NATIONAL PUBLIC OPINION POLL REPORT

JUNE-JULY 2023

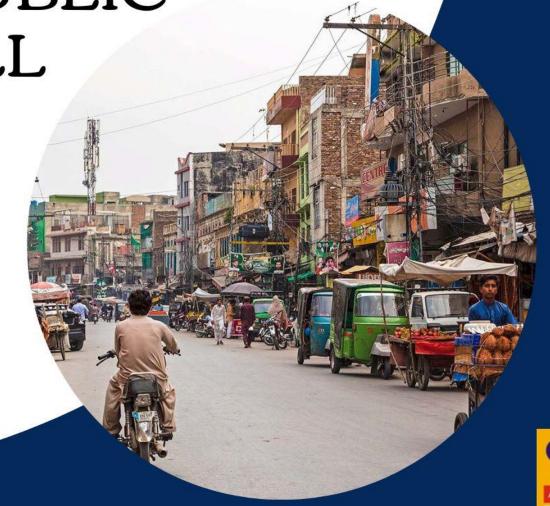




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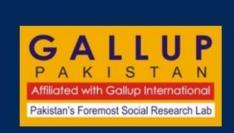
SECTION 1

GENERAL POLITICAL AND WARM UP



1.1

DIRECTION OF THE COUNTRY? WHAT DO PAKISTANIS THINK?





77% RESPONDENTS REPORTED BEING DISSATISFIED WITH THE WAY THINGS ARE GOING IN THE COUNTRY

General Satisfaction:

Question: "Overall, are you satisfied or dissatisfied with the way things are going in our country today?"

Satisfied, 23%	Dissatisfied, 77%	
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Q. آج کل ہمارے ملک میں جس طرح سے حالات چل رہے ہیں۔ مجموعی طور پر، کیا آپ اس سے مطمئن ہیں یا غیر مطمئن ہیں ؟



ACROSS PROVINCES, RESPONDENTS ARE DISSATISFIED WITH THE WAY THINGS ARE GOING IN THE COUNTRY TODAY; HIGHEST DISASTISFACTION WITH THE DIRECTION OF THE COUNTRY FOUND IN SINDH

Q. آج کل ہمارے ملک میں جس طرح سے حالات چل رہے ہیں۔ مجموعی طور پر، کیا آپ اس سے مطمئن ہیں یا غیر مطمئن ہیں ؟ Question: "Overall, are you satisfied or dissatisfied with the way things are going in our country today?" **Province:** Dissatisfied 87% 82% 81% 72% Punjab Sindh ΚP Balochistan



1.2 ECONOMIC CONDITIONS NOW-WHAT DO PAKISTANIS THINK?

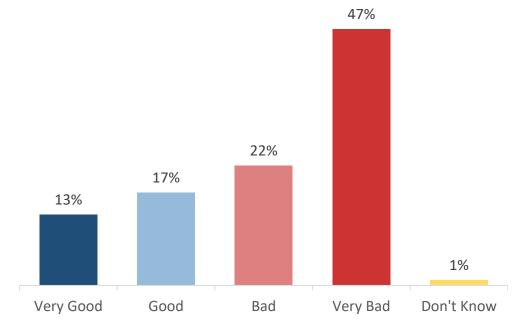




47% RESPONDENTS DESCRIBED THE CURRENT ECONOMIC SITUATION AS VERY BAD

Economic Opinion:

Question: "Thinking about the economic situation in our country, how would you describe the current economic situation in Pakistan — is it very good, somewhat good, somewhat bad or very bad?"



30% respondents rate Economic Situation Good or Very Good

70% respondents rate Economic Situation Bad or Very Bad

Q. اب سمارے ملک کی معاشی صورتحال کے بارے میں سوچتے ہوئے بتائیں که، آپ پاکستان کی موجودہ معاشی صورتحال کوکس طرح بیان کریں
 گے ؟ کیا یہ بہت اچھی ، کسی حد تک اچھی، کسی حد تک خراب یا بہت خراب ہے ؟



1.3 HOPE FOR FUTURE ECONOMY? MAJORITY PESSIMISTIC ABOUT FUTURE TOO

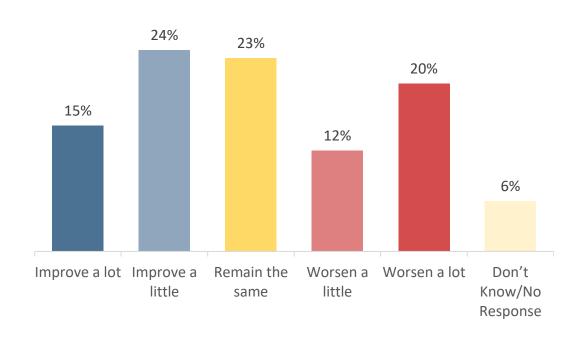




ONLY 15% RESPONDENTS THINK THE ECONOMIC SITUATION OF THE COUNTRY WILL IMPROVE A LOT OVER THE NEXT 12 MONTHS

Improvement in Economic Situation

Question: "Over the next 12 months do you expect the economic situation in our country to improve a lot, improve a little, remain the same, worsen a little or worsen a lot?"



39% respondents say Economy will improve in future (A LOT OR SOME WHAT)

23% say it would remain the same

32% respondents feel economy would worsen more (A LITTLIE OR A LOT)

Q. کیاآپ توقع کرتے ہیں کہ لگے 12 مہینوں میں ہمارے ملک کے معاشی حالات بہت بہتر ہو جائیں گے ، کچھ بہتر ہو جائیں
 گے ، اسی طرح رہیں گے ، کچھ خراب ہو جائیں گے یا بہت خراب ہو جائیں گے ؟



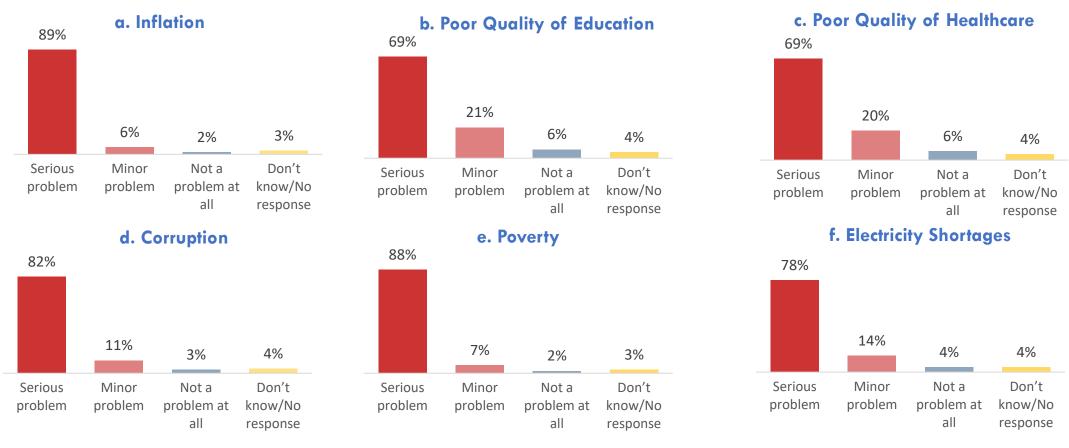
1.4 PROBLEMS FACING PAKISTANIS

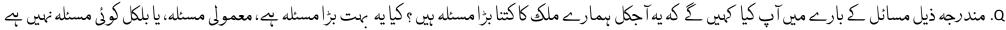




89% RESPONDENTS THINK INFLATION IS A SERIOUS PROBLEM IN PAKISTAN; 88% THINK IT IS POVERTY

Question: "For each of the following issues, please tell me whether you think it is a serious problem, a minor problem, or not a problem at all in our country."



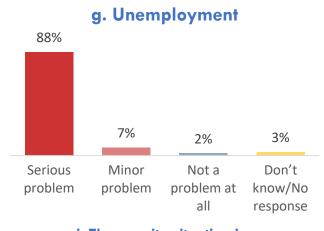


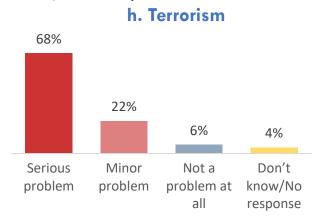


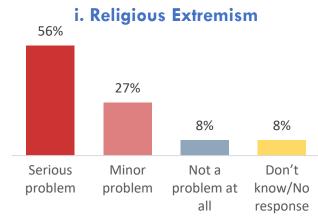
Source: National Public Opinion Poll

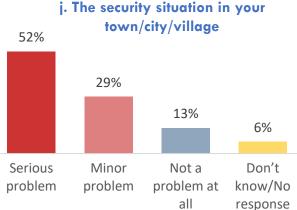
88% RESPONDENTS THINK UNEMPLOYMENT IS A SERIOUS PROBLEM IN PAKISTAN; 82% THINK IT IS ELECTRICITY PRICES

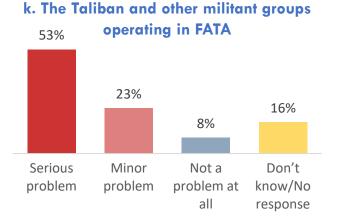
Question: "For each of the following issues, please tell me whether you think it is a serious problem, a minor problem, or not a problem at all in our country."



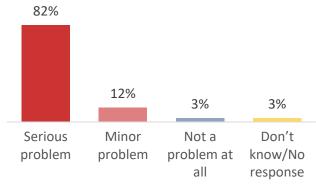












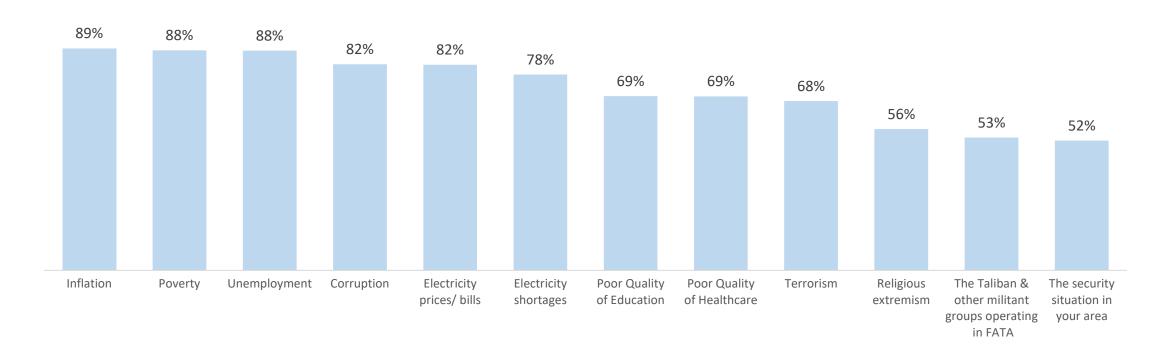
Q. مندرجه ذیل مسائل کے بارے میں آپ کیا کہیں گے که یه آجکل ہمارے ملک کا کتنا بڑا مسئلہ ہیں ؟ کیا یہ بہت بڑا مسئلہ ہے، معمولی مسئلہ، یا بلکل کوئی مسئلہ نہیں ہے



Source: National Public Opinion Poll

INFLATION, POVERTY AND UNEMPLOYMENT THE MOST SERIOUS PROBLEMS FACED IN PAKISTAN

Most Serious Problem





1.5

SATISFACTION WITH DEMOCRACY IN PAKISTAN -A GENERALLY UNSATISFIED NATION

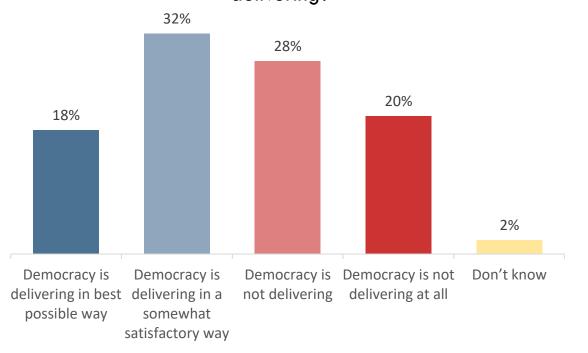




ONE IN FIVE PAKISTANIS (20%) FEEL THAT DEMOCRACY IS NOT DELIVERING AT ALL

Opinions of Democracy:

Question: "Some people think that democracy in Pakistan is delivering to Pakistani public in a satisfactory way. Others think it is not delivering?"



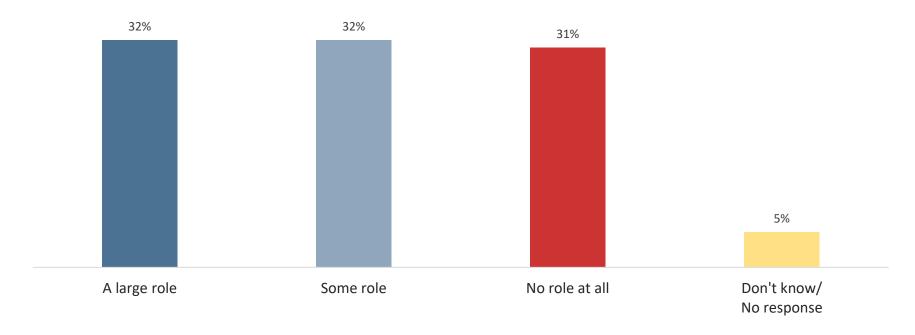
0. کچھ لوگوں کا خیال ہے کہ جمہوری نظام پاکستانی عوام کے لیئے اچھی سہولیات فراہم کررہا ہے جبکہ کچھ لوگوں کے خیال میں یہ اچھی سہولیات نہیں فراہم کر رہا، آپ کی اس بارے میں کیا رائے ہے ؟



AN EQUAL PERCENTAGE OF RESPONDENTS –32%– THINK THAT THE MILITARY SHOULD HAVE A LARGE ROLE OR SOME ROLE IN THE COUNTRY'S POLITICS

Role of military in politics:

"How much of a role do you think the Pakistan military should have in our country's politics? Do you think it should have a large role, some role, or no role at all?"



Q. آپ کے خیال میں پاکستانی فوج کا ہماری ملکی سیاست میں کتنا کردار ہونا چاہیے؟ کیا آپ کو لگتا ہے کہ اس میں کوئی بڑا کردار ہونا چاہیے،کسی حدتک کردار ہونا چاہیے، یا کوئی کردار نہیں؟



46% RESPONDENTS FROM KP THINK THAT THE MILITARY SHOULD HAVE NO ROLE AT ALL IN THE COUNTRY'S POLITICS; LESS FROM OTHER PROVINCES THINK SO

Province: ■ A large role ■ Some role ■ No role at all 46% 44% 36% 34% 31% 31% 30% 30% 30% 27% 25% 12% ΚP Balochistan Punjab Sindh



1.6 INTEREST IN POLITICS?

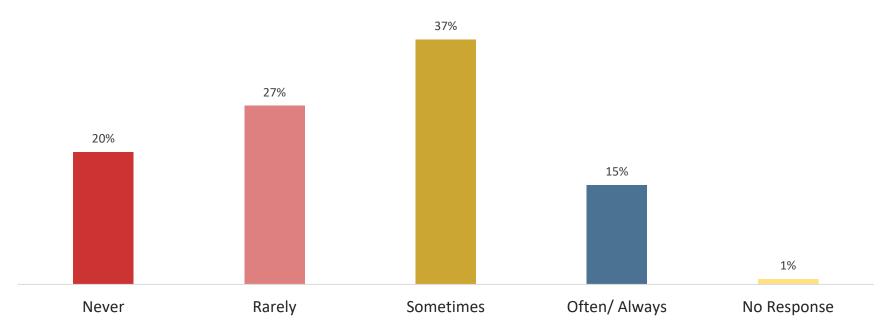




47% RESPONDENTS SAID THAT THEY OFTEN OR ALWAYS DISCUSS CURRENT EVENTS WITH THEIR FRIENDS

Everyday discussions around current events:

"Normally, how much discussion do you have with your friends about politics, government and current situation?"



Q. عام طور پر، آپ اپنے دوستوں سے سیاست، حکومت اور موجودہ حالات کے بارے میں کتنی بات چیت کرتے ہیں ؟



SECTION 2

APPROVAL RATING AND VOTING INTENTIONS



2.1

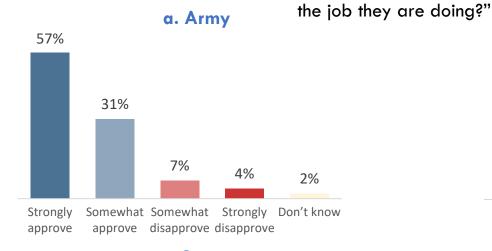
APPROVAL RATING OF INSTITUTIONS OF POWER IN THE COUNTRY; WHO HAS THE HIGHEST AND THE LOWEST APPROVAL RATING?

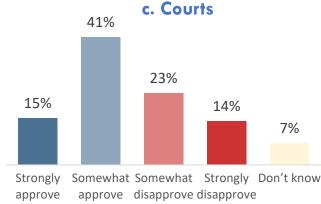


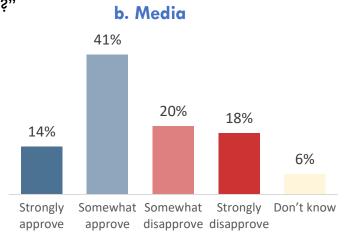


57% RESPONDENTS STRONGLY APPROVE OF THE JOB THE ARMY IS DOING; 41% SOMEWHAT APPROVE THE JOB BEING DONE BY THE MEDIA

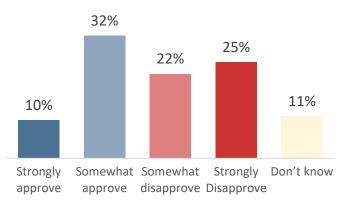
Question: "Thinking now about the following institutions, to what extend do you approve or disapprove of







d. Election Commission

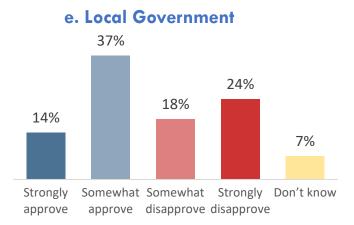


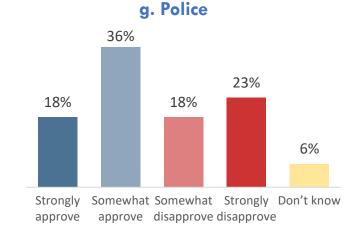


۵. درج ذیل اداروں کے بارے میں سوچتے ہوئے بتائیں،آپ ان کے کام کوکس حد تک پسندیا ناپسند کرتے ہیں؟ کیا آپ بہت زیادہ ناپسند کرنے ہیں
 پسند،کسی حد تک ناپسندیا بہت زیادہ ناپسند کرنے ہیں

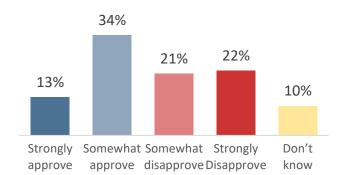
51% RESPONDENTS SOMEWHAT APPROVE OF THE JOB THE CIVIL SERVICE IS DOING WHILE 34% STRONGLY DISAPPROVE THE WORK BEING DONE BY POLITICIANS IN GENERAL

Question: "Thinking now about the following institutions, to what extend do you approve or disapprove of the job they are doing?"

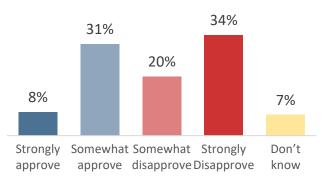




h. Parliament



i. Politicians in General



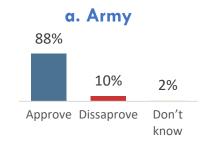
۵. درج ذیل اداروں کے بارے میں سوچتے ہوئے بتائیں، آپ ان کے کام کوکس حد تک پسندیا ناپسند کرتے ہیں؟ کیا آپ بہت زیادہ پسند کسی حد تک
 پسند، کسی حد تک ناپسندیا بہت زیادہ ناپسند کرتے ہیں
 Source: National Public Opinion Poll



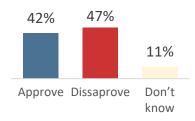
APPROVAL RATINGS ARE HIGHEST FOR THE MILITARY (88%), FOLLOWED BY CIVIL SERVICE (69%). POLITICIANS, ELECTION COMMISSION, AND PARLIAMENT SEE THE HIGHEST LEVELS OF DISSAPROVAL AMONGST THE PUBLIC

Question: "Thinking now about the following institutions, to what extend do you approve or disapprove of the job they are doing?"

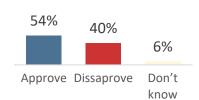
APPROVAL RATINGS:



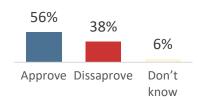
d. Election Commission



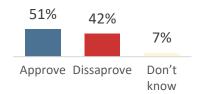
g. Police



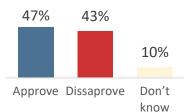
b. Media



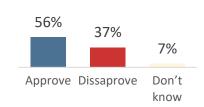
e. Local Government



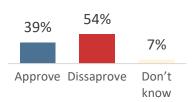
h. Parliament



c. Courts



i. Politicians in general





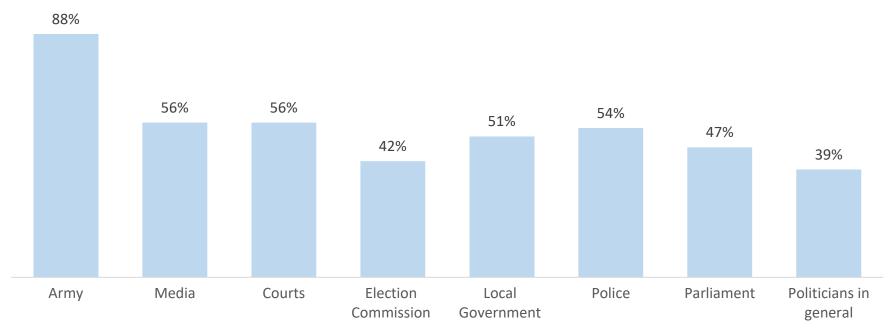
۵. درج ذیل اداروں کے بارے میں سوچتے ہوئے بتائیں،آپ ان کے کام کوکس حد تک پسندیا ناپسند کرتے ہیں؟ کیا آپ بہت زیادہ پسند کسی حد تک پسند، کسی حد تک ناپسندیا بہت زیادہ ناپسند کرنے ہیں

APPROVAL RATINGS ARE HIGHEST FOR THE MILITARY (88%), FOLLOWED BY MEDIA AND COURTS AT 56% EACH

Question: "Thinking now about the following institutions, to what extend do you approve or disapprove of the job they are doing?"

APPROVAL RATINGS:

Positive Approval Rating*



۵. درج ذیل اداروں کے بارے میں سوچتے ہوئے بتائیں،آپ ان کے کام کوکس حد تک پسندیا ناپسند کرتے ہیں؟ کیا آپ بہت زیادہ پسند کسی حد تک پسند، کسی حد تک ناپسندیا بہت زیادہ ناپسند کرتے ہیں



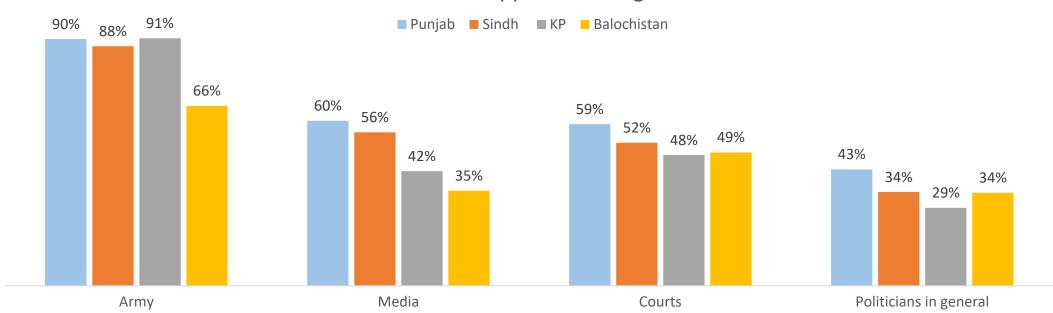
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MILITARY APPROVAL RATING IS HIGH ACROSS PROVINCES EXCEPT IN BALOCHISTAN WHERE THERE IS A 20% DIFFERENCE FROM THE NATIONAL AVERAGE

Question: "Thinking now about the following institutions, to what extend do you approve or disapprove of the job they are doing?"

APPROVAL RATINGS (BY PROVINCE):

Positive Approval Rating*



۵. درج ذیل اداروں کے بارے میں سوچتے ہوئے بتائیں،آپ ان کے کام کو کس حد تک پسندیا ناپسند کرتے ہیں؟ کیا آپ بہت زیادہ پسند کسی حد تک پسند، کسی حد تک ناپسندیا بہت زیادہ ناپسند کرنے ہیں



* Positive Approval Rating = Very Good+ Good

2.2 EVALUATION OF PREVIOUS PTI GOVERNMENT

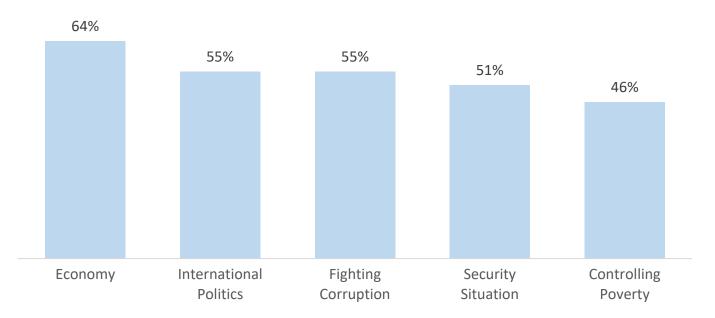




OUT OF DIFFERENT GOVERNANCE INDICATORS/DIMENSIONS, PTI GOVERNMENT RATED HIGHEST FOR ITS ECONOMIC PERFORMANCE. PTI GOVERNMENT REMEMBERED IN GOOD WORDS BY MAJORITY ON ALMOST ALL METRICS

Positive Approval Rating:

Question: "Thinking about PTI's government during 2018-2022, what is your overall opinion about their performance in the following fields?"





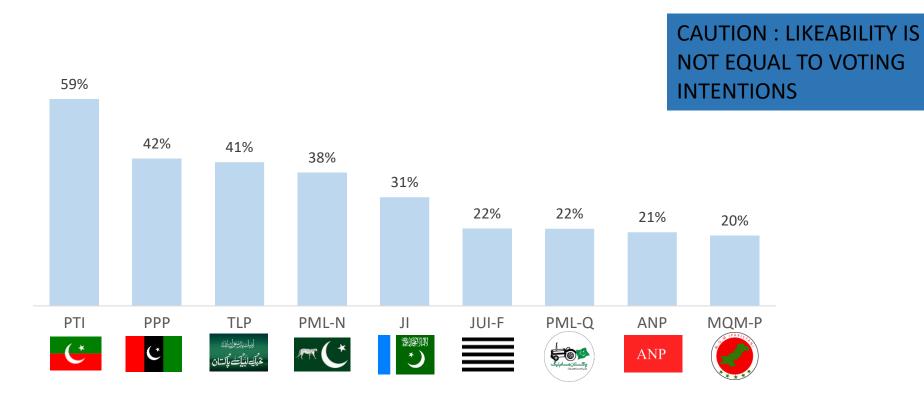
2.3 LIKING FOR POLITICAL PARTIES





PTI ENJOYS THE HIGHEST LIKEABILITY RATING AMONG POLITICAL PARTIES AT 59%

LIKEABILITY RATING OF POLITICAL PARTIES





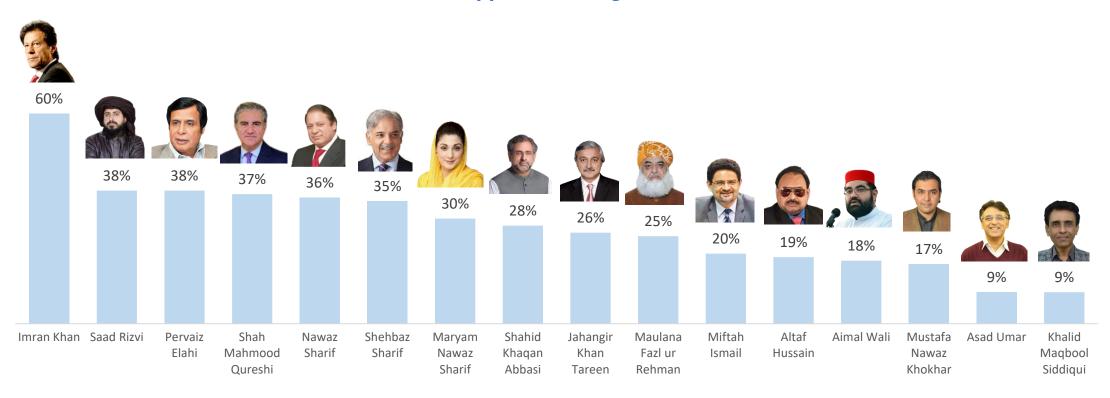
2.4 APPROVAL RATING OF LEADERS





ACROSS NOTABLE POLITICAL FIGURES, IMRAN KHAN RECEIVES THE HIGHEST POSITIVE APPROVAL RATING AT 60%

Positive Approval Rating of Leaders





2.5 VOTING INTENTIONS

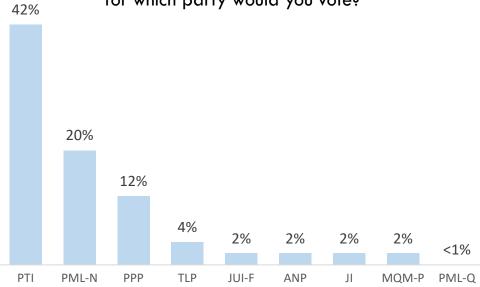




TWICE AS MANY WOULD VOTE FOR PTI IF ELECTIONS HAPPENED NEXT WEEK THAN THOSE WHO WOULD VOTE FOR PML-N

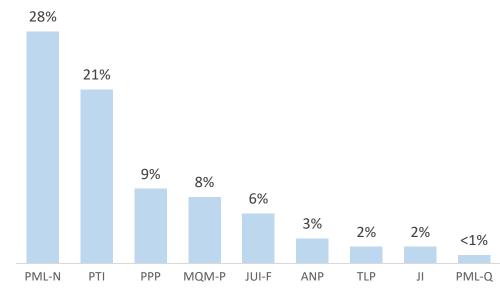
Voting Behavior:

Question: "Thinking now about national elections, if the national assembly elections were held next week, for which party would you vote?"



۵. اب قومی انتخابات کے بارے میں سوچتے ہوئے بتائیں که، اگر اگلے ہفتے قومی اسمبلی کے انتخابات منعقد ہوتے ہیں توآپ کس پارٹی کو ووٹ دیں گے؟

Question: "Which party would you never vote for?"



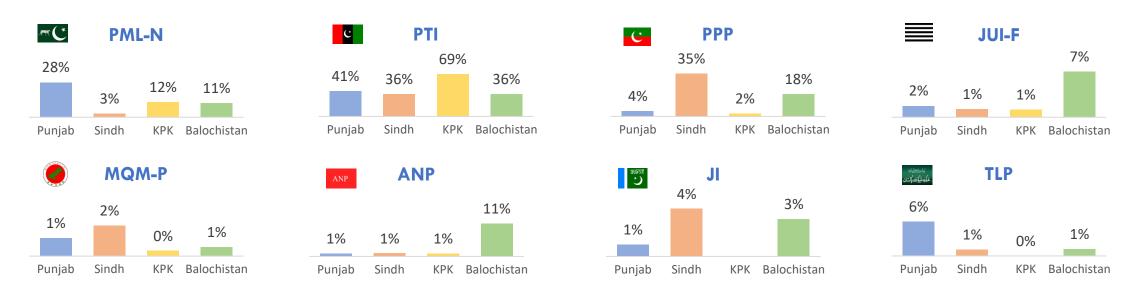


PTI LEADS IN ALL PROVINCES EXCEPT SINDH WHERE THERE IS A TIE. IN ALL PROVINCES, PDM PARTIES COMBINED BEAT PTI EXCEPT IN KP

Voting Behavior:

Question: "Thinking now about national elections, if the national assembly elections were held next week, for which party would you vote?"

PROVINCIAL BREAKDOWN:



a. اب قومی انتخابات کے بارے میں سوچتے ہوئے بتائیں که،اگر لگہ ہفتے قومی اسمبلی کے انتخابات منعقد ہوتے ہیں تو آپ کس پارٹی کو ووٹ دیں گے؟











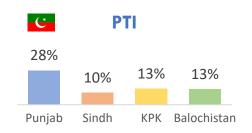
PMLN LEADS AS THE PARTY PEOPLE SAY THEY WOULD NEVER VOTE FOR IN ALMOST ALL PROVINCES. HOWEVER IN PUNJAB THERE IS A TIE WITH ALMOST EQUAL NUMBER STATING THEY WOULD NOT VOTE FOR PTI AND PMLN, SHOWING HIGH LEVEL OF POLARIZATION IN THE PROVINCE.

Voting Behavior:

Question: "Which party would you never vote for?"

PROVINCIAL BREAKDOWN:





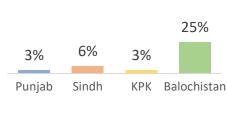


KPK Balochistan

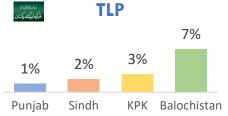
Sindh

Punjab





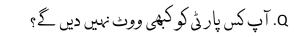
JUI-F











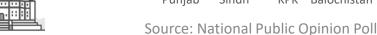








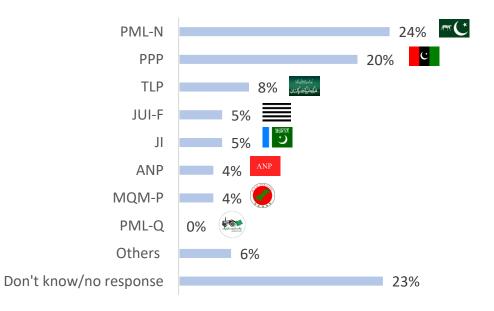


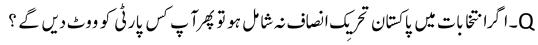


IF PTI DOES NOT STAND IN THE ELECTION, AMONG THOSE WHO SAY THEY WOULD STILL VOTE NEARLY A QUARTER OF RESPONDENTS WOULD VOTE FOR PML-N. 1 IN 4 (23%) SAY THEY CANNOT SAY WHO THEY WOULD VOTE FOR

New Political Party:

Question: "If Pakistan Tehreek-e-Insaaf does not stand in the elections, then which party will you vote for?"







SECTION 3

DEMOGRAPHICS/ METHODOLOGY



SAMPLING LOCATIONS:

METHODOLOGY

Stratified Random Sampling

Sample Size 3500 respondents



18+ men and women

across Pakistan



Field Dates 10 June 2023 -

30th June 2023



Error Margin 2.5% at 95%

confidence level



Gallup Pakistan's usual approach of fieldwork is conducting face-to-face interviews in households using geographical sampling. The sampling is done using the census as the frame.



Sample Selection Procedure:

This survey uses stratified random sampling. Following steps have been used to achieve this:

Stage 1: Stratification:

Stratification is principally at two levels:

- a. The **First** stratification is by PROVINCE, of which there are 4 in Pakistan.
- b. The **Second** stratification is by size of location. We stratify by 4 types of locations: Large/Metropolitan Cities (there are 3); Medium size (those whom population is over 100,000 persons); Towns (those whom population is less than 100,000) and Villages (those declared as such in the Census).

Stage 2: Stratification:

Within each stratum communities are selected through a random process. In some cases we make replacements by communities of similar profile with a view to logistical and other considerations.

Fieldwork Procedure:

This survey uses stratified random sampling. Following steps have been used to achieve this:

Briefing/Training of interviewers:

The Questionnaire Designed for the survey is briefed to the interviewers at Regional Centers across the Centre. The interviewers are instructed on measures such as:

- 1. Following Sampling/Quota Instructions Properly
- 2. Ethical Code of Conduct towards interviewers
- 3. Following skipping Instructions and other interview instructions on the Questionnaire
- 4. Maintaining Neutrality in asking Question

Mock Calls:

After the briefing is completed all the field workers do the mock calls under the direct supervision of an executive or a fieldwork supervisor. This ensures that the field workers properly understand the instructions and they can handle various interviewing problems during the interview (in the field). After completion of mock calls, a debriefing session is arranged in which the problems faced by the interviewers during the mock interviews are discussed and solutions are suggested.

Initial Checking:

After the training, the interviewers go into the field for actual interviewing. The first ten filled in questionnaires of every interviewer are thoroughly checked by their supervisor to ensure that the interviewer is performing well. In case the work of an interviewer is not acceptable he/she is disengaged from the survey.

Field Editor or Intake Edit

In normal routine at least 30-40 interviews of each interviewer are visually checked by the supervisor before passing them to Data Coding/Entry department. The problems or missing information identified during field edit are explained to the relevant interviewer and he/she is instructed to rectify them either through telephone and/or revisit the respondent for clarification and re-asking the missing questions.

Supervision & Back Checking:

It is essential that the interviewers are properly supervised on the job and the work done by them is back checked. At least 20% back checking is done on work completed by each interviewer to ensure authenticity of data.

Data Coding/Editing:

About 20% work of each coder is rechecked and verified by the concerned DC Supervisor/In-charge.

Data Entry and Verification

GP's Quality Manual contains a detailed check-list on the handling control, entry and other steps involved in the management of data.

Once the questionnaires are received from the field, they are checked and the responses of open-ended questions are coded with the help of a code list. A coding scheme/book/guide is prepared on the basis of these questionnaires.

After the coding of open-ended responses, data is entered into computers. GP uses the SPSS data entry program that has flexibility to implement validity checks and skipping rules etc. The SPSS data entry software also has flexibility to verify the entered data by using the double punch options. Gallup normally double punches for 20% of its entered data.

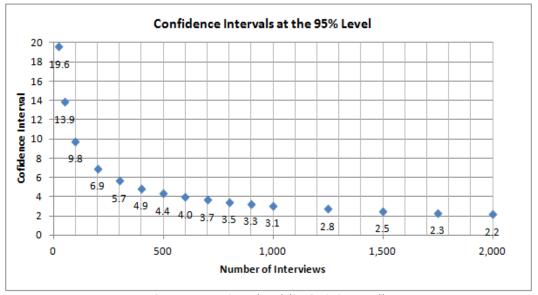
After completion of data entries and double punch, all data is cleaned by using a data-cleaning program written in SPSS which is customized for every project according to the survey/questionnaire needs. Data is thoroughly checked for an omission, displacements and other error resulting in inconsistencies with the coding scheme.

Source: National Public Opinion Poll

Note on Sample Size

The sample size used in this survey is quite adequate even in comparison to international standards. Gallup US Daily poll is 500 and the Gallup Poll Social Series is 1000, both having track record of reliable predictability for USA (a country nearly 100 million larger in population of Pakistan). According to Five Thirty-Eight, one of the most credible sources on polling in the US: "Surveying 2,000 voters substantially reduces error compared with surveying 400 of them but surveying 10,000 voters will produce only marginal improvements in accuracy compared with the 2,000- person survey".

Obviously, choosing a higher confidence interval will give greater accuracy to the survey results, however, as the chart below shows, at a certain point the benefits of conducting more surveys begins to tail off:



Source: National Public Opinion Poll

25 interviews have a confidence interval of 19.6 and 100 interviews has a confidence interval of 9.8, whilst it falls to 4.4 at 500 interviews and 3.1 at 1000 interviews. However, a further 1000 interviews only lower the confidence interval by 0.9 to 2.2. A confidence interval of 1 (not shown on the graph) would require a massive 9604 interviews.

Is a larger sample always better than a smaller sample?

Larger samples are generally more precise, but sometimes not. The important rule in sampling is not how many poll respondents are selected but, instead, how they are selected. A reliable sample selects poll respondents randomly or in a manner which ensures that everyone in the area being surveyed has a known chance of being selected.

Source: National Public Opinion Poll

How do you interpret Error Margins?

How do you interpret a margin of error? Suppose you know that 51% of people sampled say that they plan to vote for Mr. X in the upcoming election. Now, projecting these results to the whole voting population, you would have to add and subtract the margin of error and give a range of possible results in order to have sufficient confidence that you're bridging the gap between your sample and the population. Supposing a margin of error of plus or minus 3 percentage points, you would be pretty confident that between 48% (= 51% - 3%) and 54% (= 51% + 3%) of the population will vote for Mr. X in the election, based on the sample results. In this case, Mr. X may get slightly more or slightly less than the majority of votes and could either win or lose the election. This has become a familiar situation in recent years when the media want to report results on Election Night, but based on early exit polling results, the election is "too close to call."

What Error Margins do not mean:

The margin of error measures accuracy; it does not measure the amount of bias that may be present. Results that look numerically scientific and precise don't mean anything if they were collected in a biased way



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