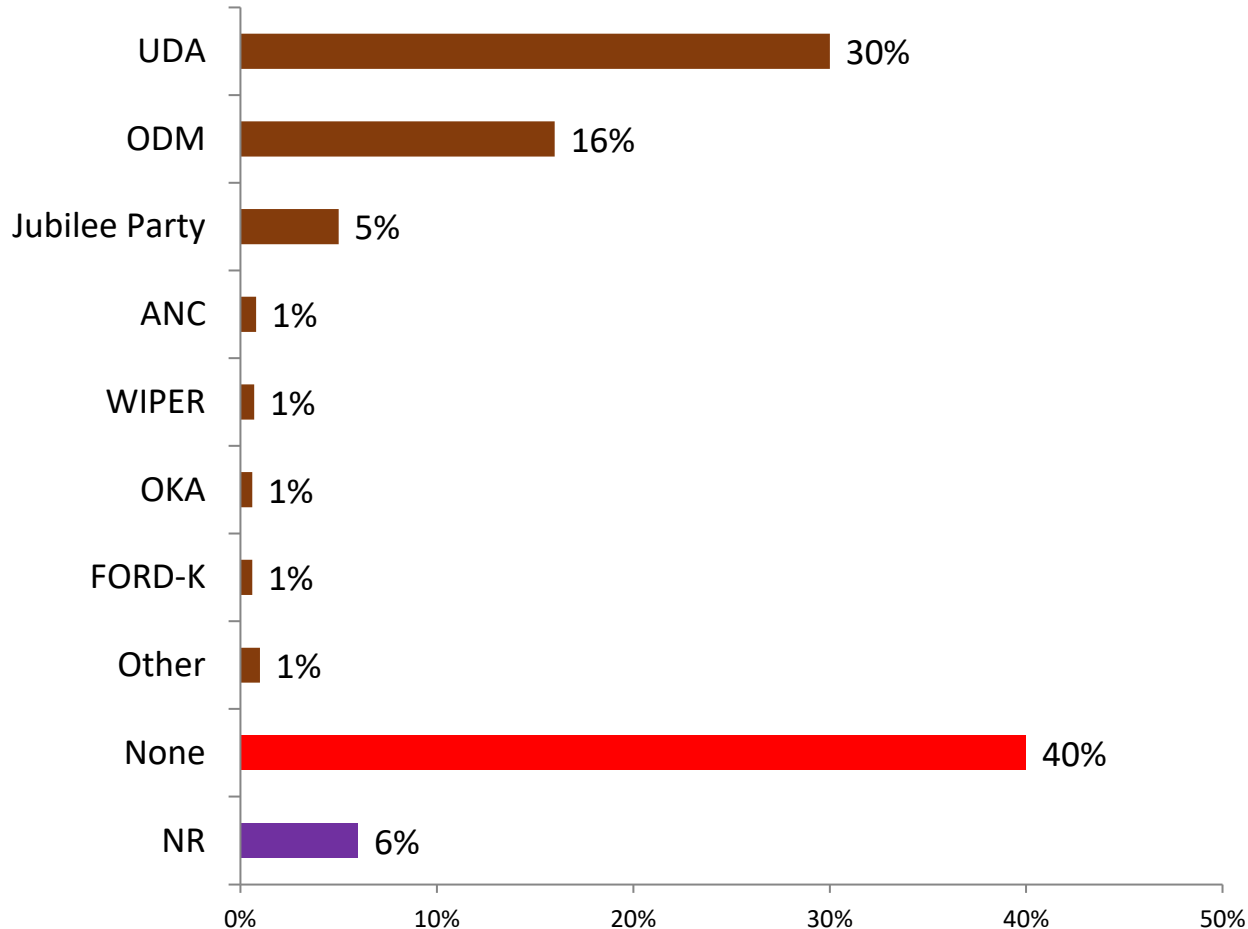
- Among those who feel the country is headed in “the wrong direction” inflation receives the most mentions by far (40%), though joblessness, poor leadership, 2022 election campaign activities and corruption are among the other most frequently mentioned issues (at 11%, 9% and 8% for the latter two reasons, respectively).
- Also of significance is that Covid-19 receives so few mentions a “the main reason” for the country’s “wrong direction (only 3% - a reduction from 7% in TIFA’s June survey).



Section Two: 2022 Election Issues

- Political Party Alignment
- Kenyans' Preferred Next President
- Uhuru's Perceived Preferred Successor

Political Party Alignment (by total)



- ❑ As of now, no political party or alliance/coalition attracts the support of more than just under one-third of Kenyans, with nearly half (40%) saying they “feel close to” or “support” no such entity.
- ❑ However, the most popular party is the newest: UDA. Its popularity (30%) is greater than that of ODM and Jubilee combined (21%).
- ❑ Given the period remaining until the next election and with considerable uncertainty regarding possible mergers/coalitions and the determination of the ballot-‘menu’ for all elective positions (starting with the presidency), no assumptions can be made now as to what these figures will be by mid-2022.

Political Party Alignment

(by total, zone)



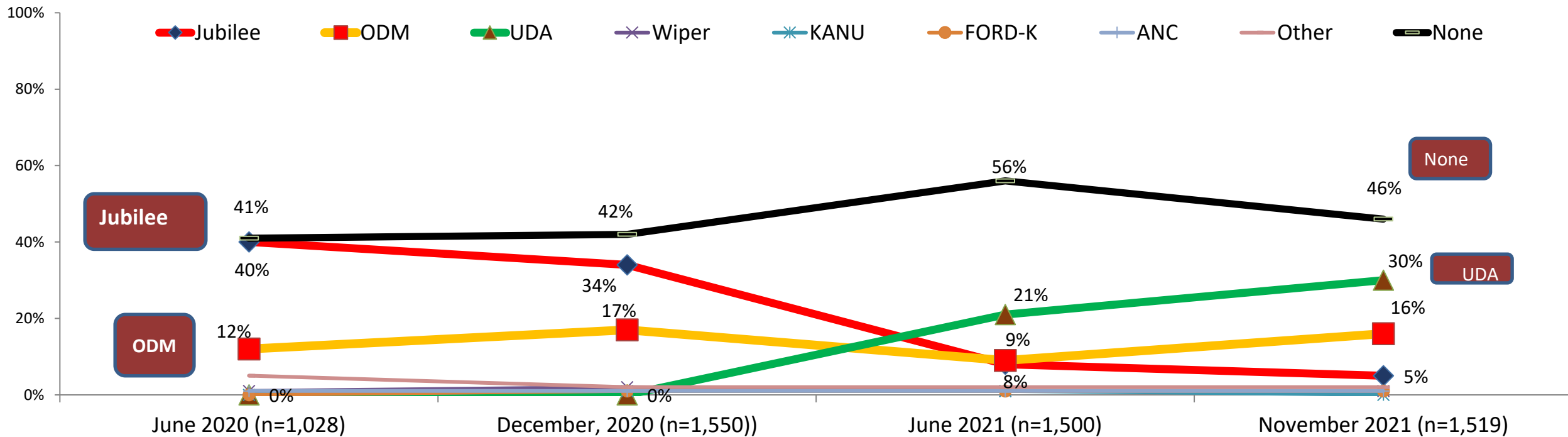
- Aside from UDA, the support for other political parties is quite highly concentrated in particular regions. For example, ODM is nearly twice as popular in Nyanza (39%) as it is anywhere else aside from South Rift (33%), and the same applies to Jubilee which is most popular in Lower Eastern (18%). At the same time, the proportion of those not associating themselves with any party is substantial nearly the same across all regions (ranging from 25% in Central Rift to 45% in Nairobi).

Political Party/Alliance	Total	Central Rift	Coast	Lower Eastern	Mt Kenya	Nairobi	Northern	Nyanza	South Rift	Western
UDA	30%	52%	25%	21%	39%	20%	29%	11%	19%	19%
ODM	16%	8%	15%	7%	5%	19%	22%	39%	33%	14%
Jubilee	5%	1%	5%	18%	6%	2%	8%	3%	0%	3%
Wiper	1%	0%	0%	4%	0%	0%	1%	1%	0%	0%
ANC	1%	1%	0%	0%	0%	0%	0%	0%	0%	5%
FORD-K	1%	0%	0%	1%	1%	0%	0%	0%	0%	3%
OKA	1%	0%	0%	2%	0%	1%	1%	1%	0%	1%
Other	1%	1%	1%	0%	2%	1%	2%	1%	0%	3%
Undecided	4%	3%	1%	4%	6%	5%	2%	5%	5%	5%
None	36%	25%	40%	37%	36%	45%	34%	33%	41%	43%
NR	6%	9%	13%	6%	5%	7%	1%	6%	2%	5%

Political Party Alignment: Trend Analysis (June 2020 – November 2021)

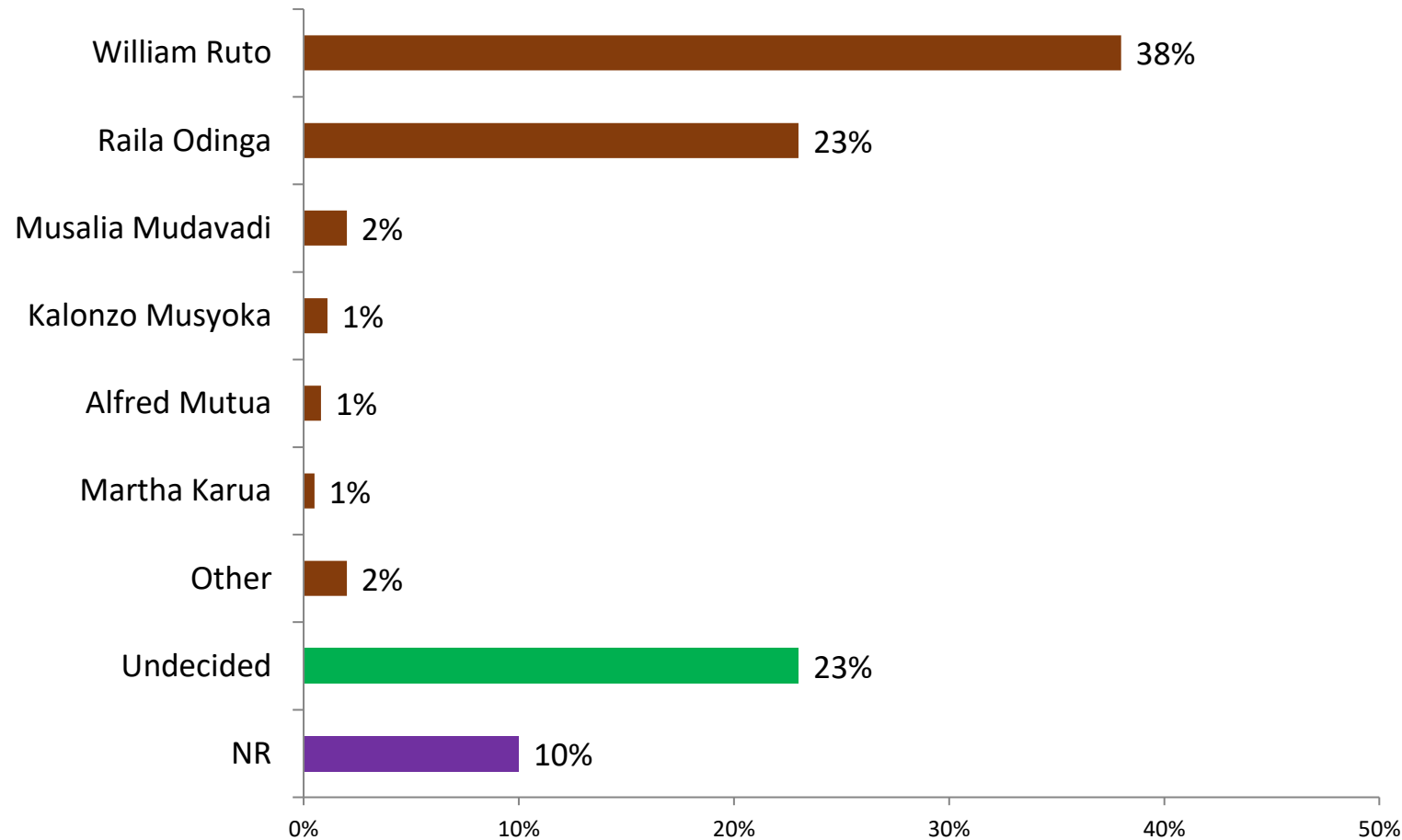


- Over the last sixteen months, two most dramatic changes in the popularity of political parties have been (1) the decline of Jubilee (from 40% to 5%) and the appearance/rise of UDA (from nothing to 30%), making it currently the most popular party.
- At the same time, the steady predominance of “none” over this period suggests that about half of Kenyans are waiting for more clarity in the evolving ‘menu’ of ballot-choices (as well as, perhaps, of manifesto-content) before aligning themselves with any particular political formation on the competitive electoral field.



Q. “What political party or alliance do you support most or feel closest to now, if any?”

Kenyans' Preferred Next President (by total)



- Among the announced and most widely considered potential presidential candidates in the 2022 election, William Ruto has most support, though from only slightly more than one-third of all respondents (38%). His nearest popularity-competitor, Raila Odinga, has only slightly more than half of Ruto's support (23%).
- At the same time, nearly a quarter (23%) say they are yet to decide as to whom they prefer, with another substantial minority unwilling to reveal their preference as of now (10%).

Kenyans' Preferred Next President

(by zone)



□ Support for the most popular potential candidates is less concentrated in regional terms for both William Ruto and Raila Odinga than it is for any other. While Ruto scores above his national average (38%) in Central Rift (57%) and Mt. Kenya (53%), Raila scores about his national average (23%) in Coast (26%), Nairobi (27%), Northern (38%) and Nyanza (48%). For Mudavadi and Kalonzo, their quite modest support is concentrated in their home regions (Western 10% and Lower Eastern 9%, respectively).

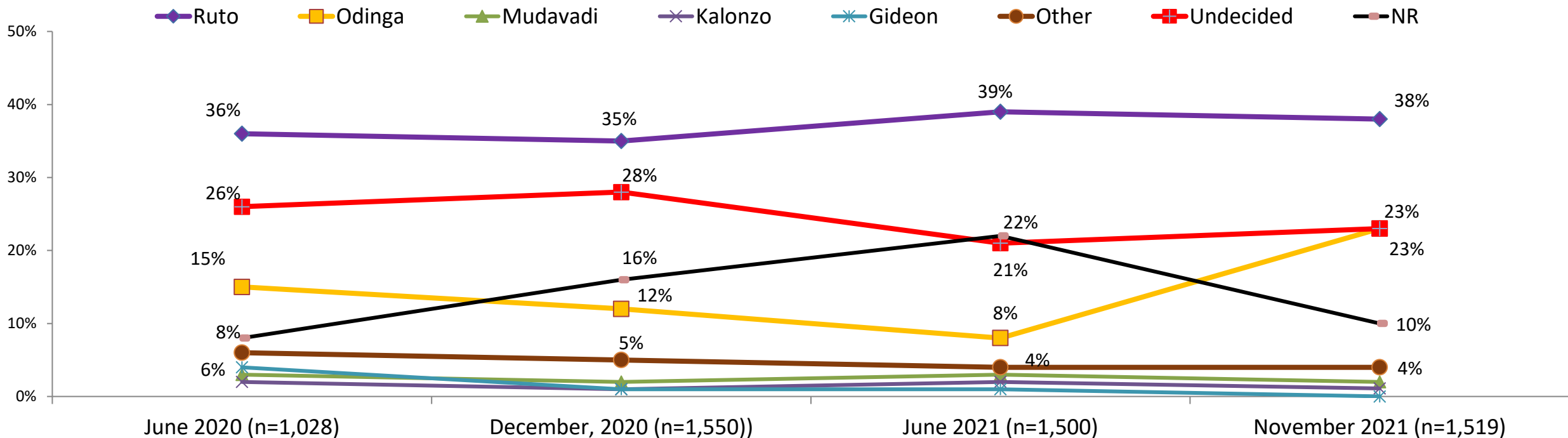
Potential Presidential Candidate	Total	Central Rift	Coast	Lower Eastern	Mt Kenya	Nairobi	Northern	Nyanza	South Rift	Western
Ruto	38%	57%	38%	35%	53%	32%	24%	16%	35%	26%
Raila	23%	10%	26%	13%	10%	27%	38%	48%	37%	21%
Mudavadi	2%	2%	1%	2%	0%	4%	1%	2%	0%	10%
Kalonzo	1%	0%	0%	9%	0%	2%	0%	1%	0%	0%
Gideon	0%	0%	1%	1%	0%	1%	0%	0%	0%	1%
Other	3%	0%	4%	1%	3%	2%	7%	2%	2%	2%
Undecided	19%	16%	20%	17%	20%	20%	16%	17%	14%	24%
None	4%	2%	2%	16%	4%	0%	6%	4%	1%	4%
NR	10%	12%	7%	7%	8%	12%	7%	10%	10%	13%

Q. "Whether or not you intend to vote in next year's election, who would you like Kenya's next president to be?" SINGLE RESPONSE – DO NOT READ OUT

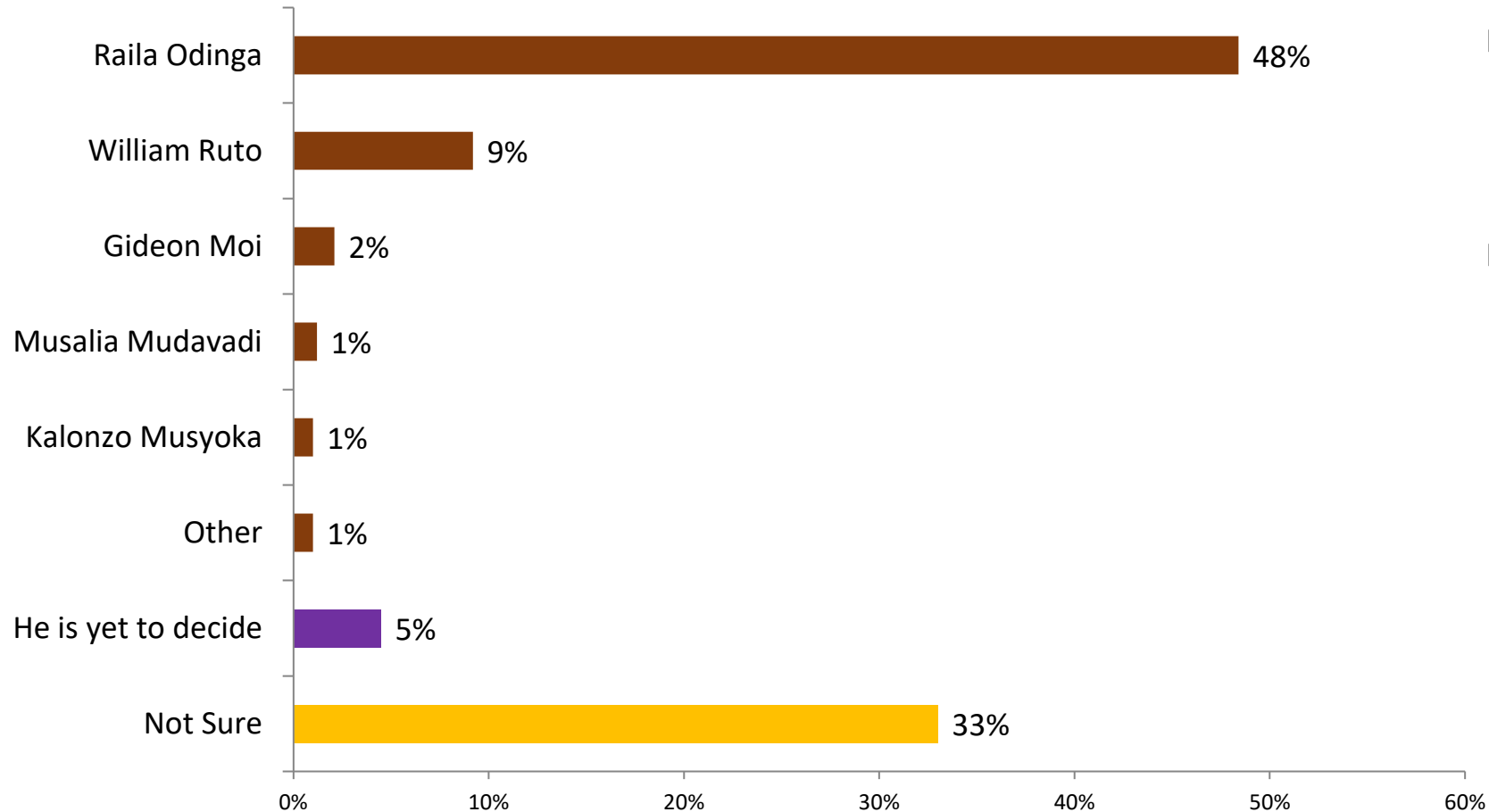
Preferred Presidential Candidate: (Trend Analysis June 2020 – November 2021)



- Over the last 16 months, TIFA's surveys reveal several major fluctuations in Kenyans' expressed preferences regarding their next president. First, there was a steady decline in Odinga's rating between June, 2020 and June, 2021 (from 15% to 8%), but it has more than rebounded in the current survey (to 23%). Second, There was a steady increase in the proportion who declined to answer this question between June, 2020 and June 2021 (from 8% to 22%), but this dropped considerably in this November survey (to 10%).
- At the same time, over this entire period, DP Ruto's ratings have been remarkably constant (within a range of just 4% - between 35% and 39%), notwithstanding his almost constant campaign activities.



Uhuru's Perceived Preferred Successor (by total)



- ❑ More than five times as many Kenyans assume that Uhuru prefers Raila rather than Ruto as his successor (48% vs. 9%).
- ❑ Still, a full one-third are uncertain as to who he would like Kenya's next president to be (33%), though a small but significant minority believe the President is yet to make up his mind about this (5%).

Uhuru's Perceived Preferred Successor (by total, zone)

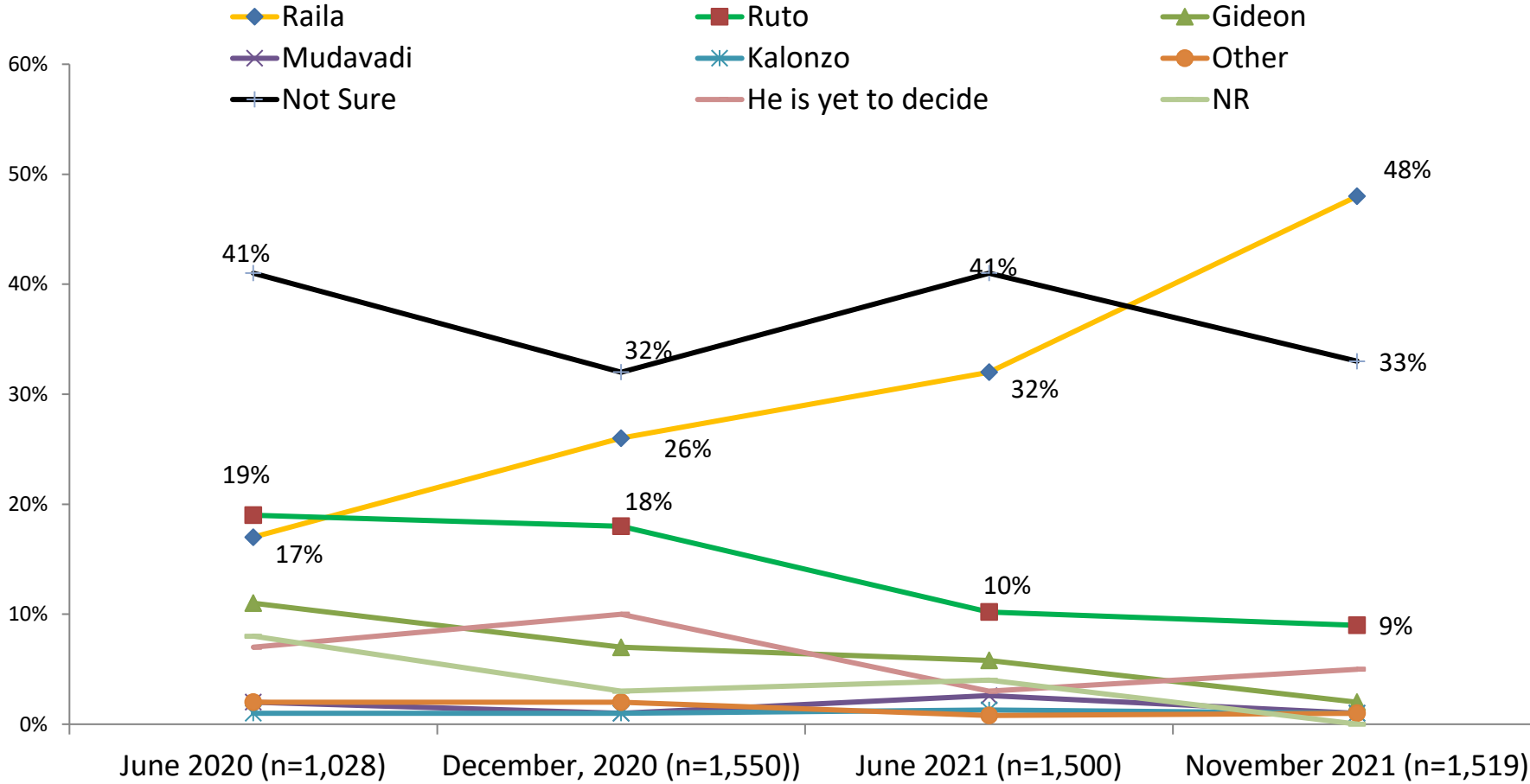


Whereas more residents of Raila's home area of Nyanza believe Raila is Uhuru's preferred successor than in any other part of the country (58%), the zone in which more residents hold this belief about Ruto is Coast (14%). Similar to the case with Raila, residents of the home areas of Gideon (Central Rift), Kalonzo (Lower Eastern) and Mudavadi (Western) are the most confident that Uhuru prefers their most popular potential presidential candidate to succeed him (5%, 4% and 2%, respectively), though Mudavadi's figure for Nairobi is the same as that for Western (2%).

Potential Presidential Candidate	Total	Central Rift	Coast	Lower Eastern	Mt Kenya	Nairobi	Northern	Nyanza	South Rift	Western
Raila	48%	44%	47%	32%	50%	49%	48%	58%	36%	52%
Ruto	9%	8%	14%	8%	11%	9%	7%	4%	12%	11%
Gideon	2%	5%	3%	2%	0%	2%	1%	2%	0%	1%
Kalonzo	1%	0%	0%	4%	1%	2%	0%	1%	0%	0%
Mudavadi	1%	1%	0%	1%	1%	2%	0%	1%	0%	2%
Other	1%	1%	2%	2%	0%	0%	0%	1%	0%	0%
He is yet to decide	5%	7%	4%	5%	4%	3%	6%	4%	5%	5%
Not Sure	33%	34%	29%	46%	32%	31%	39%	29%	48%	28%
NR	1%	0%	1%	1%	1%	3%	0%	0%	0%	1%

Q. "Whoever you would like the next president to be, who do you think that Uhuru prefers as president after he retires next year?" SINGLE RESPONSE – DO NOT READ OUT

Uhuru's Perceived Preferred Successor (Trend Analysis June 2020 – November 2021)



- Since mid-last year, the proportion of Kenyans who believe that Raila is Uhuru's preferred successor has continued to increase, even if still fewer than half of them hold this view.
- By a considerable margin, more Kenyans assume that Uhuru prefers Raila as his successor (48%), while fewer than one-fifth of this proportion believes he would like his Deputy to ascend to power after he retires (9%). Still, a full one-third are uncertain as to who he would like Kenya's next president to be (33%).

Section Three: Correlation Analysis

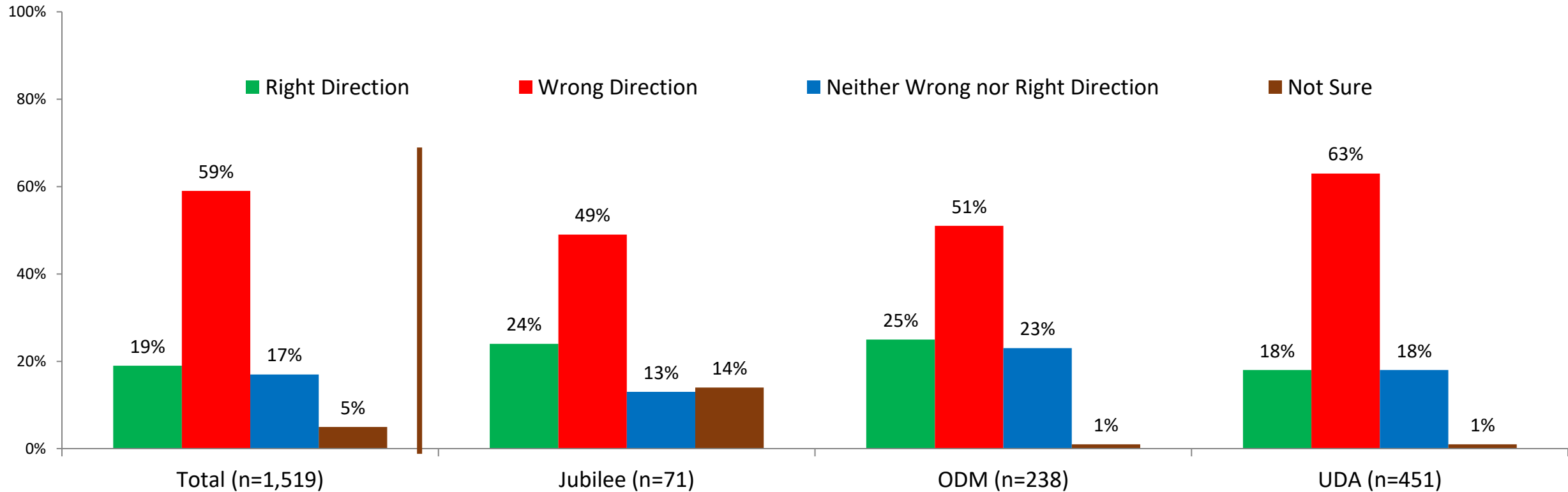
- Kenya's Perceived Direction
- Kenyans' Preferred Next President
- Uhuru's Perceived Preferred Successor

Kenya's Perceived Direction

(by total, the most popular political parties)



☐ In terms of views about the country's current direction, supporters of the official Opposition party, ODM have more in common with those of Jubilee than they do with those of UDA. Specifically, while only about half of the supporters of these two political parties consider Kenya's current direction as "wrong" (49% and 51% for those of Jubilee and ODM, respectively), nearly two-thirds of UDA supporters hold this negative view (63%).



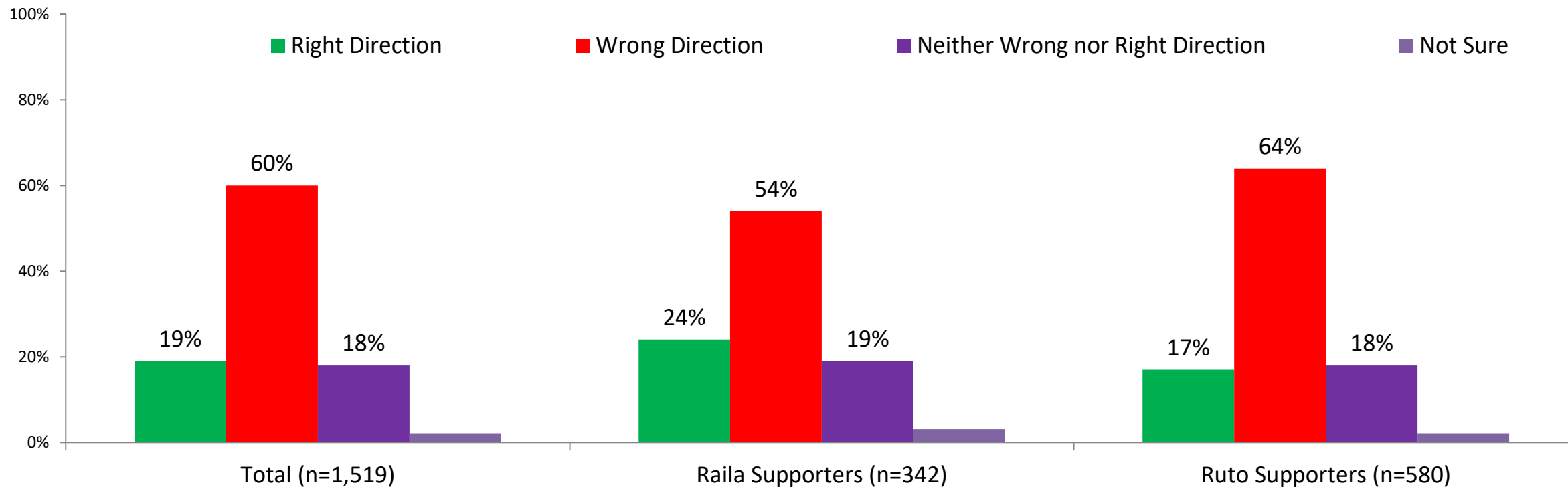
Q. "What political party or alliance do you support most or feel closest to now, if any?" SINGLE RESPONSE – DO NOT READ OUT

Q. "Would you that as a whole Kenya is headed in the right or the wrong direction?"

Kenya's Perceived Direction: (by Total, Those Who Support Ruto/Raila)



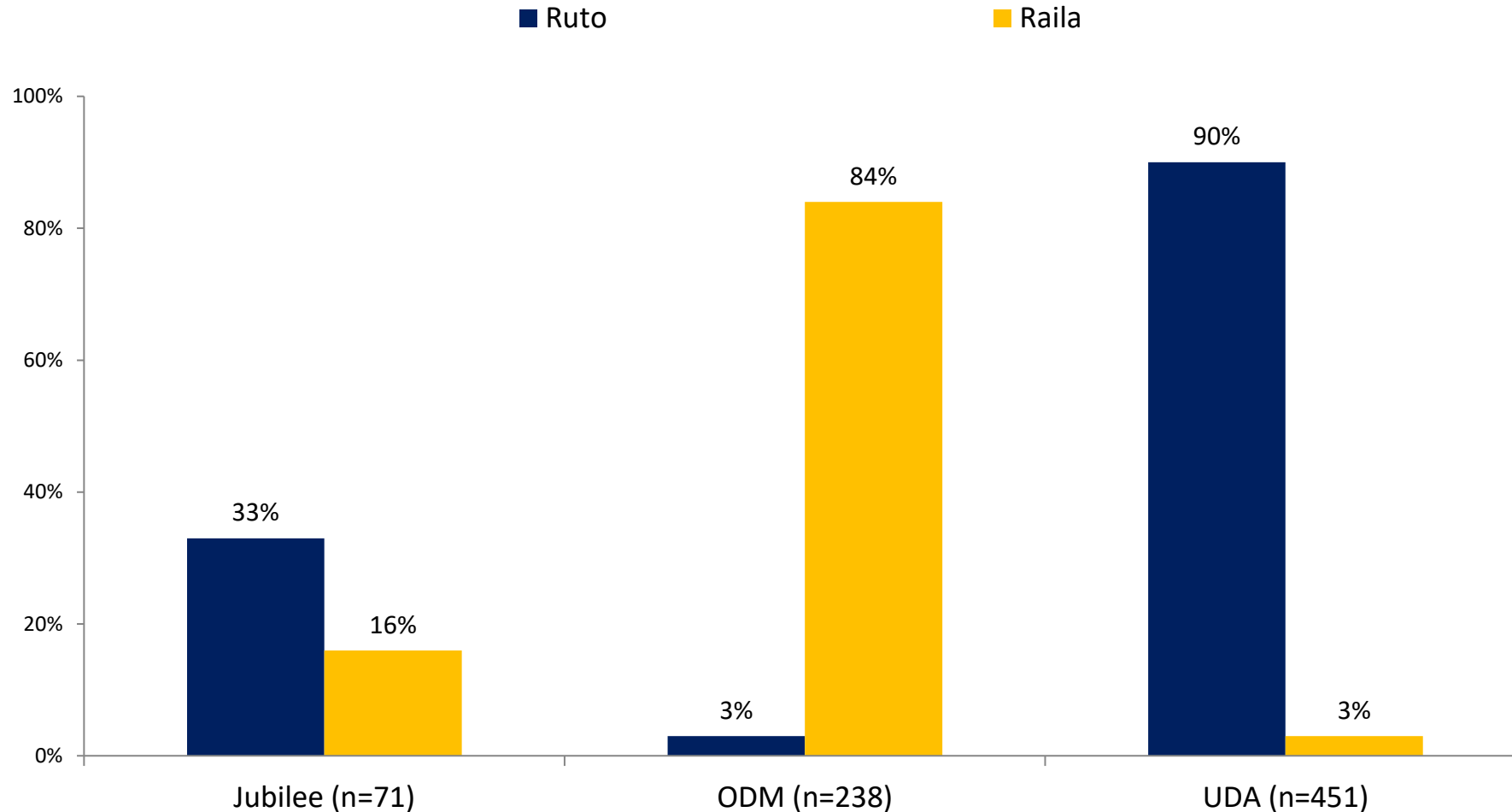
- Although the contrasts are modest, it is clear that more of Raila's supporters are of the view that the country is headed in "the right direction" as compared with those of Ruto (24% vs. 17%). Conversely, more of the DP's supporters consider Kenya's current direction is "wrong" (64% vs. 54%). Such figures suggest the former Prime Minister no longer has a 'lock' on those Kenyans who feel that they are 'victims' of the status quo.



Q. "Whether or not you intend to vote in next year's election, who would you like Kenya's next president to be?" SINGLE RESPONSE – DO NOT READ OUT

Q. "Would you that as a whole Kenya is headed in the right or the wrong direction?"

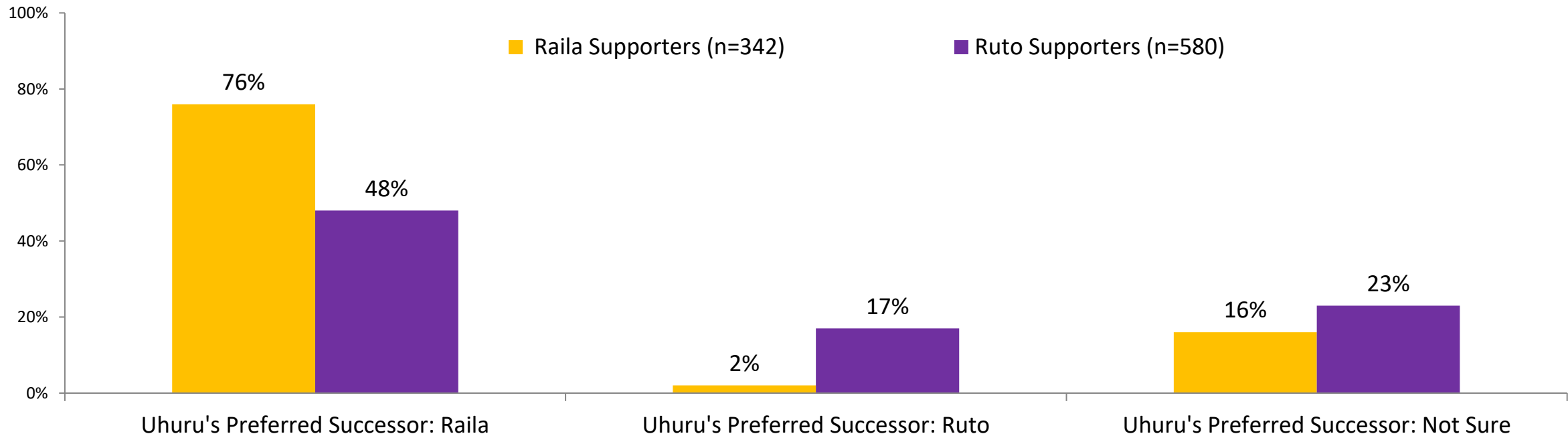
Preferred Next President (Ruto vs. Raila): by Political Party Alignment (of the Three Most Popular Parties)



- While each of the (as of now) two main potential presidential candidates is far more popular in his own party, Ruto is slightly more popular among UDA supporters than Raila is among those of ODM (90% vs. 84%).
- Among those still identifying with Jubilee, however, the DP is twice as popular as Raila in terms of the possible presidential contest (33% vs. 16%).

Uhuru's Perceived Preferred Successor: (by Those Who Support Raila/Ruto/Are Not Sure)

Supporters of the two leading candidates are more likely to believe that President Uhuru likewise supports their preferred candidate as opposed to his main rival. Specifically, while some three-quarters of Raila's supporters believe Uhuru wants Raila to succeed him, only about half of Ruto's supporters hold this view (76% vs. 48%). Or to put it another way, While three quarters of Raila's supporters think that he is Uhuru's preference, almost none believe he prefers Ruto (76% vs. 2%). Still, it is clear that far fewer of the DP's supporters believe Uhuru supports him as compared with Raila's supporters who think Uhuru supports the latter (17% vs. 76%).



Q. "Whether or not you intend to vote in next year's election, who would you like Kenya's next president to be?" SINGLE RESPONSE – DO NOT READ OUT
 Q. "Whoever you would like the next president to be, who do you think that Uhuru would like to be the next president after he retires next year?" SINGLE RESPONSE – DO NOT READ OUT



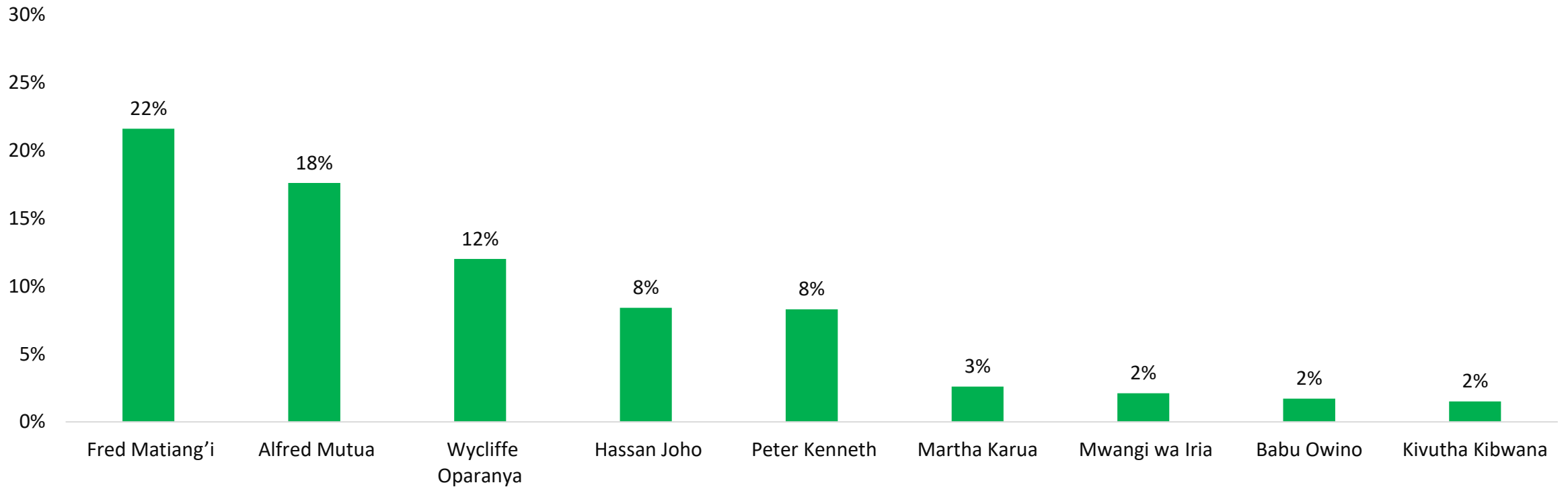
Section Four: Emerging Future National Political Leaders

- Political leaders with presidential potential (2027 onwards)

Political leaders with presidential potential (2027 onwards) (by total)



□ Fred Matiangi and Alfred Mutua have the highest mentions for leaders who can be the next president in future.



Q. Apart from Raila, Ruto, Musalia, Kalonzo, can you think of two younger political leaders/Cabinet Secretary/Governor/Senator/MP who would be good president at any future time?



Concluding Comments

Concluding Comments

Several points can be made with regard to several of the findings included in this 1st Release of TIFA's November, 2021 survey:

- ❑ While economic challenges at both the national and local level – specifically, the rising cost-of-living and joblessness - are cited far more frequently than any other such issues, recent positive figures released by the KNBS indicating a 10% improvement in economic activity during the 2nd Quarter of this year appear to be confirmed by the findings of this survey. Not only do fewer Kenyans perceive the country's overall direction as “wrong” as compared with June (59% vs. 72%), but considerably more Kenyans (among those currently earning anything) report that they are earning more than or at least the same as they were before Covid-19 arrived early last year as compared with those reporting that they are now earning less (44% vs. 27%). Such findings may at least partly explain why the proportion considering the country is headed in the “wrong direction” has declined since TIFA's June survey: from 72% to 59%.
- ❑ Turning to politics, a striking finding is the rise of the UDA party since its emergence as the preferred electoral vehicle for DP Ruto and those allied to him, first captured in TIFA's June, 2021 survey and repeated in this current one, so that as of now it is nearly twice as popular as its closest (ODM) rival (30%. Vs. 16%), and with official ruling party (Jubilee) now just a shadow of its former self in terms of popularity (5%). However, with increasingly frequent and concrete suggestions of a merger between ODM and Jubilee, it may be incorrect to assume that the ‘sum’ of these two parties will be no greater than ‘the sum of its parts’ (i.e., 16% + 5% = 21%) if and when this merger takes place.



Concluding Comments (con't)

Regarding the evolving 2022 presidential contest, the most relevant findings are as follows:

- ❑ First, the DP's popularity as a likely (if not certain) presidential candidate, while clearly far greater than that of his closest potential rival, Odinga, has not significantly increased over the last sixteen months, notwithstanding his almost incessant 'campaign-like' activities, as well as the more recent string of defections of various elected leaders from other parties. As for Odinga, his initial standing of less than half of that of Ruto (16% vs. 36% as recorded in TIFA's survey of June, 2020) has more than recovered following the decline he experienced at the end of 2020 and then earlier this year (in June, when it fell to just 8%), now standing at about two-thirds of the DP's candidate-popularity (24% vs. 38%). Whether such an increase in competitiveness is mainly due to the former's more active campaigning or the increasing likelihood of his candidacy, or both, is unclear, but the impact (if any) of his forthcoming announcement about this on December 9 should be captured in TIFA's next survey.
- ❑ Second, various findings based on the correlation of data from several different questions show clearly that supporters of ODM now have more in common with those of Jubilee in terms of their views about current conditions, so that Ruto's UDA appears to be more of an 'opposition' party than ODM, at least in terms of the level of satisfaction or otherwise among their supporters with the status quo. They thus confirm the DP's current persona as the loudest voice of the 'down-trodden', even as he continues to enjoy the trappings of the second highest office in the land.



Concluding Comments (con't)



But the question remains, what, if anything, can the DP do to further increase his electoral attractiveness, even as his various opponents seek to design a strategy that would both diminish his profile while avoiding any cantankerous fall-out among themselves, given that aside from Odinga, a number of them have their own burning presidential ambitions? Subsequent TIFA surveys should be able to shed light on all these, among various other, important issues.





Methodology and Demographics

Methodology Overview

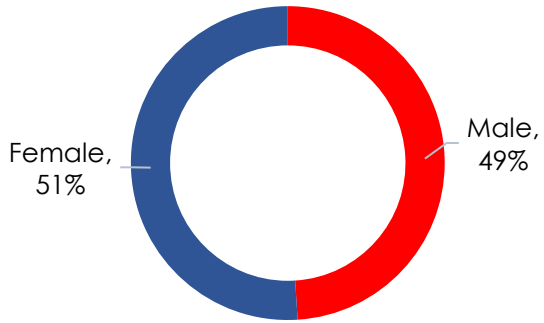


Fieldwork Dates	7 th to 13 th November 2021
Geographical	Nationally Representative Sample (spread across 9 Zones ; <ul style="list-style-type: none">• Central Rift, Coast, Lower Eastern, Mt Kenya, Nairobi, Northern, Nyanza, South Rift, Western
Data collection	<ul style="list-style-type: none">▪ Telephonic Interviews conducted (with respondents whose contacts were collected through face-to-face (i.e., household-based interviews)▪ The interviews conducted in Kiswahili (mainly) and English.
Sample	1,519 respondents
Margin of error	+/- 2.51 % (Note: Larger error-margins for sub-samples)
Funding	TIFA Research funded the survey

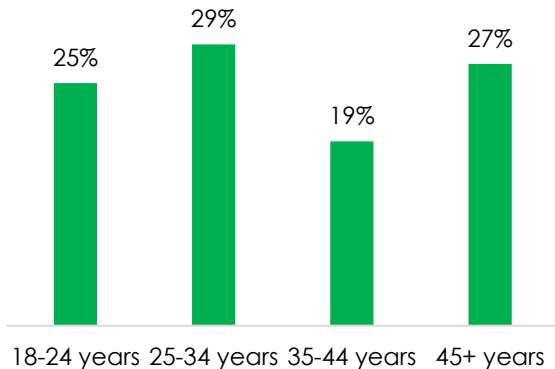
Demographics:

Region, Gender, Age, Religion, Setting & Marital Status

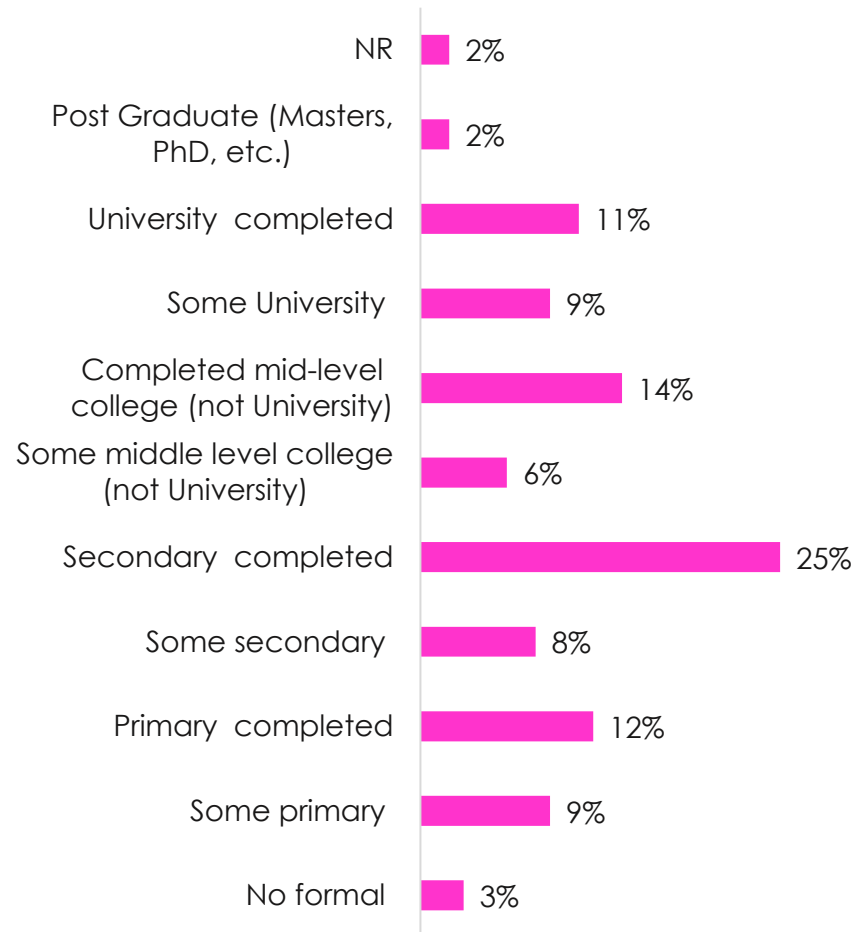
Gender



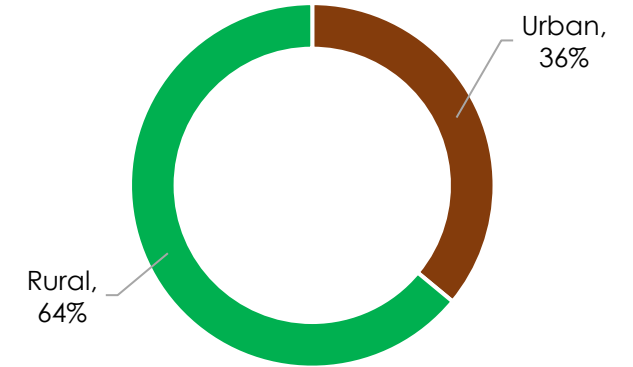
Age



Education



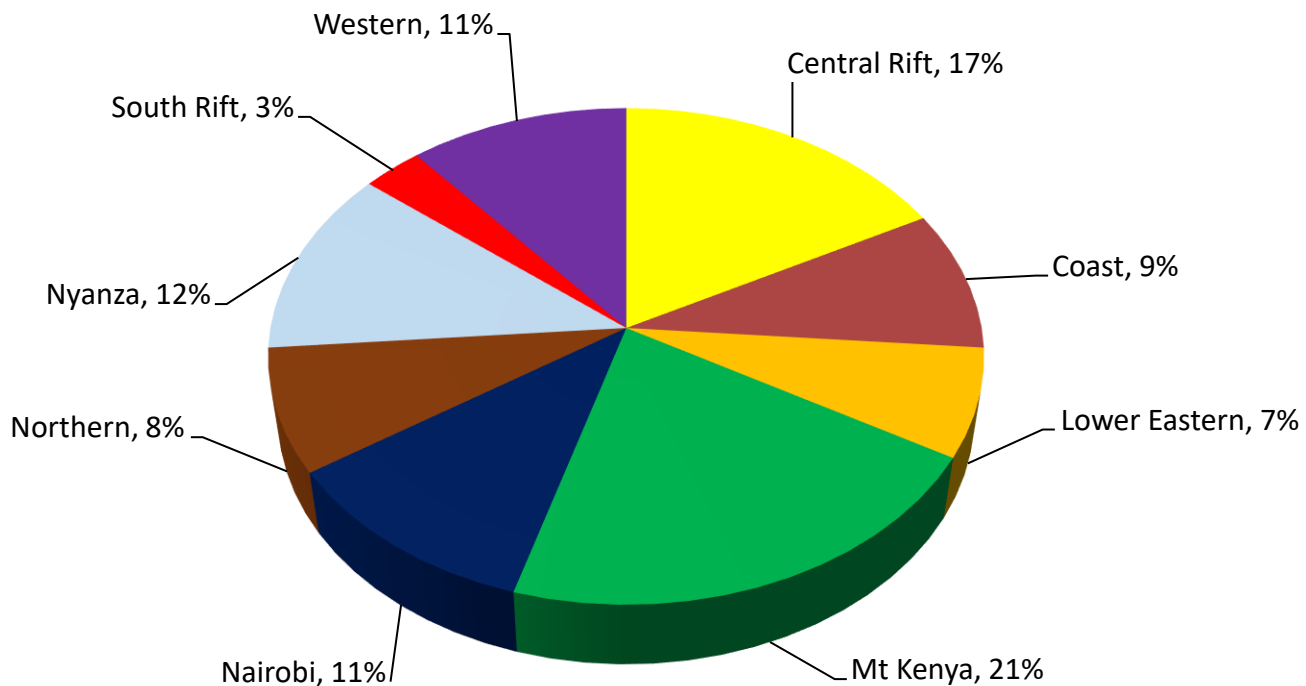
Setting



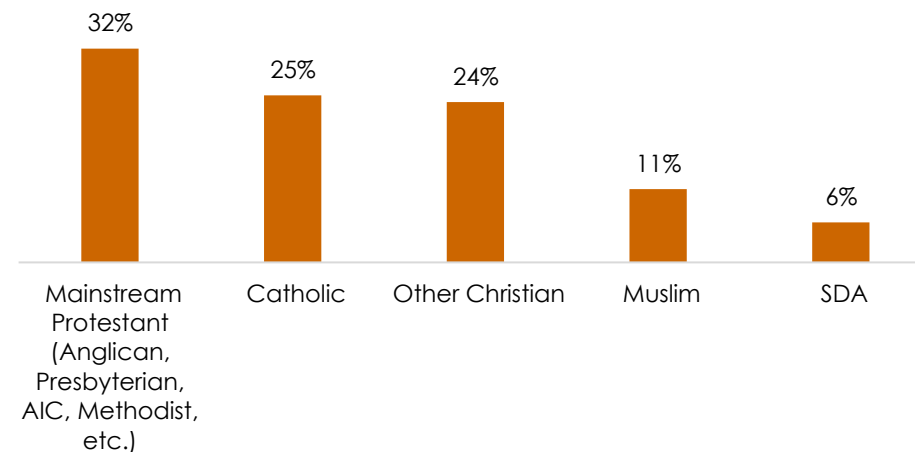
Demographics: Region, Gender, Age, Religion, Setting & Marital Status



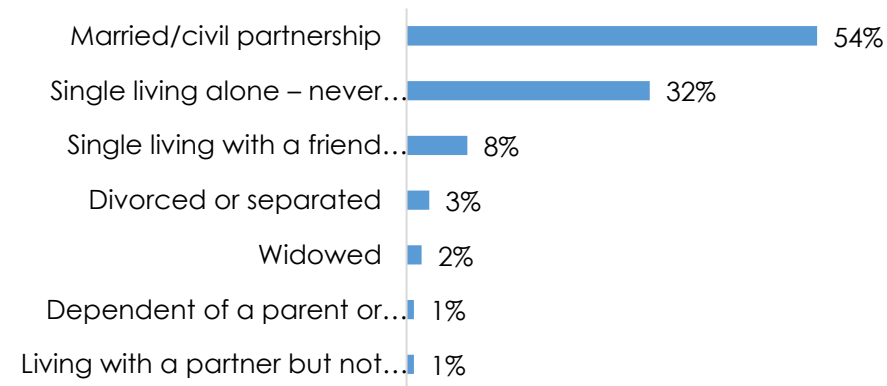
Zone



Religion



Marital Status





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