

General Election 2018

Poll of Polls

A forecast pending the decision of the 12%
undecided voters

Computed by Gallup Pakistan

As per last available measurement from
5 polling organizations including
Gallup Pakistan

July 24, 2018



HIGHLIGHT

The poll of polls computed by Gallup Pakistan constitutes the average of poll findings by five different polling organizations.

Released on July 24, a day ahead of the polling day the following are the Highlights and key findings:

1. PTI and PML-N are running neck and neck, with **PTI ahead in the national** vote bank and **PML-N ahead in the crucial province of Punjab.**

2. The poll of polls indicates that the dramatic rise of PTI at both national and provincial level is mostly on account of winning over voters of PML-N as well as other parties.

Thus, while the vote bank of PML-N has declined nationally by, 3-6% depending on the polls considered, from its vote bank of GE 2013, the PTI vote bank during the same time period has nearly doubled from its score of 17% in 2013. The rise of PTI is explained both by **decline of PML-N** as well as **decline in votes of other parties** (as well as share of Independents in the voting pattern).

3. In Pakistan's First Past the Post electoral system, the ascent of PTI to catch PML-N could cause a major upset for the parliamentary seat distribution in Punjab. This will, in turn, create **two key competitors for forming the federal government.** In 2013, PML-N was marked by a head by nearly 100 seats more than the runner up in the National Assembly

4. The national average of expected votes computed by Gallup Pakistan ranges between 30 to 32% for PTI; 27% to 30% for PML-N; and 17% to 20% for PPP. (please see disclaimers on last page with respect to this forecast).



EXPECTED OUTCOME AT NATIONAL AND SUB NATIONAL LEVEL IN GE 2018 In Terms Of Votes

FEDERAL GOVERNMENT	PTI TO BE LARGEST PARTY CLOSELY FOLLOWED BY PML-N in terms of votes
PUNJAB	PML-N WOULD LEAD IN TERMS OF VOTES BUT WITH SINGLE DIGIT MARGIN WITH PTI
CENTRAL AND WESTERN PUNJAB	PML-N TO LEAD IN TERMS OF VOTES
SOUTH PUNJAB	ANTI PML-N VOTE WOULD BE IN MAJORITY with probable PTI in the lead
NORTH PUNJAB	PTI AND PML-N WOULD HAVE TOUGH COMPETITION WITH PTI BEING AHEAD IN VOTES
SINDH	PPP WOULD CONTINUE TO DOMINATE
KP	PTI WOULD CONTINUE TO LEAD
BALUCHISTAN	A COALITION OF PARTIES WOULD BE ABLE TO FORM GOVERNMENT

Source: Poll of Public Opinion Polls conducted during May/ June/ July 2018

Note on the stubborn undecided: THE POLL OF POLLS FINDS AROUND 12% RESPONDENTS TO BE STILL UNDECIDED, SOME OF WHICH SAY THEY AIM TO MAKE A DECISION ON THE ELECTION DAY. THIS CONTINUES TO LEND UNCERTAINTY TO THE NECK AND NECK COMPETITION IN GE 2018 BETWEEN PTI AND PML-N.



4 KEY LEARNINGS FROM 'POLL OF POLLS' BEFORE GE 2018

INTRODUCTION

Unlike the previous ten elections in Pakistan, wide range of polling data are available in the forthcoming **11th election** scheduled only a couple of days from now.

Were you to add up the latest measurements provided by these polls (2 of which were conducted in July and 3 in May/June 2018, together surveying around 22,000 respondents) and average them, the conclusion shared by nearly all pollsters **is that it is an unpredictable election.**

Having said that, there are some outcomes which can be said with more certainty:

1. **PTI vote has increased rapidly nationally since 2013 (nearly doubling in a short span)**

The score of the previous runner-up (PTI) has risen substantially (17% to 32%) among voters who have revealed their choices at national level.

2. **PML-N vote has dropped since 2013 but is forecasted to be second largest party nationally.**

The vote score of previous incumbent (PML-N) has dropped by around 3% from 33% score in 2013 election to 30% in this Poll of Polls.

- 3- **Undecided Voters continue to confound predictability.**

According to poll of polls computed by Gallup Pakistan, there are still nearly 12% undecided voters who to make the forecast for elections murky and unpredictable.

In Gallup's own poll findings, the figure of the undecided voters dropped from 21% two month ago to 13% in the final week. Nearly 6% of them switched to PTI.



Who are the remaining undecided voters? Will they also switch to PTI, PML-N or split in many directions?

Our analysis suggests that the profile of the undecided voters is close to the profile of PML-N voters. If these undecided PML-N voters decide to join PTI fold or go back to PML-N in large numbers the situation may change drastically. That is why we think that the undecided voters may tilt the balance of the forthcoming election in Punjab and thereby determine the fate of the Federal Government.

4- **PLAYING FIELD**

The unpredictability forecast is reinforced by the uncertainty about the playing field. There is considerable display of judicial and para-judicial activity culminating in arrests, disqualifications and judgments which cause concern among all key contestants except the front runner of the polling data, PTI.



Election 2018

ALL PAKISTAN

Poll of Polls

As per last available measurements

		Poll of Polls Scenario 1	Poll of Polls Scenario 2	Poll of Polls Scenario 3
PTI	IPOR/ Herald- SDPI/ RP/ Pulse/ Gallup Pakistan	29%, 29%, 30%, 30%, 25%	29%	32% 32%
PML-N	IPOR/ Herald- SDPI/ RP/ Pulse/ Gallup Pakistan	32%, 25%, 25%, 27%, 26%	27%	30% 29%
PPP	IPOR/ Herald- SDPI/ RP/ Pulse/ Gallup Pakistan	13%, 20%, 15%, 17%, 16%	17%	19% 20%
All Others	IPOR/ Herald- SDPI/ RP/ Pulse/ Gallup Pakistan	22%, 13%, 30%, 12%, 16%	15%	21% 21%
	Undecided Voters AVERAGE		12%	

Source: Poll of Polls computed by Gallup Pakistan (July 23, 2018)

Section 1: Reporting numbers with undecided and will not vote.

Section 2: Numbers of among voters only

Section 3: IPOR results were found to be an outlier among the readings taken in this analysis and therefore a scenario has been created after removing IPOR values.



METHODOLOGY

The data from 5 polling organization/ publishers has been drawn from publically available sources, including their websites, and the newspapers and magazines where they were published.

These 5 polling organizations / publishers are (alphabetically)

- i- Gallup Pakistan Survey conducted for Geo/ Jang Group (www.gallup.com.pk)
- ii- IPOR Survey (<http://ipor.com.pk/>)
- iii- Pulse Consultants Survey conducted for Geo/Jang Group (<https://pulseconsultant.com/>)
- iv. Roshan Pakistan Survey (<https://twitter.com/RoshanOpinion>)
- v. SDPI/ Dawn Survey (<https://www.dawn.com/news/1421537>)

The errors if any are not intentional and Gallup Pakistan does not take responsibility of any kind. The reader may consult original sources for data in order to obtain more precise information.

Authenticity/ Reliability of included Polls: Gallup Pakistan does not take responsibility of the polls included in this report. Apart from Gallup's own poll, we have no means to verify the quality of data gathering or reporting. The reader may, therefore, be cautious in the use of this data.

Margin of Sampling Error: Variance between different polls is not the only source of uncertainty; every individual poll also comes with a margin of error of its results, ranging from 1.5 to sometimes as high as 3 percentage points if the sample size is small. We advise readers to keep in mind that every polling number has to be interpreted as a range of plus-minus of this error and that the "true" support for the respective party is going to lie within 95 percent confidence interval within this range.

Fieldwork Dates: The 5 survey works included in this report were conducted between 1st May to 11th July 2018.

Note on important events after field dates: The surveys reported in this report were conducted mostly before 2 key events i.e. Avenfield Judgment which sentenced Nawaz Sharif to 10 years in Jail and his arrival from UK to face jail term. These events have not been tracked in these polls and therefore the poll of polls does not measure the effect that these events may hold on the voting intentions of the respondents.



Disclaimers

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