

PAKISTAN'S GENERAL ELECTION: 2018

EXIT POLL SURVEY REPORT

Who voted for whom why and
what does it mean for Pakistan's
future?

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This report is a Draft Version

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Introduction

INTRODUCTION

Gallup Pakistan carried out a large scale Election Day Survey on July 25 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. Section 7 analyses the role of media during election campaigning. The final section in this series discusses the new Federal Government.

The findings are based on a survey of 3,549 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.

EXECUTIVE SUMMARY

PTI is the most popular choice among voters of all age groups.

The age wise voting behavior of the Exit Poll data suggests in the recent elections PTI replaced PML-N as the most favored party by all age groups. PTI has a significant lead in all age groups except in the age category of 35-49 years old where PML-N is closely behind.

PML-N's share of new voters (age 18-24) declines by 14% since the last elections.

According to the Exit Poll Data, PTI has been the most popular choice of new voters (age 18-24) in the recent elections. In this age range, PML-N's share has declined by 14% since General Elections 2013. It was 35% in the last elections as compared to 21% in this election. PTI's fortunes have increased by 9% in this age bracket. PTI's share was 26% in the last elections and 35% in GE 2018. PPP also saw a minor increase in their share. It was 12% in 2013, while it is 14% now. In the age category of 25+ PML-N, lost 10% voters since the last elections. PTI gained 15% voters, while PPP also lost 2% voters.

13% more new and educated voters chose PTI over PML-N in General Elections 2018.

PTI has been the choice of more new and educated voters than PML-N since 2013. Alternatively, PML-N being the choice of this category of voters has seen a decline of 8% since the last elections.

PTI's high share of new, educated and upscale voters stays consistent since GE 2013.

The share for both parties: PML-N and PTI among new, educated and upscale voters decreases by 8% and 9% respectively, but PTI's share of this type of voters remains higher than PML-N's in both elections.

The age composition of party votes is roughly similar.

The age composition of party votes does not differ significantly for each party nor are there any significant changes since General Elections 2013. At all Pakistan level, 12% voters are new voters (18-24 years old), 19% of them are in the age bracket 25-29, 17% belong to 30-34 years old category, 37% are fall in the age group 23-49 years and 15% are aged 50 years or more.

Since General Elections 2013, PTI has seen a 13% increase in illiterate voters, while PML-N's vote bank has seen a decline of 8% in illiterate voters.

Education wise voter behavior shows that, among the three leading parties (PML-n, PTI and PPP), PML-N has the highest share of illiterate voters with PTI closely behind. PTI has the highest share among voters who are educated up to middle school, followed by PML-N and then PPP. PTI also takes lead among voters who are educated till high school/ intermediate level and those who have obtained higher education.

In Pakistan the highest level obtained by 35% of voters is up to middle school.

At all Pakistan level, there are 22% illiterate voters, 35% voters educated up to middle school, 34% educated to a level of high school/intermediate and only 10% who hold a bachelors/ master's degree. PTI has 5% less illiterate voters than the percentage of illiterate voters at all Pakistan level, while PML-N has 2% more illiterate voters while PPP has 9% more illiterate voters. PML-N has 3% more voters and PPP has 3% less voters than the country's total share of voters in the category of education up to middle school, PTI has the same share as the country's share of such kind of voters. Only PTI's share of votes is greater than the country's share of votes, casted by voters who have acquired higher education.

As compared to PML-N and PPP; PTI most successful in capturing the votes of the very poor (earning up to Rs.10,000).

PTI's vote share of votes in comparison to PML-N and PPP is higher in all income categories but the lead is quite significant in the top income brackets.

About a quarter of both PML-N's and PTI's vote bank belongs to the Rs.20,001- Rs. 25,000 income bracket, while a quarter a quarter of PPP's vote bank belongs to Rs. 15,001-Rs.20,000 income bracket.

Among PML-N, PTI and PPP, PPP has the highest share of poor and very poor (income up to Rs.20,000) voters. PML-N has the highest share of middle income earners (up to Rs. 25,000) while PTI has the highest share of voters who are earning more than Rs. 25,000.

7% more females than males in PML-N's vote bank in General Elections 2018.

The gender wise voter behavior shows that the proportion of males and females voters in PPP's and PTI's vote bank is equal for both 2013 and 2018

elections, while, PML-N has more female voters as compared to male voters for both years.

There are 20% more educated women in PTI's vote bank as compared to PML-N in GE 2018.

PTI has the highest share of educated (high school and above) female voters, followed by PML-N and PPP in GE 2018, while PML-N had the highest share of educated female voters, followed by PTI and then PPP in GE 2013.

PTI's share of educated and upscale voters increases by 7% since GE 2013.

In GE 2018, PTI replaced PML-N with its highest share of voters in the category of educated and upscale voters. The gender wise distribution of educated and upscale voters shows that PML-N has more female educated and upscale voters while PTI has more male educated, upscale voters. PPP has the same proportion of such type of voters.

PTI has 23% and 36% more young, upscale male voters as compared to PML-N and PPP respectively in its vote bank.

At all Pakistan level, PTI has the highest share (34%) of young and upscale voters. PML-N has a share of 26%, PPP only has a 6% share of voters with these characteristics and all other parties have a collective share of 34%. The highest share of upscale male voters (10% more than its total proportion of young upscale voters in the country) goes to PTI. On the other hand, PML-N has 9% more female young upscale voters than PML-N's total share of such voters in the country.

At all Pakistan level, proportion of male voters increased by 3% since the last elections, while the proportion of female voters has dropped by 3%.

In GE 2018, 61% of the voters were males, while 39% were females. PTI has the highest share of male voters (61%). Alternatively, PML-N has the highest share (46%; 7% more than the entire country's share of female voters).

PERCEPTIONS ON IMPARTIALITY

4% more voters in 2018 than 2013 found the polling staff to be partial to a particular candidate.

The Exit Poll data suggests that contrary to the popular belief, 4% more voters in the recent most elections felt that a particular candidate was favored by the polling staff than they did in the last election. Fewer people found the

polling staff to be impartial as compared to GE 2013, but more thought the polling staff was impartial as compared to GE 2008.

About 8% fewer respondents found media to be impartial before the elections in comparison to other institutions like ECP staff, agencies, courts and NAB.

The respondents were asked about how impartial they thought different institutions were. Among ECP staff, agencies, media, courts and NAB, media was considered to be the most partial to a particular party before elections while followed by ECP staff and agencies with courts and NAB closely behind. On the other hand, ECP staff and courts were rated as the most impartial before the elections, followed by agencies, NAB and then media.

TIPS FOR PARTY LEADERS ABOUT VOTERS' CHOICES FOR POLITICAL ALLIANCES

29% fewer PTI voters listed PML-N as their second best choice in the GE 2018 as compared to GE 2013.

The respondents were asked about their second best choice to vote for. Among PML-N voters, PTI was the most popular choice, while PTI voters preferred PPP the most over all other parties. Similarly, PPP voters also listed PTI as their most common pick (as their second best choice), so did MMA and independent candidate voters in GE 2018. While in GE 2013 most of the leading parties listed PML-N as their second best choice to vote for.

55% of PTI voters listed PML-N as their second best choice, while only 32% of PML-N voter favored PTI.

The Exit Poll data of GE 2018 suggests that, MMA was the most popular second choice of PML-N voters, while majority of the PTI voters chose PML-N as their second best choice. In PPP voters PTI was a popular choice while most MMA voters and independent candidate voters listed PTI as their second best choice.

HOW VOTERS MAKE THEIR CHOICE

The share of patron seeking voters sees a rise of 11% since the last elections.

The voters have been classified in seven different categories based on their motivations to vote for a particular candidate. Since GE 2013, the proportion of party loyal voters has decreased by 8%, while development seeking voters

have seen a rise in their proportion. Patron seeking voters have increased, while legislation minded voters have decreased. Morality seeking voters have also increased but the Biradari bound voters have decreased significantly by 6%. The proportion of skeptic voters has remained the same.

Almost half (43%) voters said that the candidate's personal qualities were their chief motivator to vote for a particular candidate.

Respondents exiting the polling station were asked about the main reason for casting their vote to a particular candidate. 39% said it was party affiliation while a majority (43%) said it was candidate's personal qualities and 15% said that it was their Biradari's decision.

Almost 6 in 10 voters (59%) voted for a candidate not belonging to their Biradari.

To see how Biradari plays a role in voting decisions, respondents were asked if the candidate they voted for belonged to their Biradari. To this only 19% said that the candidate did belong to their Biradari while, majority (59%) said that the candidate did not belong to their Biradari. 17% said that they are not associated to a specific Biradari.

52% voters' Biradari together made the decision to cast their vote.

Voters were asked if their Biradari together made a decision to cast their vote. To this 52% said that it did, while 45% said it did not. 3% did not know or did not wish to respond.

VOTER'S SENSE OF EMPOWERMENT

2% voters in GE 2018 than GE 2013 believe that their vote will be helpful improving the condition of the country.

In comparison to GE 2013, 2% fewer voters are optimistic about their vote making a difference in these elections, but this number has seen a rise of 5% since GE 2008.

POLITICAL ACTIVISM

Political activism among the general public in decline since the last elections.

When people were asked about how politically active (taking part in political gatherings, rallies or campaigns) they were; it was found out that overall fewer people were politically active for GE 2018 but at the same time fewer people were not politically active at all in the recent most elections as compared to the previous election.

12% less politically active voters hoisted a flag for GE 2018 as compared to the last elections.

The politically active voters were asked if they undertook the common practices associated with political activism e.g, canvassing, flag hoisting, organizing or making a speech in a rally etc. Less politically active voters took part in all of these activities for GE 2018 as compared to GE 2013.

Effect of Political Media Campaign (Television on Voting Decision)

7% more voters changed their voting decision due to political campaigns on TV in this year's elections as compared to 2013's elections.

Voters were asked if their voting decision changed after watching election campaigns and advertisements on TV. To this 85% in GE 2013 and 78% in GE 2018 said that it stayed the same as before, while 11% and 18% in GE 2013 and GE 2018 respectively said that it changed.

PTI gained 22% voters due to the switching behavior of voters owing to political campaigns on television.

Political campaigns on television only positively benefitted PTI in both GE 2013 and GE 2018. PML-N and PPP both were adversely affected by the political campaigns on media.

NEW FEDERAL GOVERNMENT

Almost half (45%) voters said that PTI will form the federal government after the recent most elections.

The Exit Poll survey asked the respondents, who in their opinion would form the federal government. To this 45% said that PTI would, 28% said PML-N

would, 14% said PPP would while 2% said other political parties would form the federal government. 11% did not know.

A vast majority (61%) of voters is against PTI and PML-N coalition government.

The respondents were presented with a scenario in which no single party has an absolute majority to form the government. They were asked which two parties should then form a coalition. In response to this, 30% were in the favor of PTI and PPP coalition but 47% opposed it. 28% favored PML-N and PPP but 47% opposed it. Only 15% supported the coalition of PTI and PML-N while 61% opposed it. 24% supported PML-N and MMA coalition but 48% opposed it. Lastly, 23% were in the favor of PTI and MMA coalition but 49% respondents opposed it.

41% voters wanted Imran Khan to be the next Prime Minister of the country.

Voters exiting the polling stations were then asked who they would choose as the next Prime Minister. Imran Khan was the choice of 41% voters, while Shahbaz Sharif was chosen by 29% voters. 13% picked Bilawal Bhutto Zardari, 2% each chose Shahid Khawaqan Abbasi, Shah Mahmood Qureshi and Asif Ali Zardari. 3% chose other candidates, while 8% did not know.

PART 1

PAKISTAN'S GENERAL ELECTION: 2018

SURVEY FINDINGS

Who voted for whom why and
what does it mean for Pakistan's
future?

SECTION 1

Voting Behavior and Profile of
Leading Political Parties Vote
Bank

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

| | 2013 | | | | | 2018 | | | | |
|--------------|--|-------------|-------------|-------------|------------|--|-------------|-------------|-------------|------------|
| | New voters (Age 18-24) | Age 25 - 29 | Age 30 - 34 | Age 35 - 49 | 50 + | New voters (Age 18-24) | Age 25 - 29 | Age 30 - 34 | Age 35 - 49 | 50 + |
| | <i>Among those who voted for (Col %)</i> | | | | | <i>Among those who voted for (Col %)</i> | | | | |
| All Pakistan | | | | | | | | | | |
| PML-N | 35 | 26 | 33 | 32 | 39 | 21 | 23 | 25 | 26 | 23 |
| PTI | 26 | 21 | 14 | 16 | 12 | 35 | 33 | 34 | 29 | 33 |
| PPP | 12 | 14 | 15 | 16 | 16 | 14 | 12 | 13 | 12 | 17 |
| All others | 27 | 39 | 38 | 36 | 33 | 31 | 31 | 28 | 33 | 27 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

Table 1.1B

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

| | 2013 | | 2018 | |
|--------------|--|------------|--|------------|
| | New voters (Age 18-24) | Age 25 + | New voters (Age 18-24) | Age 25 + |
| | <i>Among those who voted for (Col %)</i> | | <i>Among those who voted for (Col %)</i> | |
| PML-N | 35 | 32 | 21 | 25 |
| PTI | 26 | 16 | 35 | 31 |
| PPP | 12 | 15 | 14 | 13 |
| All others | 27 | 37 | 31 | 31 |
| Total | 100 | 100 | 100 | 100 |

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

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.

| | 2013 | 2018 |
|-------|--|--|
| | New voters (Age 18-24) who are educated to a level of High School and above | New voters (Age 18-24) who are educated to a level of High School and above |
| | <i>Among those who voted for</i> | <i>Among those who voted for</i> |
| PML-N | 31 | 23 |
| PTI | 34 | 36 |

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

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 and PML-N has a higher share of young, educated and upscale voters compared to PML-N.

| | 2013 | 2018 |
|-------|--|--|
| | New voters (Age 18-24) who are educated to a level of High School and above, and are earning more than Rs. 30,000 | 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 those who voted for</i> | <i>Among those who voted for</i> |
| PML-N | 35 | 27 |
| PTI | 37 | 28 |

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

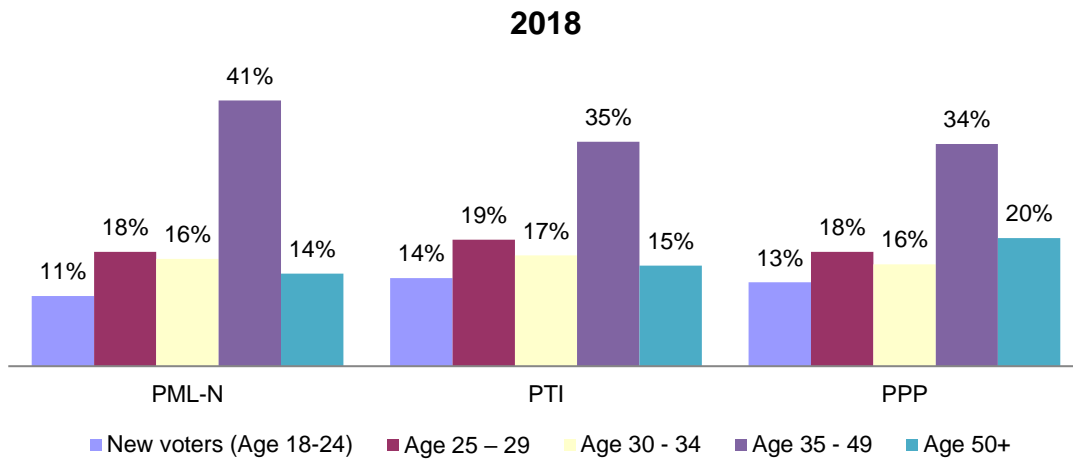
Table 1.2

AGE COMPOSITION OF PARTY VOTES

The vote bank of all three leading parties is roughly similar in age composition.



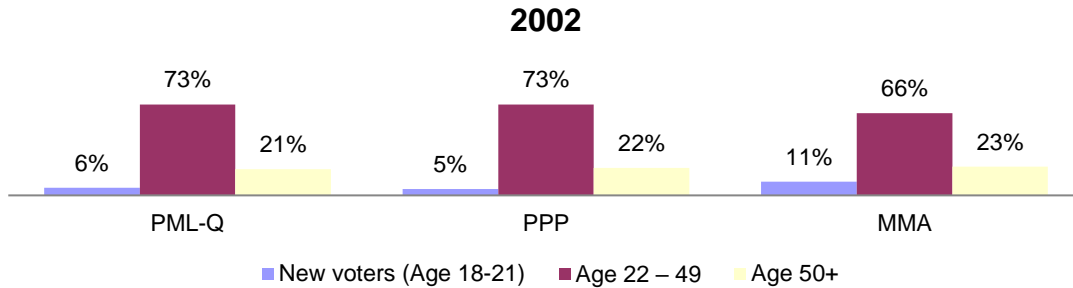
| | 2013 | | | | 2018 | | | |
|------------------------|---|------------|------------|------------|---|------------|------------|------------|
| | All Pakistan | PML-N | PTI | PPP | All Pakistan | PML-N | PTI | PPP |
| | Percent share in all votes scored by this party (col %) | | | | Percent share in all votes scored by this party (col %) | | | |
| New voters (Age 18-24) | 11 | 12 | 17 | 9 | 12 | 11 | 14 | 13 |
| Age 25 – 29 | 14 | 11 | 18 | 14 | 19 | 18 | 19 | 18 |
| Age 30 – 34 | 18 | 18 | 15 | 18 | 17 | 16 | 17 | 16 |
| Age 35 - 49 | 42 | 42 | 40 | 44 | 37 | 41 | 35 | 34 |
| 50 + | 15 | 17 | 10 | 15 | 15 | 14 | 15 | 20 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |



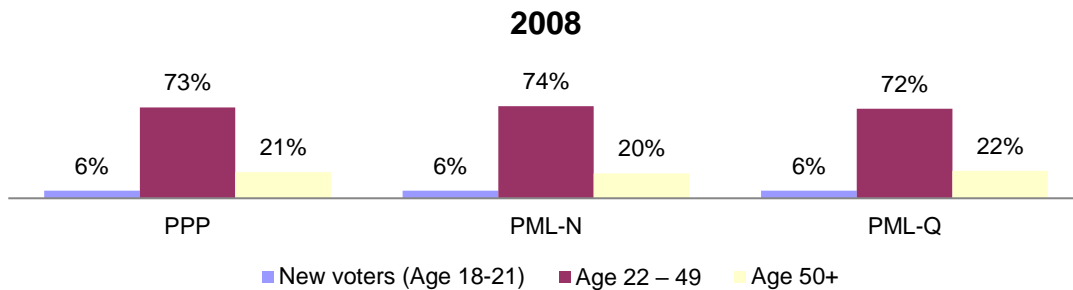
Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

AGE COMPOSITION OF PARTY VOTES – COMPARATIVE ANALYSIS:

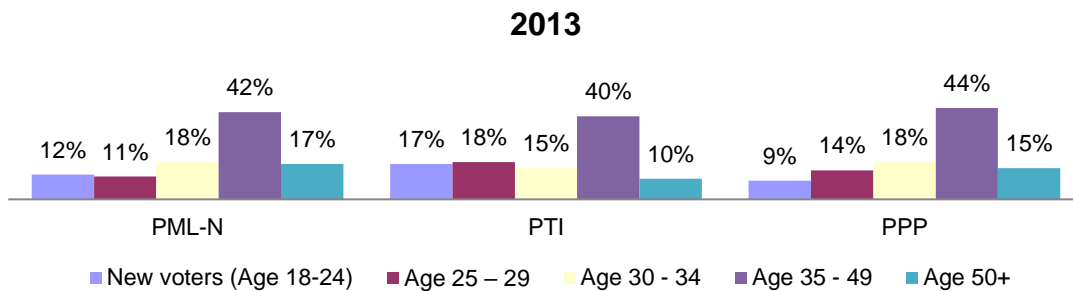
2002 Exit Poll: MMA had higher proportion of young voters compared to PML-Q and PPP who had a roughly similar age composition of voters.



2008 Exit Poll: The vote bank of all three leading parties is roughly similar in age composition.



2013 Exit Poll: 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.



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

Table 1.3

EDUCATION-WISE VOTER BEHAVIOUR

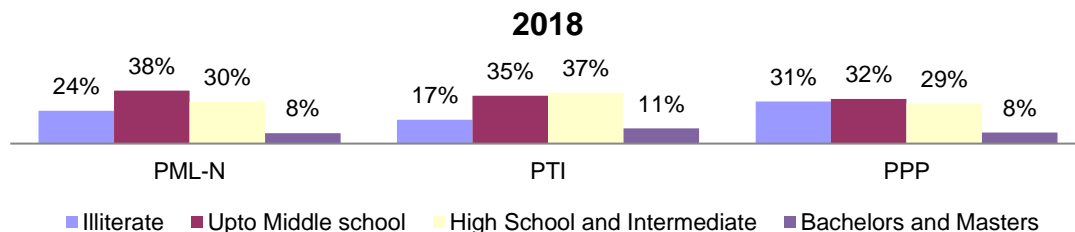
| | 2013 | | | | 2018 | | | |
|--------------|--|--------------------|------------------------------|-----------------------|--|--------------------|------------------------------|-----------------------|
| | Illiterate | Upto Middle School | High School and Intermediate | Bachelors and Masters | Illiterate | Upto Middle School | High School and Intermediate | Bachelors and Masters |
| | <i>Among those who voted for (Col %)</i> | | | | <i>Among those who voted for (Col %)</i> | | | |
| PML-N | 33 | 38 | 30 | 23 | 25 | 27 | 23 | 21 |
| PTI | 11 | 13 | 22 | 28 | 24 | 32 | 35 | 40 |
| PPP | 20 | 14 | 13 | 12 | 17 | 12 | 11 | 12 |
| All others | 36 | 35 | 35 | 37 | 33 | 30 | 31 | 27 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

Table 1.4

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.

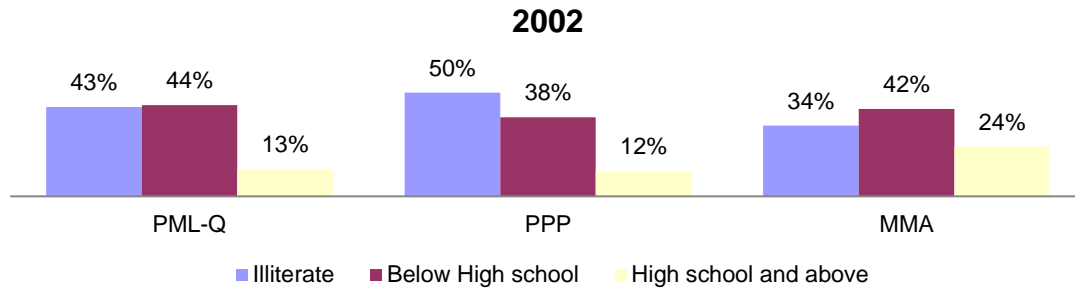
| | 2013 | | | | 2018 | | | |
|---------------------------------|--|------------|------------|------------|--|------------|------------|------------|
| | All Pakistan | PML-N | PTI | PPP | All Pakistan | PML-N | PTI | PPP |
| | <i>Percent share in all votes scored by this party (col %)</i> | | | | <i>Percent share in all votes scored by this party (col %)</i> | | | |
| Illiterate | 26 | 27 | 17 | 35 | 22 | 24 | 17 | 31 |
| Upto Middle School | 32 | 37 | 25 | 30 | 35 | 38 | 35 | 32 |
| High School and Intermediate | 33 | 30 | 43 | 28 | 34 | 30 | 37 | 29 |
| Bachelors and Masters (College) | 9 | 6 | 15 | 7 | 10 | 8 | 11 | 8 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |



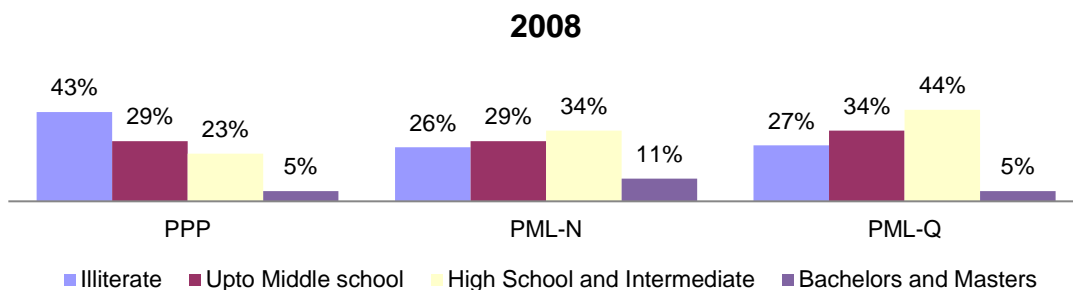
Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

EDUCATIONAL COMPOSITION OF PARTY VOTES – COMPARATIVE ANALYSIS

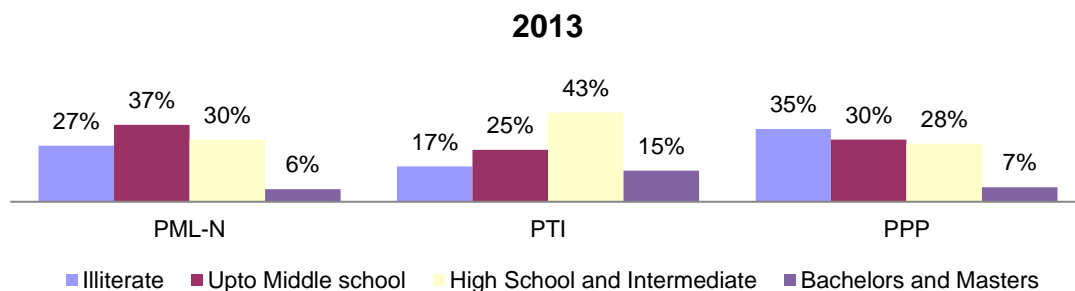
2002 Exit Poll: PPP and PML-Q had a proportionate edge over MMA among the illiterates whereas the MMA had a proportionate edge over them among those who had high school and above education.



2008 Exit Poll: PML-N vote bank had a higher share of college-educated votes compared to the other parties. The PPP vote bank had a notably higher share of illiterate voters.



2013 Exit Poll: PPP and PML-N vote bank had a notably higher share of illiterate voters. PTI vote bank had a higher share of college-educated voters.



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

Table 1.5

INCOME-WISE VOTER BEHAVIOUR

| | 2018 | | | | | |
|--------------|--|------------------|--------------------|------------------------|------------------------|----------------------|
| | Upto Rs.10,000 | Rs 10,001-15,000 | Rs 15,001 - 20,000 | Rs 20,001 - Rs. 25,000 | Rs 25,001 - Rs. 30,000 | More than Rs. 30,000 |
| | <i>Among those who voted for (Col %)</i> | | | | | |
| PML-N | 14 | 25 | 24 | 27 | 23 | 27 |
| PTI | 25 | 26 | 28 | 33 | 34 | 36 |
| PPP | 19 | 18 | 15 | 10 | 13 | 8 |
| All others | 42 | 30 | 33 | 30 | 20 | 28 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 |

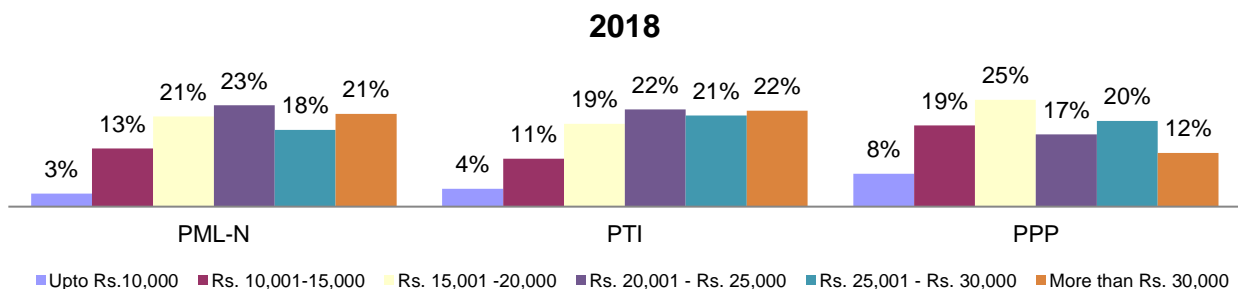
Table 1.6

INCOME COMPOSITION OF PARTY VOTES

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



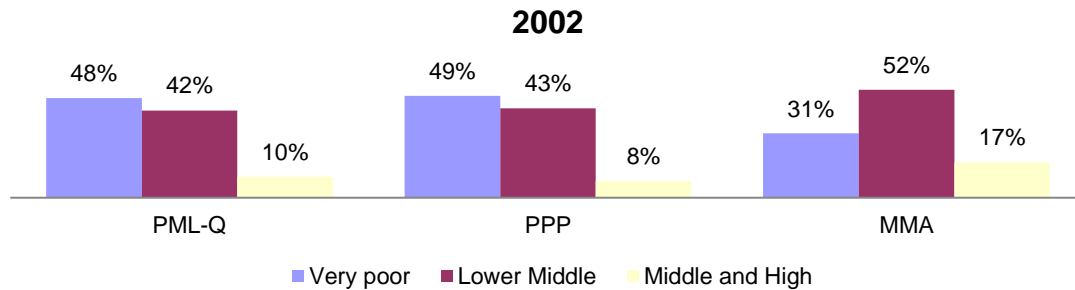
| | 2018 | | | |
|----------------------|--|------------|------------|------------|
| | All Pakistan | PML-N | PTI | PPP |
| | <i>Percent share in all votes scored by this party (col %)</i> | | | |
| Upto Rs.10,000 | 5 | 3 | 4 | 8 |
| Rs.10,001 – 15,000 | 13 | 13 | 11 | 19 |
| Rs.15,001 – 20,000 | 21 | 21 | 19 | 25 |
| Rs.20,001 – 25,000 | 22 | 23 | 22 | 17 |
| Rs.25,001 – 30,000 | 20 | 18 | 21 | 20 |
| More than Rs. 30,000 | 20 | 21 | 22 | 12 |
| Total | 100 | 100 | 100 | 100 |



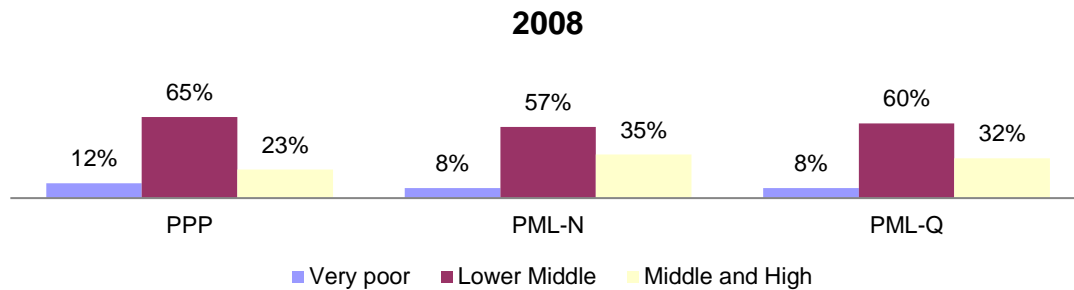
Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

INCOME COMPOSITION OF PARTY VOTES – COMPARATIVE ANALYSIS

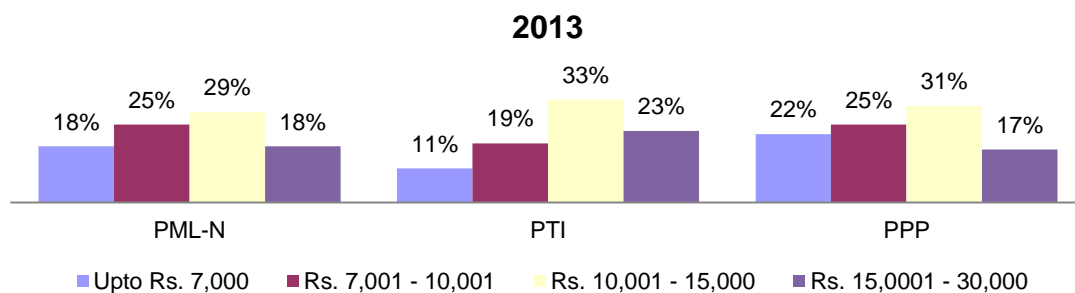
2002 Exit Poll: PPP and PML-Q had an advantage over MMA among the very poor (voters reporting household income less than Rs. 3000). On the other hand, MMA had an advantage over the other two leading parties among households where monthly income was greater than Rs. 10,000.



2008 Exit Poll: PML-N vote bank had a higher share of upper income groups followed by PML-Q; PPP had higher share of the very poor.



2013 Exit Poll: PML-N and PPP had higher share of the very poor; PTI vote bank had a higher share of upper income groups followed by PML-N.



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

Table 1.7A

Voting Behavior Among GENDER-WISE VOTER BEHAVIOUR

| | 2013 | | 2018 | |
|-------|--|-------|--|-------|
| | Men | Women | Men | Women |
| | <i>Among those who voted for (Col %)</i> | | <i>Among those who voted for (Col %)</i> | |
| PML-N | 30 | 36 | 22 | 29 |
| PTI | 17 | 17 | 32 | 32 |
| PPP | 15 | 15 | 13 | 13 |

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

Table 1.7B

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

| | 2013 | | 2018 | |
|--------------|--|------------|--|------------|
| | Men | Women | Men | Women |
| | <i>Among those who voted for (Col %)</i> | | <i>Among those who voted for (Col %)</i> | |
| PML-N | 24 | 36 | 20 | 23 |
| PTI | 23 | 24 | 36 | 43 |
| PPP | 14 | 11 | 11 | 15 |
| All others | 39 | 29 | 32 | 19 |
| Total | 100 | 100 | 100 | 100 |

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

Table 1.7C

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

| | 2013 | | | 2018 | | |
|--------------|------------|--|------------|------------|--|------------|
| | ALL | Men | Women | ALL | Men | Women |
| | | <i>Among those who voted for (Col %)</i> | | | <i>Among those who voted for (Col %)</i> | |
| PML-N | 38 | 38 | 36 | 24 | 17 | 33 |
| PTI | 30 | 27 | 35 | 37 | 39 | 34 |
| PPP | 10 | 11 | 8 | 12 | 12 | 12 |
| All others | 22 | 24 | 21 | 27 | 32 | 20 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 |

Table 1.7D

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

| | 2013 | | | 2018 | | |
|--------------|------------|--|------------|------------|--|------------|
| | All | Men | Women | All | Men | Women |
| | | <i>Among those who voted for (Col %)</i> | | | <i>Among those who voted for (Col %)</i> | |
| PML-N | 41 | 35 | 51 | 26 | 21 | 35 |
| PTI | 32 | 35 | 27 | 34 | 44 | 17 |
| PPP | 2 | 3 | 0 | 6 | 8 | 2 |
| All others | 25 | 27 | 22 | 34 | 26 | 46 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 |

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

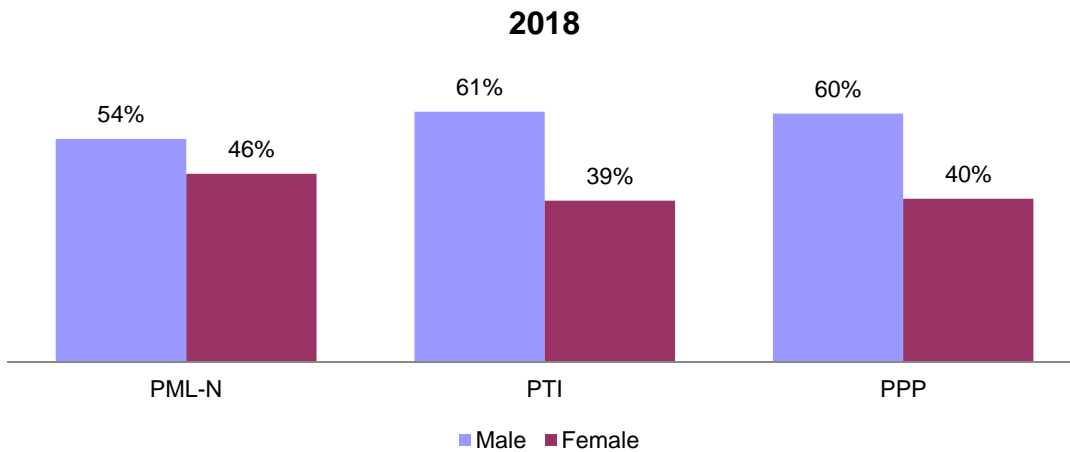
Table 1.8

GENDER COMPOSITION OF PARTY VOTES

PML-N has higher share of women compared to PTI and PPP.



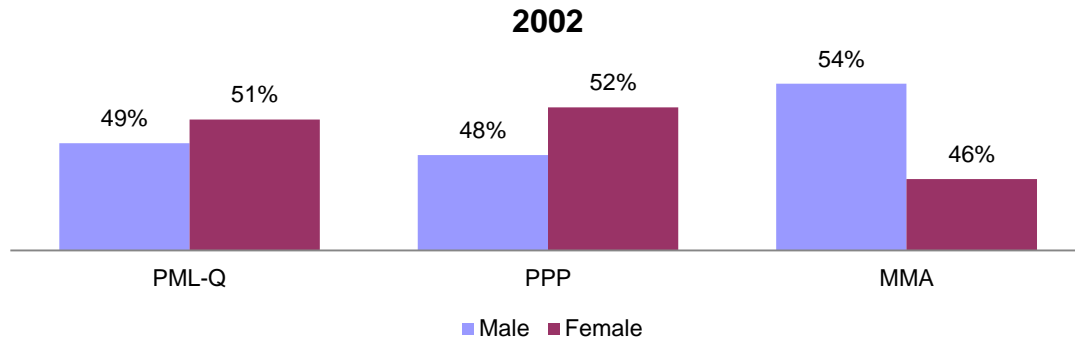
| | 2013 | | | | 2018 | | | |
|--------------|--|------------|------------|------------|--|------------|------------|------------|
| | All Pakistan | PML-N | PTI | PPP | All Pakistan | PML-N | PTI | PPP |
| | <i>Percent share in all votes scored by this party (Col %)</i> | | | | <i>Percent share in all votes scored by this party (Col %)</i> | | | |
| Men | 58 | 53 | 58 | 53 | 61 | 54 | 61 | 60 |
| Women | 42 | 47 | 42 | 47 | 39 | 46 | 39 | 40 |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |



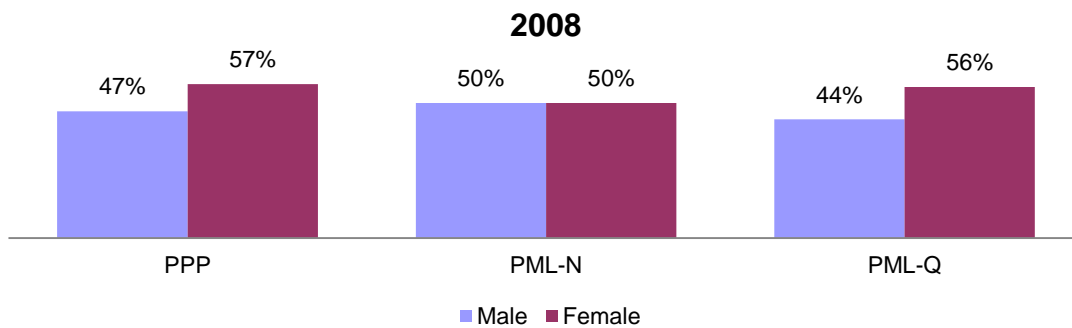
Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

GENDER COMPOSITION OF PARTY VOTES – COMPARATIVE ANALYSIS

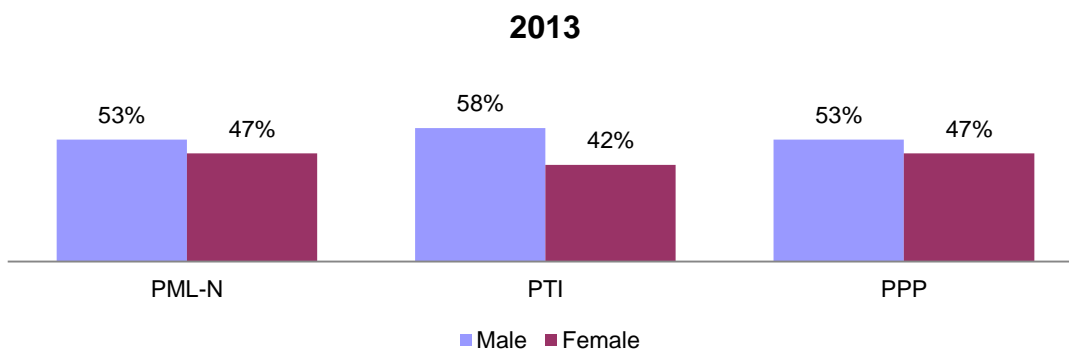
2002 Exit Poll: There was a slight difference in the gender composition of the voters of the top three parties. PPP had a slight advantage among females, while MMA had a slight disadvantage. The difference was however not very significant.



2008 Exit Poll: PML-Q and PPP vote banks had higher share of women compared to PML-N



2013 Exit Poll: PML-N and PPP vote banks had higher share of women compared to PTI



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

SECTION 2

Perceptions on Impartiality

Section # 2

PERCEPTIONS ON IMPARTIALITY

POLLING STATION LEVEL

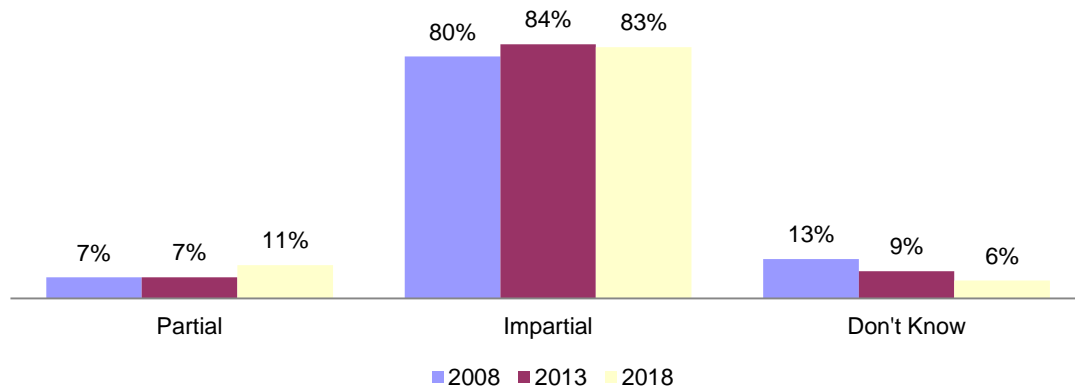
The majority (82%) of a scientific sample of voters from all across the country perceived that the polling staff was impartial on the Election Day.

Table 2.1

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

| | 2008 | 2013 | 2018 |
|------------|------|------|------|
| Partial | 7% | 7 % | 11% |
| Impartial | 80% | 84 % | 83% |
| Don't Know | 13% | 9 % | 6% |



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

INSTITUTIONAL LEVEL

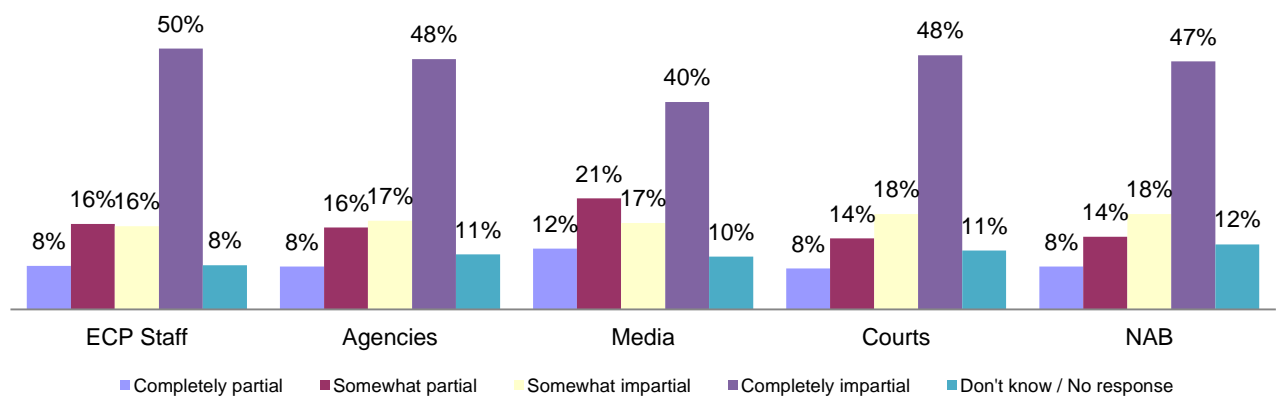
Majority voters from all across the country perceived that institutions were impartial before the elections.

Table 2.2

Question: In your opinion, were the following institutions partial towards a particular party or not, before the elections?

Percentage of respondents

| | 2018 | | | | |
|--------------------------|-----------|----------|-------|--------|-----|
| | ECP STAFF | Agencies | Media | Courts | NAB |
| Completely partial | 8% | 8% | 12% | 8% | 8% |
| Somewhat partial | 16% | 16% | 21% | 14% | 14% |
| Somewhat impartial | 16% | 17% | 17% | 18% | 17% |
| Completely impartial | 51% | 49% | 41% | 49% | 48% |
| Don't Know / No Response | 8% | 11% | 10% | 11% | 13% |



SECTION 3

VOTERS AND LEADERS

Tips for Party Leaders About
Voters' Choices for Political
Alliances

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

PTI – PPP: Voter Affinities

Among PTI voters 21% would have PPP as their second choice. In contrast 32% of PPP voters chose PTI as their second choice.

PTI – PML-N: Voter Affinities

The survey showed very interesting relationship between PTI and PML-N voters. Among PTI voters 19% would have PML-N as their second choice. In contrast 25% of PML-N voters chose PTI as their second choice.

PTI - MMA: Voter Affinities

Furthermore, 8% of **PTI voters** indicated MMA as their second best choice; and 38% of **MMA voters** said the same about PTI.

PTI – Independent Candidates: Voter Affinities

Additionally, only 9% of **PTI voters** indicated Independent Candidates as their second best choice; 32% of **Independent Candidate voters** said the same about PTI.

PML-N - PPP: Voter Affinities

On the other hand 16% of **PML-N voters** indicated PPP as their second best choice and 13% 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 3.1

2013

| 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 |

2018

| Among voters of | PREFERENCES OF ALLIANCE MINDED VOTERS | | | | |
|-----------------------|---------------------------------------|-----|-----|-----|-----------------------|
| | <i>Percent share (Among All)</i> | | | | |
| | Read in Rows | | | | |
| | PML-N | PTI | PPP | MMA | Independent Candidate |
| PML-N | | 25 | 16 | 11 | 11 |
| PTI | 19 | | 21 | 8 | 9 |
| PPP | 13 | 32 | | 4 | 9 |
| MMA | 9 | 38 | 17 | | 8 |
| Independent Candidate | 13 | 32 | 4 | 8 | |

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

Table 3.2

PERCENT SHARE (2013)

(among those who gave a second choice)

| Among voters of | PREFERENCES OF ALLIANCE MINDED VOTERS | | | | |
|-----------------------|---|-----|-----|-----|-----------------------|
| | <i>Percent share (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 |

PERCENT SHARE (2018)

(among those who gave a second choice)

| Among voters of | PREFERENCES OF ALLIANCE MINDED VOTERS | | | | |
|-----------------------|---|-----|-----|-----|-----------------------|
| | <i>Percent share (Among those who gave a second choice)</i> | | | | |
| | PML-N | PTI | PPP | MMA | Independent Candidate |
| PML-N | NA | 32 | 29 | 37 | 33 |
| PTI | 55 | NA | 53 | 36 | 37 |
| PPP | 16 | 22 | NA | 8 | 15 |
| MMA | 4 | 10 | 7 | NA | 5 |
| Independent Candidate | 13 | 19 | 3 | 3 | NA |

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

SECTION 4

How Voters Make their Choice:
SEVEN TYPES OF VOTERS

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 11% of the voters in the 2018 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.

30% 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.

23% 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.

14% of voters are **Legislation-Minded**. They chose their legislator because of his competence in the comprehension of national affairs.

Another 12% 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.

6% admitted to be **Biradari-bound**. They said they followed their Biradri's verdict in choosing the legislator.

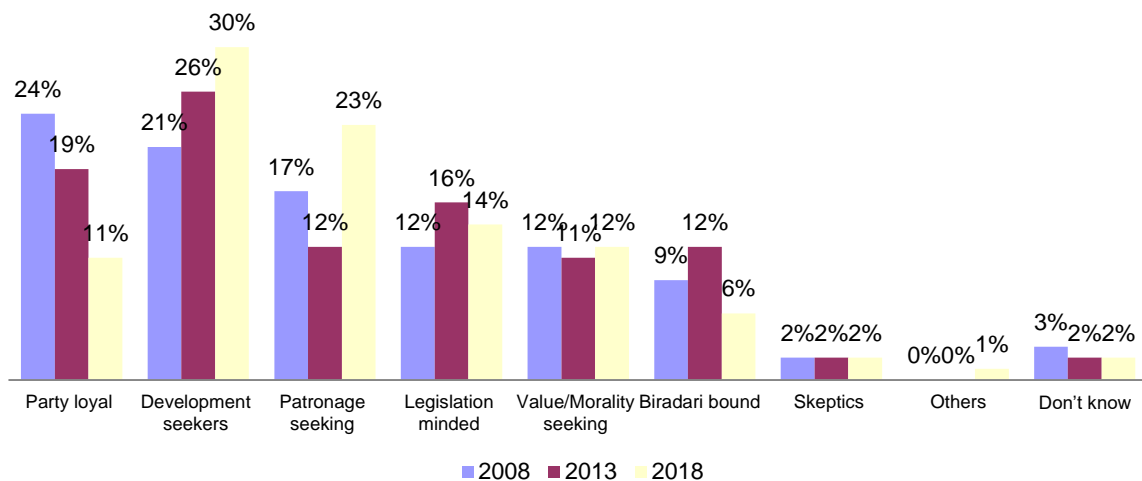
Only 2% placed themselves in the category of **Skeptic Voters** that is those who chose a certain legislator because he was most capable of defeating the candidate whom the voter disliked or despised.

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 4.1

Percentage of Respondents

| | 2008 | 2013 | 2018 |
|------------------------|------|------|------|
| Party loyal | 24% | 19% | 11% |
| Development seekers | 21% | 26% | 30% |
| Patronage seekers | 17% | 12% | 23% |
| Legislation minded | 12% | 16% | 14% |
| Value/Morality seekers | 12% | 11% | 12% |
| Biradri bound | 9% | 12% | 6% |
| Skeptics | 2% | 2% | 2% |
| Don't know | 3% | 2% | 2% |



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

IMPORTANCE OF BIRADRI IN VOTING DECISIONS

Does Biradri play a role in voting decisions? Only 6% 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 6% 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 ones 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 though survey research among a nationally representative sample of 3,549 voters on the Election Day.

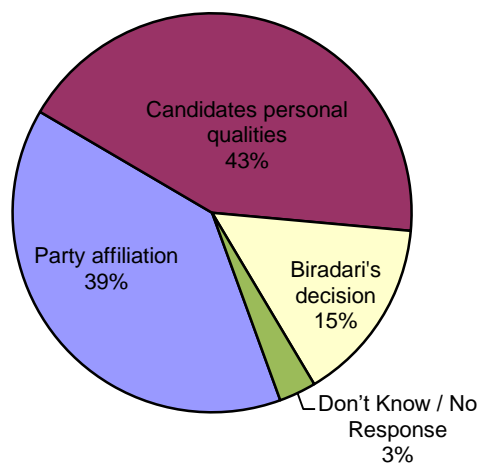
MOTIVATIONS TO VOTE

Does Biradri play a role in voting decisions? Gallup Pakistan Exit Poll Survey had asked a nationally representative sample of voters on the Election Day: **“Today you voted for a candidate. Which one of the three was the main reason you voted for him / her? Was it due to the party, personal qualities or Biradari?”**

Table 4.2

| <i>Percentage of Respondents</i> | |
|----------------------------------|-----|
| 2018 | |
| Party Affiliation | 39% |
| Candidates personal qualities | 43% |
| Biradari's decision | 15% |

2018



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

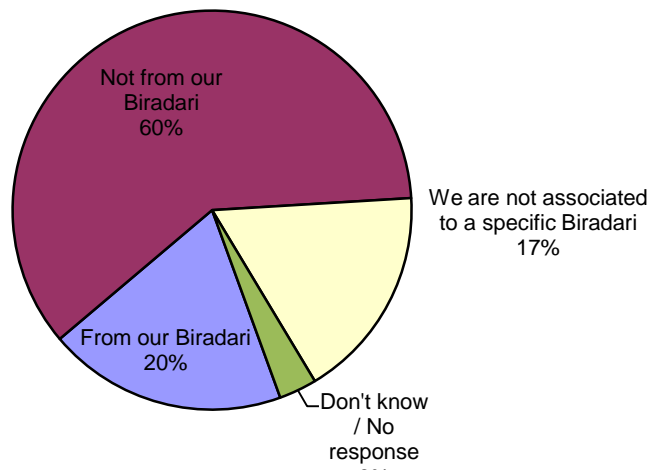
ROLE OF BIRADRI IN VOTING DECISIONS

Does Biradri play a role in voting decisions? Gallup Pakistan Exit Poll Survey had asked a nationally representative sample of voters on the Election Day: **“The National Assembly candidate you voted for, is he from your Biradari or not?”**

Table 4.3

| <i>Percentage of Respondents</i> | |
|--|-----|
| 2018 | |
| From our Biradari | 19% |
| Not from our Biradari | 59% |
| We are not associated to a specific Biradari | 17% |

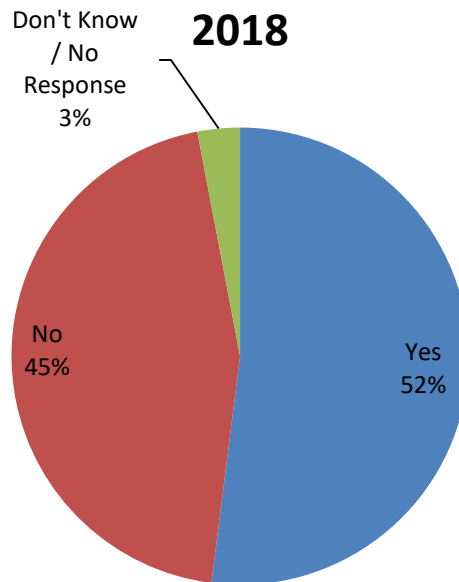
2018



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

Respondent were further asked: **“Did your Biradari together make a decision to cast their vote?”**

Fig 4.4



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

SECTION 5

Voter's Sense of
Empowerment

Section # 5

VOTER'S SENSE OF EMPOWERMENT

The verdict is out on this very crucial election. Voters express a combination of hope and despair on different aspects of the electoral process. 85% are confident their vote can make a difference.

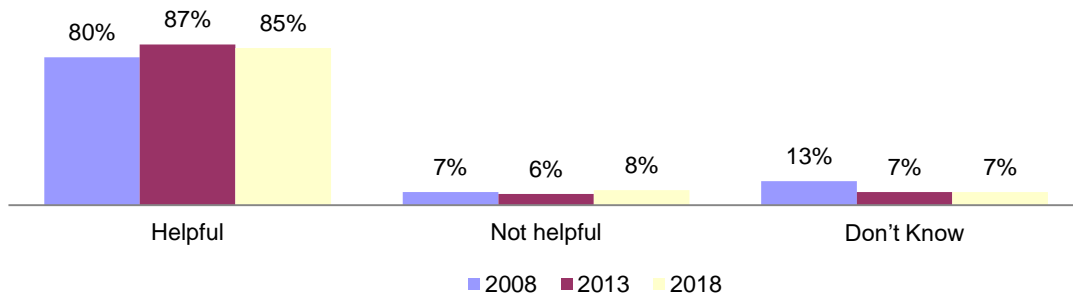
The Gallup Pakistan Exit Poll (Election Day Survey) asked a nationally representative sample of voters on the Election Day: **“Do you think your vote will be helpful in improving the condition of our country or not?”** 85% of the respondents expressed faith that their vote will be helpful. Only 8% were despondent, while 7% remained uncertain.

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

Table 5.1

Percentage of Respondents

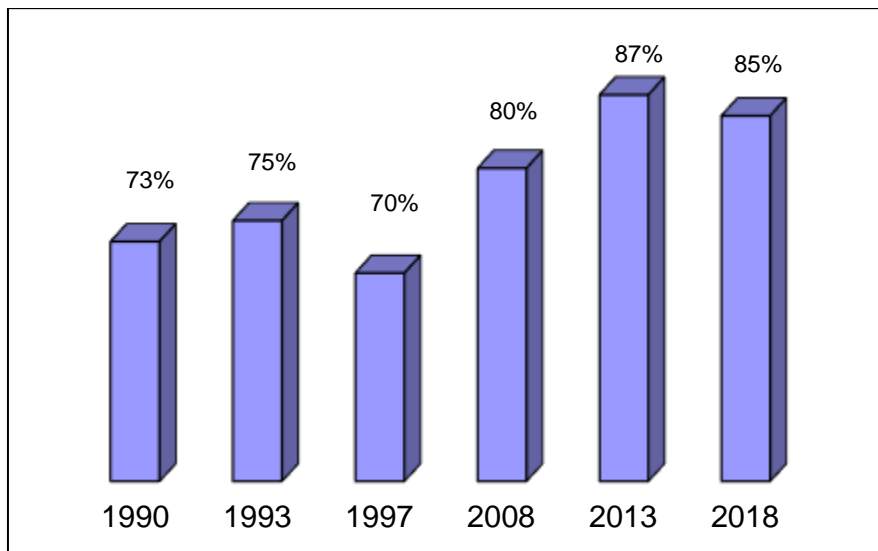
| | 2008 | 2013 | 2018 |
|-------------|------|------|------|
| Helpful | 80% | 87% | 85% |
| Not helpful | 7% | 6% | 8% |
| Don't know | 13% | 7% | 7% |



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

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

SECTION 6

Political
Activism

Section # 6

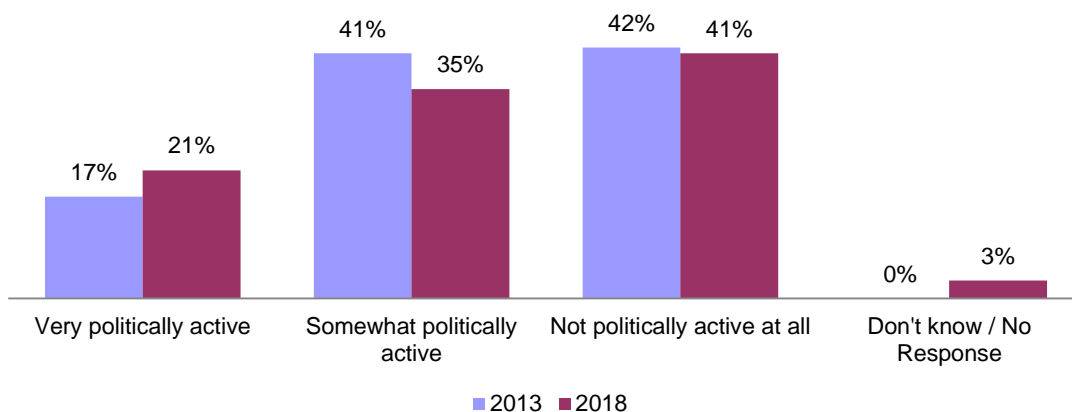
POLITICAL ACTIVISM

The Gallup Pakistan Exit Poll (*Election Day Survey*) asked a nationally representative sample of voters on the Election Day about their political activism. 21% 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 6.1

| Interest in Politics | 2013 | 2018 |
|-------------------------------|------|------|
| Very Politically Active | 17 % | 21% |
| Somewhat Politically Active | 41 % | 35% |
| Not Politically Active at all | 42 % | 41% |
| Don't Know / No Response | - | 3% |



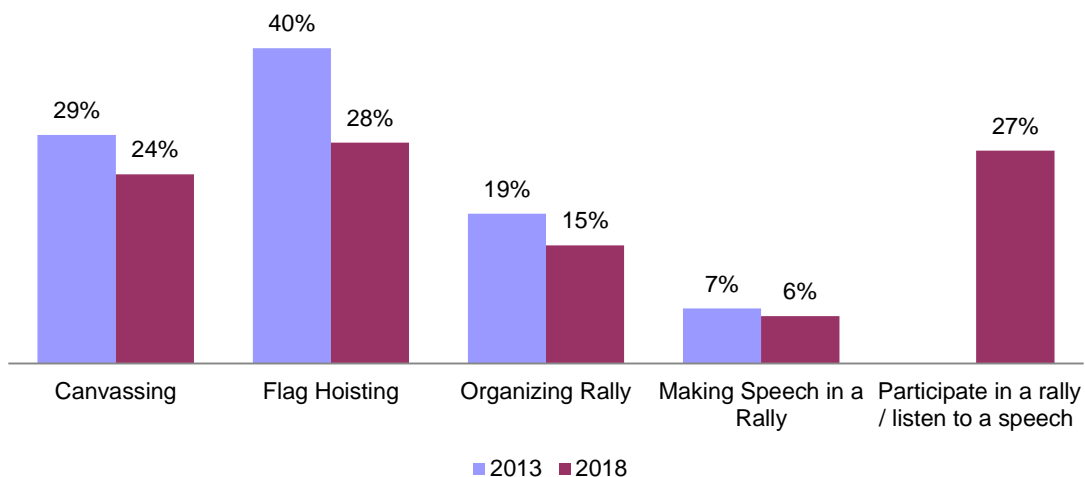
Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

When asked about the extent to which respondents went in taking part in the election campaigning, a 28% 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: (Among the politically active (very / somewhat)

Table 6.2

| Participation in Election Campaign | 2013 | 2018 |
|---|------|------|
| Canvassing | 29% | 24% |
| Flag Hoisting | 40% | 28% |
| Organizing Rally | 19% | 15% |
| Making Speech in a Rally | 7% | 6% |
| Participate in a rally / listen to a speech | - | 27% |



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

SECTION 7

Role of Media in Political
Campaigning

Section # 7

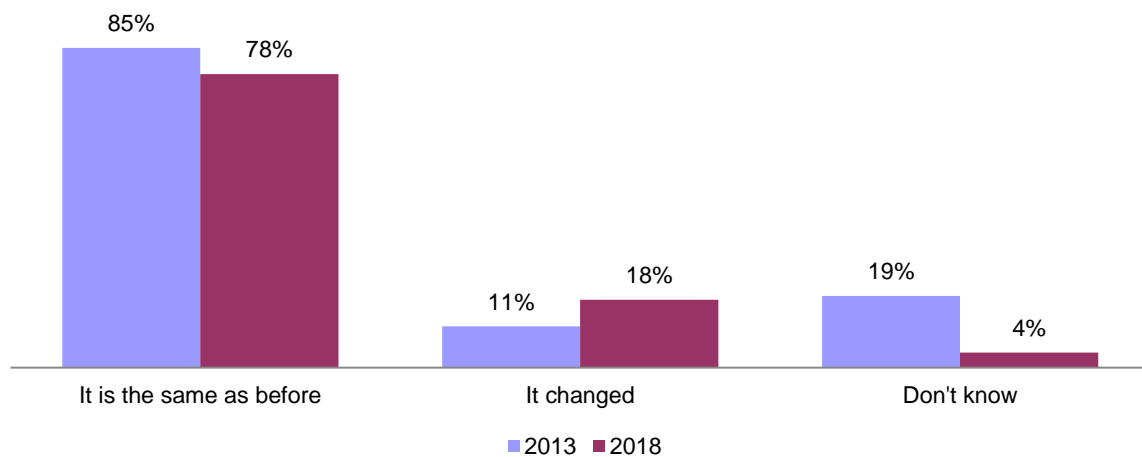
Effect of Political Media Campaign (Television on Voting Decision)

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. 18% of the respondents claimed that their voting decision changed due to political campaigning on television.

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

Table 7.1

| | 2013 | 2018 |
|--------------------------|------|------|
| It is the same as before | 85 % | 78% |
| It changed | 11 % | 18% |
| Don't Know | 4% | 4% |



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

Switching Behaviour

Political Media campaigns played a significant role in changing voting decisions of voters. **Among the 18% voters** who changed their voting decision due to political media campaign on television, PTI gained 31% vote bank due to the political campaigning on television. On the other hand, PML-N and PPP have lost -24% and -3% of their vote bank respectively.

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

Table 7.2

| | Voted for on Election Day 2013 | | | Voted for on Election Day 2018 | | |
|----------------------------|---------------------------------------|-----|-----|---------------------------------------|-----|-----|
| | <i>Percent share in Gain and Loss</i> | | | <i>Percent share in Gain and Loss</i> | | |
| Switching Behaviour | PML-N | PTI | PPP | PML-N | PTI | PPP |
| Switched To (Gain) | 28 | 33 | 9 | 12 | 42 | 10 |
| Switched Away (Loss) | 36 | 18 | 22 | 39 | 20 | 13 |
| Net Gain | -8 | +15 | -13 | -27 | +22 | -3 |

Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

SECTION 8

New Federal
Government

Section # 8

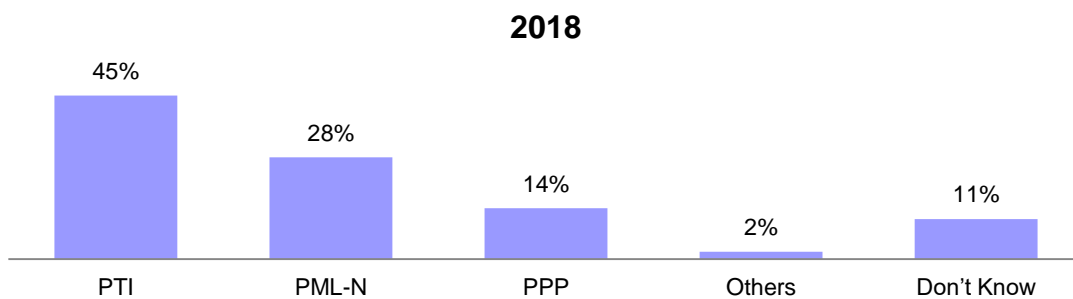
NEW FEDERAL GOVERNMENT

The Gallup Pakistan Exit Poll (Election Day Survey) asked a nationally representative sample of voters on the Election Day who in their opinion would form the new Federal Government. 45% responded PTI would form the new Federal Government in Islamabad after the elections.

Question: In your opinion, which political party would form the federal government after this election?

Table 8.1

| | 2018 |
|------------|------|
| PTI | 45% |
| PML-N | 28% |
| PPP | 14% |
| Others | 2% |
| Don't Know | 11% |



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

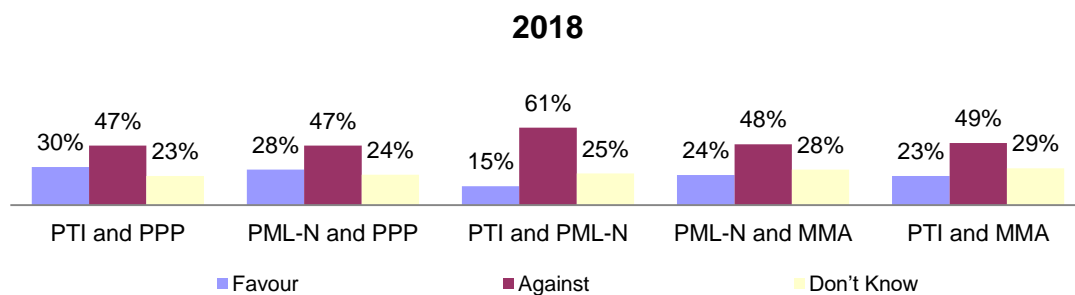
COALITION GOVERNMENT

A nationally representative sample of voters on the Election Day was asked if no party has an absolute majority, then which parties should form a coalition government. 30% voters favour PTI and PPP coalition government. 61% are against PTI and PML-N coalition.

Question: Suppose, no party has majority to form the government. Which political parties should then form a coalition government? Please tell are you in favour or against the below coalitions?

Table.2

| | Favour | Against | Don't Know |
|---------------|--------|---------|------------|
| PTI and PPP | 30% | 47% | 23% |
| PML-N and PPP | 28% | 47% | 24% |
| PTI and PML-N | 15% | 61% | 25% |
| PML-N and MMA | 24% | 48% | 28% |
| PTI and MMA | 23% | 49% | 29% |



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

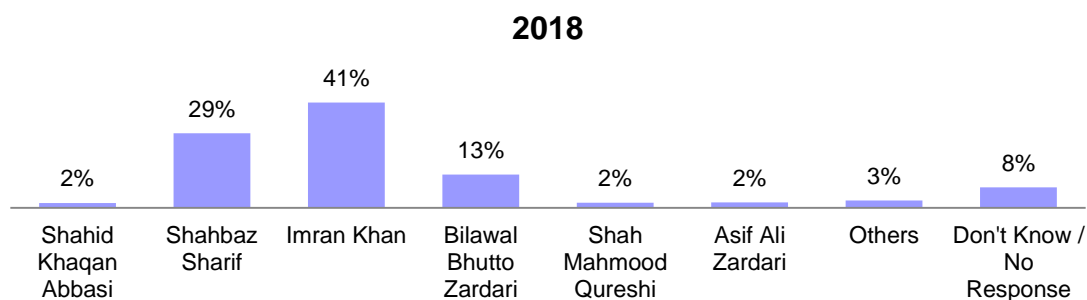
PRIME MINISTERIAL FAVOURITES

The Gallup Pakistan Exit Poll (Election Day Survey) asked a nationally representative sample of voters on the Election Day who they would want to choose as the next Prime Minister of Pakistan. 41% responded they would select Imran Khan as the next Prime Minister, followed by 29% who say Shahbaz Sharif.

Question: If you have to choose one of these six candidates as the next Prime Minister, who would you choose?

Table 8.3

| | 2018 |
|------------------------|------|
| Shahid Khaqan Abbasi | 2% |
| Shahbaz Sharif | 29% |
| Imran Khan | 41% |
| Bilawal Bhutto Zardari | 13% |
| Shah Mahmood Qureshi | 2% |
| Asif Ali Zardari | 2% |
| Others | 3% |
| Don't Know | 8% |



Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

Methodology

METHODOLOGY

The survey was conducted with a statistically selected sample of 3,549 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. Face-to-face Interviews were conducted by a team of more than 200 men and women between 8 am to 6 pm on the polling day (*July 25*). 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 $\pm 2-3\%$ 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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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.