EiE-SBM ELECTION FORECAST

It all hinges on turnout and insecurity

FEBRUARY 2023

ENOUGH IS ENOUGH NIGERIA

SB MORGEN

As a leading civil society organisation, Enough is Enough (EiE) Nigeria believes in the importance of promoting democracy and the free, fair and credible elections that are at its foundation. As a result, EiE Nigeria commissioned SBM Intelligence to do a nationwide survey of likely voters on salient issues regarding the 2023 elections. The following report is the result of that survey.

Nigeria is Africa's most populous country and its elections have a significant impact not just on the country but on the continent, and indeed the world. The 2023 elections will be closely watched by all stakeholders and we are honoured to have the opportunity to commission this report and contribute to the conversation around this important event.

We are grateful to our funders for their support of our election interventions. EiE has a history of partnering with SBM Intelligence on national projects and we are glad that this survey enables them to compare their findings from three polls during this election cycle.

We thank our readers for taking the time to engage and consider the findings. We hope that this report contributes to the ongoing conversation about the future of Nigeria and the role that insecurity and citizen engagement and participating play in creating a better future for all Nigerians.

www.eie.ng

info@eienigeria.org

@EiENigeria

Facebook.com/EiENigeria

SB MORGEN

Disclaimer

The data contained in this report is only up-to-date as of Friday, 3 February 2023. Some of it is subject to change during the natural course of events. SB Morgen cannot accept liability for any errors or omissions that may follow such events that may invalidate data contained herein.

Our researchers employed one-on-one interviews, desk research and polling to collate the available data. Our editors sifted through the data and prepared the report, using various proprietary tools to fact-check and copy-edit the information gathered.
Our publicly released reports are formatted for easy and quick reading and may not necessarily contain all the data that SB Morgen gathered during a given survey. Complete datasets can be made available on request.

All forecasts were built using data from a variety of sources. A baseline of accurate and comprehensive historical data is collected from respondents and publicly-available information, including from regulators, trade associations, research partners, newspapers and government agencies.

Sbmintel.com
info@sbmintel.com
@sbmintelligence
Facebook.com/sbmintel

INTRODUCTION

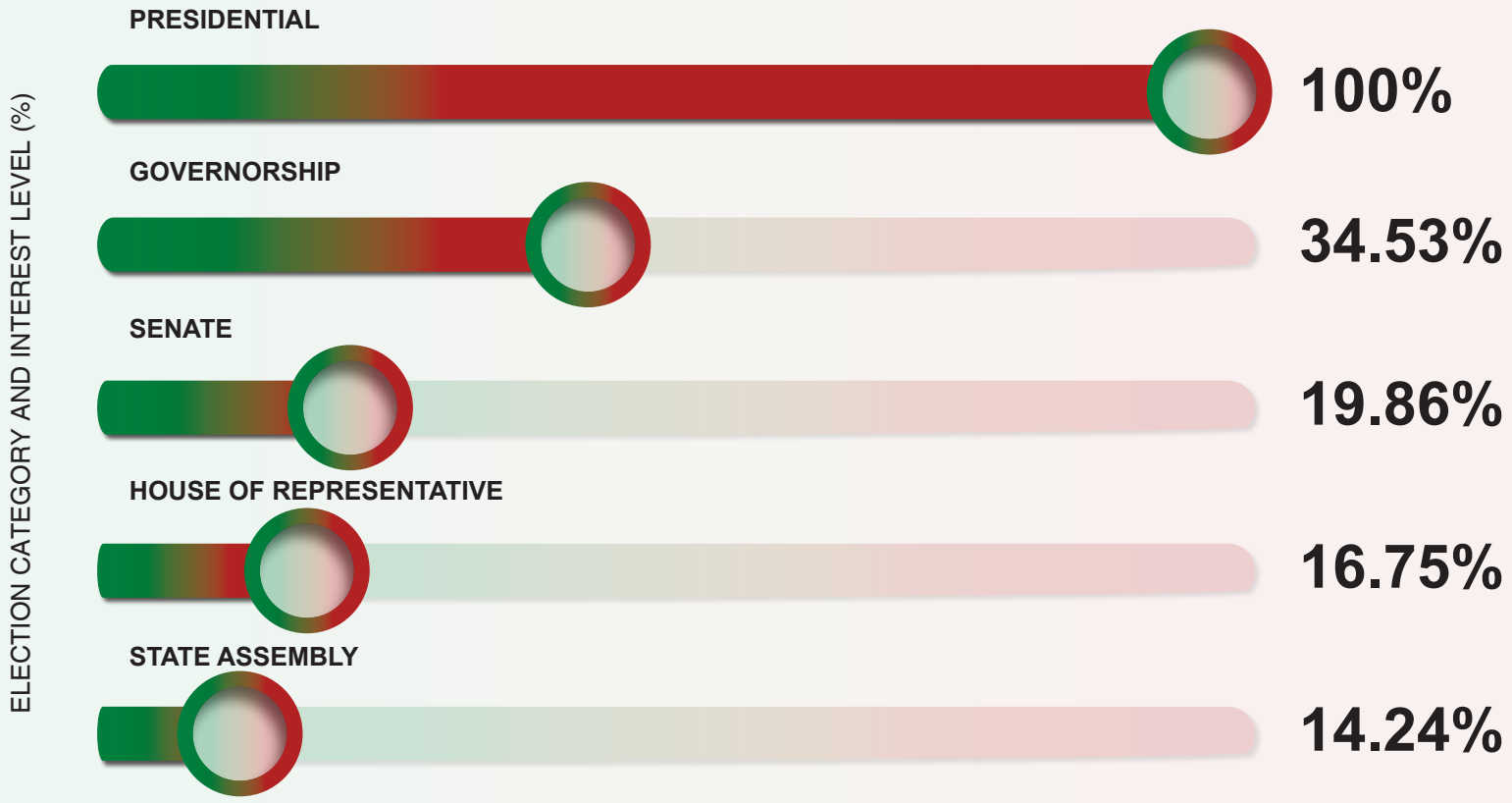
INTRODUCTION

The 2023 General Election in Nigeria represents a few firsts since its return to democracy in 1999. It is the first time a former army general is not on the ballot for the main political parties. Additionally, it is the first time since 1979 that the presidential race has a third force contender who is seen as a serious challenger in the elections. This means that, more than ever, the existing models for predicting the direction of elections in the country are unlikely to work in the 2023 elections.

But other issues bear interrogation. Nigeria's federal system of government requires the concurrent functioning of the three tiers of government (local, state, and federal) to facilitate substantive change. Regrettably, it has been noted that the Nigerian electorate tends to focus primarily on the presidential elections, neglecting the significance of elections for the governorship, legislative, and local government.

Voters must recognise the significance of these other levels of elections as they play a crucial role in determining the quality of life within their communities. For instance, the local government is responsible for providing basic services such as basic education and healthcare. On the other hand, the state governments are responsible for overseeing the implementation of these services, as well as for economic development and job creation. Furthermore, the legislative arm of government is tasked with the responsibility of creating and passing laws, as well as ensuring accountability. Consequently, it is crucial for citizens to participate in these other elections actively and to consider the consequences of their decisions. This can be achieved through a heightened awareness of the important role that each level of government plays and through the engagement of citizens in the democratic process. This will enable citizens to hold their elected officials accountable and ensure that those in power meet their needs.

Most voters are focused on the presidential election, owing to the power arrogated to the centre by the 1999 Constitution.



Although the Constitution is federal on paper, experts have argued that it is quasi-federal and still retains shades of the unification decree passed into law under General Aguiyi Ironsi, the country's first military ruler, in 1966. This argument largely stems from the fact that security is one of 68 items on Nigeria's legislative list, which only the federal government can decide. For example, some state governors have complained that the constitution

prevents them from taking swift action against non-state actors because they do not control the police force in their territory.

On the legislative front, presidents and state governors always hope their party will dominate the legislature. For the first time in the Fourth Republic, Nigerians might elect a president whose party will be the minority in the tenth assembly. That will undoubtedly present problems, as the president might be forced to use executive orders more often to bypass the country's two lawmaking houses. Our survey shows that many voters in this year's elections will attempt to vote across party lines in the presidential, legislative and gubernatorial ballots. There are also real challenges – security, economic, social – that the country goes into the elections with that are likely to impact how the electorate will vote significantly.

Finally, the perennial twins of ethnicity and religion have been a factor in previous elections in Nigeria. It is necessary to attempt to measure how much of an impact they may have on the 2023 elections.

To this end, in partnership with Enough Is Enough Nigeria, SBM Intelligence has carried out a nationwide survey to provide indicative direction on the following:

- How are Nigerians likely to vote by gender, location, age, income and religion?
- Who do Nigerians believe will win the elections, irrespective of how they vote individually?
- How much impact do these parameters have on projected voting patterns?
- Will Nigerians vote for the same parties across the board or for different candidates in each of the electoral races in the 2023 election?
- What are PVC collection rates and likeliness to vote in the elections?
- How aware are Nigerians of the candidates in the other races, such as gubernatorial and legislative?

INTRODUCTION

- Are Nigerians aware of the new electoral law, its provisions and INECs voting procedure, especially concerning the BVAS?
- How much do Nigerians trust INEC to deliver a free and fair election?
- History of vote buying, probability of voters selling their votes and vote buying thresholds.
- As violence looks like an increasingly go-to tool for the political players to impact elections, what are the potential security and violence flashpoints?

The survey polled 11,534 Nigerians across the 36 States and the Federal Capital Territory (FCT), ensuring a population-reflective representation across demographics such as age, gender, religion and income levels, and the rural-urban split.

The report provides a robust and detailed analysis of the polling data to provide insights into these questions. While recognising the potential of social desirability bias, where respondents alter their perspectives to present themselves in the best possible light, we believe that these polls strongly indicate how Nigerians are likely to vote in the 2023 elections.

METHODOLOGY

SB MORGEN

METHODOLOGY

SBM Intelligence aimed to survey 10,000 respondents in the 36 states and the F.C.T., polling only potential voters. The total number of registered voters for the 2023 general elections is 93.2 million, as given by INEC in January 2023. Based on this total, we determined the following for this survey using standard sampling calculation methods.

Region	No. of Registered Voters	% of registered voters	Target no. of respondents per Region
North Central	15,363,731	16.44	1,536
North East	12,542,429	13.42	1,254
North West	22,255,562	23.81	2,626
South East	10,907,606	11.67	1,091
South South	14,440,714	15.45	1,594
South West	17,958,966	19.21	1,946

SB MORGEN

METHODOLOGY

To arrive at the number of respondents for each state, we weighted the number of respondents per geopolitical zone, then divided these numbers for each geopolitical zone by the number of states in each zone. After that, the states in each zone were appraised for the number of registered voters in each state, thus, in the South-West geopolitical zone, for example, Ekiti ended up with fewer respondents than Lagos. This weighting gave preference to Lagos, Kano, Kaduna, and Rivers as first-tier states with at least ten more respondents than other states in their geopolitical zones, and then Katsina, Oyo, Delta, Plateau, Benue, Bauchi, Niger, Ogun and Anambra as second tier states with at least six more respondents than other states in their geopolitical zones, thus giving a final respondent chart that bore a resemblance to the number of registered voters as published by INEC. In the event, we spoke with 11,534 respondents, exceeding our target by 14.8%.

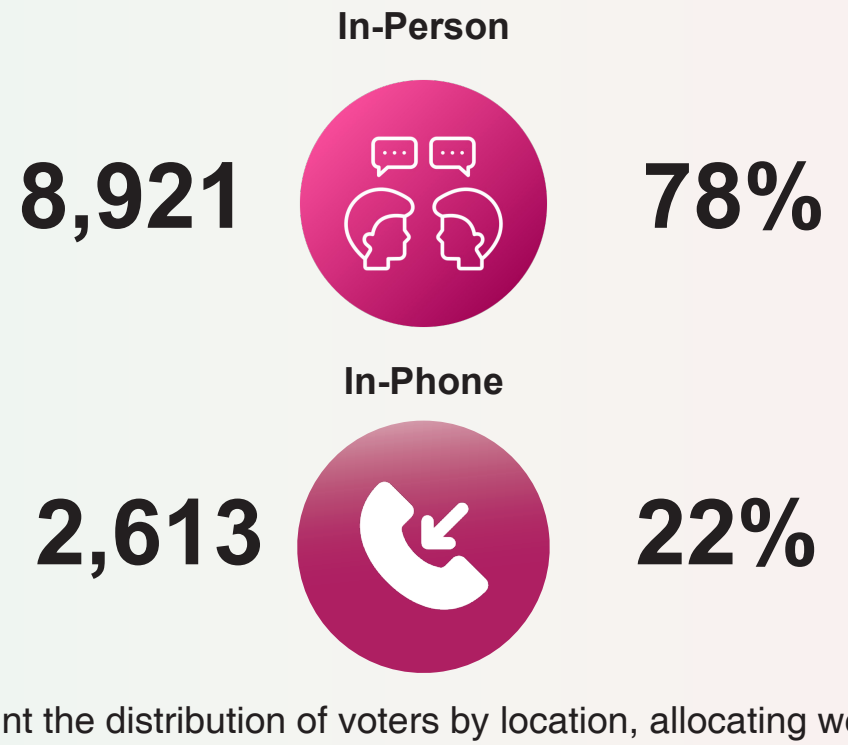
Sample Size	**11,534 Respondents**
Margin of Error	**±3%**
Confidence level	**95%**

The survey asked the respondents 45 questions covering Demographics, PVC Collection Status, Intent to Vote, How they will vote, awareness of key electoral information, experience and intent concerning vote buying and electoral violence, the impact of ethnicity and religion on their voting intentions and their voting preferences.
The survey was administered in person and via telephone in the following proportions over 20 days between 22 January and 6 February 2023.

SB MORGEN

METHODOLOGY

SURVEY ADMINISTRATION METHOD



The sampling takes into account the distribution of voters by location, allocating weights in the sampling by the number of voters a location has on the register.

Quantitative analysis was carried out on the primary data collected, disaggregating by the relevant parameters on each question amongst the following – Gender, Religion, Age, Income and Location – to extract insights driven by these parameters for each of the questions the survey seeks to answer.

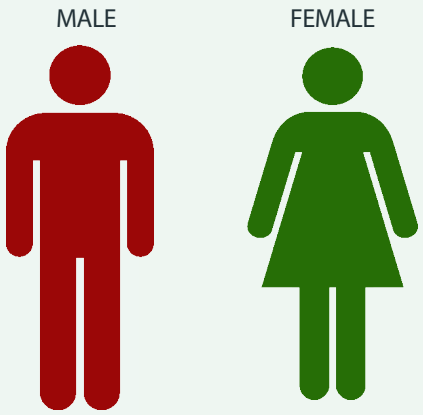
Finally, our commentary on the quantitative analysis includes the nuances that non-quantitative data alone can provide to provide context around some of the results and/or explain some of them to finally offer insights into how we project the elections to go.

DEMOGRAPHICS

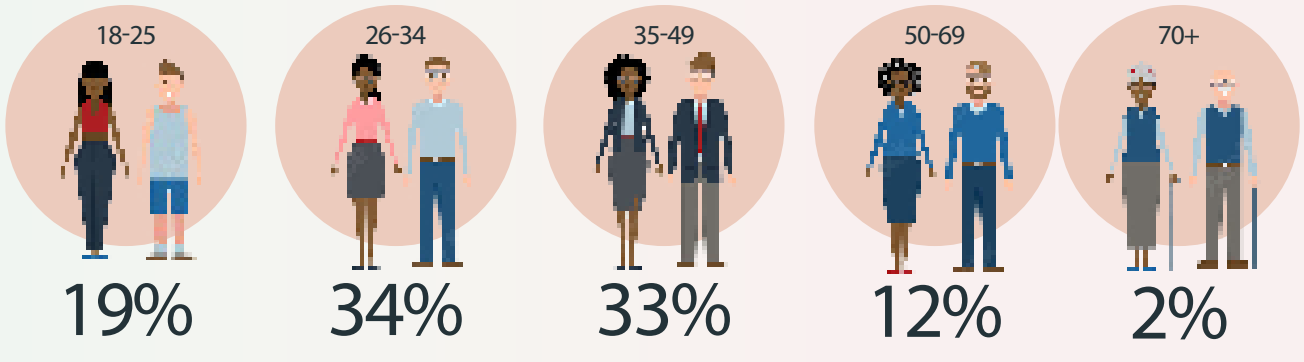
SB MORGEN

DEMOGRAPHICS

GENDER DISTRIBUTION

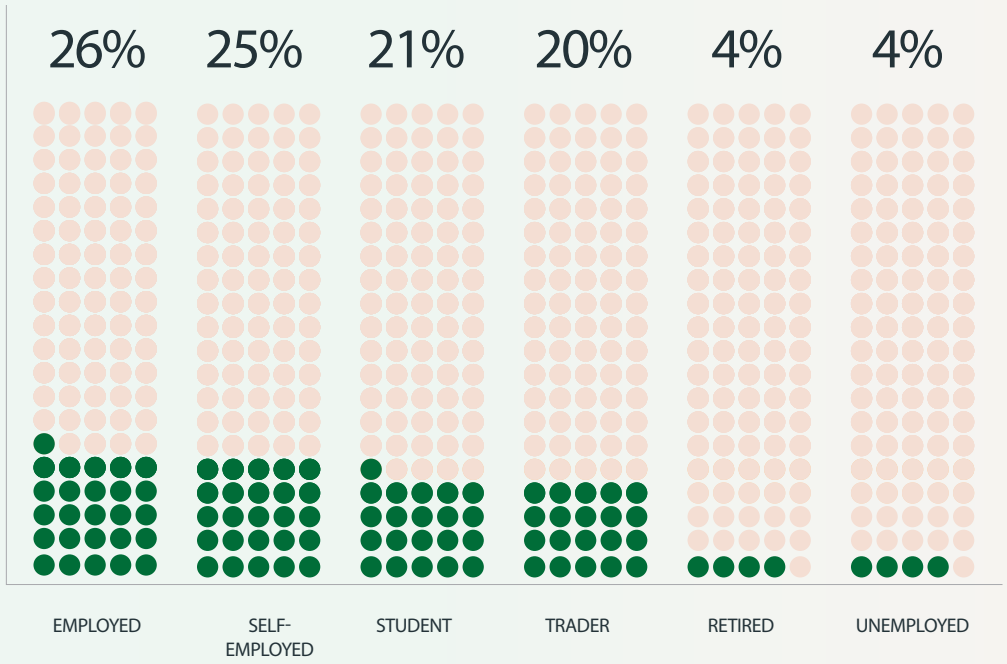


AGE DISTRIBUTION

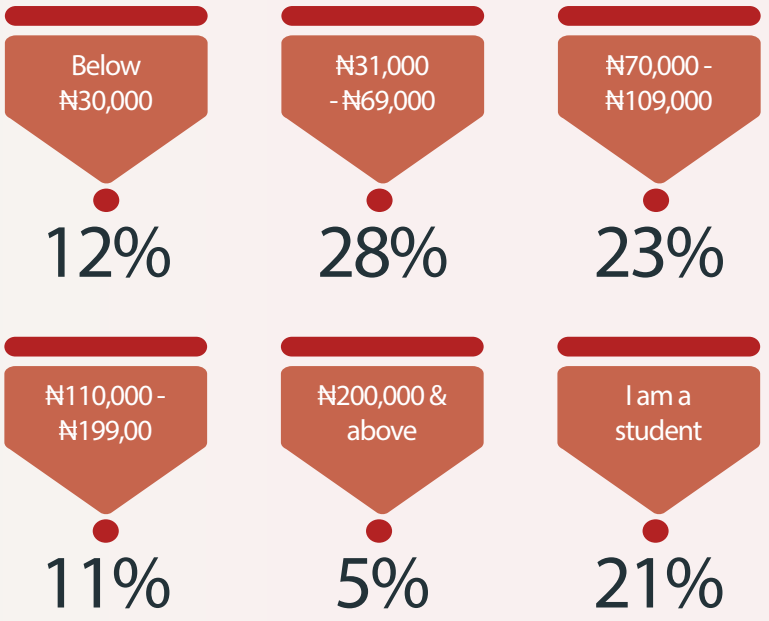


RELIGION DISTRIBUTION

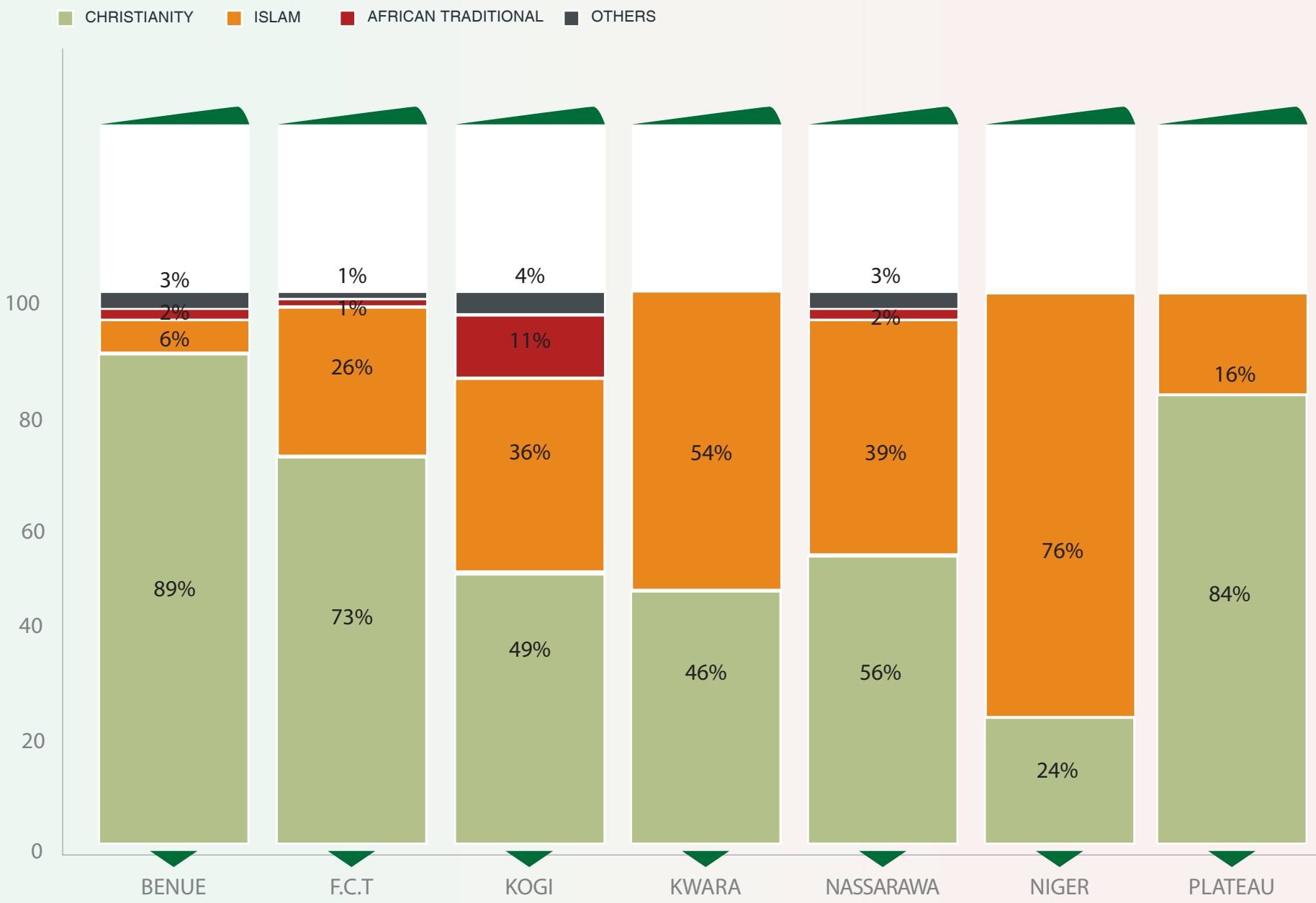
EMPLOYMENT STATUS



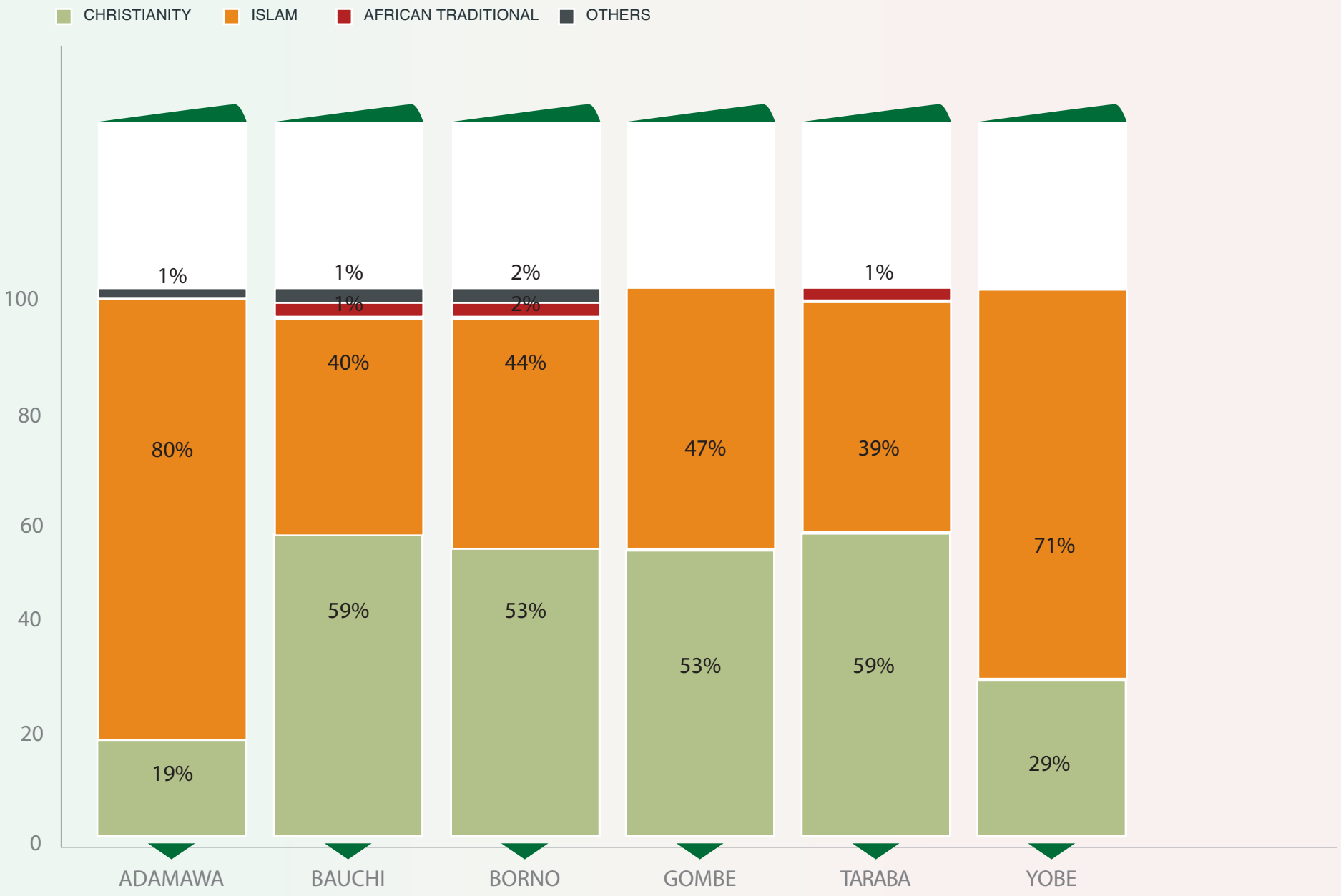
MONTHLY INCOME



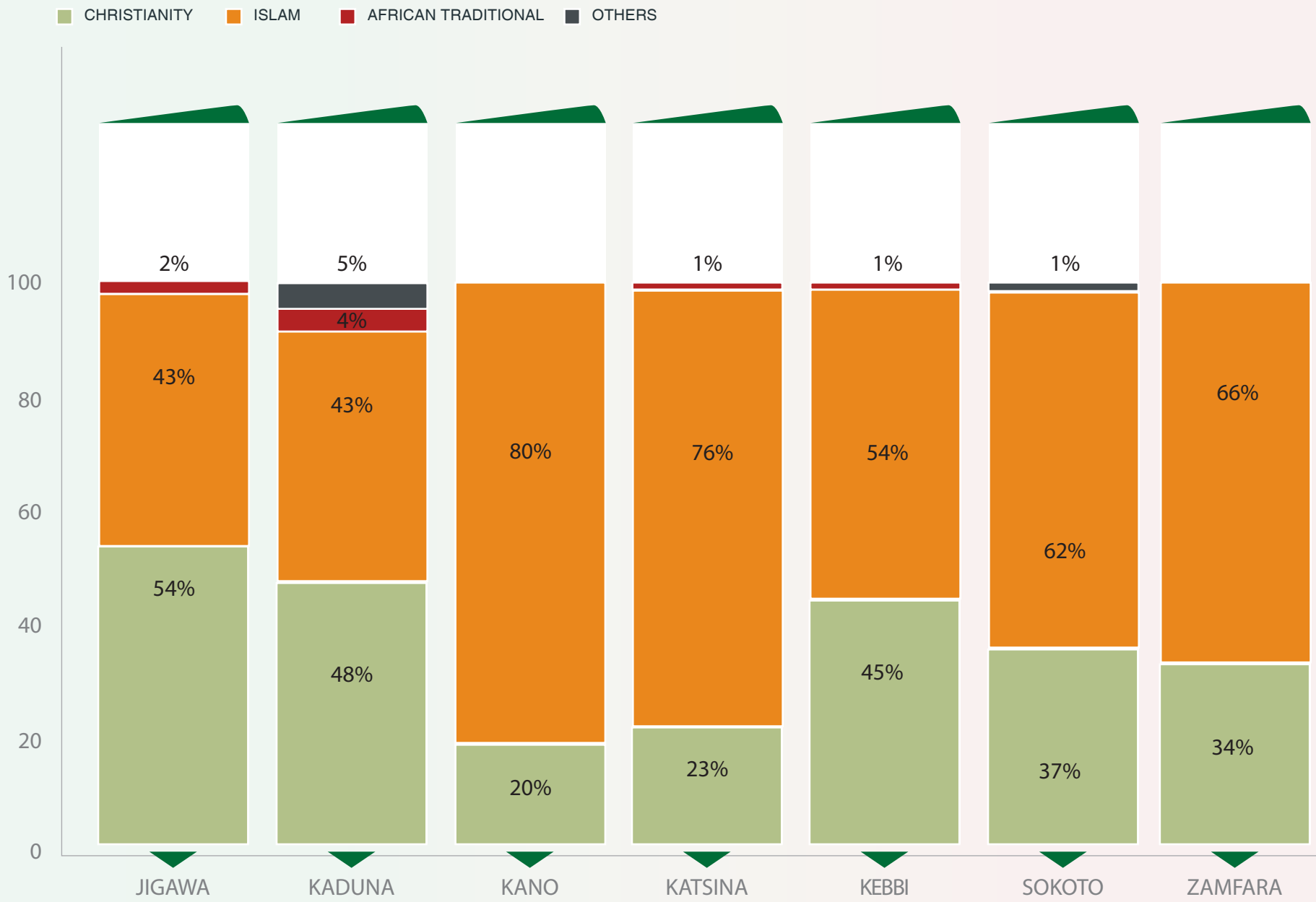
RELIGIOUS DISTRIBUTION (NORTH CENTRAL)



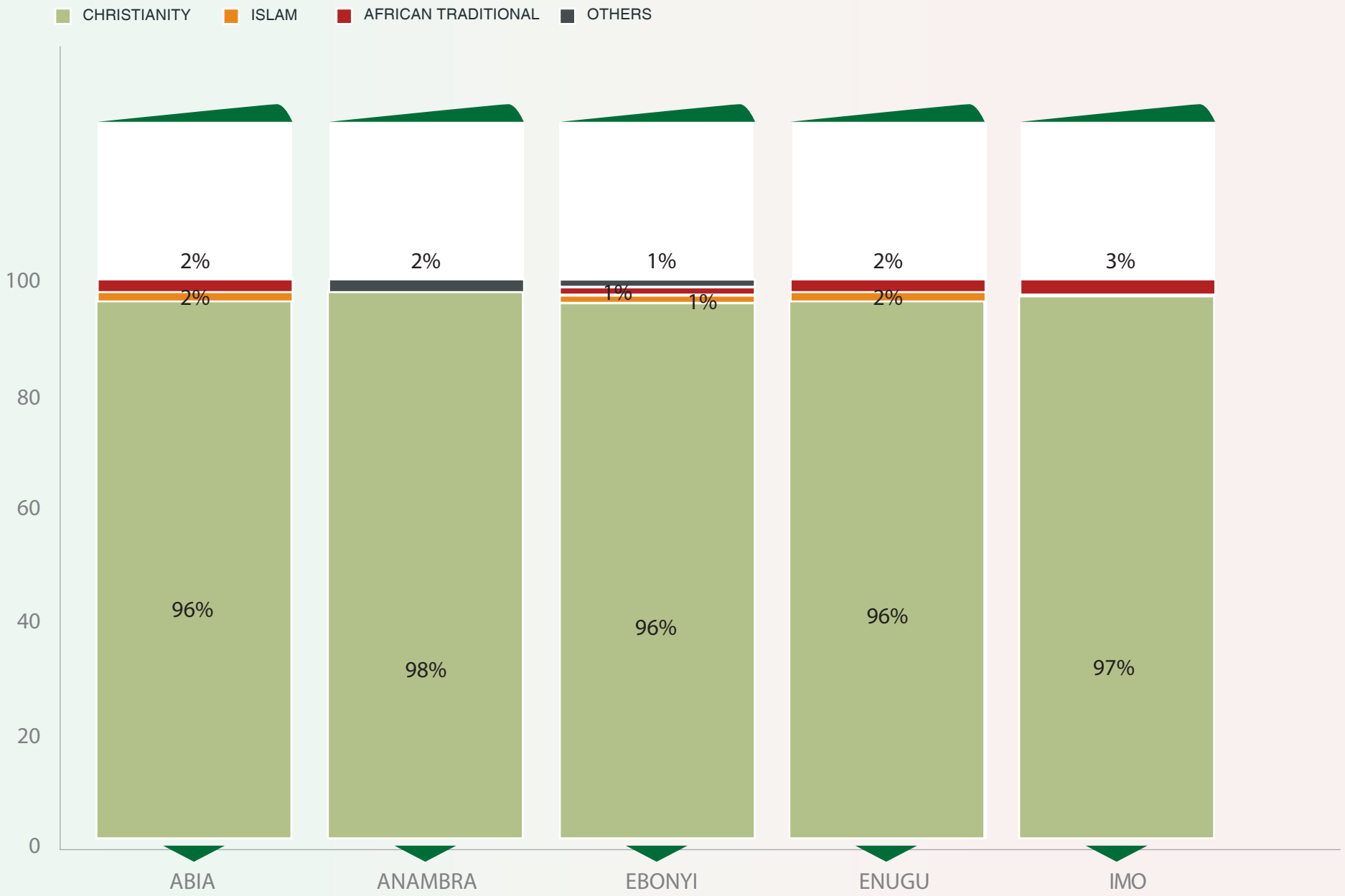
RELIGIOUS DISTRIBUTION (NORTH EAST)



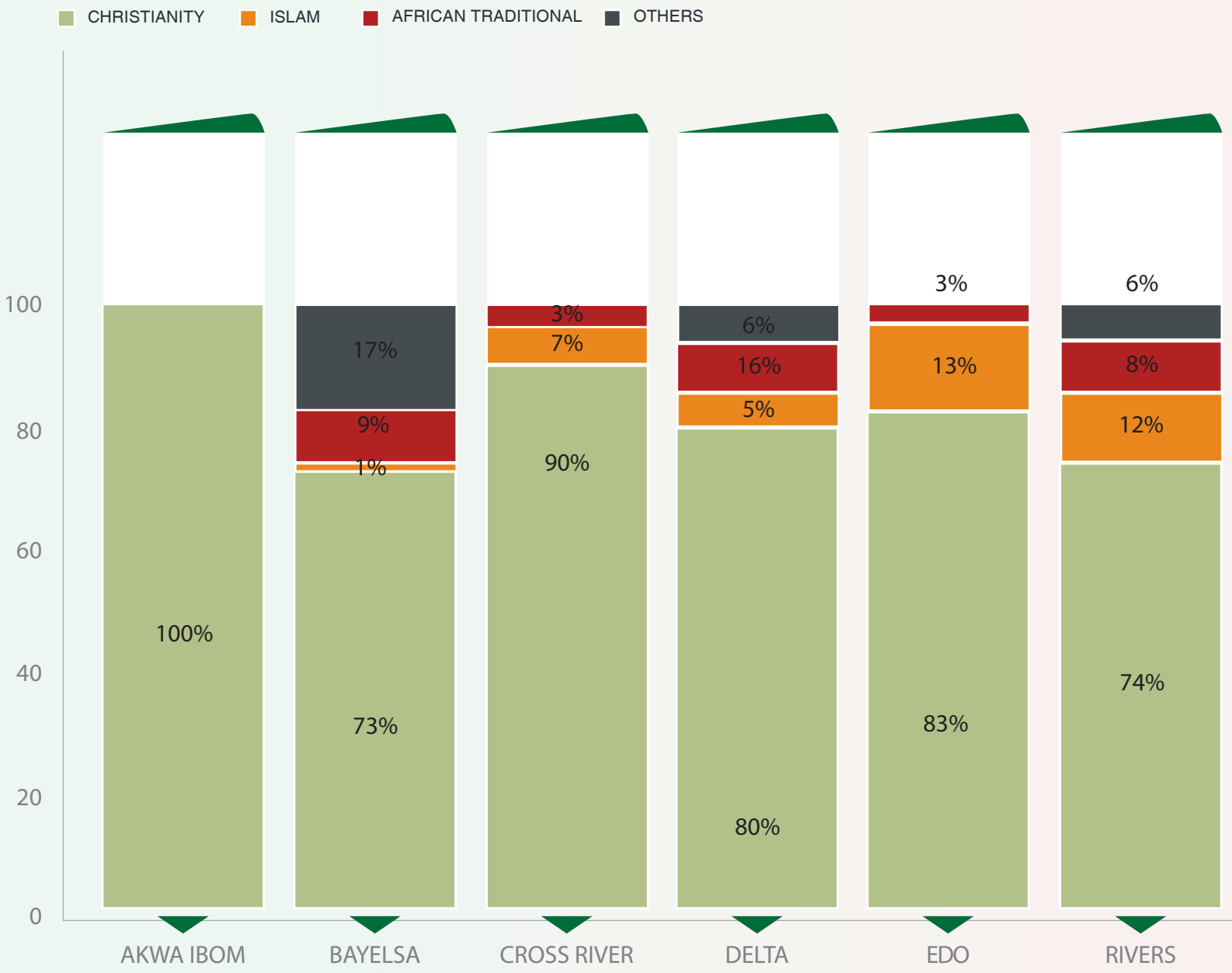
RELIGIOUS DISTRIBUTION (NORTH WEST)



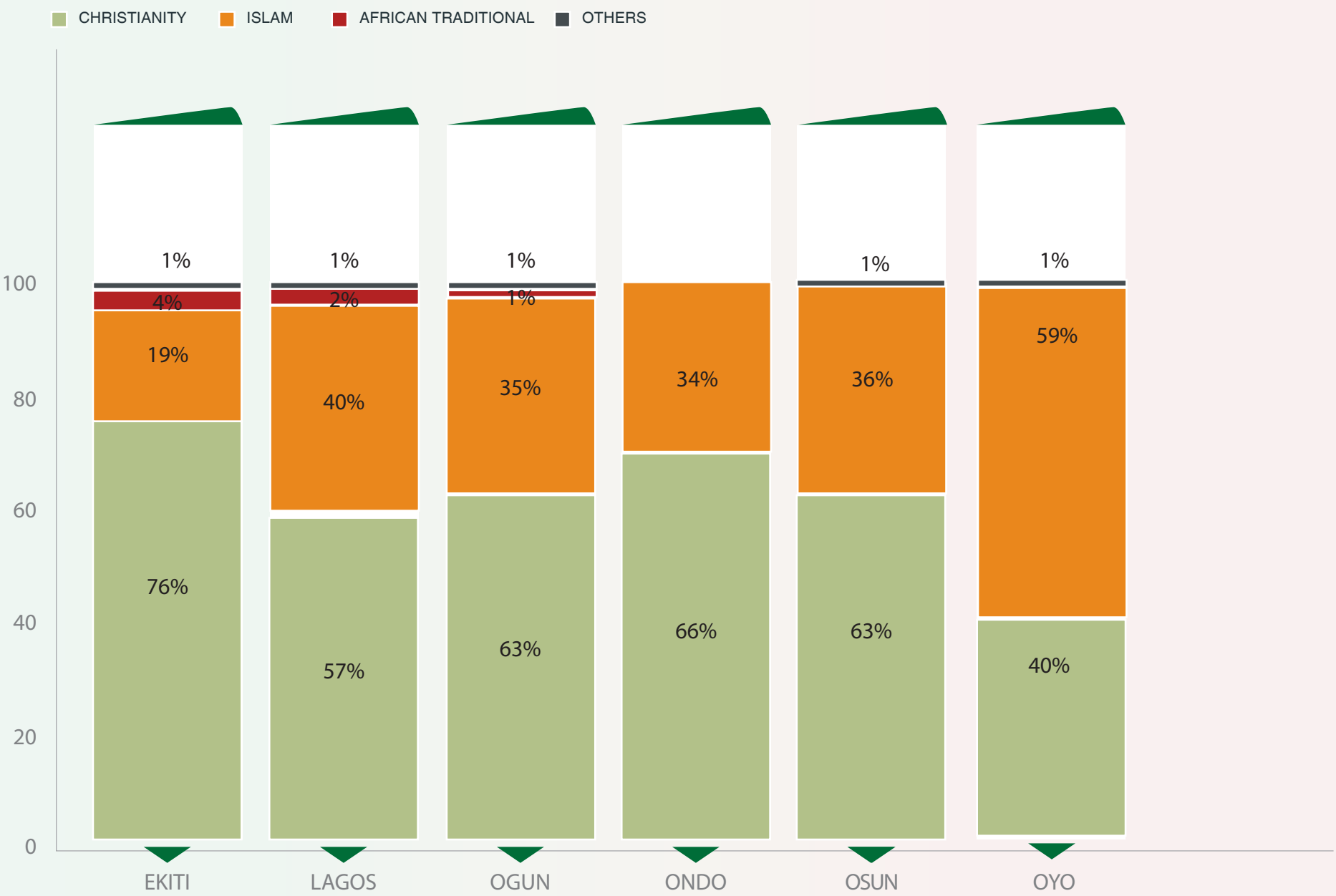
RELIGIOUS DISTRIBUTION (SOUTH EAST)

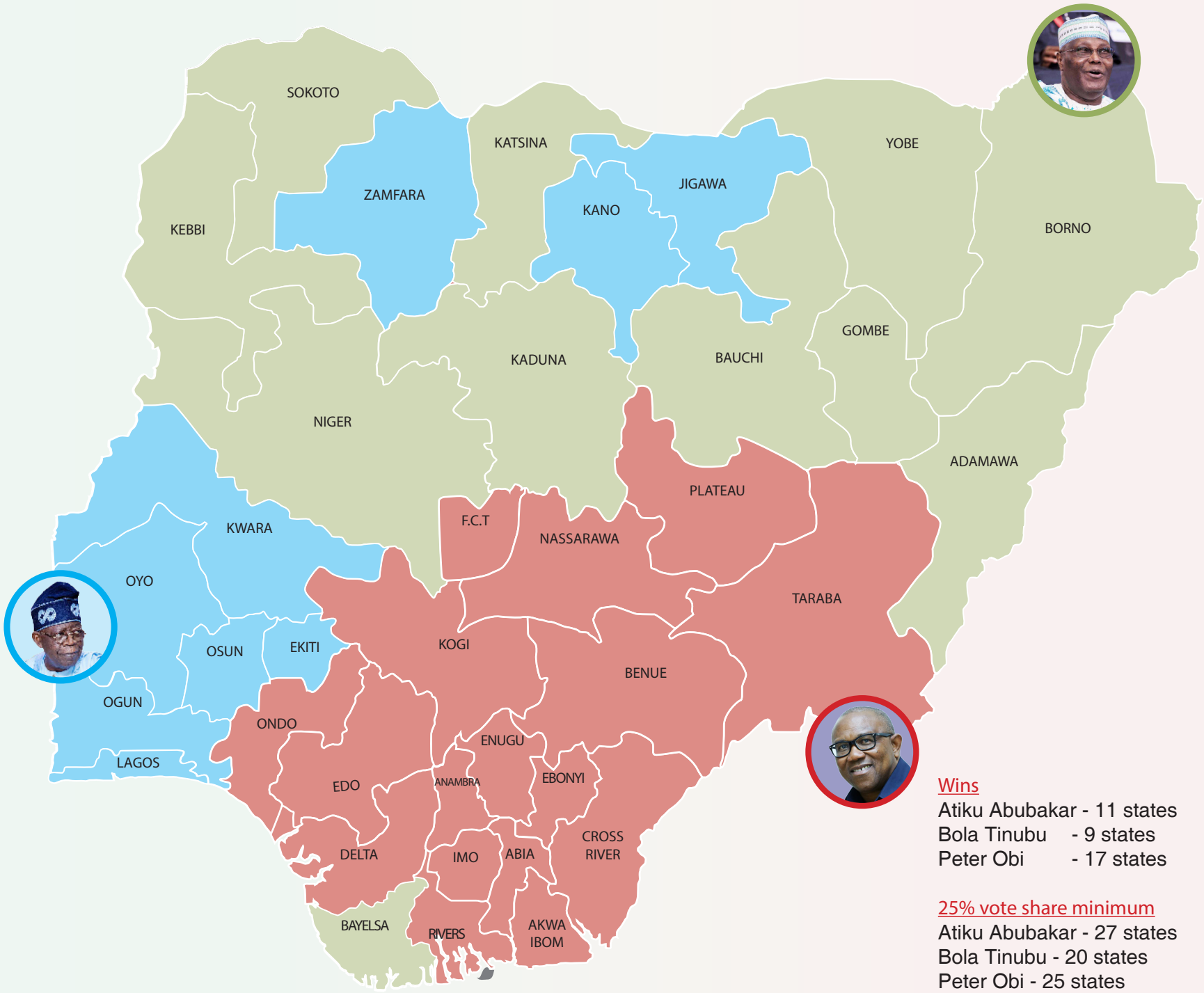


RELIGIOUS DISTRIBUTION (SOUTH SOUTH)



RELIGIOUS DISTRIBUTION (SOUTH WEST)





Wins

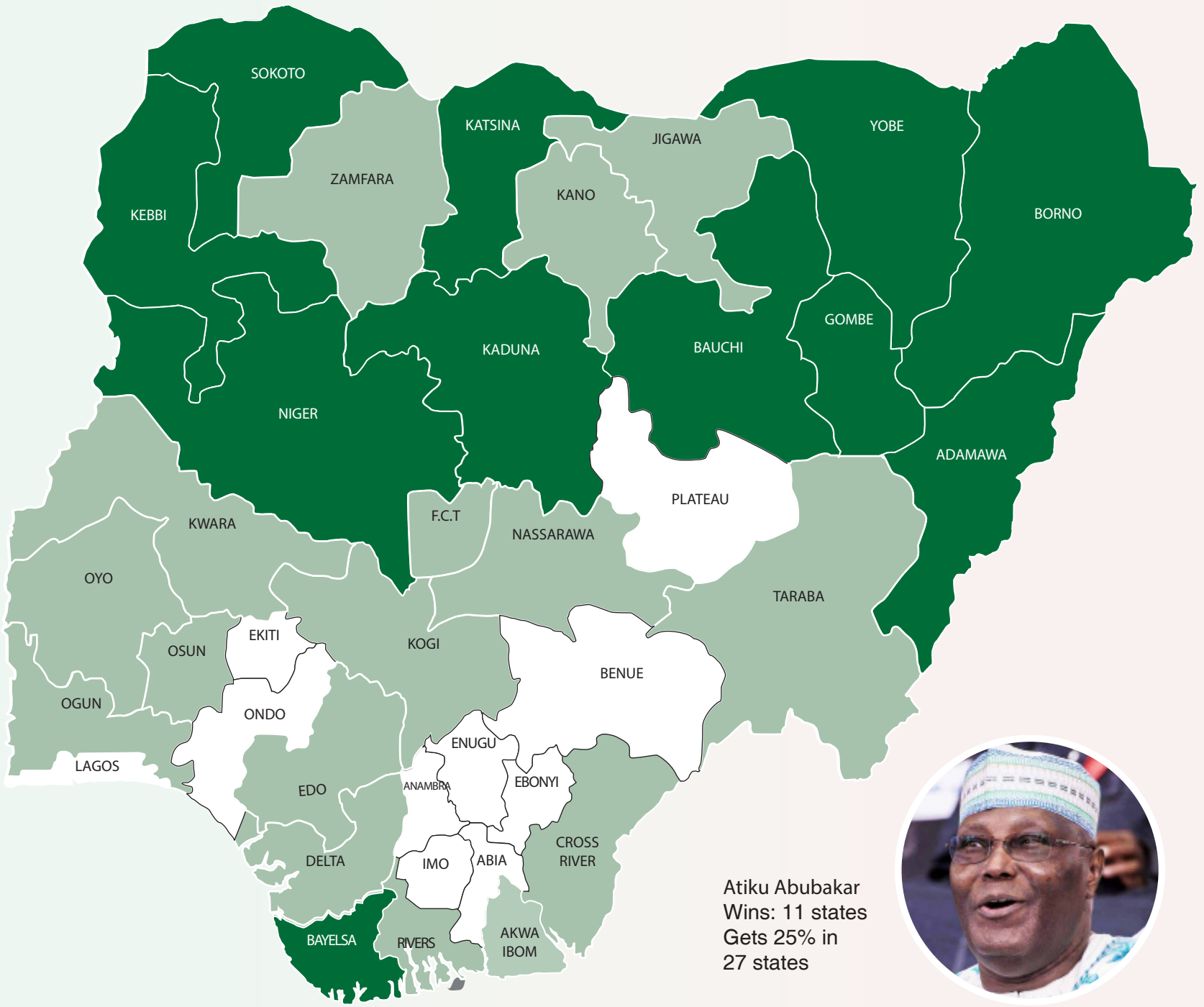
Atiku Abubakar - 11 states
Bola Tinubu - 9 states
Peter Obi - 17 states

25% vote share minimum

Atiku Abubakar - 27 states
Bola Tinubu - 20 states
Peter Obi - 25 states

SB MORGEN

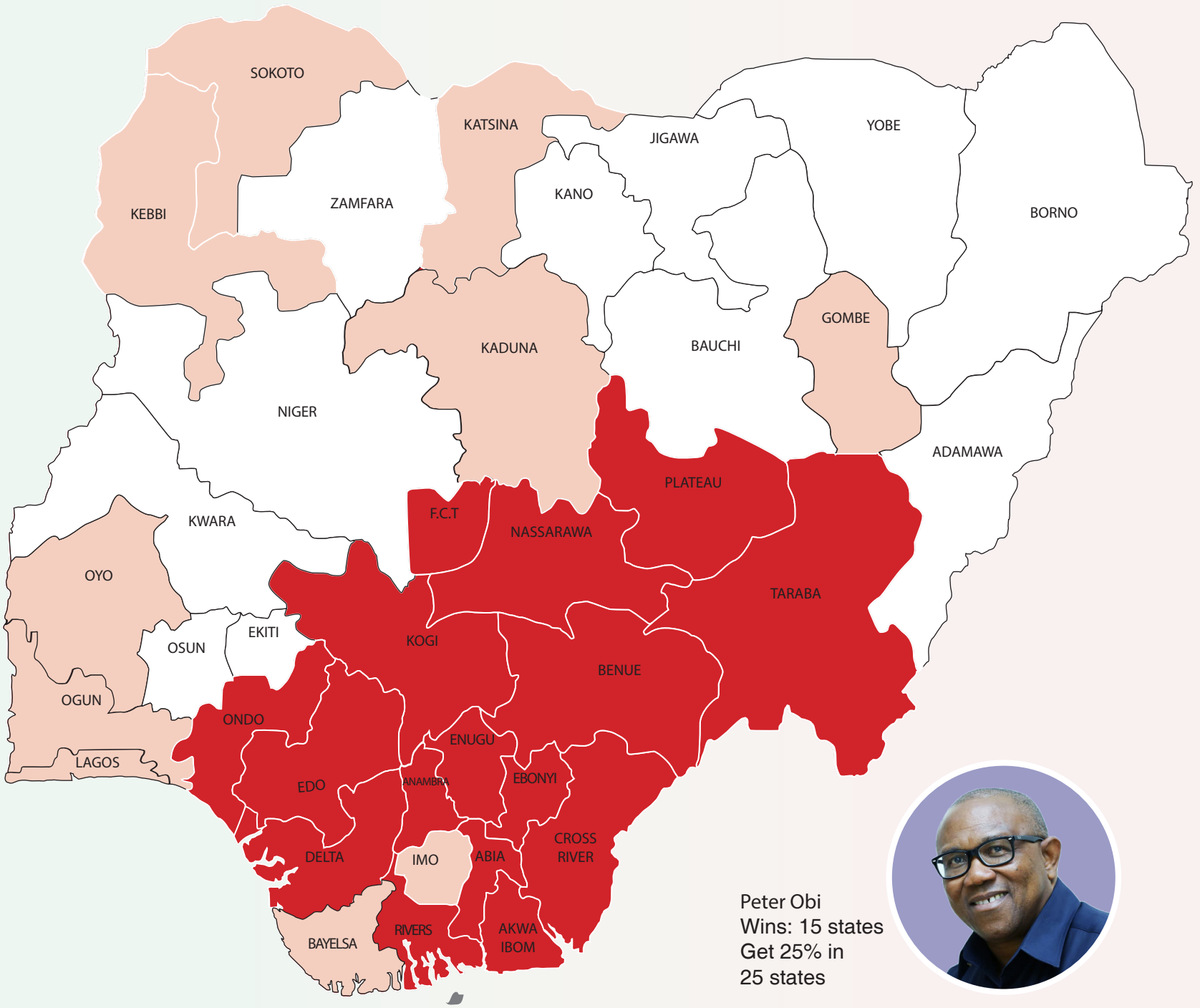
ATIKU'S PROJECTIONS



Atiku Abubakar
Wins: 11 states
Gets 25% in
27 states

SB MORGEN

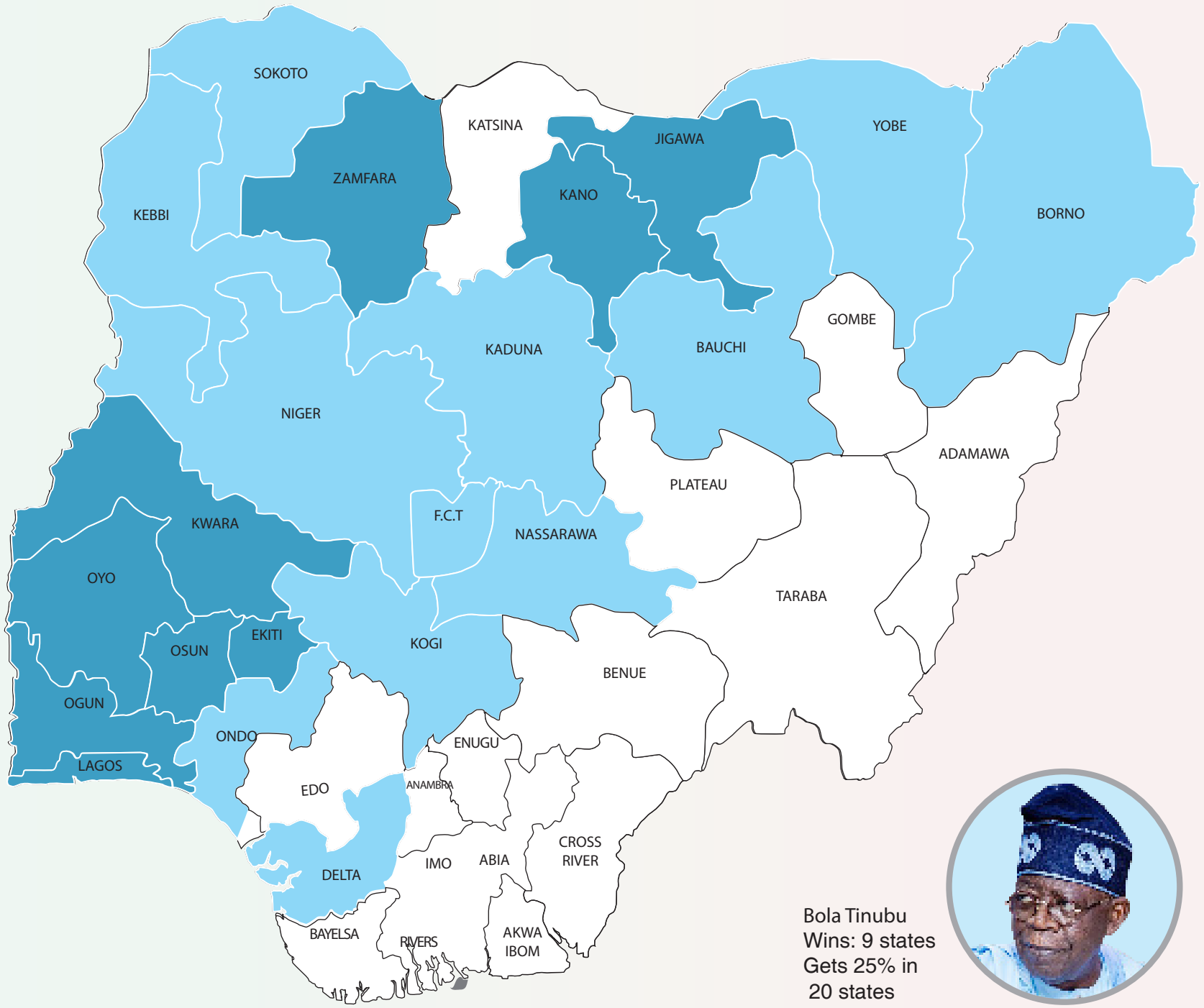
OBI'S PROJECTIONS



Peter Obi
Wins: 15 states
Get 25% in
25 states

SB MORGEN

TINUBU'S PROJECTIONS



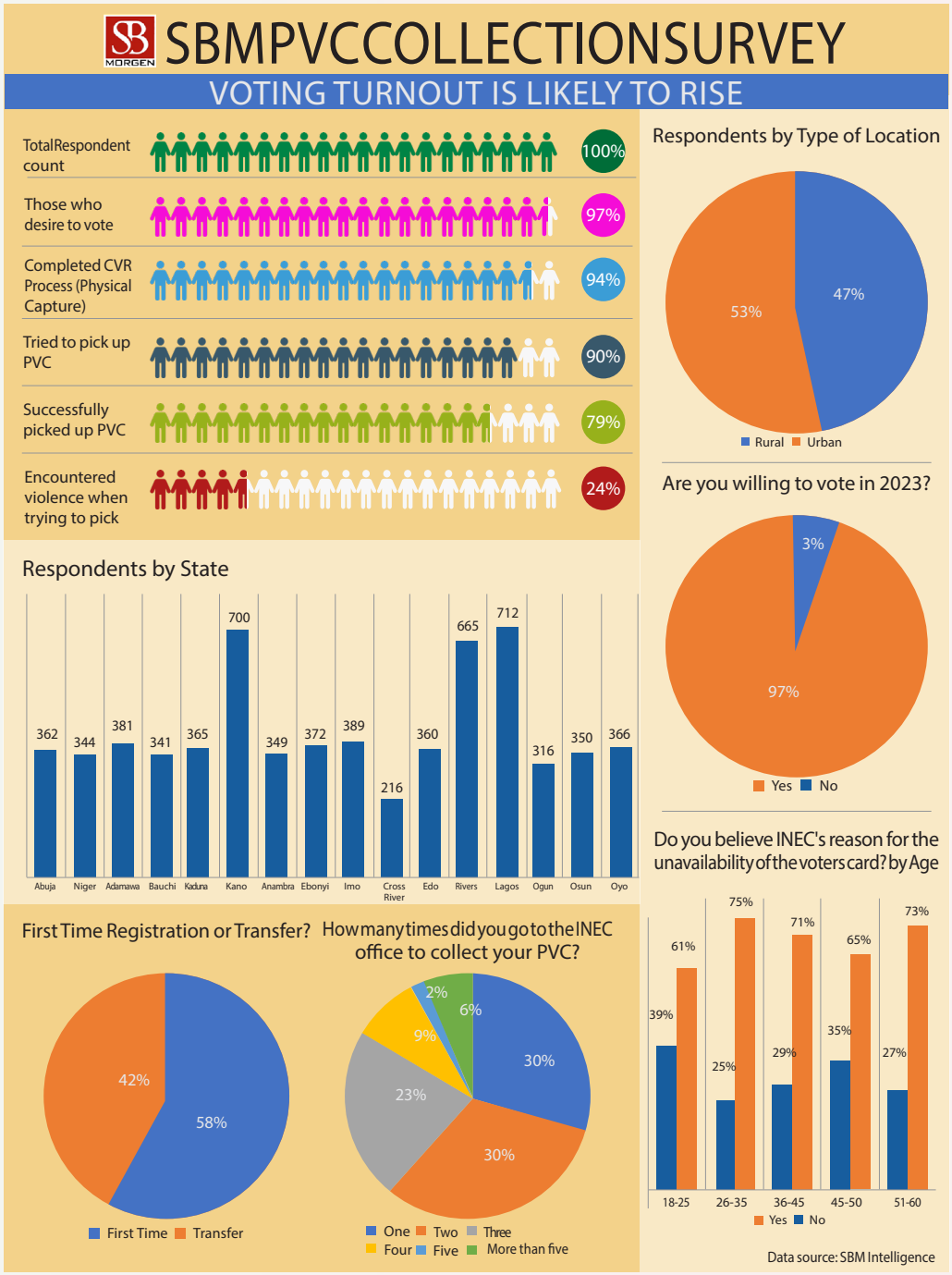
Bola Tinubu
Wins: 9 states
Gets 25% in
20 states

SB MORGEN

CONCLUSION

On 13 July 2022, SBM Intelligence published its first 2023 election survey, which indicated that at the time that a mere 41% of registered voters had collected their Permanent Voters Cards (PVCs). This implied a low turnout for the 2023 elections, an event that would have continued a declining voter turnout in Nigeria's General Elections since 2007. In October 2022, we surveyed potential voters, polling 7,000 respondents. The results of this survey were mapped with expected low turnout, and based on that, we published our first projection of likely candidate performance for the 2023 elections on 15 December 2022.

The assumption of low voter turnout has changed. On 9 January 2023,



we published the result of a 6,588-respondent survey which was conducted in the last working week before Christmas. The survey result showed a marked increase in PVC collection - 97% of respondents said they desired to vote, 94% completed the Continuous Voter Registration process, and 79% successfully picked up their PVCs. This has changed the dynamics of the 2023 elections as this vote, with the caveat of unforeseen events, will buck the trend of declining voter turnout. We anticipate a more than 50% turnout, driven by voter concerns about insecurity and the economy.

Voter awareness and education have played a unique role in driving voter interest and might represent the most important reason turnout in this election will reverse decades-long historical trends. From driving voter registration numbers through concerted campaigns via Short Message Service (SMS), radio, television, digital and social media channels during the Continuous Voter Registration (CVR) exercise to byte-size snippets elucidating on important practices such as PVC collections, identifying Polling Units within a given voter's registration district through the Independent National Electoral Commission (INEC)'s portal and ballot use and other aspects of voter conduct on Election Day, the use of technology has ensured a preponderance of information about the elections is available to the Nigerian voter. Enough is Enough Nigeria's #RSVP – Register | Select | Vote | Protect campaign remains one of the cornerstones of election-related civil society interventions. Like in past votes, was at the forefront of driving the 2021-2022 CVR participation and overall voter education. The organisation's PU Locator, launched in 2019, helped over 200,000 voters easily find their polling units on Election Day. In this cycle, the organisation has created a WhatsApp bot to ensure voters can find their polling unit straight from social media.

CONCLUSION

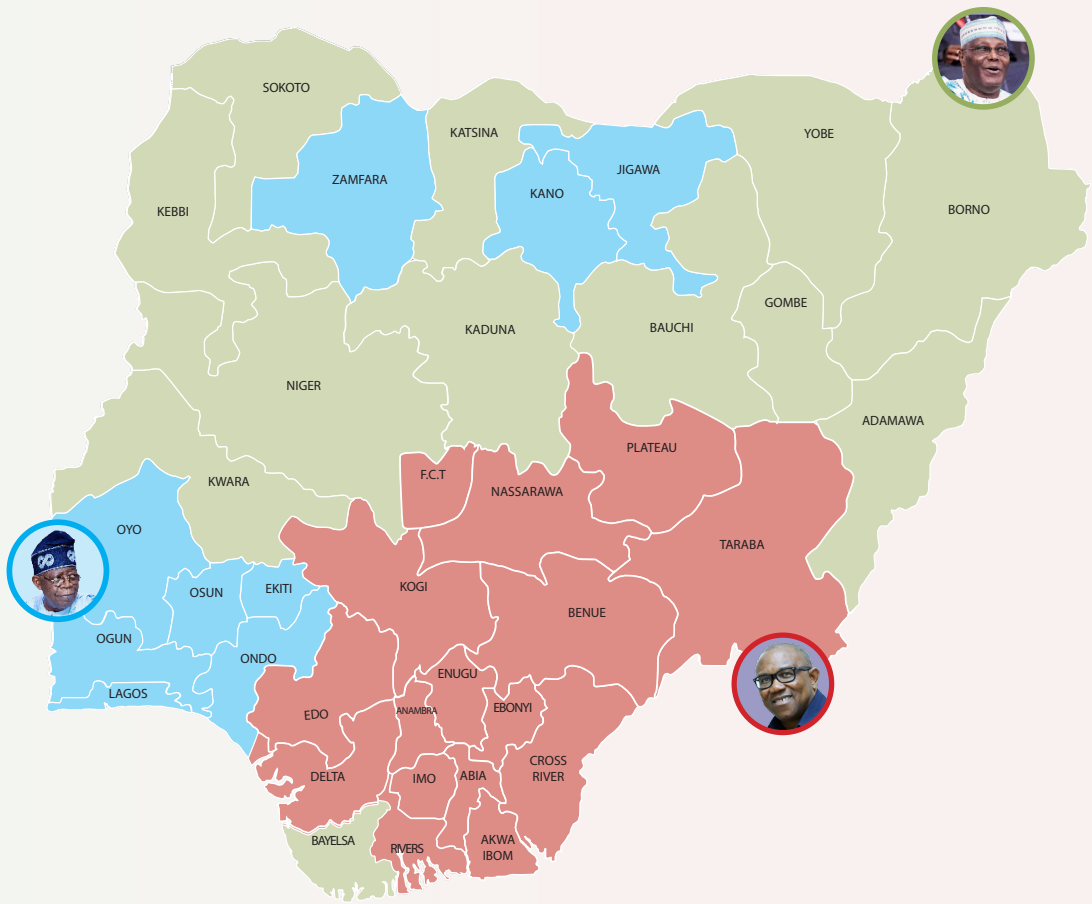
The path to Aso Rock has been riddled with permutations and scenario planning primarily because, for the first time since the era of parliamentary democracy in the 1960s, there are three competitive political blocs, broadly distributed along the old East, North and West regional divides with a smattering of swing states where they must compete for absolute votes and vote share. Considering heightened voter interest, the surge in voter awareness and education by political, institutional and civil society actors, the absence of a ruling incumbent in this cycle and an expected rise in participation, an analysis of the latest polling data does not provide us with a clear frontrunner - an unprecedented state of affairs in Nigerian electoral history.

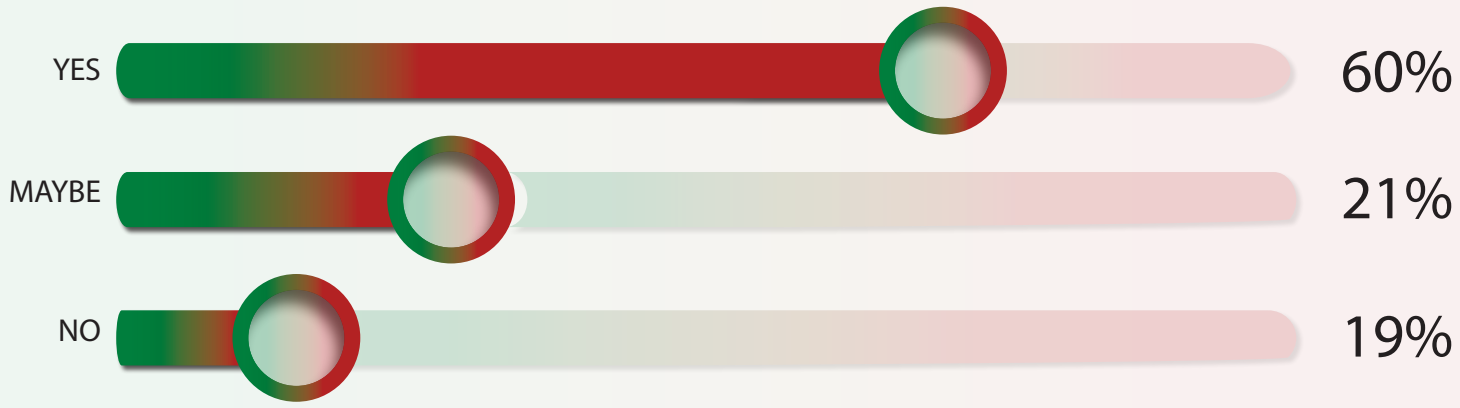
This is predicated on several factors. While many respondents were clear about who they think will win the presidential contest in their state, their candidate preferences were less than consistent. This might be because the candidate preference question imputes a sense of personal responsibility on the respondent to assess their candidate choice while the question on ‘who they think will win the contest’ shifts the assessment of the issue from the personal to more general terms. Furthermore, a plurality of registered voters told us that ethnicity and religion would play big parts in their choice of candidate. This runs contrary to recent commentary that suggests that this will be Nigeria’s first post-modern election, where voters will be squarely focused on the issues in determining their candidate choice. The data suggests otherwise and shows that this belief is region- and religion-agnostic. This might also be the primary reason why the ‘undecided’ pool of voters remains large in this poll and similar polls of this kind and has remained a significant factor throughout this election cycle. Nigerians also expect vote buying, despite recent technological and legislative changes that seek to curb its effect, to be a factor that colours this election. While an overwhelming majority of respondents claim that they won’t sell their vote, more than a third have experienced vote buying in the past, setting a possible stage for political actors to

run rings around the voting process.

The data suggest that two of the four leading candidates - the Labour Party's Peter Obi and the Peoples Democratic Party's Atiku Abubakar - could garner enough votes over a sufficient number of Nigerian states spread across four of the country's six geopolitical zones to be able to meet the constitutional requirement of scoring 25% in at least 24 states. This outcome, however, is complicated by the fact that the All Progressives Congress's Bola Tinubu is likely to do well in two of the country's biggest voting states - Kano and Lagos - and coupled with strong performances in a potpourri of heavily populated Southwest and Northwest states may have the inside track on winning the popular vote.

We, however, do not think he can reach the finish line in the race to 24. The New Nigeria Peoples Party's Rabiu Kwankwaso, while not projected to win any state, may garner sufficient votes in Kano and a smattering of states in the North Central and North West geopolitical zones to complicate the political maths for the other candidates on both the popular vote and the 'Road to 24' measures. For all of the reasons enumerated above, we are not confident enough to call the election for any candidates. We maintain our

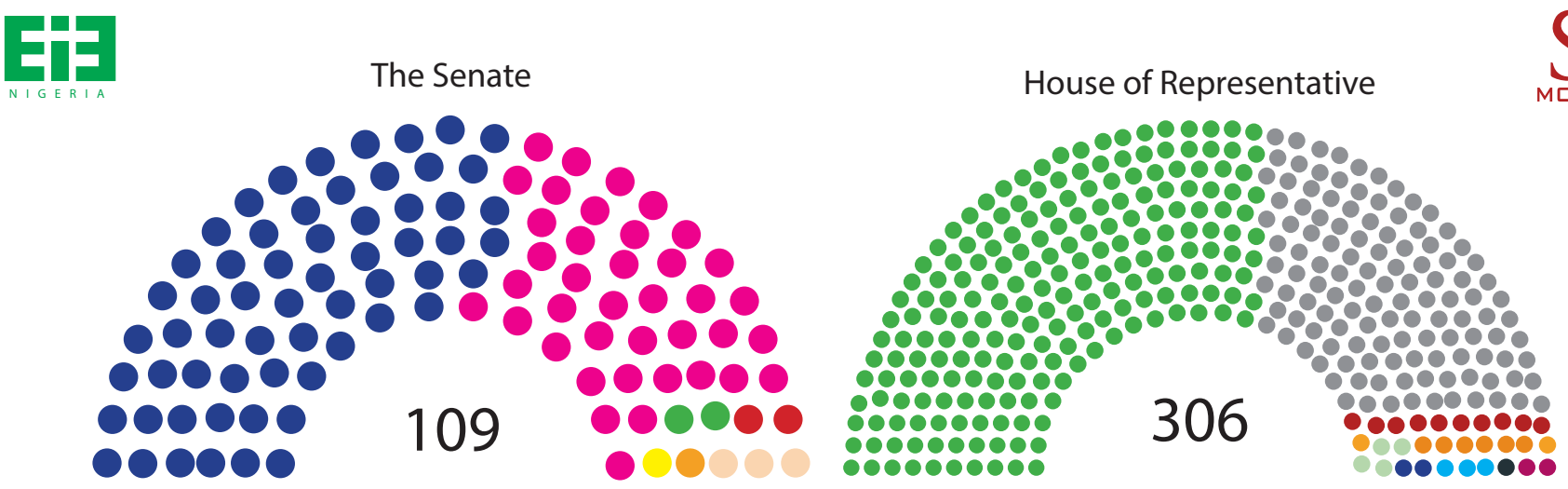




initial assessment from our two previous forecasts - Nigerians will need a second round to decide their next President definitively.

Another observation has to be about institutional trust. Nigerians appear to be waning in their confidence in INEC's ability to deliver a free, fair and credible election. While the electoral body has promised to deliver the most credible elections yet, important gaps remain between the work that election managers have put into organising this vote and the public's perception of that work. This important relationship between voters and vote managers appears to be impacted by three major factors - the possible impact that insecurity may have on Vote Day, the public's awareness of a new electoral law and the voter biometric accreditation process. Just 60% of voters say they trust INEC to conduct a credible exercise. Younger voters were slightly less likely to trust the umpire than other demographic groups. Only 66% of Nigerian voters say they know the Electoral (Amendment) Act 2022, a law that came into effect a year away from the presidential elections. Critically,

wealthier and older voters broadly report higher levels of electoral law awareness than younger voters and students, who comprise most voters. Of concern is the fact that only 4 in 10 voters say the new law will have a positive impact on the elections. The recent judicial pronouncement and associated commentary surrounding the Bimodal Voter Accreditation System (BVAS) - which will be deployed nationally for the first time after being trialled in three off-cycle state elections - appears to have sullied voter enthusiasm. A full third of Nigerian voters report not having any knowledge of BVAS. Again, older and wealthier voters were more likely to be aware of BVAS. Only 42% of voters know the fallback procedure for voting in the event of technical challenges with BVAS, a major concern considering that the devices need a strong 3G or basic 4G connection to assure optimal performance. As the contest draws near, INEC and supporting partners need to channel a lot of their energies over the next few weeks to ramp up positive voter appreciation of the authentication process and appeal/ remedial procedures in the event of technical glitches.



A final observation: one thing that jumped out is the declining interest in down-ballot elections. Most citizens are focused on the presidential election, owing to the power arrogated to the centre by the 1999 Constitution. All respondents to this survey answered questions about the presidential elections, while only 35% of respondents responded to questions about the governorship elections. The interest in state legislature elections was 14%. This drop-off is unacceptable. Citizens must recognise the significance of these other levels of elections as they play a crucial role in determining the quality of life within their communities. Despite this, we attempted to model for the National Assembly elections. Our model points to a Senate dominated by the APC and a House of Representatives with the PDP in the majority, pointing to the potential for legislative gridlock in the 10th National Assembly.

ABOUT SBM

SBM Intelligence is an Africa-focused geopolitical research and strategic communications consulting firm that addresses the critical need for political, social, economic and market data, and big data analytics. We employ various methods of data collection.

Our Data Collection Methodology team advises on data collection methods for all ONS social and business surveys. With clients both within the business and the wider government community, we aim to provide expert advice on data collection procedures and carry out research leading to improvements in survey quality. Since 2013, we have provided data analytics and strategic communication solutions to clients across various sectors in Nigeria, Ghana, the Ivory Coast, Kenya, South Africa, the UK, France and the United States.

ABOUT ENOUGH IS ENOUGH NIGERIA

Enough is Enough (EiE) Nigeria (aka The EiE Project) was set up as the next step from two citizens' protests in 2010 on our missing President, killings in Jos & fuel scarcity – March 16 protest to the National Assembly & April 13 protest to the Lagos State Governor. Based on the mobilisation done for the protests, it started as a loose network of individuals and organisations committed to changing the dynamics of accountability to citizens by public officials. The protests were organised primarily via email, SMS, Twitter, Blackberry Messenger and Facebook. It was the beginning of what would be EiE's heavy reliance on technology as a tool of education, engagement and mobilisation. EiE began operations in January 2011 with grants from the Omidyar Network and MacArthur Foundation. It was formally registered in July 2012.

EiE continues to be a loose network of individuals and organisations committed to instituting a culture of good governance and public accountability in Nigeria through active citizenship. EiE's #RSVP – Register | Select | Vote | Protect is Nigeria's longest-running get-out-the-vote campaign. It is a play on the popular acronym and the idea is that the four letters represent the activities young people, and indeed all Nigerians, need to complete to impact governance in Nigeria positively.

EiE was an integral part of the #OccupyNigeria movement in 2012; co-leads the #OpenNASS campaign and launched the #OfficeOfTheCitizen campaign to mark its 5th anniversary in 2015. It published a collection of essays to mark its decade plus of impact in 2022 - Footprints: Past | Present | Future.