

PAKISTAN'S NATIONAL ELECTION: 2013**Report # 3****EXIT POLL SURVEY
REPORT**

Who Voted for Whom and What does it mean for
PAKISTAN'S FUTURE

Prepared by
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Research Team**



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* An earlier version (released on May 12) was based on a sample of 4,316 respondents. This is an updated final version. There are minor changes in figures, but no changes in key findings or interpretations.

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INTRODUCTION

Gallup Pakistan carried out a large scale Election Day Survey on May 11 across all four provinces of Pakistan. The survey was not meant to be an early prediction or to monitor the fairness of elections. It was a survey to determine the age, income and education composition of the vote banks of the leading political parties. But it also captured perceptions about impartiality of polling staff, role of media in election campaigning and a host of other issues.

The survey was carried out by Gallup Pakistan and the findings are presented here in the form of seven sections. Section 1 analyses profile of political party vote banks, by age, gender, education and income group. Section 2 discusses voter perceptions about impartiality of polling staff. Section 3 reveals voters choices for various party alliances. Section 4 discusses motivations to vote categorizing them into seven voter types. Section 5 discusses voters' sense of efficacy of their vote. Section 6 discusses the political activism present among voters prior to the elections. The final section in this series analyses the role of media during election campaigning.

The findings are based on a survey of 4,636 statistically selected voters from all the four provinces of Pakistan. They were randomly selected as they stepped out of polling stations after casting their vote.

HIGHLIGHTS

This Report addresses the issue: Who voted for whom on May 11, why and what does that mean for the future of Pakistan.

The study is based on interviews conducted with 4,636 men and women voters in over 200 polling station booths, spread out in all four provinces and over 75 districts of the country. Face to face field work was conducted with voters as they exited from polling centers during 9 am to 6 pm on the Election Day, May 11. The data is representative of over 45 million voters who voted in Pakistan's National Election 2013.

GALLUP EXIT POLL SURVEY REVEALS DEMOGRAPHIC DIVIDE IN PAKISTANI POLITICS

The Report focuses on both geographic and demographic distribution of votes. But it focuses more on demographic explanations of voting behavior. It shows that in many ways this election produced two winners, each in their own demographic space. Imran Khan won in the Upscale College educated population and Nawaz Sharif won among the rest. Since the first demographic is much smaller than the second, Nawaz Sharif won the election quite decisively by scoring nearly twice as many votes among all voters.

What is the implication of this demographic divide for Pakistan's future is analyzed in the concluding chapter of the Report authored by Chairman of Gallup Pakistan Dr. Ijaz Shafi Gilani. According to him PTI's upscale educated vote bank is numerically small but powerful in terms of its socio-economic capabilities, besides harboring a sharp penchant for political participation. He recommends that the doors of political participation should be opened for Pakistan's emerging middle class political aspirants through local government and mayoral jobs.



SUPPORT FOR 'FRIENDLY OPPOSITION' AND NON-POLARIZED POLITICS

Based on Exit Poll data, Dr. Gilani has argued that Pakistan has moved on from a polarized to a highly reconciliatory voter population. Among those who voted on May 11, around 70% of voters of the top two political rivals consider the rival party as their second best choice. He presents exit poll data since 1993 to show how this is a sea change from the polarization prevailing at that time. Now voters support the concept of 'friendly opposition'. In his views if political power is equitably distributed through local governments, Pakistan can start moving to be a mature democracy with good governance in a non-polarized political climate.

DEVELOPMENT WAS TOP MOST MOTIVATION TO CHOOSE FAVORITE CANDIDATE

Gallup Exit poll data shows that top most motivation to vote for a particular candidate or party was their concern with development, electricity, roads, education and other infrastructure.

THREATS TO DEMOCRATIC GOVERNANCE

Dr. Gilani has also indicated certain threats to democratic governance. Arguing on the basis of exit poll data he suggests that while a broad consensus among voters on socio-economic issues and questions of cultural identity produces a sound basis for national cohesion and stable politics, it marginalizes social, cultural and lifestyle minorities. They get fringed to the extremes. He argues that elections and majority rule should be seen as an instrument to elect rulers, but not to govern by majority views alone. The 'rule of law' must stand above electoral results and should override the powers of electoral victors. He argues that consensus on governance through friendly opposition and regional empowerment rests on the fact that almost everyone rallied around common ground for rule of law. If that was not respected, the situation could relapse into older grooves leading to governance by forces other than elected civilians.

4 key findings on Demographic Divide in Pakistani Politics

Education Divide:

The edge of victory by PML-N over PTI declines as educational category of voters rises. Among the least educated PML-N wins by **24%** points; among the college educated, it loses by **5%**.

Age Divide:

Among voters over 30 years of age, PML-N wins by **19%** points, among the under 30, this edge gets reduced to **7%** points only.

Income Divide:

Among the bottom two income group, PML-N wins by **23%** points; among the top two income categories the margin of victory gets reduced to **10%** only.

Gender Divide:

Among women PML-N wins by **19%** among Men the margin of victory gets reduced to **13%** only.

Pakistan's National Election: 2013

Part 1:

SURVEY FINDINGS

who voted for whom why and what does
it mean for

PAKISTAN'S FUTURE



Section # 1

**This Section provides a set of tables on
Voting Behavior and Profile of Political Party Vote Banks
across Age, Education, Income and Gender**

Table 1.1A

AGE-WISE VOTER BEHAVIOUR

	New voters (Age 18-24)	Age 25 – 29	Age 30 - 34	Age 35 - 49	50 +
	<i>Among them who voted for (Col %)</i>				
All Pakistan					
PML (N)	35	26	33	32	39
PTI	26	21	14	16	12
PPP	12	14	15	16	16
All others	27	39	38	36	33
Total	100	100	100	100	100

Table 1.1B

AGE-WISE VOTERS BEHAVIOUR (Age 18-24 & the rest)

	New voters (Age 18-24)	Age 25 +
	<i>Among them who voted for (Col %)</i>	
PML (N)	35	32
PTI	26	16
PPP	12	15
All others	27	37
Total	100	100

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Table 1.1C

Voting Behavior Among YOUNG AND EDUCATED VOTERS

PTI vote bank has a considerably higher share of new voters (Age 18 – 24) who are educated to a level of High School and above as compared to PML (N). Although PTI's total vote bank is almost half of PML (N)'s, but it has equal share of vote bank among young and educated voters.

	New voters (Age 18-24) who are educated to a level of High School and above
	<i>Among them who voted for</i>
PML (N)	31
PTI	34

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Table 1.1D

Voting Behavior Among YOUNG, EDUCATED AND UPSCALE VOTERS

Voters having an income of Rs. 30,000 and above are defined as Upscale voters. It can be seen again that PTI has a significantly higher share of young, educated and upscale voters with respect to its total vote bank.

	New voters (Age 18-24) who are educated to a level of High School and above, and are earning more than Rs. 30,000
	<i>Among them who voted for</i>
PML (N)	35
PTI	37

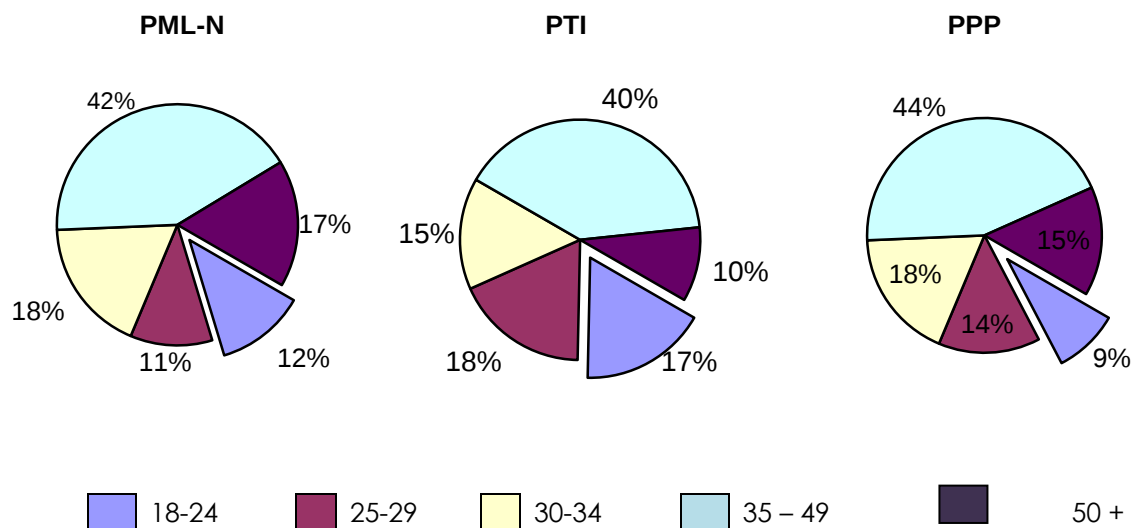
Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Table 1.2

AGE COMPOSITION OF PARTY VOTES

The vote bank of all three leading parties varies differently in age composition. PML (N) and PPP roughly have similar age composition, whereas PTI has a larger youth vote bank.

	 All Pakistan	 PML (N)	 PTI	 PPP
	<i>Percent share in all votes scored by this party (col %)</i>			
New voters (Age 18-24)	11	12	17	9
Age 25 – 29	14	11	18	14
Age 30 – 34	18	18	15	18
Age 35 - 49	42	42	40	44
50 +	15	17	10	15
Total	100	100	100	100



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Table 2.1
EDUCATION-WISE VOTER BEHAVIOUR

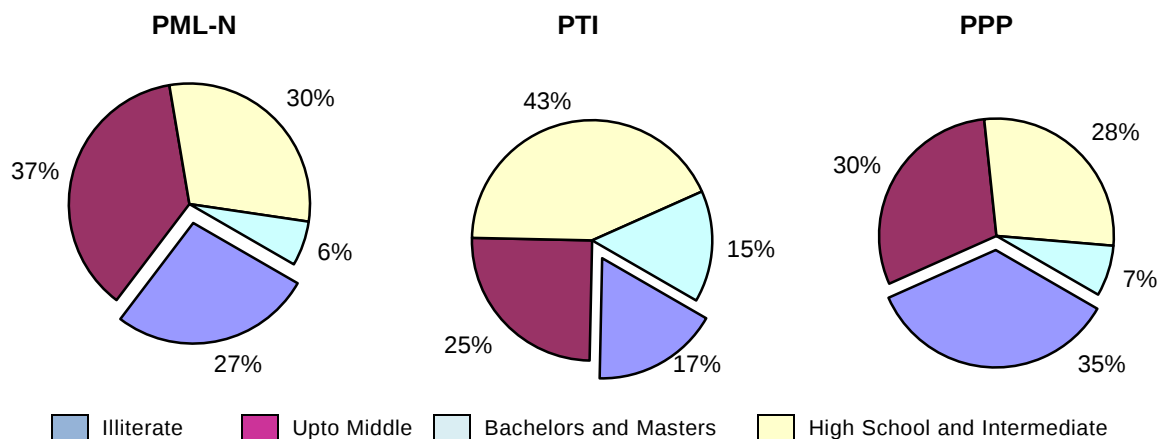
	Illiterate	Up to Middle School	High School and Intermediate	Bachelors and Masters (College)
	<i>Among them who voted for (Col %)</i>			
PML (N)	33	38	30	23
PTI	11	13	22	28
PPP	20	14	13	12
All others	36	35	35	37
Total	100	100	100	100

Table 2.2
EDUCATIONAL COMPOSITION OF PARTY VOTES

The PPP and PML (N) vote bank have a notably higher share of illiterate voters. PTI vote bank has a higher share of college-educated voters compared to the other.



	All Pakistan	PML (N)	PTI	PPP
	<i>Percent share in all votes scored by this party (col %)</i>			
Illiterate	26	27	17	35
Up to Middle School	32	37	25	30
High School and Intermediate	33	30	43	28
Bachelors and Masters (College)	9	6	15	7
Total	100	100	100	100



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Table 3.1
INCOME-WISE VOTER BEHAVIOUR

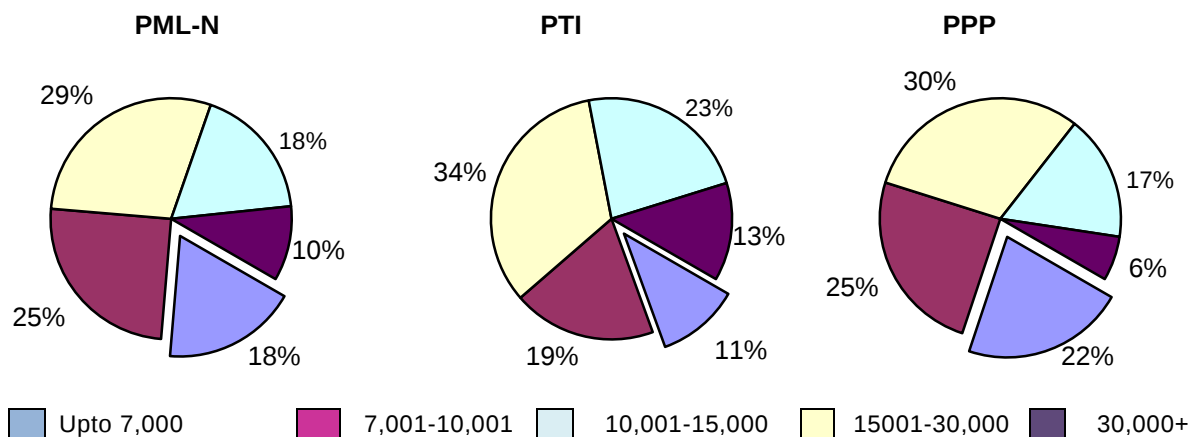
	Upto Rs.7,000	Rs 7,001- 10,000	Rs 10,001 - 15,000	Rs 15,000 - Rs. 30,000	More than Rs. 30,000
<i>Among them who voted for (Col %)</i>					
PML (N)	38	35	29	28	39
PTI	12	14	17	19	26
PPP	21	16	14	13	11
All others	29	35	40	40	24
Total	100	100	100	100	100

Table 3.2
INCOME COMPOSITION OF PARTY VOTES

PML (N) and PPP have higher share of the very poor. PTI vote bank has a higher share of upper income groups followed by PML(N).



	All Pakistan	PML (N)	PTI	PPP
<i>Percent share in all votes scored by this party (col %)</i>				
Upto Rs.7,000	16	18	11	22
Rs.7,001 – 10,000	24	25	19	25
Rs.10,001 – 15,000	32	29	33	31
Rs.15,000 – 30,000	20	18	23	17
More than Rs.30,000	8	10	14	5
Total	100	100	100	100



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Table 4.1A

Voting Behavior Among GENDER-WISE VOTER BEHAVIOUR

	Men	Women
	<i>Among them who voted for (Col %)</i>	
PML (N)	30	36
PTI	17	17
PPP	15	15

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Table 4.1B

Voting Behavior Among GENDER-WISE EDUCATED VOTERS WITH (High school and above) EDUCATION

	Men	Women
	<i>Among them who voted for (Col %)</i>	
PML (N)	24	36
PTI	23	24
PPP	14	11
All others	39	29
Total	100	100

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Table 4.1C

Voting Behavior Among
GENDER-WISE EDUCATED (High school and above) **AND UPSCALE VOTERS** (top one Quintile)

	ALL	Men	Women
		<i>Among them who voted for (Col %)</i>	
PML (N)	38	38	36
PTI	30	27	35
PPP	10	11	8
All others	22	24	21
Total	100	100	100

Table 4.1D

Voting Behavior Among
GENDER-WISE YOUNG (Age 18-24) **AND UPSCALE VOTERS** (top one Quintile)

	All	Men	Women
		<i>Among them who voted for (Col %)</i>	
PML (N)	41	35	51
PTI	32	35	27
PPP	2	3	0
All others	25	27	22
Total	100	100	100

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

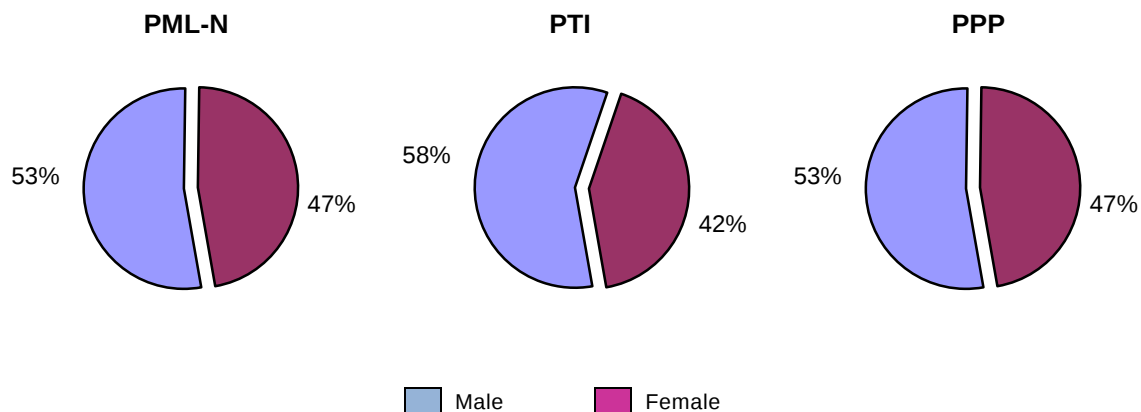
Table 4.2

GENDER COMPOSITION OF PARTY VOTES

PML (N) and PPP vote banks have higher share of women compared to PTI.



	All Pakistan	PML (N)	PTI	PPP
	<i>Percent share in all votes scored by this party (Col %)</i>			
Men	58	53	58	53
Women	42	47	42	47
Total	100	100	100	100



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Section # 2

PERCEPTIONS ON IMPARTIALITY OF POLLING STAFF

The majority (83%) of a scientific sample of voters from all across the country perceived that the polling staff was impartial on the Election Day.

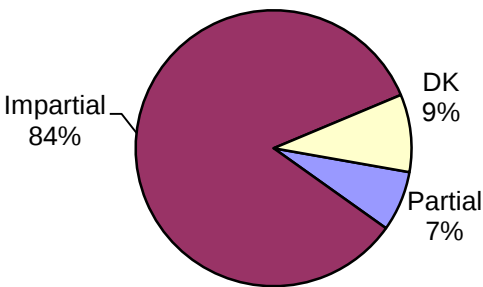
Table 5.1

POLLING STATION LEVEL

Question: Do you think that the polling staff at the polling station is impartial in your constituency or partial towards a particular candidate?

Percentage of respondents

Partial	7 %
Impartial	84 %
Don't Know	9 %



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Section # 3

VOTERS AND LEADERS

TIPS FOR PARTY LEADERS ABOUT VOTERS' CHOICES FOR POLITICAL ALLIANCES

As winners and runner ups ponder upon forming alliances and future relationships to form a Government one thing must be on their mind: How would their voters react to their alliance-formation. Are they emotionally supportive of some political parties more than others? Are they pre-disposed to some alliances more than others?

Anticipating this situation the Gallup Pakistan Exit Poll Survey had asked a nationally representative sample of voters on the Election Day: **"You have just voted for a person of your choice. Please let us know who would have been your second best choice?"**

The responses by the voters of all the leading parties were both interesting and revealing. Most voters mentioned a second choice. These choices would be a good tip for party leaders about the preferences of the voters who voted them in as parliament members. Here are the findings:

PREFERRED ALLIES

PML (N) – Independent Candidates: Voter Affinities

The survey showed very interesting relationship between PML (N) and Independent Candidate voters. Among PML (N) voters 13% would have Independent Candidate as their second choice. In contrast a hefty 39% of Independent Candidate voters chose PML (N) as their second choice.



PML (N) - PTI: Voter Affinities

The Exit Poll-Election Day Survey reveals that at this point the voters of the two parties, PML (N) and PTI have the highest level of mutual political affinity. Thus, 47% of **PML (N) voters** indicated PTI as their second best choice; and 56% of **PTI voters** said the same about PML (N).

PML (N) - PPP: Voter Affinities

On the other hand only 11% of **PML (N) voters** indicated PPP as their second best choice and 21% of **PPP voters** would choose PML (N) as their second best choice.

SECOND BEST CHOICE

Question: You have just voted for a person of your choice. Please let us know who would have been your second best choice?

Table 6.1

Among voters of	PREFERENCES OF ALLIANCE MINDED VOTERS				
	<i>Percent share (Among All)</i>				
	Read in Rows				
	PML-N	PTI	PPP	MQM	Independent Candidate
PML-N	24	36	11	0	13
PTI	48	14	8	2	9
PPP	21	12	22	2	25
MQM	3	22	11	13	6
Independent Candidate	39	17	5	0	28

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Table 6.2

PERCENT SHARE

(among those who gave a second choice)

Among voters of	PREFERENCES OF ALLIANCE MINDED VOTERS				
	<i>Percent share</i>				
	<i>(Among those who gave a second choice)</i>				
	PML-N	PTI	PPP	MQM	Independent Candidate
PML-N	NA	47	14	0	17
PTI	56	NA	10	3	10
PPP	27	15	NA	2	32
MQM	4	0	13	NA	7
Independent Candidate	53	23	7	0	NA

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Section # 4

How Voters Make their Choice: SEVEN TYPES OF VOTERS

One issue often raised in political discourse about Pakistani politics is: To what extent are the voters' loyalties bound to the individual candidate's attributes rather than the party in whose name he contested the elections? The Gallup Pakistan Exit Poll (Election Day Survey) has some answers.

Analysis of the Exit Poll data suggests that voters can be classified into seven major types by their motivation to vote: **Party Loyals, Morality Seeking Voters, Patron Seeking Voters, Legislation Minded Voters, Development Seeking Voters, Biradari Bound, and Skeptic Voters.**

A preliminary analysis of the data suggests that almost one quarter (19%) of the voters in the 2013 General Elections like to be seen as **Party Loyals**. The most important reason in their choice was the nomination of their candidate by the party. They chose this reason from seven different reasons provided to them on a circular card.

26% of voters would pass as **Development Seekers**. They mentioned their legislator's ability to execute development projects, such as, bringing electricity and building roads for their community as the critical reason behind their choice.

12% percent of voters are the **Patron-seeking** types. The legislator's ability to help them with the police, courts and other officials stands out as his major attribute.

16% of voters are **Legislation-Minded**. They chose their legislator because of his competence in the comprehension of national affairs.

Another 11% voters would like to be seen as **Morality/ Value Seeking** voters. They describe legislator's religiosity, honesty and integrity as the principal motive behind their choice.

12% admitted to be **Biradari-bound**. They said they followed their Biradri's verdict in choosing the legislator.

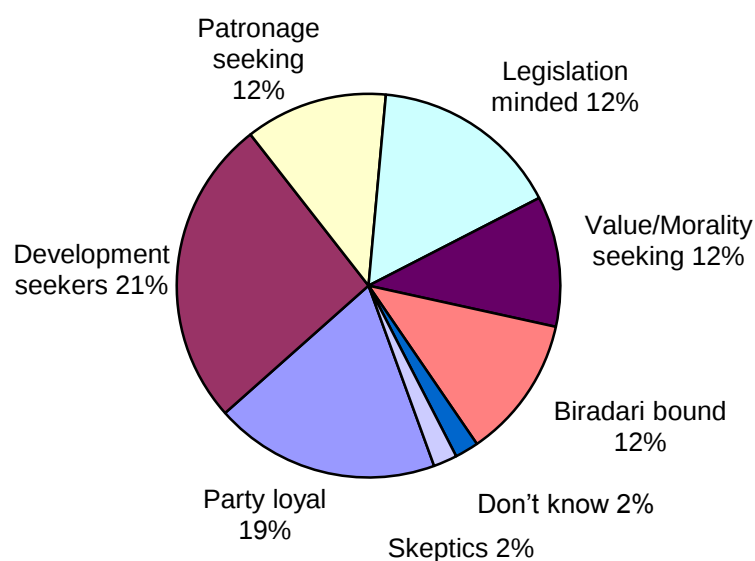


Only 2% placed themselves in the category of **Skeptical Voters**, that is those who chose a certain legislator because he was most capable of defeating the candidate whom the voter disliked or despised.

Question: Would you tell us the most important reason, which led you to vote for the candidate for whom you have just voted for the National Assembly?

Table 7.1

	<i>Percentage of Respondents</i>
Party loyal	19%
Development seekers	26%
Patronage seekers	12%
Legislation minded	16%
Value/Morality seekers	11%
Biradri bound	12%
Skeptics	2%
Don't know	2%



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

IMPORTANCE OF BIRADRI IN VOTING DECISIONS

Does Biradri play a role in voting decisions? Only 12% in the Gallup Pakistan Exit Poll (Election Day Survey) say it does. But the subject is perhaps more complicated than reaching this simple conclusion. Firstly, while only 12% nationally say "Biradri" or "kinship group" was the single most important influence in their voting decision, the proportion in some areas of the country is much larger. Incidentally, it might be appropriate to translate "Biradri" in English as "kinship" as opposed to "caste" which has several other connotations and usually a fixed hierarchy attached to it. Secondly, the influence of "Biradri" on voting decision is more complex than a straightforward "yes" and "no". As we have discovered in our research, "group-thinking" comprising deliberations in the community and negotiating political loyalties as "corporate" groups in the sociological sense is an important part of election campaign. It happens in rural settings as well as urban neighborhoods, and occupational syndicates of various levels and kinds. People may not always decide to vote for a person from their own community or "biradri". Yet meeting as a community or "biradri" to deliberate and decide on who to vote for is much more common than what might be otherwise understood as voting for a candidate of one's own "biradri". It should also be noted that in many cases competing candidates are from the same biradri and that biradri can be a very loose concept encompassing at one level tens of millions of people leaving very little room for narrow and binding group loyalty. In a nutshell, "Biradri" plays a role in voting behaviour well understood by the players in the game but not necessarily its observers and analysts. Here is an attempt to reveal at least one layer of understanding as captured through survey research among a nationally representative sample of 4,636 voters on the Election Day.

Section # 5

COMBINATION OF HOPE AND DESPAIR ON DIFFERENT ASPECTS OF THE ELECTORAL PROCESS

The verdict is out on this very crucial election. Voters express a combination of hope and despair on different aspects of the electoral process. Eighty percent (87%) are confident their vote can make a difference.

The Gallup Pakistan Exit Poll (Election Day Survey) asked a nationally representative sample of voters on the Election Day: **“Do you think your vote will be helpful in improving the condition of our country or not?”** Eighty percent (87%) of the respondents expressed faith that their vote will be helpful. Only 6% were despondent, while 7% remained uncertain.

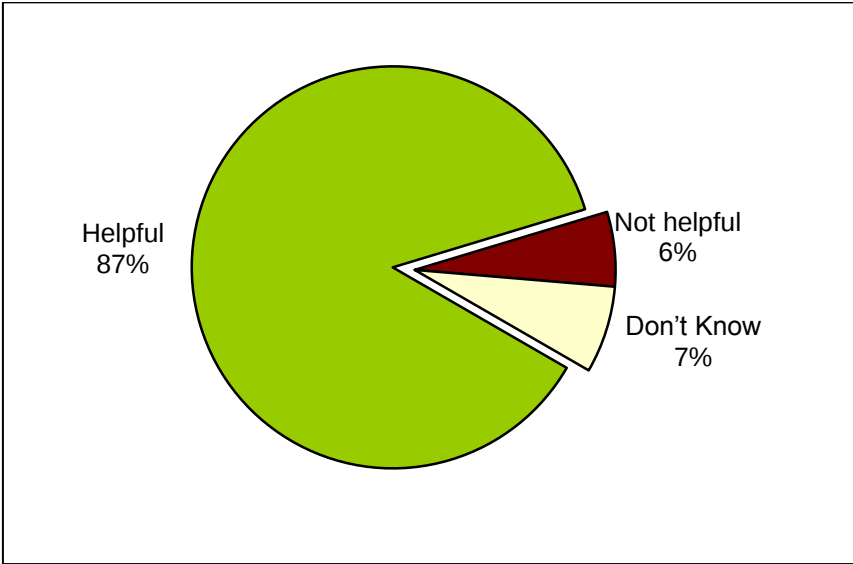
Question: “Do you think your vote will be helpful in improving the condition of our country or not?”

Table 8.1

	<i>Percentage of Respondents</i>
Helpful	87%
Not helpful	6%
Don't know	7%

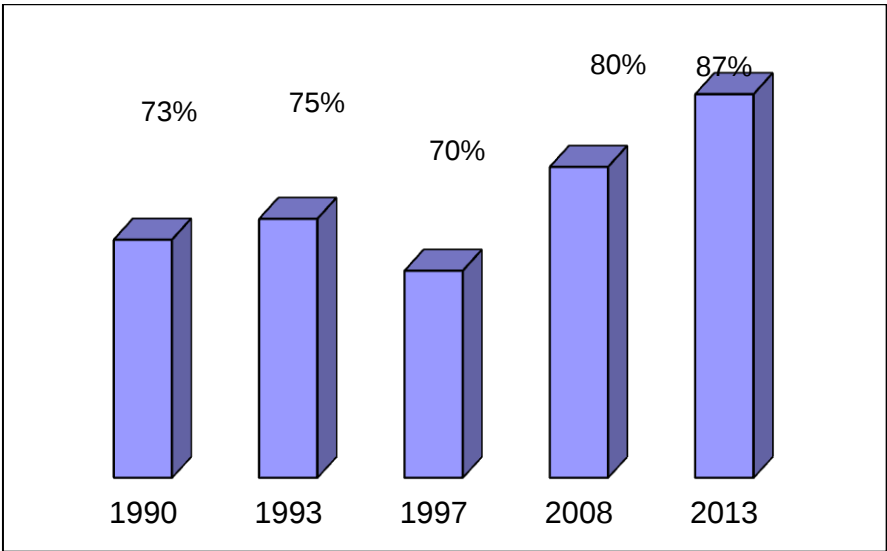
Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan





COMPARISON WITH THE PAST

Question: "My vote will be helpful in improving the condition of our country"



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Section # 6

POLITICAL ACTIVISM

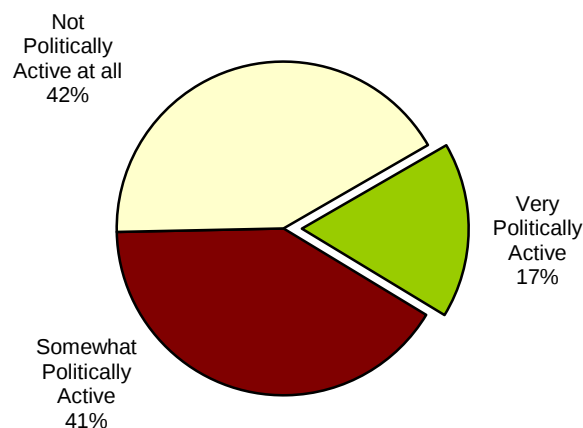
The Gallup Pakistan Exit Poll (*Election Day Survey*) asked a nationally representative sample of voters on the Election Day about their political activism. 17% of the respondents claimed to be politically active.

Question 7: Some people are very politically active; they take part in political gatherings and rallies or campaign for candidates, while some people do not take any interest in politics. Are you:

Table 9.1

Interest in Politics

Very Politically Active	17 %
Somewhat Politically Active	41 %
Not Politically Active at all	42 %



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

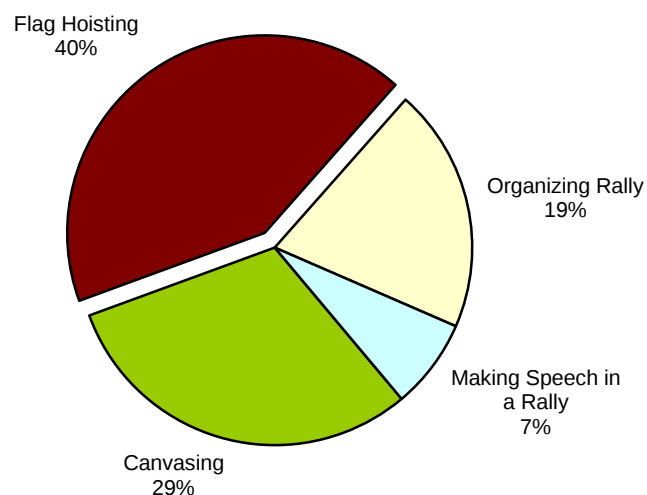
When asked about the extent to which respondents went in taking part in the election campaigning, a significant 40% claimed to have put flags of a party on house/shop or car/bike.

Question 8: During the current elections, did you get a chance to:

Table 9.2

Participation in Election Campaign

Canvasing	29%
Flag Hoisting	40%
Organizing Rally	19%
Making Speech in a Rally	7%



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Section # 7

Political Media Campaign on Television

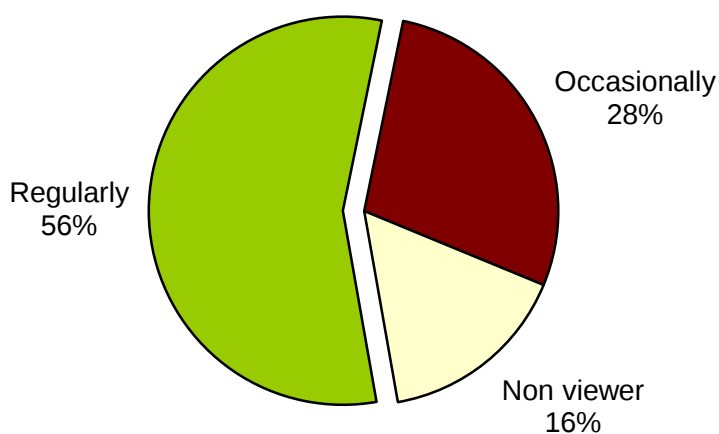
Election 2013 saw a surge of political campaigning on television. It is of great interest to analyse the effect of political media campaigning on the voting decision of people.

TV Viewers:

Question 3: Normally, how much TV do you watch in one week?

Table 9.3

Regularly	56%
Occasionally	28%
Non viewer	16%



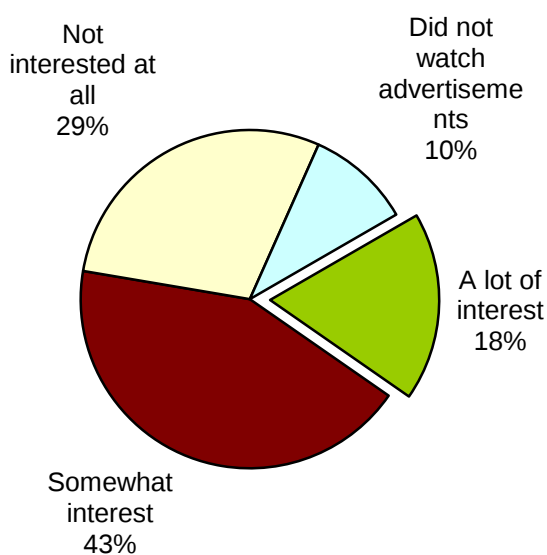
Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Interest in watching Political Media Campaign

Question 9: During this election, many political parties advertised their election symbols to increase popularity on advertisements on TV. Please tell us, with how much interest did you watch these advertisements?

Table 9.4

A lot of interest	18%
Somewhat interest	43%
Not interested at all	29%
Did not watch advertisements	10%



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

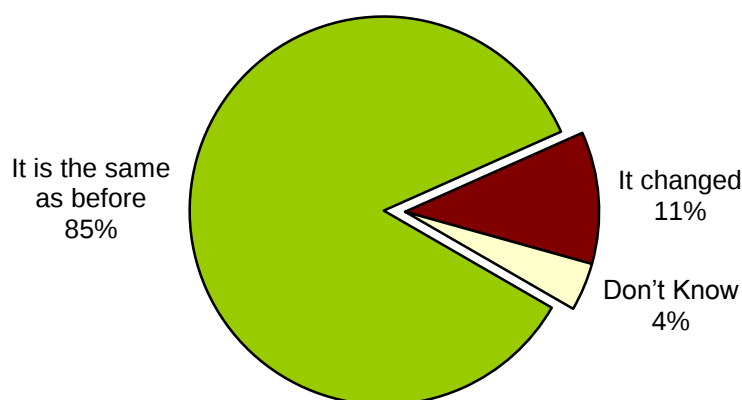
Effect of Political Media Campaign (Television on Voting Decision)

The Gallup Pakistan Exit Poll (Election Day Survey) asked a nationally representative sample of voters on the Election Day whether the political campaigning on television affected their voting decision. 11% of the respondents claimed that their voting decision changed due to political campaigning on television.

Question 6: Did you change your voting decision after watching election campaign and advertisements on TV or is it the same?

Table 9.5

It is the same as before	85 %
It changed	11 %
Don't Know	4%



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Switching Behaviour

Political Media campaigns played a significant role in changing voting decisions of voters. **Among the 12% voters** who changed their voting decision due to political media campaign on television, PTI gained 15% vote bank due to the political campaigning on television. On the other hand, PML (N) and PPP have lost -8% and -13% of their vote bank respectively.

Question 6a: If your voting decision changed, who did you want to vote for before?

Table 9.6

	Voted for on Election Day		
	<i>Percent share in Gain and Loss</i>		
Switching Behaviour	PML (N)	PTI	PPP
Switched To (Gain)	28	33	9
Switched Away (Loss)	36	18	22
Net Gain	-8	+15	-13
Net Gain (over All Voters)	-0.96	+1.80	-1.56

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Pakistan's National Election: 2013

Part 2:

ANALYSIS BY GALLUP ELECTION RESEARCH TEAM

who voted for whom why and what
does it mean for
PAKISTAN'S FUTURE

Section1:

WHO VOTED:

Voter Turn-out

4 KEY POINTS

1- **TURN-OUT WAS A
34% IMPROVEMENT
OVER PREVIOUS TRACK-
RECORD**

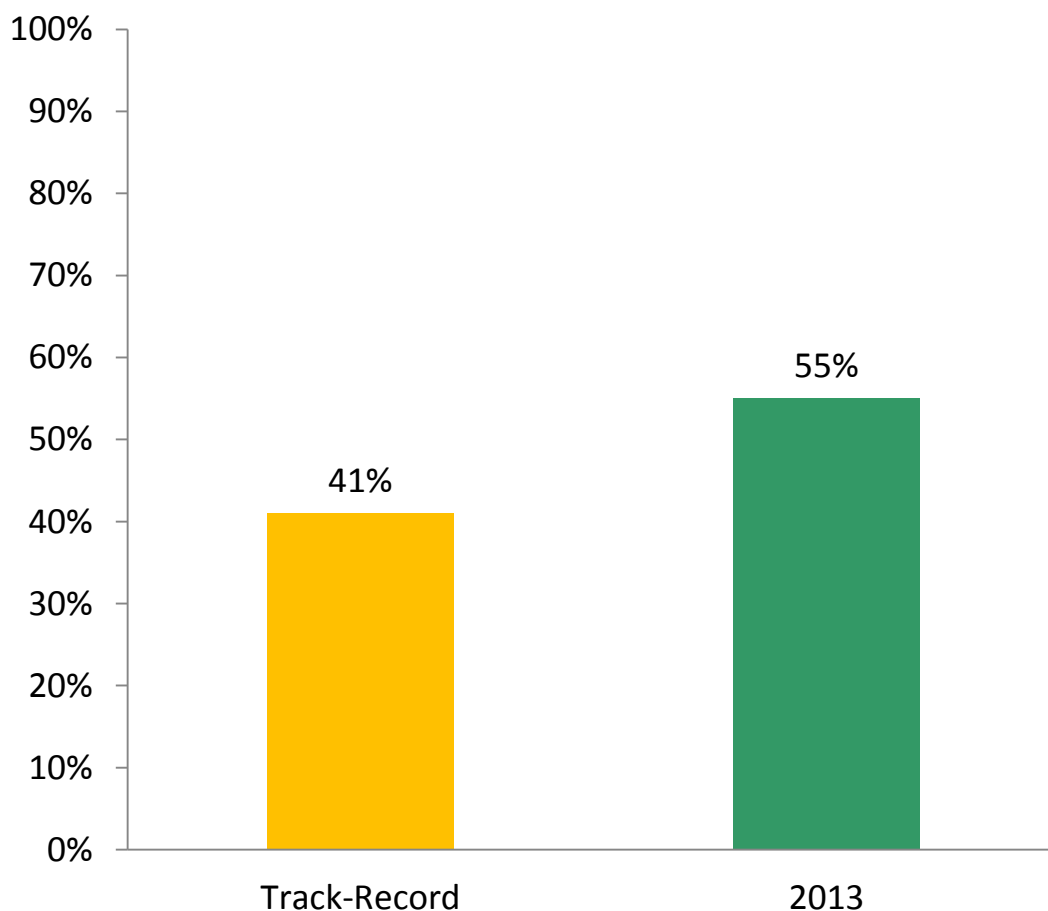
2- **IMPROVEMENT
ACROSS ALL PROVINCES
AND REGIONS
INCLUDING
BALOCHISTAN**

3- **IMPROVEMENT IN TURN-
OUT AMONG WOMEN YOUTH
AND UPSCALE POPULATION**

4- **12 MILLION MORE VOTES
RESULTED FROM HIGHER TURN-OUT**

34%

IMPROVEMENT OVER TRACK-RECORD SINCE 1988

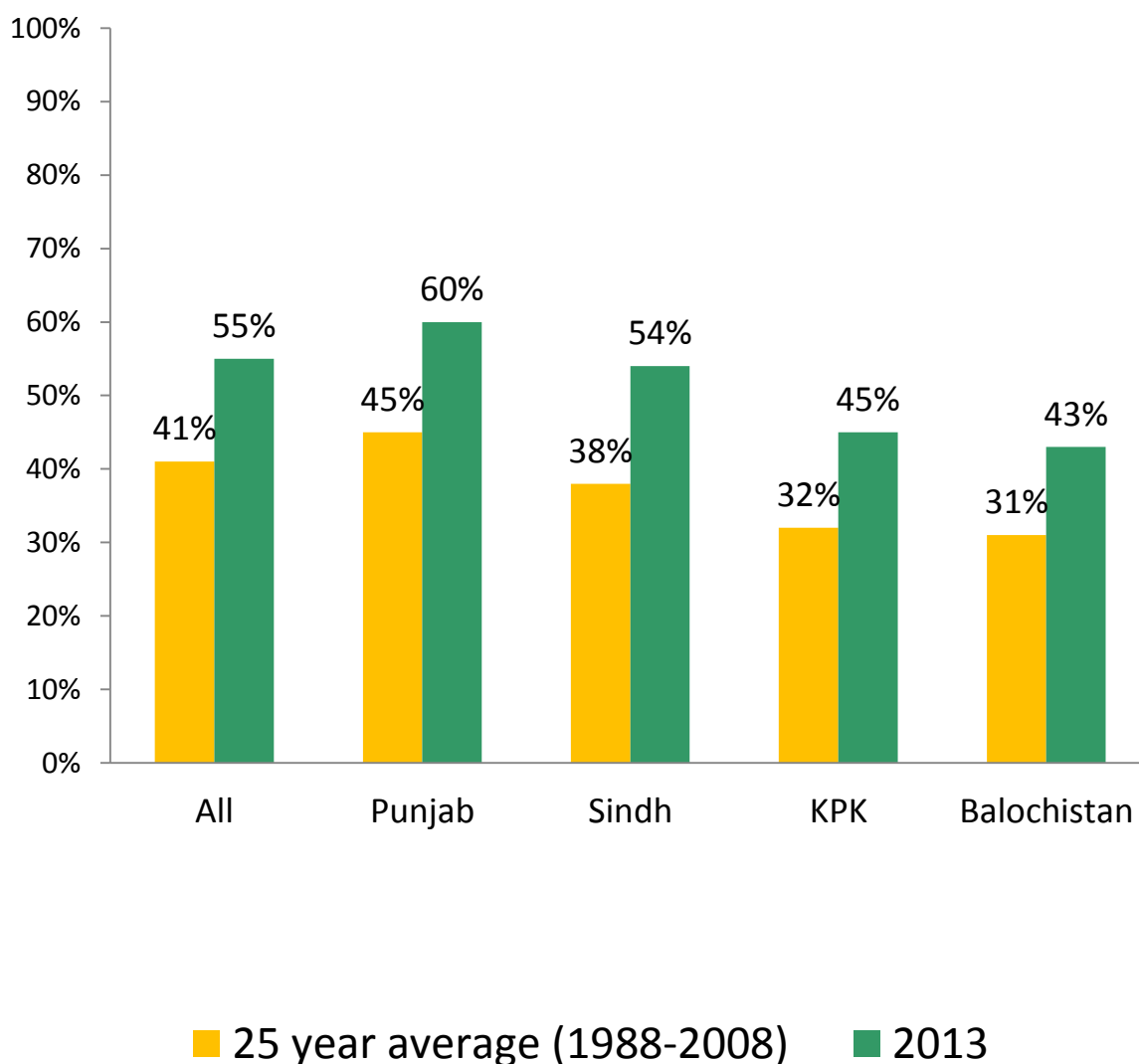


Track Record shows Average turn-out in
6 elections during 1988-2008

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

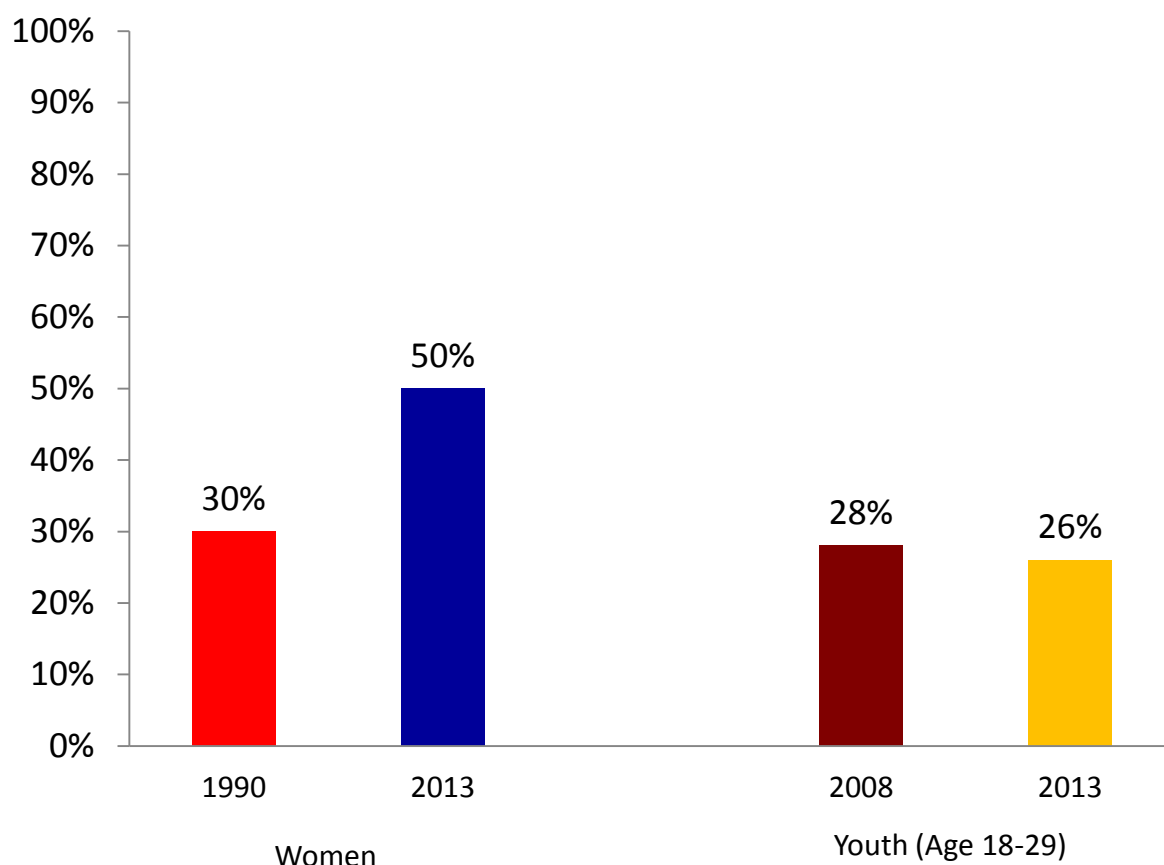


IMPROVEMENT ACROSS ALL PROVINCES AND REGIONS INCLUDING BALOCHISTAN



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

IMPROVEMENT IN TURN-OUT AMONG WOMEN, YOUTH AND UPSCALE POPULATION



10% attributable to
REGISTRATION OF VOTERS
THROUGH IMPROVED
COVERAGE

Registration rose
substantially; thus there is a
'hidden improvement'
contributable to higher voter
registration in this group

Voter Turn-out among VARIOUS AGE GROUPS : Estimates by Gallup Pakistan

	(1) Share in Adult population as per 1998 census	(2) Share among registered voters (as per 2013 ECP data)	(3) Election 2013; share in turn-out as per Gallup Exit Poll
Age Group			
18-29	41%	32%	26%
30-49	37%	42%	60%
50+	22%	26%	14%
	100%	100%	100%

Note on whole numbers: figures have been rounded off. Please note that as a result of this there can be a difference of up to $\pm 1\%$ compared to any previous or other tabulation on the subject.

Voter Turn-out among VARIOUS AGE GROUPS : Estimates by Gallup Pakistan TREND DATA (1993-2008)

Age Group	1988	1990	1993	1997	2002	2008	2013
18-29	Age 21-30	Age 21-30	Age 21-30	Age 21-30	28%	27%	26%
	35%	38%	33%	26%			
30-49	Age 31-50	Age 31-50	Age 31-50	Age 31-50	50%	51%	60%
	47%	51%	50%	57%			
50+	Age 51+	Age 51+	Age 51+	Age 51+	22%	22%	14%
	18%	10%	17%	17%			
All Age Groups	100%	100%	100%	100%	100%	100%	100%

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan



12 MILLION VOTES
RESULTED FROM HIGHER TURN-OUT

Turn-out at **55%** was
~46 Million

Turn-out at **41%**, average turn-out
in 6 elections since 1988 would have
been
~34 Million

Note: Registered voters as per ECP were: 84,207,524

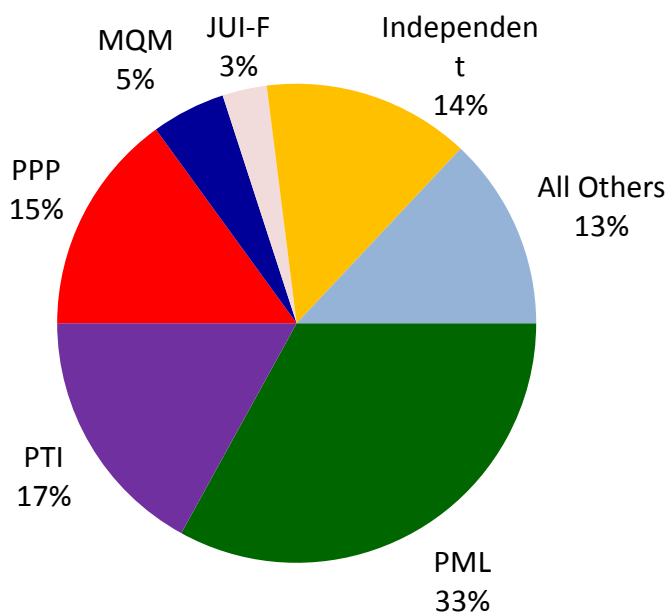


Section 2:

FOR WHOM:

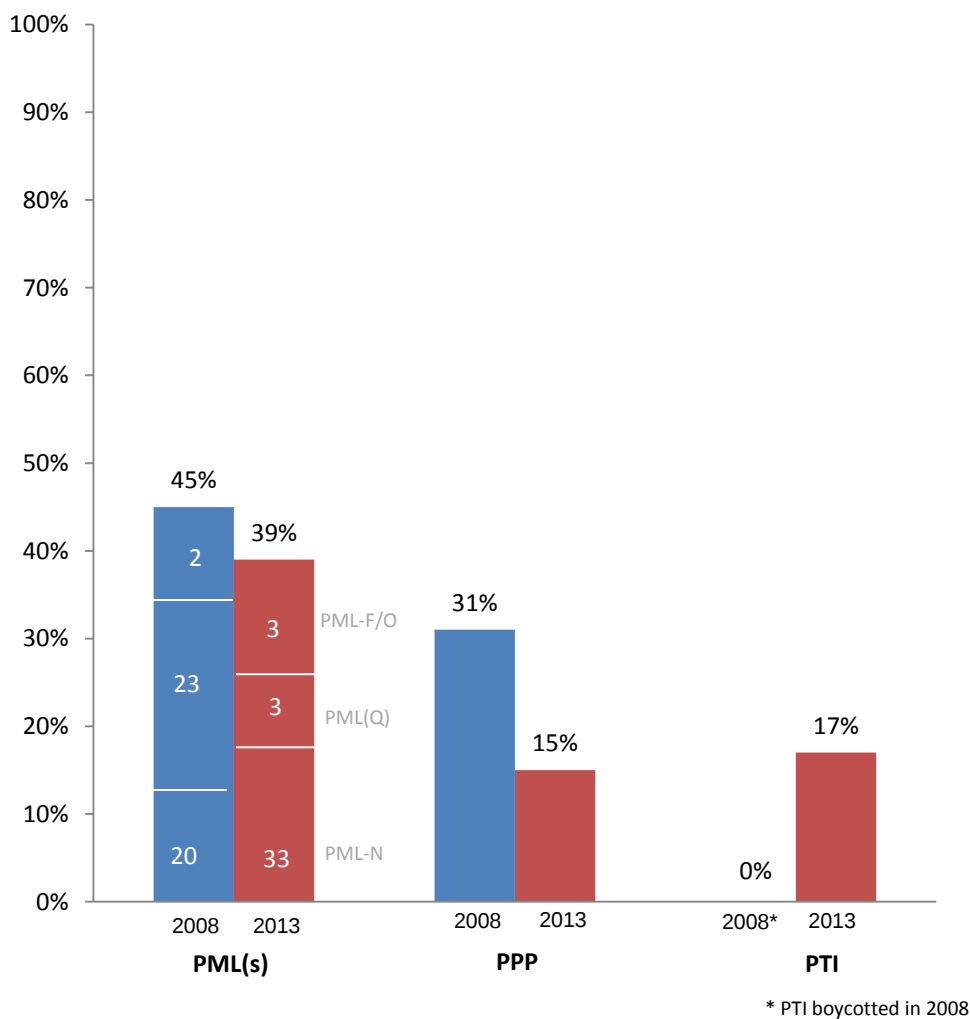
Party Scorecard of Votes

SCORE-CARD OF VOTES 2013



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

COMPARATIVE DATA 2008-2013



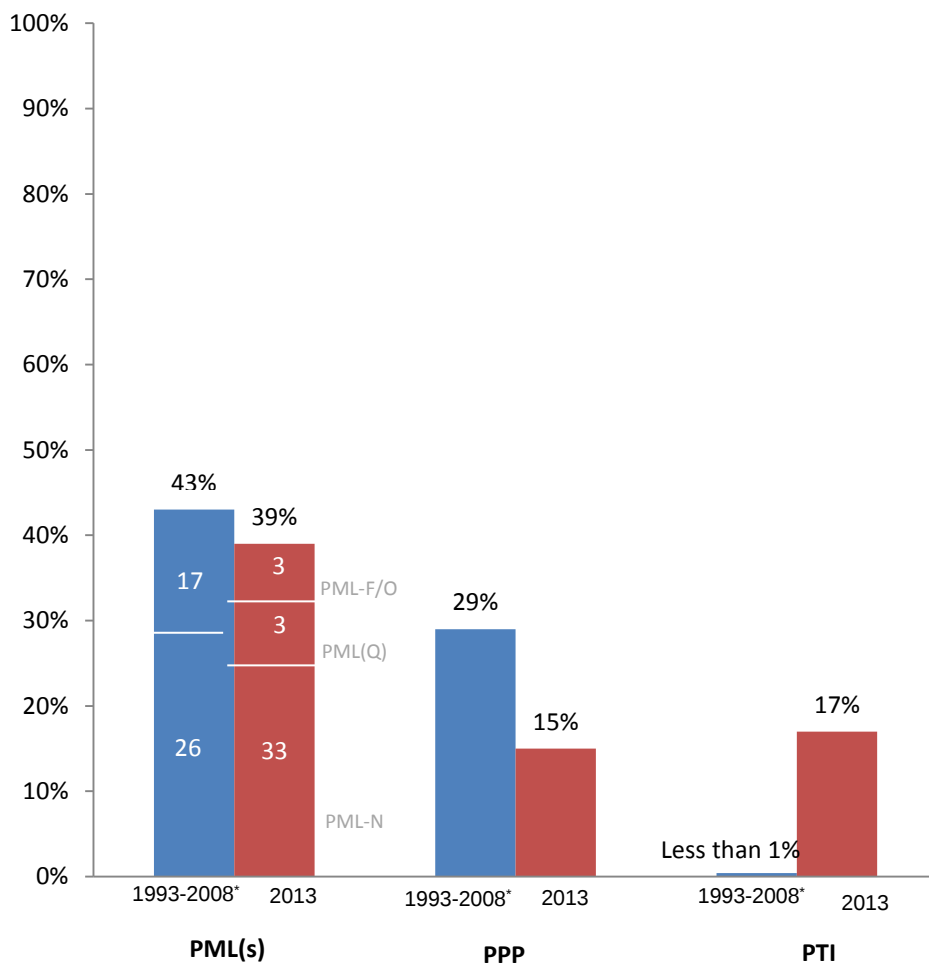
Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan



COMPARATIVE DATA

1993-2013*

(1993-2008) Average of 4 elections compared with Election: 2013



* Average of 4 Elections

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan



INDEPENDENT CANDIDATES

(Who contested election as a non-party independent candidate)

TREND DATA

	<i>Percentage Share in Total Votes</i>
1993	7%
1997	14%
2002	9%
2008	11%
Average During 1993-2008	10%
2013	14%

PML(s) PERFORMANCE IN PAKISTAN AND PUNJAB

TREND DATA (1970-2013)

Percent of total votes in %

	All Pakistan	Punjab
1970	23%	23%
1977	36%	36%
1985	NA	NA
1988	32%	38%
1990	37%	49%
1993	44%	45%
1997	46%	59%
2002	39%	53%
2008	45%	59%
2013	PML(N) + PML(Q) + PML(F) 39% (33+3+3)	PML(N) + PML(Q) + PML(F) 53% (46+5+2)

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan



PPP

PREFORMANCE IN PAKISTAN, INTERIOR SINDH AND PUNJAB

TREND DATA (1970-2013)

Percent of total votes in

	All Pakistan	Punjab	Interior Sindh
1970	39%	42%	51%
1977	59%	61%	77%
1985	NA	NA	NA
1988	34%	46%	68%
1990	37%	39%	58%
1993	38%	39%	57%
1997	22%	22%	42%
2002	26%	27%	45%
2008	31%	29%	54%
2013	15%	10%	51%

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan



REGIONALIZATION OF VOTE BANKS

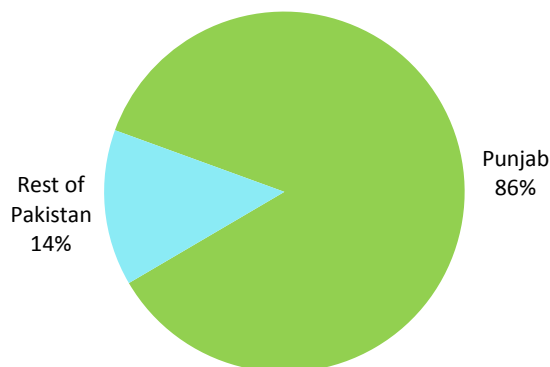
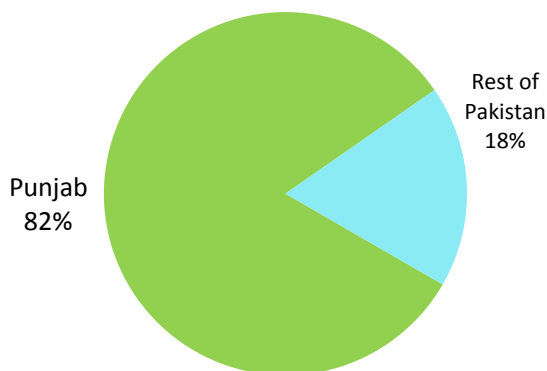
REGIONALISATION OF VOTE BANKS:

Trend Data

PML(s) in PUNJAB

Average figure for 4 elections (1993-2008)
compared with 2013

	Punjab	Rest of Pakistan
1993	82%	18%
1997	84%	16%
2002	85%	15%
2008	80%	20%
Avg during 1993-2008	82%	18%
2013	82%	18%



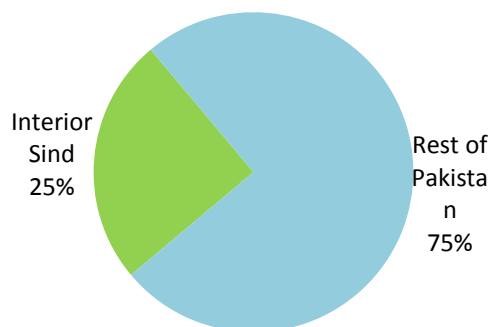
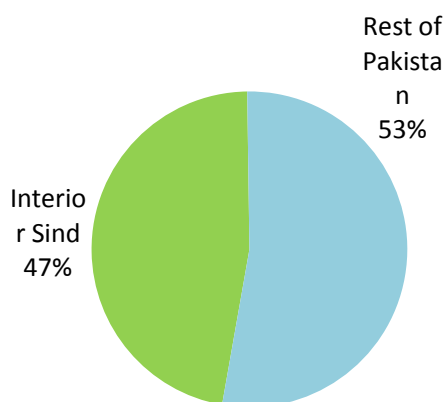
Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

REGIONALISATION OF VOTE BANKS: Trend Data

PPP in INTERIOR SINDH

Average figure for 4 elections (1993-2008)
compared with 2013

	Interior Sindh	Rest of Pakistan
1993	18%	82%
1997	30%	70%
2002	26%	74%
2008	27%	73%
Avg during 1993-2008	25%	75%
2013	47%	18%



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Section 3: Who Voted for Whom:

WHY

- ♦ Demographic Drivers
- ♦ Motivational Drivers

DEMOGRAPHIC DRIVERS

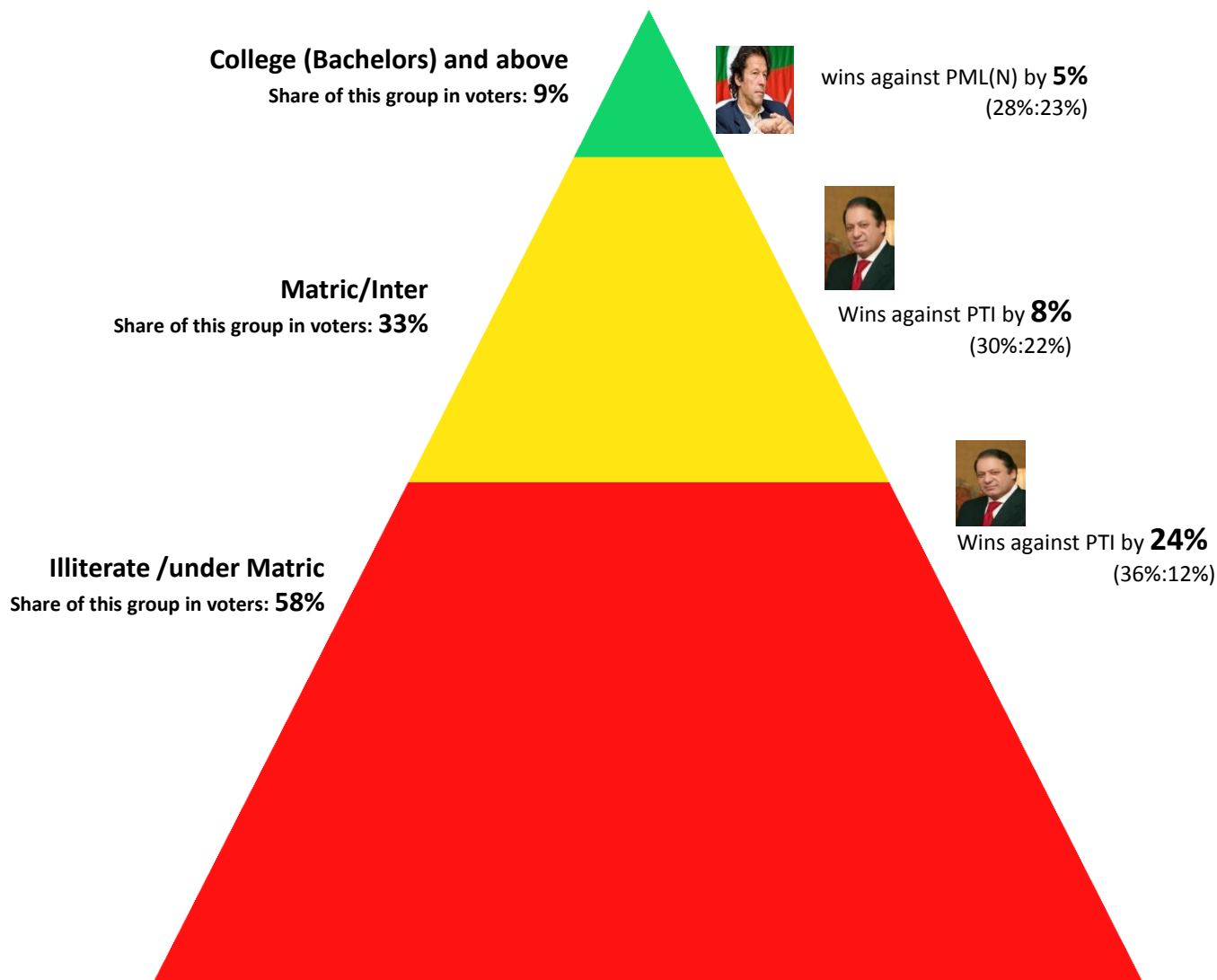
EDUCATION-WISE VOTER BEHAVIOUR

Education Group	PML-N	PTI	PPP	All Others	Edge Analysis PML-N over PTI
All Combined	33%	17%	15%	36%	16%
Illiterate/Under Matric (Share 58%)	36%	12%	17%	35%	24%
Matric/Intermediate (Share 33%)	30%	22%	13%	36%	8%
College (Bachelors) and above (Share 9%)	23%	28%	12%	37%	-5%

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan



EDUCATION-WISE VOTER BEHAVIOUR



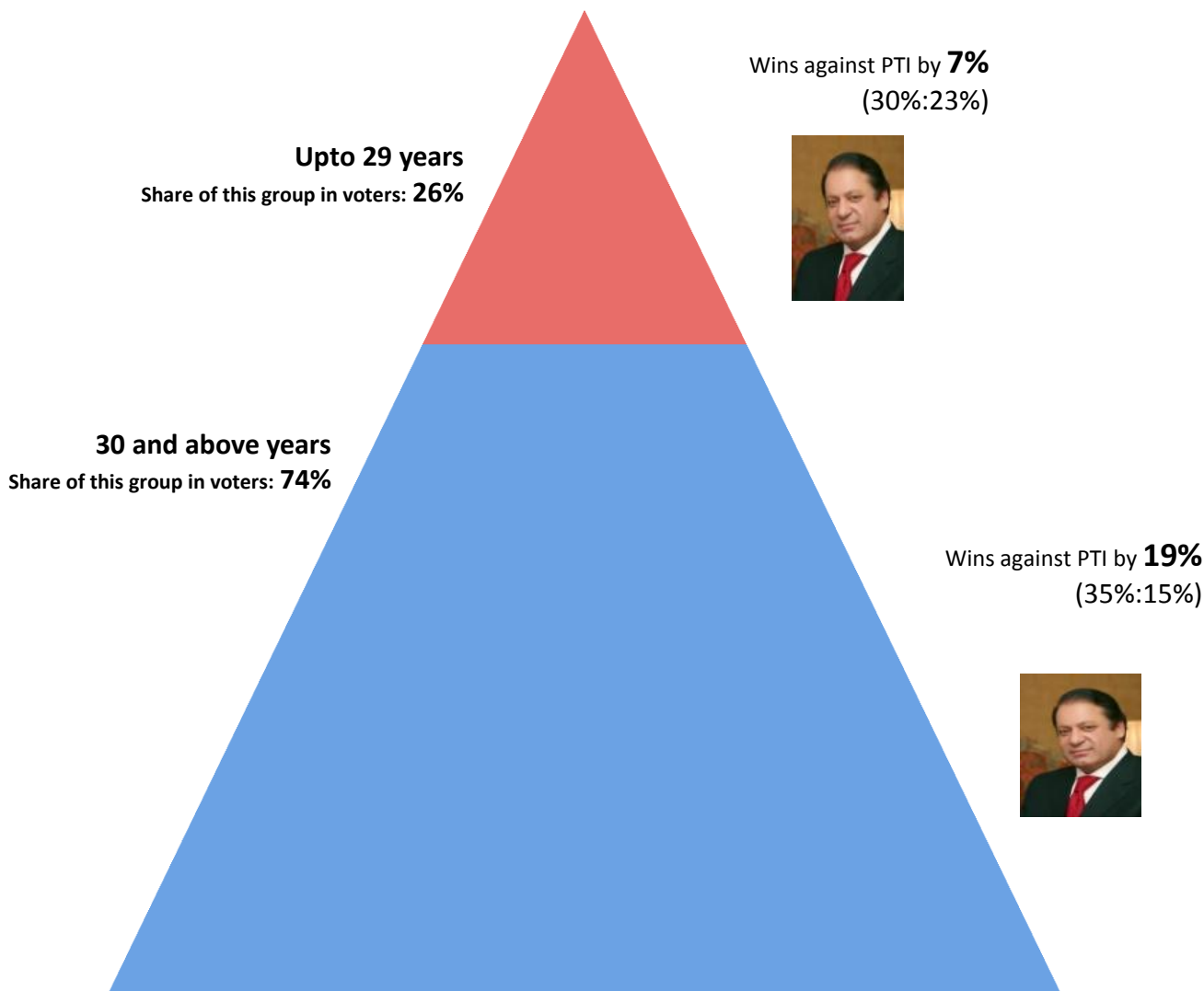
Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

AGE-WISE VOTER BEHAVIOUR

Age Group	PML-N	PTI	PPP	All Others	Edge Analysis PML-N over PTI
All Age Combined	33%	17%	15%	35%	16%
Upto 29 years (Share 26%)	30%	23%	13%	34%	7%
30 and above years (Share 74%)	34%	15%	16%	36%	19%

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

AGE-WISE VOTER BEHAVIOUR

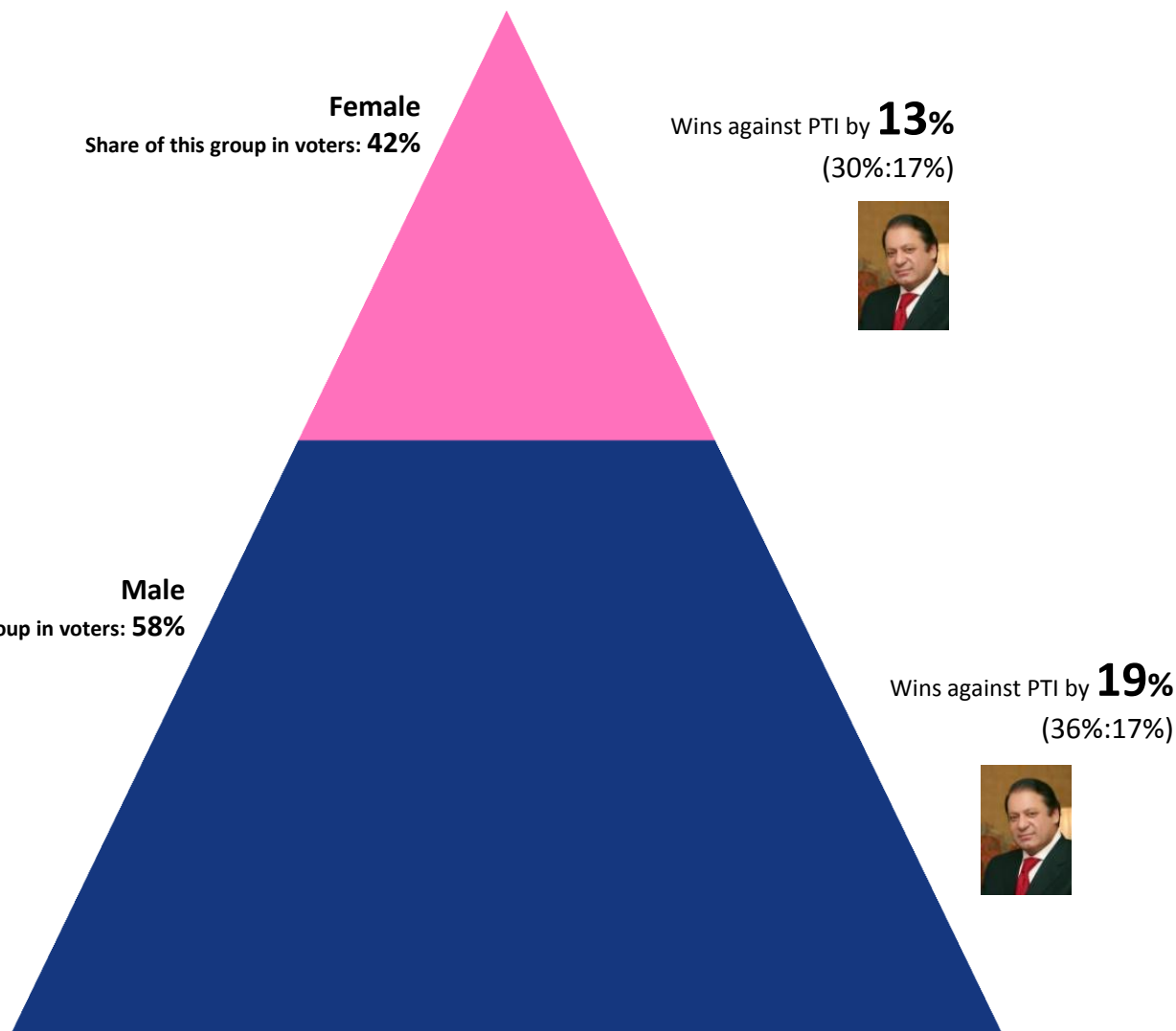


Competition for **WOMEN VOTERS**

Gender Group	PML-N	PTI	PPP	All Others	Edge Analysis PML-N over PTI
All Gender Combined	33%	17%	15%	36%	16%
Male (Share 58%)	30%	17%	15%	38%	13%
Female (Share 42%)	36%	17%	15%	32%	19%

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

WOMEN VOTER BEHAVIOUR



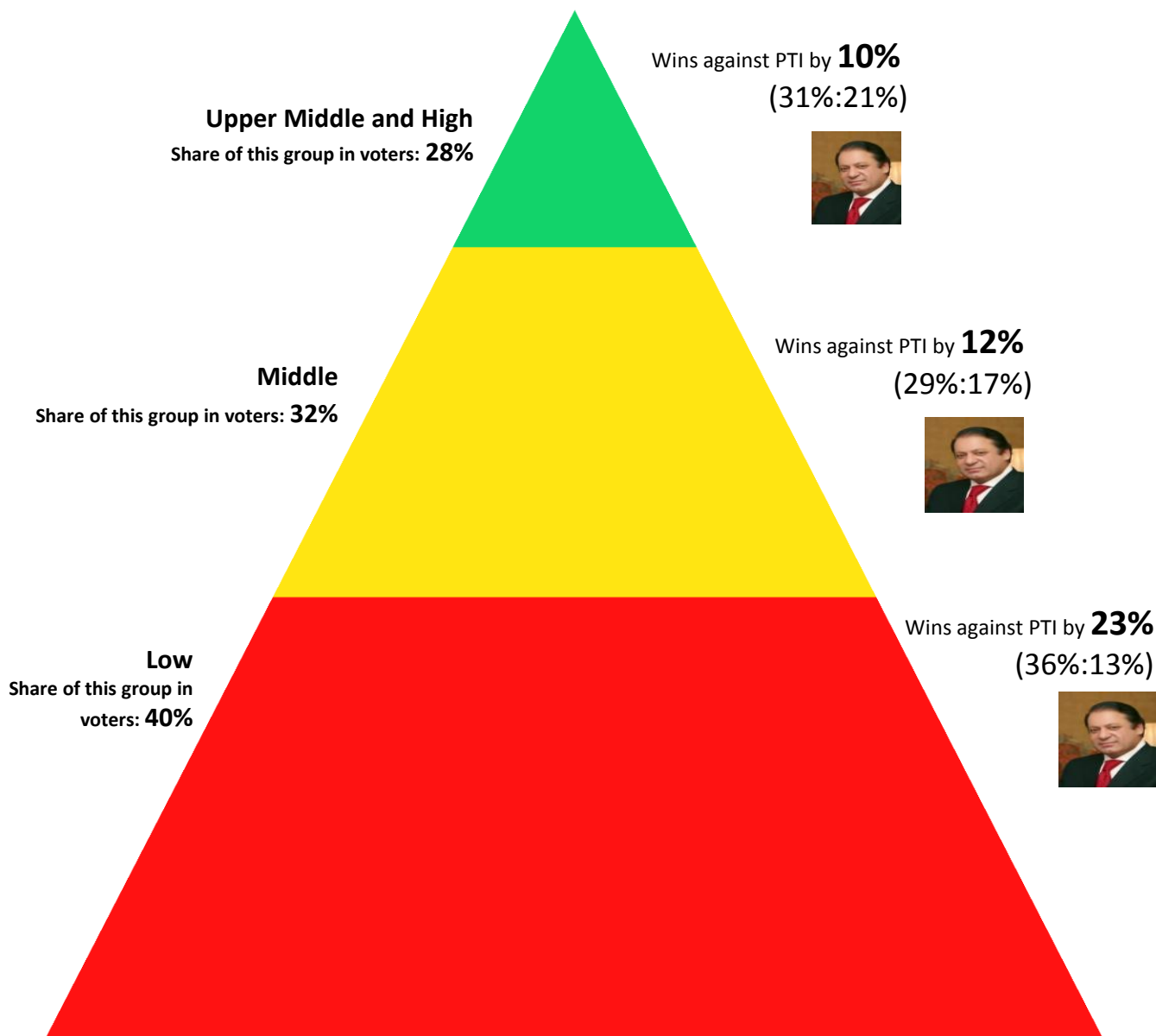
Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

INCOME-WISE VOTER BEHAVIOUR

Income Group	PML-N	PTI	PPP	All Others	Edge Analysis PML-N over PTI
All Combined	33%	17%	15%	36%	16%
Low Income Share 40%	36%	13%	18%	33%	23%
Middle Share: 32%	29%	17%	14%	39%	12%
Upper Middle & High Share: 28%	31%	21%	12%	35%	10%

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

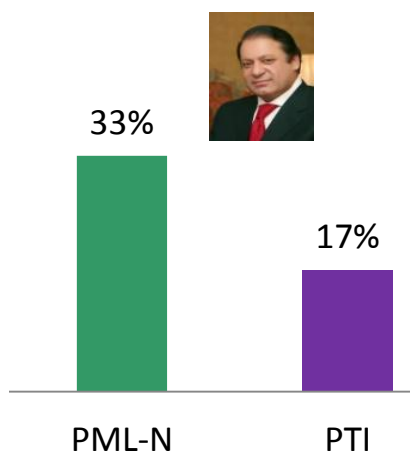
INCOME-WISE VOTER BEHAVIOUR



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

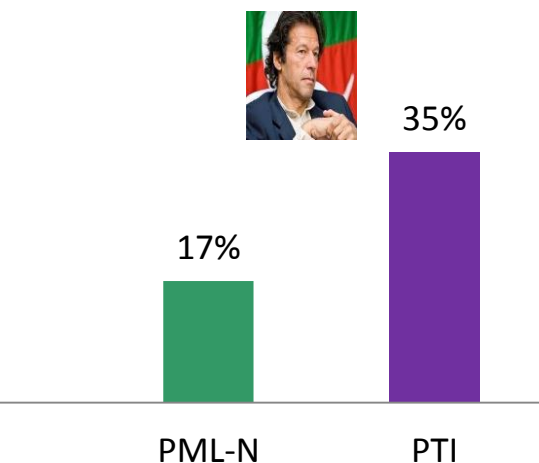
Combined Demographic Driver (CEYM) EDUCATION AGE AND GENDER

NAWAZ BEATS IMRAN
AMONG OTHER THAN "CEYM" VOTERS
BY **16%**



All Voters other than CEYM
(~95% share in All Voters)

IMRAN BEATS NAWAZ
AMONG "CEYM" VOTERS
(College Educated Young Men*) BY **18%**



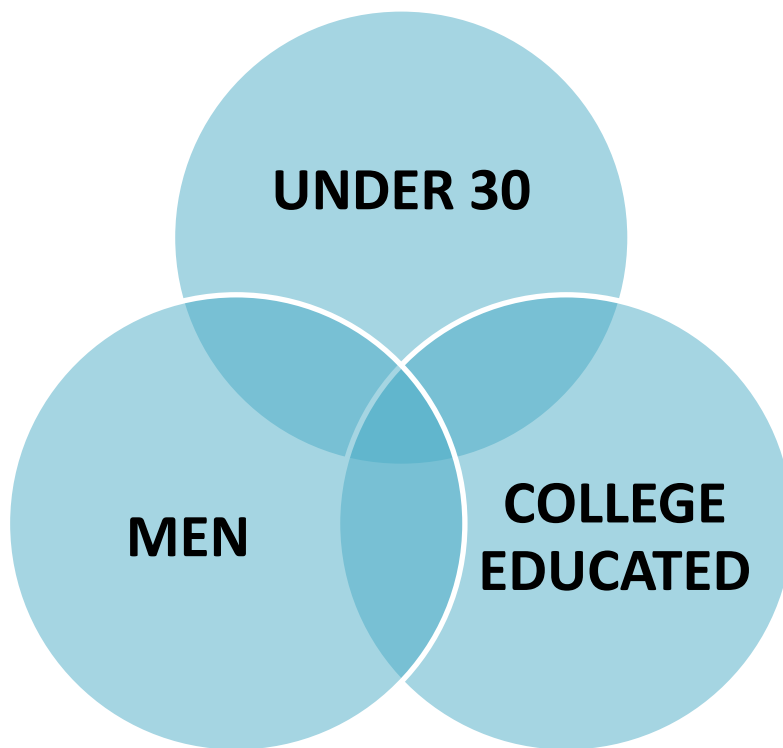
College Educated (under 30) Young Men
(CEYM)
(~5% share in All Voters)

For Approximate Reference
Vote Distribution (2013)
Among

* Among College Educated Young (under 30)
Women CEYW, the score is PML-N (34%); PTI
(27%)

	CEYM (College Educated Young Men)	CEYW (College Educated Young Women)
PML-N	400,000~	400,000~
PTI	800,000~	300,000~
All Others	1,200,000~	400,000~
All	3,400,000~	1,100,000~

KEY DRIVERS IN PML-N and PTI CONTESTS



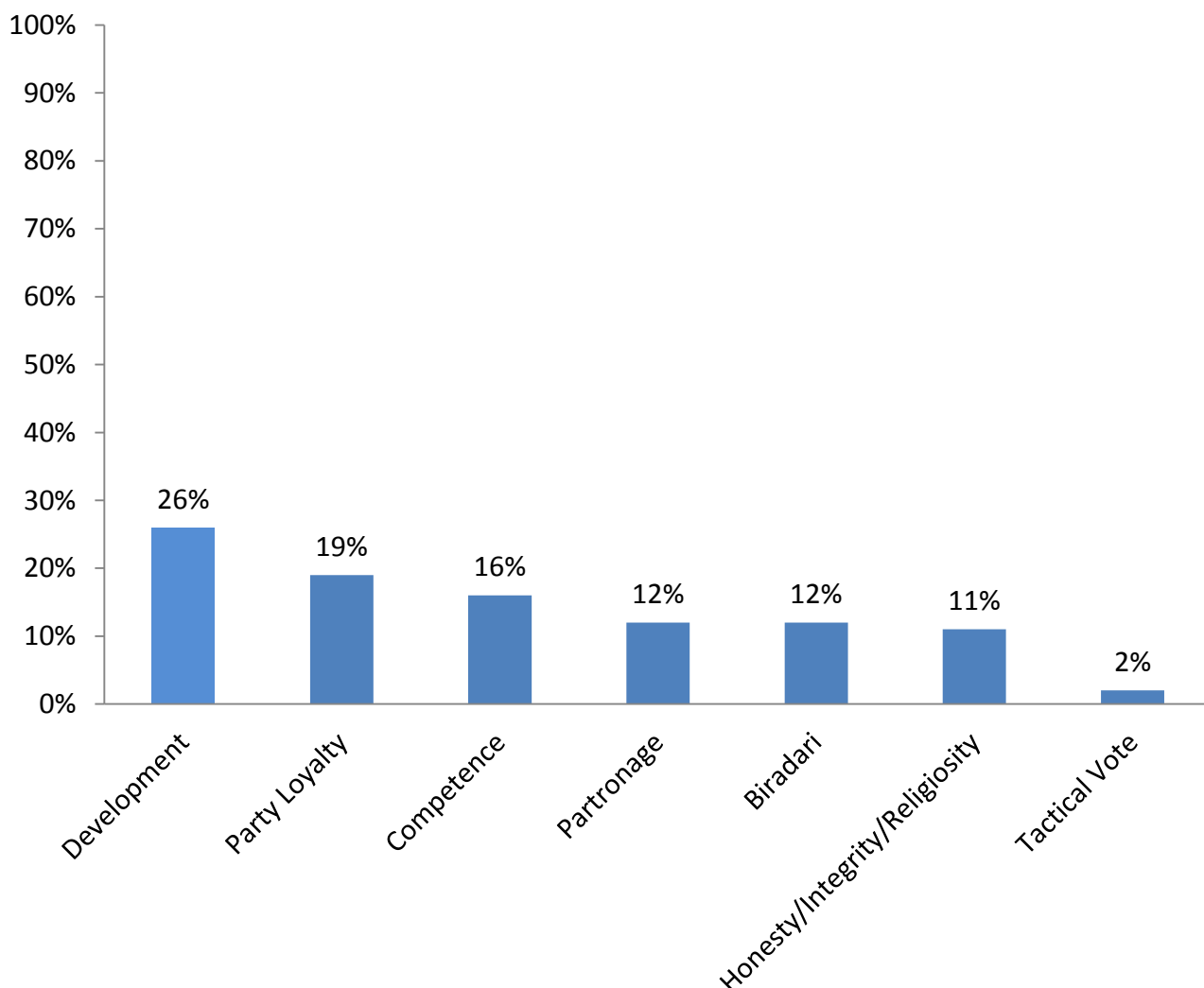
COLLEGE (Bachelors) EDUCATED YOUNG (under 30) MEN

CEYM

MOTIVATIONAL DRIVERS

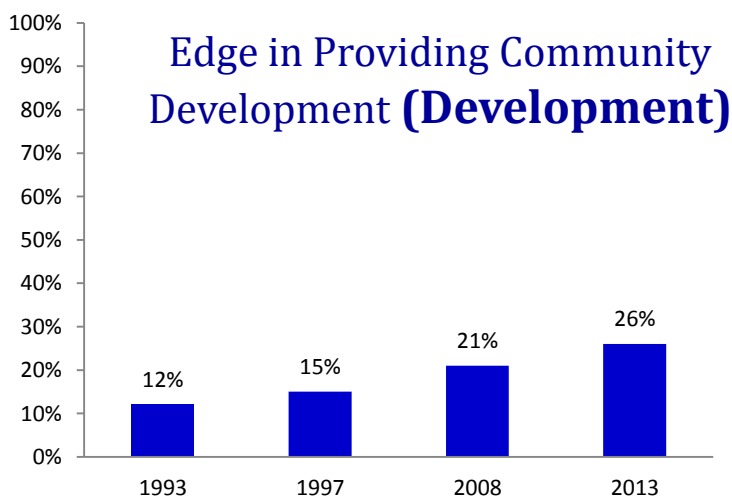
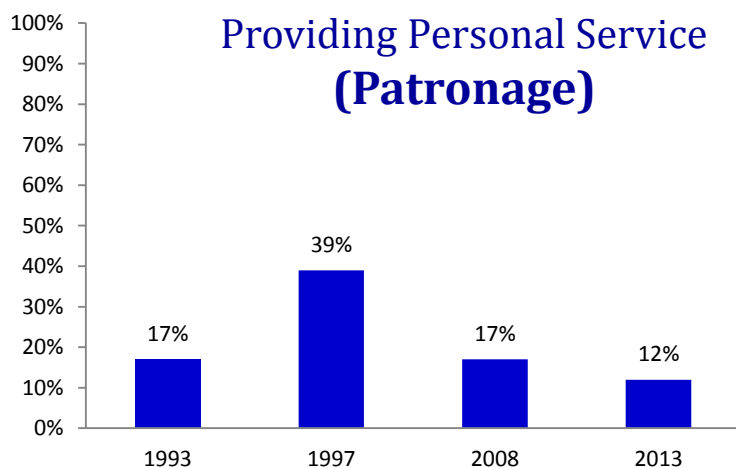
7 MOTIVATIONS TO VOTE

Question: What is the most important reasons for giving the vote to your preferred candidate for the National Assembly constituency seat?



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

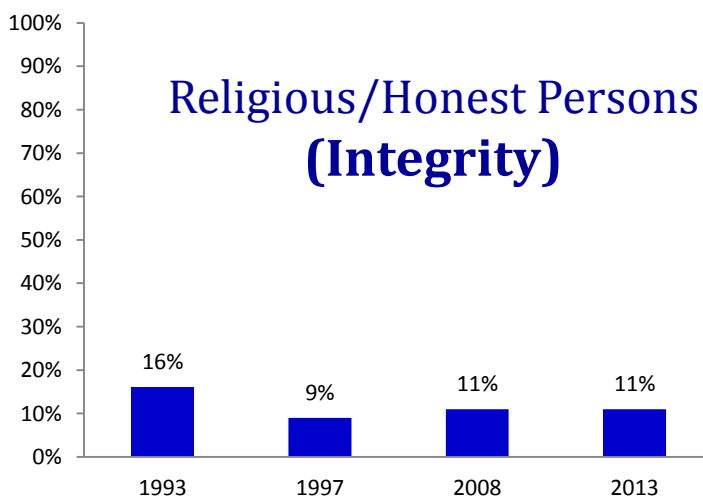
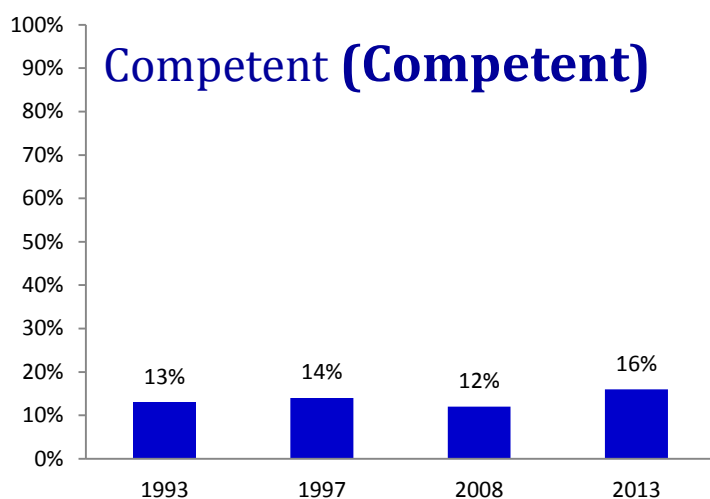
7 Motivations to vote Trend Analysis (1993-2013)



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan



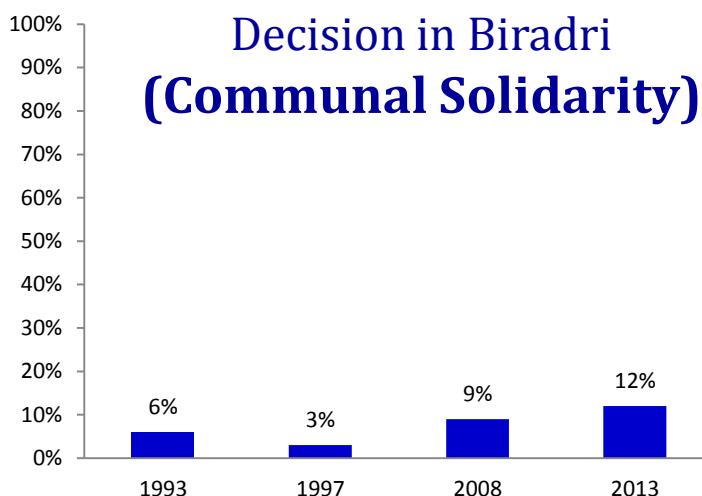
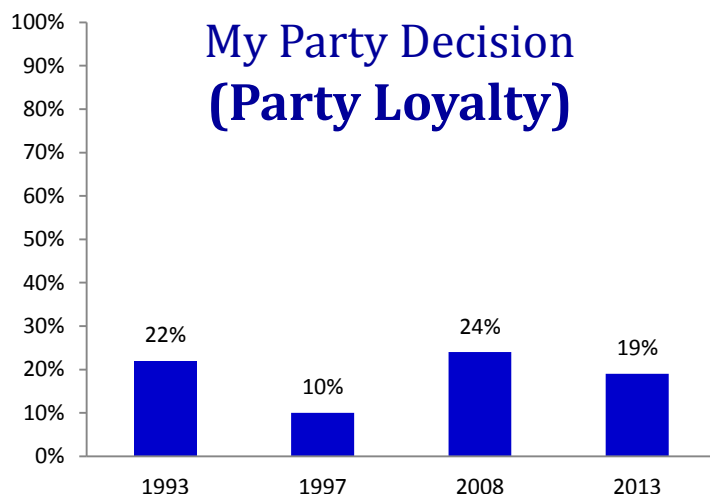
Motivation to vote Trend Analysis (1993-2013)



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

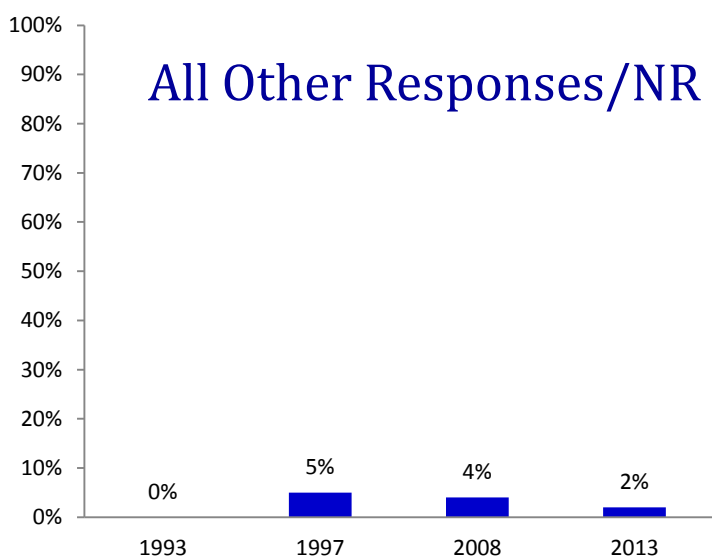
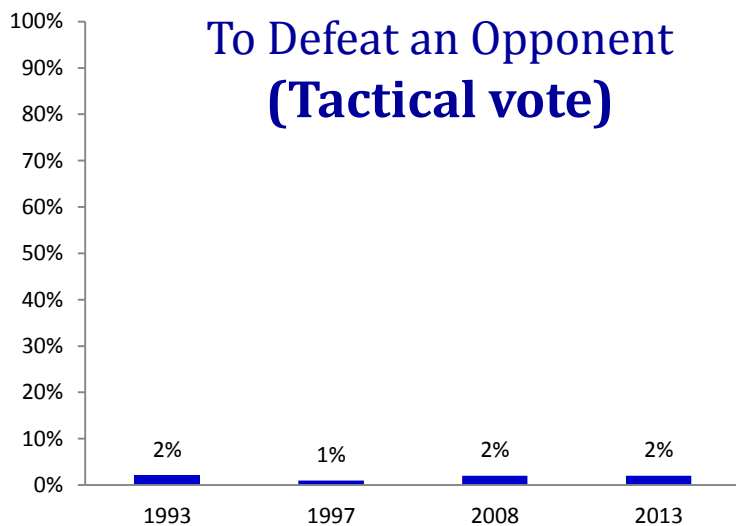


Motivation to vote Trend Analysis (1993-2013)



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

Motivation to vote Trend Analysis (1993-2013)



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan



Section 4:

**What does it mean for
Pakistan's future:**

A basic SWOT Analysis

**4Rs OF STRENGTHS; 3Rs OF WEAKNESSES/THREATS AND
3 DOORS OF OPPORTUNITIES**



4 STRENGTHS

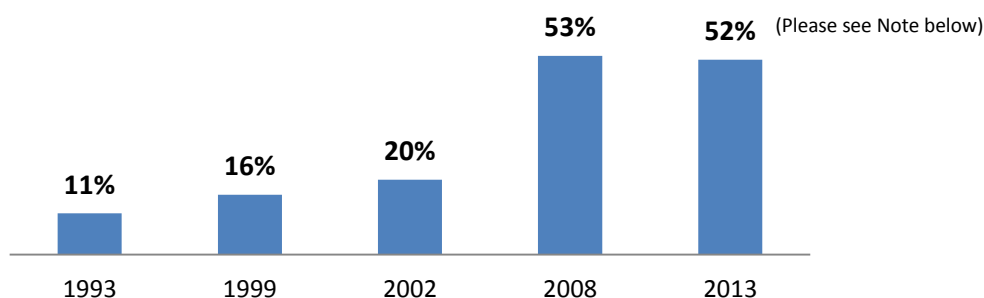
- RECONCILIATION
- REGIONALIZATION
- RE-ALIGNMENT
- RULE OF LAW

(4 Rs of Strengths)

RECONCILIATION

AND SUPPORT FOR FRIENDLY OPPOSITION: Trend Data

Percent of voters of top 2 parties who describe their **Rival Party** as their Second Best Choice (1993-2013)*



* Among those who provided a second choice

Percent who voted for
RIVAL PARTY AS SECOND CHOICE

	(PML-N) voters opting for PPP as Second Best	(PPP) voters opting for PML-N as Second Best	Average inclination among TOP 2 RIVALS
	(1)	(2)	(1+2) / 2 = Average
1993	7%	14%	11%
1997	13%	19%	16%
2002	20%	19%	20%
2008	54%	51%	53%
2013	47%	56%	52%
	PML-N voters for PTI	PTI voters for PML-N	

* For 2013 comparison is among top two which were PML(N) and PTI

Correction and Caution for readers who saw or listened to an EARLIER VERSION of this Graph and Table

We apologise that an earlier version of this table showed the figure of 24%, 64% and 73% for 2002, 2008 and 2013 respectively. While verifying the data, we found a mistake in tabulation. We greatly regret the mistake and apologise for any inconvenience. In observing our Code of Ethics we are bound to make such corrections, despite the embarrassment to us and inconvenience to you. Once again our sincere regrets.

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data and ECP data computed by Gallup Pakistan

REGIONALISATION

The Process of Building a
CONSORTIUM OF
REGIONALLY FOCUSED
VOTE BANKS

HAS BONDED RATHER THAN
FRAGMENTING
PAKISTAN

REALIGNMENT

Since **1970** the Winner and Runner up were **PPP and PML(s)**; all other accounted for a minor share in Pakistani vote banks

In **2013** a realignment of forces has transformed it. It is highly likely that the two parties on center stage in the future will be **PML(N) and PTI**

RULE OF LAW

NATIONAL CONSENSUS ON 'RULE OF LAW' PROVIDED THE BASIS FOR

- 1- **RECONCILIATION:** End of polarization and mainstreaming by coming together on the platform of rule of law.
- 2- **REGIONALIZATION:** Consensus of regionalization through 18th Amendment
- 3- **REALIGNMENT:** Re-aligning of political competition through the emergence of a new upper middle class which spearheaded the emergence of PTI as Pakistan's second most important vote bank.

WEAKNESSES / THREATS

- **RELAPSE TO PAST HABITS:** Polarization, Province bashing and Breach of Law at will.
- **RESULTS IN HASTE:** Good governance from top could end up in displacing local political-cum economic entrepreneurs, thus paralyzing Pakistan's (anarchic) engines of growth.
- **RETICENCE OF MAINSTREAM TO LOOKAFTER THE 'MARGINALIZED' AND THE 'FALLEN':** Mainstream politics can be tyrannizing if legal and social rights of those on the fringe are violated.

(3 Rs of Weaknesses and Threats)



OPPORTUNITIES

- o **Sound Fundamentals: One Nation with many political faces**
- o **Passionate Middle class, now with a foot in the door**
- o **An opportunity to open 3 doors for the passionate new middle class, and expand Political space in Pakistan**

(3 Doors of Opportunity)



HUNGER FOR SHARE IN POLITICAL POWER

ELECTION DATA SHOWS THAT COLLEGE EDUCATED YOUNG MEN (CEYM)* HAVE A HUNGER (passion) TO GET A SHARE IN POLITICAL POWER. THE DOORS OF POLITICAL PARTIES ARE CLOSED TO THEM. EVEN IF THEY WERE OPENED THERE IS NOT MUCH SPACE. EXIT POLL DATA SHOWS THAT THEY VOTED HEAVILY FOR PTI HOPING TO GET A SHARE IN POLITICAL POWER. BUT NO POLITICAL PARTY CAN OFFER WHAT THEY WANT UNLESS THE SPACE IN THE ROOM IS EXPANDED. THERE ARE 3 DOORS OF OPPORTUNITY. THE DOORS SHOULD BE OPENED TO ROOMS WITH EXPANDED SPACE

* Voting behavior among College Educated Young women (CEYW) is slightly different than their men counterparts. Data are available in an earlier part of this Report.

3 DOORS OF OPPORTUNITY

TRANSLATE SOUND FUNDAMENTALS
INTO SOUND GOVERNANCE

by opening 3 doors in Political space

9 Rulers are better than **1**

(the door has already been opened)

100,000 Elections are better than **1000**

(the door should be opened by holding local government elections before the end of year)

30 Governments are better than **5**

(the door should be opened before the next election in 2018)

METHODOLOGY

The survey was conducted with a statistically selected sample of 4,636 men and women voters comprising a cross-section of all ages, income and educational backgrounds. The survey was conducted in the rural and urban polling stations of all the four provinces of Pakistan. Interviews were face to face conducted by a team of more than 200 men and women between 8 am to 5 pm on the polling day (*May 11*). The respondents were selected through time sampling method soon after they stepped out of the polling station. Every voter stepping out at the end of 15-minute slot was selected for interview. The purpose was to randomize the selection independent of arbitrary role of the interviewer. The process was continued throughout polling time to ensure randomization of voters casting their votes during different parts of the day. All data are computer processed. The error margin is estimated to be + 2-5% at 95% confidence level.

The survey was carried out by Gallup Pakistan, supervised and directed by Dr. Ijaz Shafi Gilani, Chairman, Gallup Pakistan.



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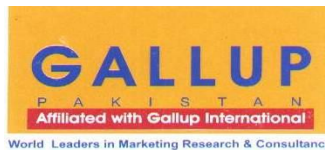
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Gallup Pakistan has conducted this poll according to the ESOMAR Code of Ethics and internationally recognized principles of scientific polling. The results in this Report do not represent views held by the authors or Gallup Pakistan. The results only represent public opinion, computed on the basis of views expressed by anonymous respondents selected through the procedure outlined in the Methodology section of this Report.

Gallup Pakistan has provided this data in the public interest and gratis. It cannot be held liable, contractually or otherwise, to the users of this data.

