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Jokowi's lead over Prabowo down again in March

Indonesian President Joko Widodo's lead over Prabowo Subianto has again narrowed slightly in March but Jokowi is still on track for a clear victory at this month's Presidential Election.

President Jokowi has the support of 56.5% of Indonesian electors in March, down 0.5% from February and still well ahead of opponent Prabowo Subianto up 0.5% to 43.5% according to the latest Roy Morgan Poll on the Indonesian Presidency conducted in March 2019 with 1,102 Indonesian electors aged 17+.

The continued strong support for President Joko Widodo translates into significant lead for his party the PDI-P. The PDI-P has the support of 39% (down 3.5% since February) of Indonesians for the concurrent Indonesian legislative elections in a few weeks. Support for Gerindra, the main opposition party of Presidential opponent Prabowo Subianto was unchanged at 21% in March.

The remaining 40% of support is spread between a multitude of parties contesting the elections.

Jokowi leads in Central & East Java while Prabowo has the lead in Jakarta, West Java & Sulawesi

Analysing the Roy Morgan Indonesian Presidential Poll by location shows Jokowi leads strongly in rural areas such as Central Java, East Java and Northern Sumatra while Prabowo is strongest in Jakarta, West Java, Southern Sumatra and the islands of Sulawesi and Kalimantan. Overall, in rural areas the preference is clearly in favour of President Jokowi (63%) cf. Prabowo (37%).

Urban areas are far more competitive based on Prabowo's strong performance in the capital of Jakarta and surrounding areas in West Java including Banten. Prabowo has closed the gap in urban areas by 6% in the last month however Jokowi maintains a narrow advantage: President Jokowi (51.5%) cf. Prabowo (48.5%).

Support for Jokowi is strongest in his home province of Central Java with President Jokowi capturing two-thirds of support: Jokowi (66%) cf. Prabowo (34%). Support for the President is even stronger in the neighbouring provinces of East Java and Bali: Jokowi (78%) cf. Prabowo (22%).

Jokowi also leads handily in the northern provinces of Sumatra: Jokowi (58.5%) cf. Prabowo (41.5%).

Support for challenger Prabowo Subianto is strong in the key provinces of West Java, Banten and the capital Jakarta where Prabowo (52.5%) leads Jokowi (47.5%). Despite trailing Prabowo support for Jokowi in Jakarta, West Java and Banten has increased in March from a month ago.

In the southern provinces of Sumatra which neighbour Prabowo's home areas of West Java there is also a clear advantage for the challenger with Prabowo (56.5%) clearly ahead of Jokowi (43.5%).

Prabowo has also gained an advantage on the islands of Sulawesi and Kalimantan. On the island of Sulawesi Prabowo (61%) has a clear advantage over Jokowi (39%) while Prabowo (59.5%) also leads Jokowi (40.5%) by a significant margin on the island of Kalimantan.

Women's support for President Jokowi grows while men's support increases for Prabowo

Analysing by Gender shows Jokowi's lead is strongest amongst women and has increased from a month ago. Women's support for Jokowi has grown 2% to 60% in March compared to Prabowo on 40% (down 2%). Support for Jokowi amongst men is down 3% to 53.5% in March while support for Prabowo is up 3% to 46.5%.

Support for Jokowi is strongest amongst Indonesians aged 25-34

Analysing the support for each candidate by age shows Jokowi with strong leads amongst Indonesians aged 25-34, 35-49 and 50+ years old. However, Prabowo's appeal is strongest among younger Indonesians with the two candidates impossible to split for Indonesians aged 17-24 years old.

- 17-24yr olds: Jokowi 50% (down 2% since February) cf. Prabowo 50% (up 2%);
- 25-34yr olds: Jokowi 62% (up 1.5%) cf. Prabowo 38% (down 1.5%);
- 35-49yr olds: Jokowi 56% (down 1.5%) cf. Prabowo 44% (up 1.5%);
- 50+yr olds: Jokowi 57.5% (up 0.5%) cf. Prabowo 42.5% (down 0.5%).

Legislature Voting Intention – March 2019

Today's Roy Morgan Poll shows Jokowi's political party the PDI-P with support down 3.5% to 39% in March although still holding a substantial lead over Gerindra, the party of Presidential opponent Prabowo now with 21% support, unchanged on a month ago.

The PDI-P and Gerindra were the only parties that qualified to stand candidates in the Presidential Election due to the level of support the parties were able to gather in the Indonesian legislature. According to new Indonesian laws legislated in 2017 a minimum of 20% of the seats in the legislature are required to support the nomination of a Presidential candidate.

Supporting PDI-P candidate Jokowi are coalition partners Golkar 7.5% (up 1.5% since February), PPP 3% (up 1%), Hanura 1% (up 0.5%), NasDem 1% (unchanged) and PKB 4.5% (down 0.5%). Support for the PDI-P led coalition fell 1% to 56% since February.

Supporting Gerindra candidate Prabowo are coalition partners Demokrat 6% (up 1%), PKS 6% (up 1%) and PAN 3.5% (down 1.5%). Support for the Gerindra led coalition is now at 36.5%, up 0.5% since February.

Michele Levine, Chief Executive Officer, Roy Morgan says with only two weeks to go before Indonesia's Presidential Election President Jokowi holds what looks like an insurmountable lead as he seeks a second five-year term:

"Today's Roy Morgan Poll on Indonesian voting intentions at this month's Presidential and legislative elections show incumbent President Jokowi remains on track to win a second term as Indonesian President with Jokowi's support now at 56.5% (down 0.5% since February) still well ahead of opponent Prabowo Subianto up 0.5% to 43.5%.

"President Jokowi's PDI-P led Majority Coalition continues to hold an election winning lead and on track to win a majority of seats in the Indonesian legislative elections held the same day. Support for the PDI-P led Majority Coalition is down 1% to 56% in March, while support for the Gerindra led Minority Coalition is up 0.5% to 36.5%.

"Jokowi's support is again strongest in rural Indonesia with Jokowi preferred by 63% of rural Indonesians, up 2.5% on a month ago compared to 37% (down 2.5%) that support Prabowo. However, Prabowo has closed the gap in Indonesia's urban areas and is now supported by 48.5% (up 3% on a month ago) of Indonesians in urban areas compared to 51.5% (down 3%) that support Jokowi.

"This support for Prabowo is strongest in Indonesia's capital city of Jakarta and the surrounding provinces of West Java and Banten along with the provinces of Southern Sumatra while Jokowi is strongest in Central Java, Yogyakarta, East Java and Bali. Over three-quarters of electors in East Java and Bali support President Jokowi.

"Although support for Prabowo has now increased for two straight months time is running out for the challenger to close the gap on President Jokowi with elections due to be held in just over two weeks on Wednesday April 17."

Electors were asked: "If general elections for members of DPR were being held today, for which party's candidate would you vote?" And for the Presidential poll "I am going to show you a list of candidates for President and Vice-President. Which one would you be most likely to vote for as President and Vice-President in the next election?"

Finding No. 7934 - This Morgan Poll on Indonesian Presidential and Parliamentary voting intention was conducted from mid-February 2019 through to mid-March 2019 with an Indonesian-wide cross-section of 1,102 electors aged 17+. Face-to-face interviews were conducted in 17 provinces, with effort made to ensure a balanced sample representing the electorate both geographically and demographically. Just over 6% of electors in both polls couldn't say who they support.

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Indonesian Presidential Voting Intention

Presidential Candidates	Indonesian Presidential Election – July 2014	December 2018	January 2019	February 2019	March 2019
	%	%	%	%	%
Jokowi (Joko Widodo)	53	59.5	58	57	56.5
Prabowo Subianto	47	40.5	42	43	43.5
TOTAL	100	100	100	100	100

Joko Widodo's Vice-Presidential running mate is Prof. Dr. K.H. Ma'rul Amin. Prabowo Subianto's Vice-Presidential running mate is Sandiaga Uno.

Indonesian Presidential Voting Intention – By Urban/Rural

Presidential Candidates	Electors	Urban/Rural	
		Urban	Rural
	%	%	%
Jokowi (Joko Widodo)	56.5	51.5	63
Prabowo Subianto	43.5	48.5	37
TOTAL	100	100	100

Indonesian Presidential Voting Intention – By Province/ Island*

Presidential Candidates	Electors	By Province/ Island*						
		*Jakarta & West Java	East Java & Bali	Central Java & Yogyakarta	*S'thern Sumatra	*N'thern Sumatra	*Island of Sulawesi	*Island of Kalimantan
	%	%	%	%	%	%	%	%
Jokowi (Joko Widodo)	56.5	47.5	78	66	43.5	58.5	39	40.5
Prabowo Subianto	43.5	52.5	22	34	56.5	41.5	61	59.5
TOTAL	100	100	100	100	100	100	100	100

*Designations: Jakarta & West Java includes Banten; Southern Sumatra includes Southern Sumatra (Sumatera Selatan) and Lampung; Northern Sumatra includes Northern Sumatra (Sumatera Utara), West Sumatra (Sumatera Barat) and Riau. Island of Sulawesi includes Southern Sulawesi (Sulawesi Selatan) and Northern Sulawesi (Sulawesi Utara); Island of Kalimantan includes East Kalimantan (Kalimantan Timur), Southern Kalimantan (Kalimantan Selatan) and West Kalimantan (Kalimantan Barat).

Indonesian Presidential Voting Intention – By Gender & Age

Presidential Candidates	Electors	Gender		Age			
		Male	Female	17-24	25-34	35-49	50+
	%	%	%	%	%	%	%
Jokowi (Joko Widodo)	56.5	53.5	60	50	62	56	57.5
Prabowo Subianto	43.5	46.5	40	50	38	44	42.5
TOTAL	100	100	100	100	100	100	100



Indonesian Legislative Voting Intention

Political Parties	Indonesian Legislative Election April 2014	December 2018	January 2019	February 2019	March 2019
	%	%	%	%	%
PDI-P	19	40.5	40.5	42.5	39
Gerindra	12	21.5	25	21	21
Golkar	15	3	5.5	6	7.5
Demokrat	10	7	6	5	6
PKS	7	4.5	5	5	6
PKB	9	6.5	3.5	5	4.5
PAN	8	4.5	4.5	5	3.5
PPP	6	2	1	2	3
Perindo	n/a	2	1	1	2
NasDem	7	1.5	1.5	1	1
Garuda	n/a	1	1	1	1
Hanura	5	1	0.5	0.5	1
Others*	2	5	5	5	4.5
TOTAL	100	100	100	100	100

*Other parties polled less than 0.5% of the vote each and include PBB, PKPI, PSI Berkarya and Others.

Indonesian Legislative Voting Intention - Coalitions

Political Parties	Indonesian Legislative Election April 2014	December 2018	January 2019	February 2019	March 2019
	%	%	%	%	%
PDI-P led Majority Coalition*	61	54.5	52.5	57	56
Gerindra led Minority Coalition*	37	37.5	40.5	36	36.5
Others*	2	8	7	7	7.5
TOTAL	100	100	100	100	100

*PDI-P led Majority Coalition also includes Golkar, PKB, NasDem, PPP and Hanura. Gerindra led Minority Coalition also includes Demokrat, PKS and PAN. Other parties include Perindo, Garuda, PBB, PKPI, PSI, Berkarya and Others.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. The following table gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. The figures are approximate and for general guidance only, and assume a simple random sample. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
1,000	±3.0	±2.7	±1.9	±1.3
2,000	±2.1	±1.9	±1.3	±1.0
3,000	±1.9	±1.7	±1.2	±0.8