

Gallup Pakistan Political Weather Report: 1 month before the General Election 2024



An Assessment Report which is based on various surveys Gallup Pakistan has conducted over past 8 months including the latest survey conducted in December 2023 and early January 2024. The report also draws on **Gallup& Gilani Electoral Index**, a 40-year study of elections by Gallup Pakistan.

**10th January
2024**

For more details about Gallup Electoral Index visit:
<https://gallup.com.pk/post/21539>



Gilani & Gallup Pakistan: Who Are We?

Established in 1980, Gallup Pakistan draws upon its rich experience of over 40 years and continues to bring innovation and technology to business opinion and socio-economic research.

Gallup Pakistan is the country's most respected opinion and socio-economic research organization and is widely quoted in national and international media.

Being an affiliate of Gallup International we have close collaboration with Gallup International associates all around the globe and enjoy the benefit of drawing upon an international pool of knowledge, while exercising independence and bringing unique local perspective drawn over 40 years of working in Pakistan.

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Pre-Election Surveys:

Pre-Election surveys are good enough to predict most likely winner and loser but cannot predict the margin of victory. Victory margin depends on who turns up to vote or stays at home.

One of the largest barriers faced by pre-election voting intention polling is estimating how many people will turn out to vote. Even people who say they are certain to cast a ballot sometimes don't turnout.

Similarly, voters can and do change their voting intentions prior to and on voting day, which can cause significant deviation in results. Gallup therefore advises caution and responsibility in use of Pre-election surveys.

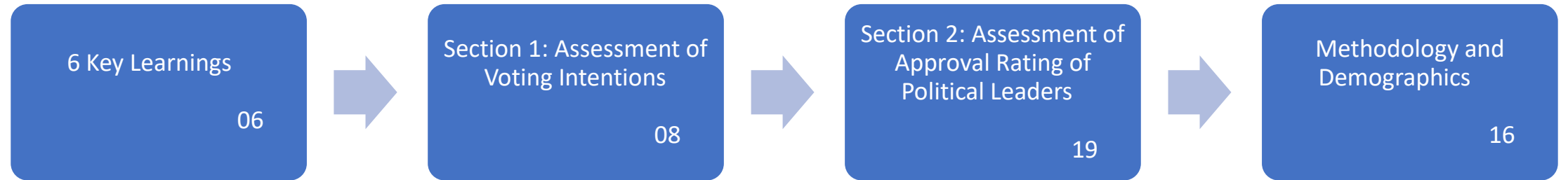
IN FIRST PAST THE POST ELECTORAL SYSTEM, VOTING INTENTIONS AS MEASURED BY SURVEYS AND ACTUAL SEATS WON BY A PARTY CAN BE VASTLY DIFFERENT. A PARTY WITH REASONABLE VOTING INTENTIONS (AND FOR THAT MATTER ACTUAL VOTE) MAY HAVE CLOSE TO NO SEATS WON. WHEREAS ANOTHER PARTY WITH SAME VOTING SHARE MAY HAVE A SIGNIFICANT NUMBER OF SEATS. IN THIS PRESENTATION WE DO NOT PREDICT SEATS.

Pre-election polls are more than just prediction for who would win. Although election polls attract a great deal of attention for their ability to predict the outcome of elections, their most important function is to help understand the meaning of the campaign and the election. Polls help to explain, among other things, what issues are important, how candidate qualities may affect voters' decisions, and how much support there is for particular policy changes.

Notes and Disclaimers

- An All Pakistan voting intentions results have not been presented in this report as Gallup Pakistan believes All Pakistan voting intentions numbers are not meaningful to understand parliamentary elections held at constituency level as is the case in Pakistan. The relationship between votes won at national level for example have limited to no relationship with the seats won (analysis of previous 11 elections shows). Despite this when All Pakistan voting intention numbers are presented, they are interpreted by section of media and analysts as prediction of seats which is misleading. Gallup Pakistan as the oldest polling firm with over 40 years of experience in political polling has decided not to release national voting intentions figures.
- This report is based on various surveys Gallup Pakistan has conducted over the past 8 months with latest survey done in recent past 2-3 weeks (mid December to early January). The surveys were not commissioned by any external source and has been done by Gallup Pakistan from its own resources. Our motivation here is to propagate the use of survey and empirical data in the country and such reports we feel help showcase responsible and scientific use of surveys.
- All care has been exercised to ensure validity and authenticity of data cited and reported in this assessment. Gallup Pakistan however advises caution in using and reporting these numbers. Gallup Pakistan cannot be held liable for any facts and figures reported in this report.

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6 Key learnings from Gallup Political Weather Report 2024 (one month before the General Election 2024)

Learning 1: In Punjab, the electoral contest one month before the election seems competitive and close to General Election 2018 situation in terms of popular voting intentions

34% and 32% of surveyed voters in December 2023 say they would vote for PTI and PML-N respectively. The gap between the two parties is 2% which is within the error margin of this survey and therefore statistically insignificant.

Learning 2: The gap between PML-N and PTI has been narrowing between last 8 months slowly but consistently as shown by surveys done in March, June, November and December 2023

In March 2023, within Punjab gap between PML-N and PTI was 21% with PTI in the lead. The gap is now around 2% in December 2023 surveys. In the crucial 30 days up to the election in February 2024, it would be important to see if the trend continues or is reversed.

Learning 3: Within Punjab, different regions show varying support for the two main parties

PTI leads with reasonable margin in North Punjab over PML-N but is neck to neck in West and Central Punjab. PML-N seems to be in a lead in South Punjab and PPP also having reasonable support here. In Central Punjab, TLP has a spoiler vote. Since North Punjab is 10% of total Punjab seats, it is safe to say that electoral race is quite competitive.

6 Key learnings from Gallup Political Weather Report 2024 (one month before the General Election 2024)

Learning 4: In Sindh, PPP is the largest political party with PTI being the second

PPP leads in Sindh over other parties. However, its support is less strong in Karachi region as opposed to Interior Sindh/ Rural Sindh

Learning 5: In KP, PTI is in lead but will have considerable challenges given the emergence of alliances

45% of voters surveyed in KP in December 2023 claim that they would like to vote for PTI. In General Election 2018, PTI had a vote share of 37% so there is a rise in PTI popularity, however not very significant. Vote of parties other than PTI is concentrated in different electoral regions which can help them win seats despite lagging behind in terms of KP wide popular vote. For example, JUI-F has significant vote share in South KP and PML-N has significant vote share in Hazara (Hazara and South KP represent close to half of National Assembly seats in KP). An alliance between parties can therefore give a reasonable competition to PTI in various territories.

Learning 6: In terms of approval ratings for leaders, Imran Khan leads with Nawaz Sharif narrowly behind at the national level.

Within Punjab, Nawaz Sharif ahead of Imran Khan. Between June 2023 and December 2023, Gap between Imran Khan and Nawaz Sharif in terms of approval rating has reduced considerably (Nawaz Sharif's ratings have improved and Imran Khan's ratings have remained consistent-more or less)

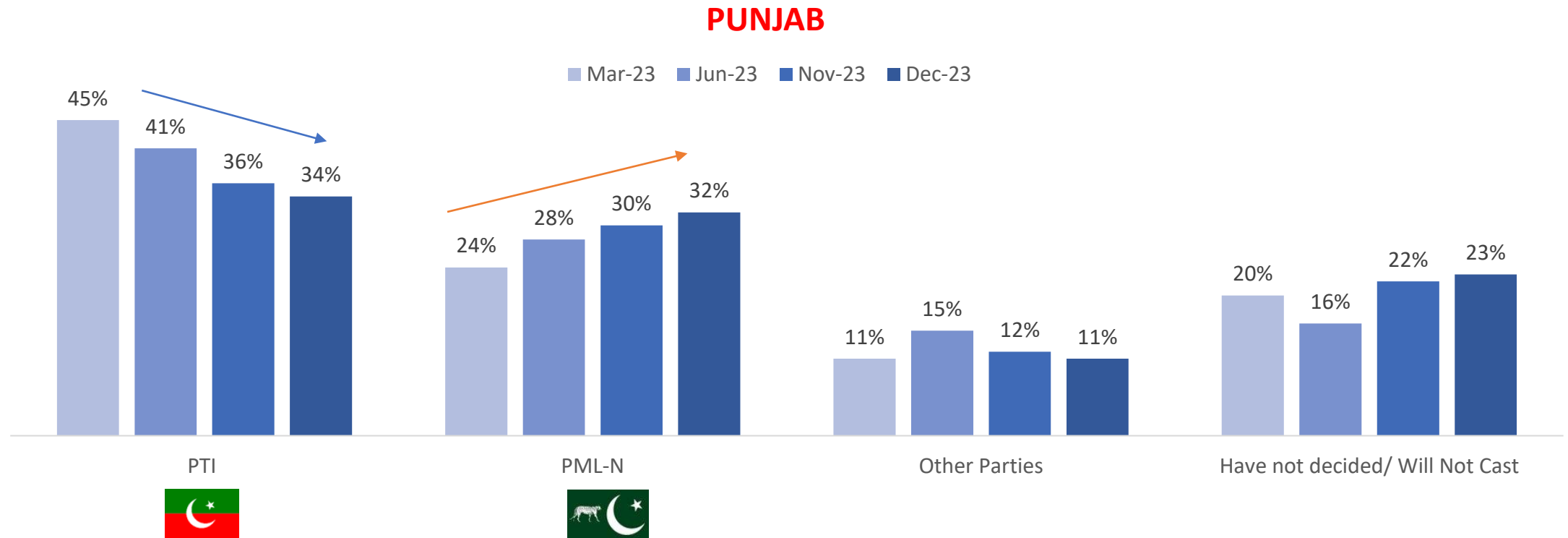
SECTION 1

ASSESSMENT OF VOTING INTENTIONS

- VOTING INTENTIONS IN PUNJAB

Punjab: PTI And PML-N In Lead With 34% And 32% in December 2023 polling respectively in terms of voting intentions. The gap between the two parties is 2% which is within the error margin of this survey and therefore statistically insignificant. Given Punjab Represents More Than Half Of The Seats, This Narrowing Could Have Important Implications In Terms Of Both Parties Ability To Bag Seats. **There is a consistent but slow decline in PTI's popularity/voting intentions since March 2023 and similar rise in PMLN's popularity**

Question: "Kindly tell me which party will you vote for in the National Assembly elections?"



PML-N and PTI had almost a tie in General Election 2018 in terms of popular vote (36% for PTI and 35% for PML-N): Gallup Electoral Index based on ECP results
Recent assessment of public opinion in Punjab suggests return to 2018 situation (see previous slide for current polling results)



National Assembly Score (Election 2018)

Punjab
Score of Votes and Seats

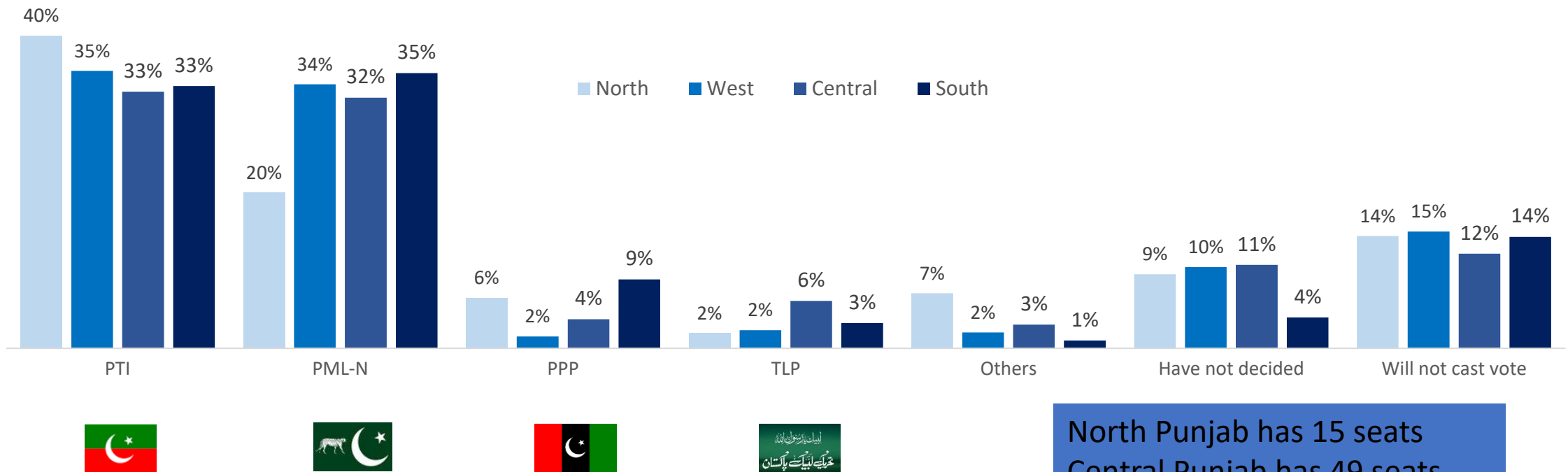
	Seats (n)	Seats %	Votes %	Votes (n)
PTI	63	44%	36%	12,096,153
PML-N	61	43%	35%	11,683,684
IND	7	5%	13%	4,296,779
PPP	6	4%	7%	2,274,128
PML-Q	4	3%	1%	490,894
All Others	1	1%	8%	2,633,615
TOTAL	142	100%	100%	33,475,253

Source : Gallup & Gilani Electoral Index and Dashboard . For more details and using the dashboard click here :
<https://www.galluppakistandigitalanalytics.com/gallup-pakistan-electoral-history-dashboard/>

PTI leads with reasonable margin in North Punjab over PML-N but is neck to neck in West and Central Punjab. PML-N seems to be in a lead in South Punjab and PPP also having reasonable support here. In Central Punjab TLP has a spoiler vote. Since North Punjab is only 10% of total Punjab seats, it is safe to say that electoral race is quite competitive as of now in Punjab and looks similar to 2018 general elections where both parties had a virtual tie in vote share (see previous slide for GE 2018 vote share)

Question: “Kindly tell me which party will you vote for in the National Assembly elections?”

Punjab – by Region (December 2023 polling results)

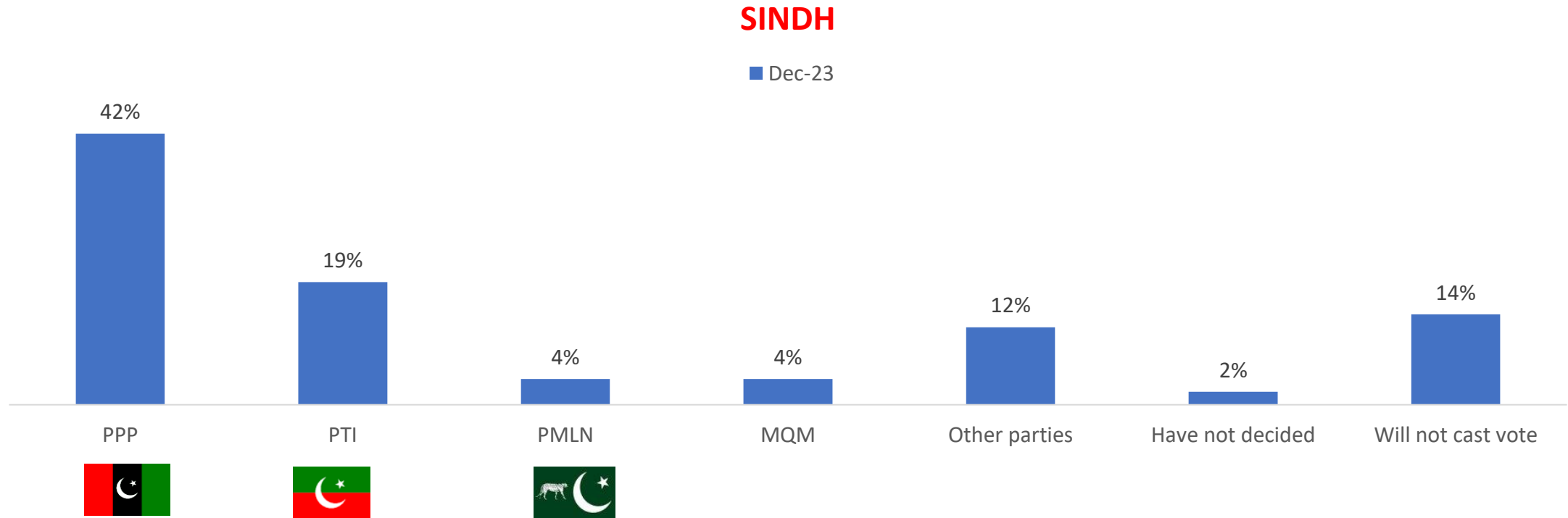


North Punjab has 15 seats
Central Punjab has 49 seats
West Punjab has 28 seats
South Punjab has 51 seats

- VOTING INTENTIONS IN
SINDH

Sindh: PPP leads in Sindh over other parties. However, its support is less strong in Karachi region as opposed to Interior Sindh/ Rural Sindh. Sindh results from the survey look similar to General Election 2018 results (presented in next slide)

Question: “Kindly tell me which party will you vote for in the National Assembly elections next year in February 2024?”

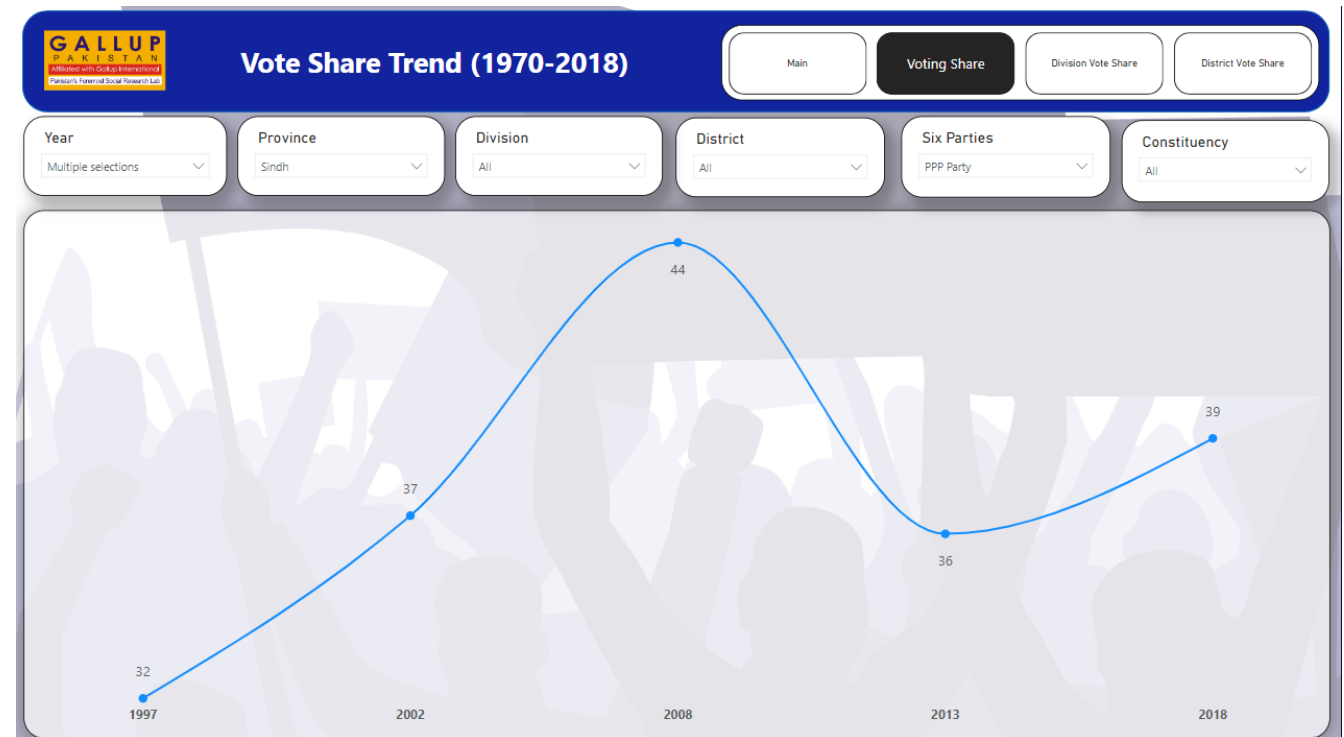


General Election 2018: Sindh Vote Share and PPP vote across different elections in the past. PPP has retained its vote share for most elections (2008 saw an increase as sympathy vote after shahadat of Benazir). PPP likely to retain its vote bank especially within Rural Sindh

Sindh

Score of Votes and Seats

	Seats (n)	Seats %	Votes %	Votes (n)
PPP	36	59%	39%	3,966,258
PTI	14	23%	17%	1,774,214
MQM	6	10%	7%	732,045
GDA	2	3%	12%	1,260,009
IND	2	3%	6%	602,396
MMA	1	2%	7%	764,535
All Others	-	-	12%	1,143,876
Total	61	100%	100%	10,243,333



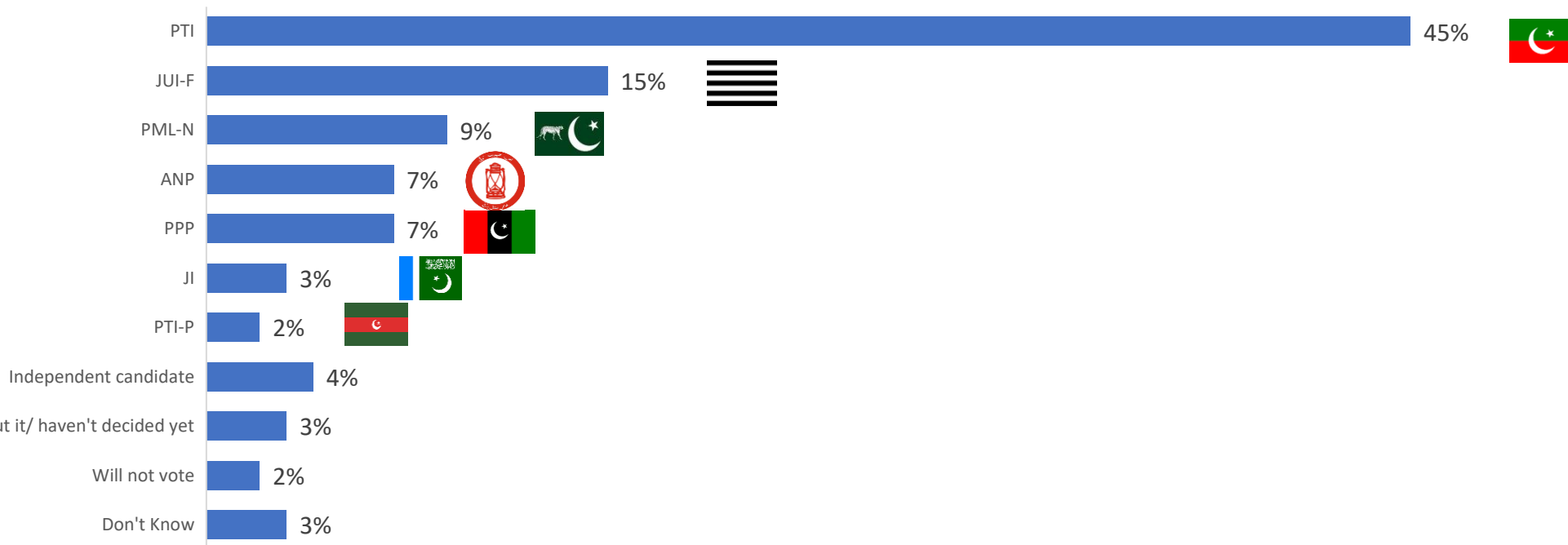
Source: Gallup & Gilani Electoral Index and Dashboard . For more details and using the dashboard click here: <https://www.galluppakistandigitalanalytics.com/gallup-pakistan-electoral-history-dashboard/>

- VOTING INTENTIONS IN KP

45% of voters surveyed in KP claim that they would like to vote for PTI. In General Election 2018, PTI had a vote share of 37%. Vote of parties other than PTI is concentrated in different electoral regions. For example, JUI-F has significant vote share in South KP and PML-N has significant vote share in Hazara. **An alliance between parties(as being reported in media) can therefore give a reasonable competition to PTI in various territories**

Question: "Please tell me which party you will vote for in the National Assembly elections next year in February 2024?"

Khyber Pakhtunkhwa – Party Voting intentions in December 2023



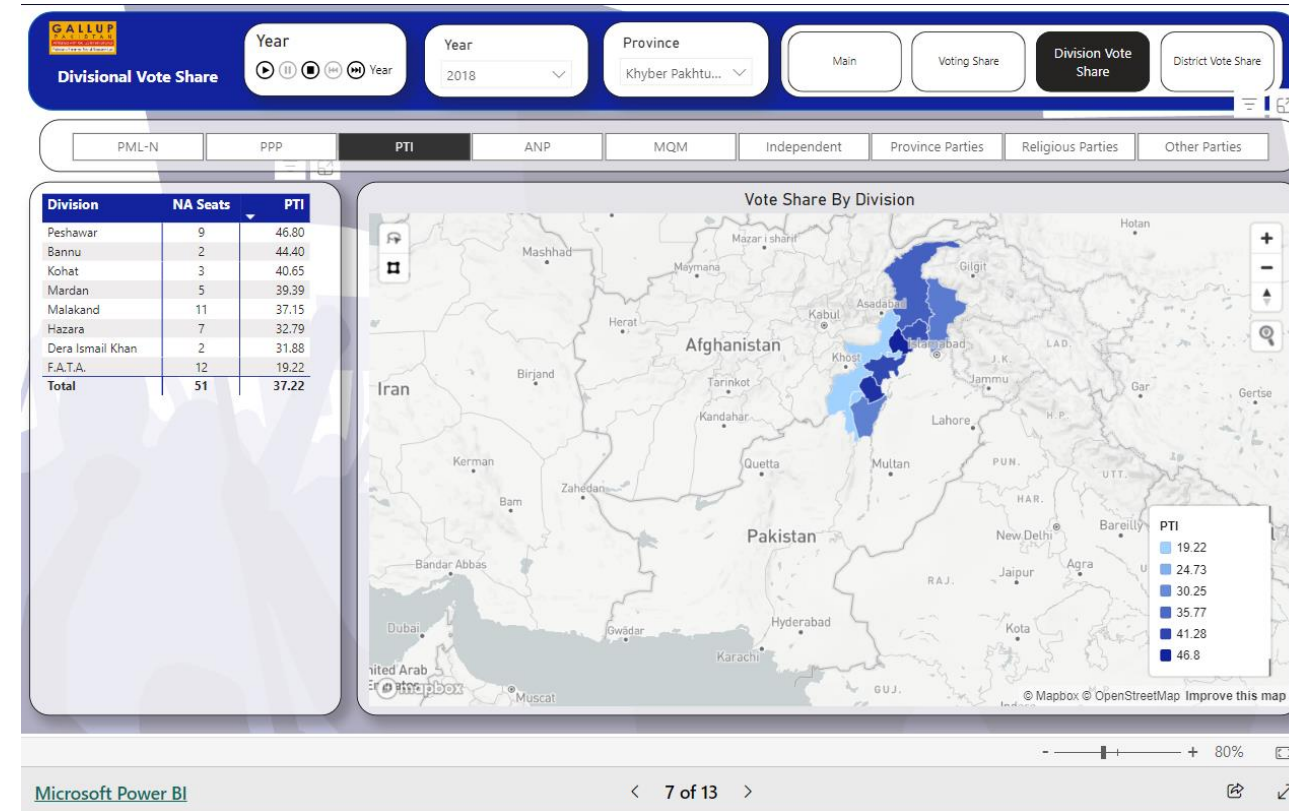
General Election 2018 Results in KP – 37% had voted for PTI as per Gallup Electoral Index based on ECP results. In most divisions within KP, more than half voters in 2018 had voted for a non-PTI party. Alliances (as reported in media) against PTI can have a significant effect if the alliances consolidate the voters who voted for other parties in 2018 General Election.



National Assembly Score (Election 2018)

KPK Score of Votes and Seats

	Seats (n)	Seats %	Votes %	Votes (n)
PTI	35	69%	37%	2,713,101
MMA	6	12%	18%	1,292,768
IND	4	8%	11%	822,675
PML-N	3	6%	12%	859,536
PPP	1	2%	8%	557,330
ANP	1	2%	10%	737,887
All Others	1	1%	4%	306,601
TOTAL	51	100%	100%	7,289,898



Source: Gallup & Gilani Electoral Index and Dashboard. For more details and using the dashboard click here: <https://www.galluppakistandigitalanalytics.com/gallup-pakistan-electoral-history-dashboard/>

SECTION 2

APPROVAL RATING

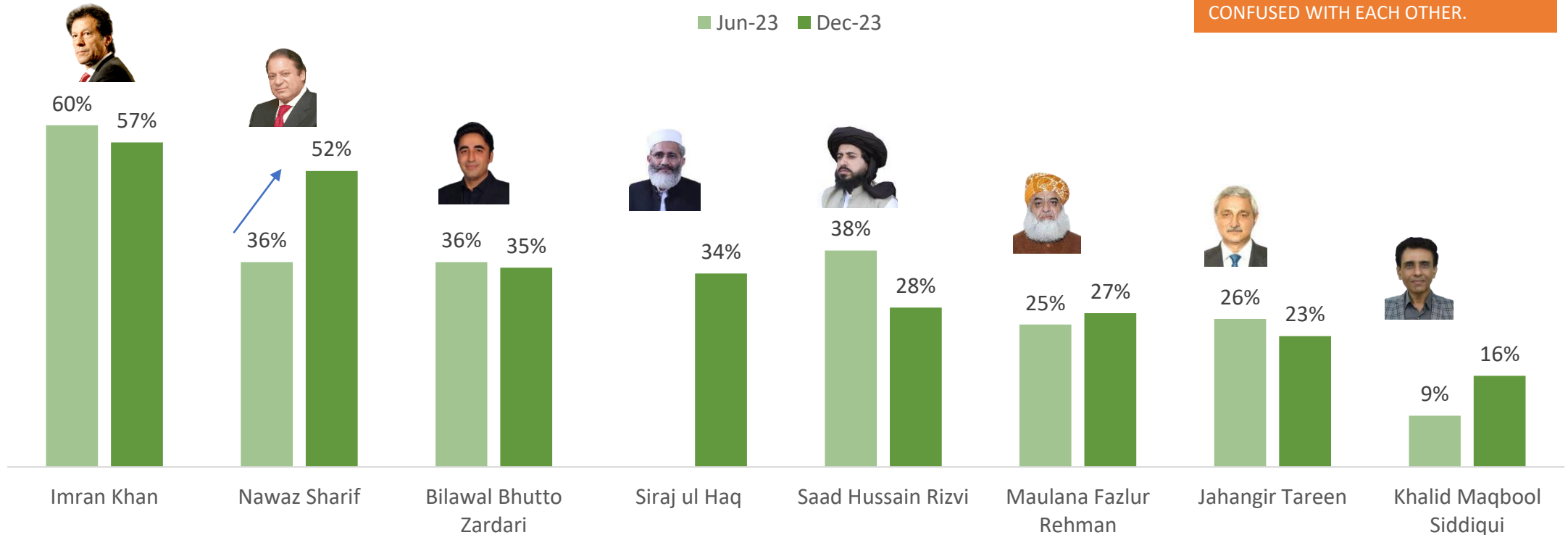
NOTE: APPROVAL RATING AND VOTING INTENTIONS ARE TWO DIFFERENT YARDSTICKS AND SHOULD NOT BE CONFUSED WITH EACH OTHER.

IMRAN KHAN AND NAWAZ SHARIF WITH THE HIGHEST POSITIVE APPROVAL RATINGS OF MORE THAN 50% : 57% say they have favorable or very favorable opinion about Imran Khan , 52% say the same about Nawaz Sharif. Between June and December 2023, Nawaz Sharif's approval rating has increased significantly, Imran Khan's approval rating has remained constant

Question: "Please let us know what your overall opinion is about the following political leaders?"

Positive Approval Rating = Very Favorable + Favorable
NATIONAL POSITIVE APPROVAL RATING

NOTE: APPROVAL RATING AND VOTING INTENTIONS ARE TWO DIFFERENT YARDSTICKS AND SHOULD NOT BE CONFUSED WITH EACH OTHER.



Note: Respondents were asked to individually rate each of these leaders. The leader choices were presented to the respondents. This is not an open-ended question. Data for Siraj ul Haq for June 2023 is not available.

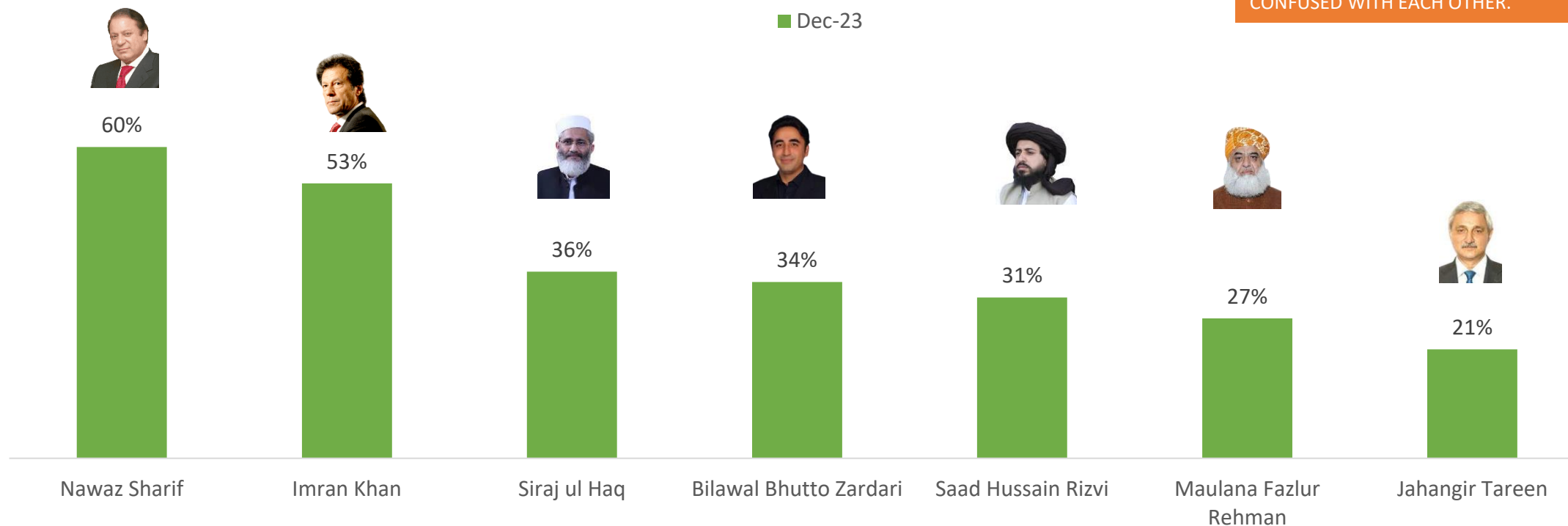
PUNJAB: NAWAZ SHARIF NOW IN THE LEAD IN TERMS OF APPROVAL RATINGS, 60% respondents in Punjab had very favorable or somewhat favorable rating for Nawaz Sharif, 53% had the same opinion about Imran Khan

Question: "Please let us know what your overall opinion is about the following political leaders?"

Positive Approval Rating = Very Favorable + Favorable

PUNJAB: POSITIVE APPROVAL RATING

NOTE: APPROVAL RATING AND VOTING INTENTIONS ARE TWO DIFFERENT YARDSTICKS AND SHOULD NOT BE CONFUSED WITH EACH OTHER.



Note: Respondents were asked to individually rate each of these leaders. The leader choices were presented to the respondents. This is not an open-ended question

METHODOLOGY & DEMOGRAPHICS



METHODOLOGY

Sample size of latest round of survey marked as December 2023 throughout the report: around 5000 Men and Women

Interview method: Combination of Random Digit Dialing Phone Survey Methodology and Face-to-Face methodology. For face-to-face methodology Stratified Random Sampling was used with Census 2017 used as a frame. Random Walk method was used at the PSU level. Respondent selection at household level was done using Kish Grid methodology.

Error margin: ± 2 to 3% at 95% confidence level for national level results

Field work Dates of latest round of survey : 15th December – 5th January 2024

Response Rate of Survey : around 85%.

For methodology of other surveys quoted in this survey please visit Gallup Pakistan website where most of the quoted survey reports are available.

June 2023 report and methodology can be found here : <https://gallup.com.pk/wp/wp-content/uploads/2023/09/Public-Pulse-Report-June-2023-3.pdf>

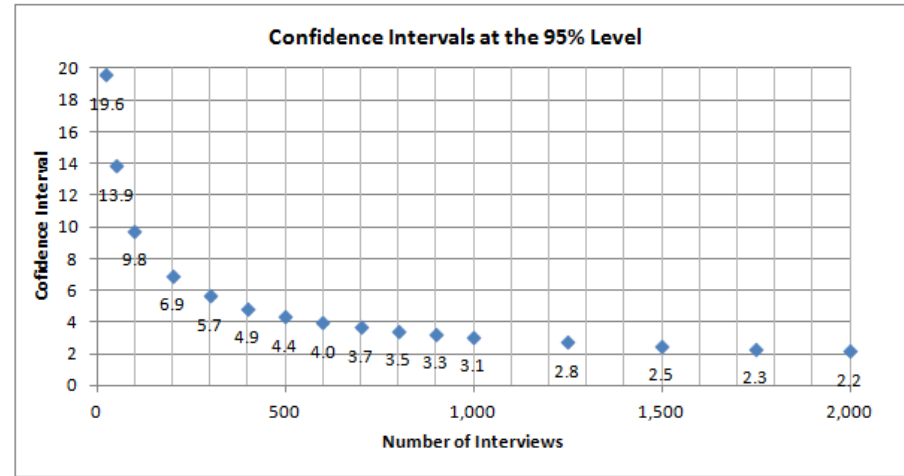
Voting intentions for Baluchistan have not been released (although survey was conducted in Baluchistan as well). The reason for this is that the survey sample was insufficient for meaningful and statistically sound analysis. Balochistan represents 6% of seats in the national assembly.

Note on Sample Size

Our sample size of 5000 respondents allows us to be representative of the of the Pakistani public opinion we surveyed with a fairly narrow margin of error. Within the constituency the sample is distributed and reported across various demographic groups (for example at province or sub province level) where the effective sample size becomes smaller and therefore Error margin applicable also changes.

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:



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 insures that everyone in the area being surveyed has a known chance of being selected.

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

SAMPLE PROFILE OF LATEST WAVE OF SURVEY (WEIGHTED PROFILE OF SAMPLE)

Total		100%
Location	Urban	36%
	Rural	64%
Province	Punjab	53%
	Sindh	22%
	KP	16%
	Balochistan	6%
Gender	Male	52%
	Female	48%
Age of Respondents	Under 30	26%
	30 – 50	53%
	50+	21%
Education of Respondents	Less than FA (12 years of education)	84%
	FA (12 years of education) and more	16%

DISTRICTS – BY PROVINCE WHERE SURVEY WORK WAS CONDUCTED FOR LATEST WAVE OF SURVEY PRESENTED

Punjab	
Attock	Layyah
Bahawalnagar	Lodhran
Bahawalpur	Mandi Bahauddin
Bhakkar	Mianwali
Chakwal	Multan
Dera Ghazi Khan	Muzaffargarh
Faisalabad	Narowal
Gujranwala	Okara
Gujrat	Pakpattan
Hafizabad	Rahim Yar Khan
Islamabad	Rajanpur
Jhang	Rawalpindi
Jhelum	Sahiwal
Kasur	Sargodha
Khanewal	Sheikhupura
Khushab	Sialkot
Lahore	Toba Tek Singh
Nankana Sahib	Vehari
	Chiniot

Sindh	
Badin	Nawabshah
Dadu	Sanghar
Ghotki	Shikarpur
Hyderabad	Sukkur
Jacobabad	Tharparkar
Karachi Central	Thatta
Karachi East	Umer Kot
Karachi South	Kambar Shahdad Kot
Karachi West	Kashmor
Khairpur	Korangi
Larkana	Matiari
Malir	Shaheed Benazirabad
Mirpur Khas	Tando Muhammad Khan
Naushahro Feroze	Qambar Shahdadkot
Jamshoro	Keamari

KP
Abbottabad
Bannu
Batagram
Buner
Charsadda
Chitral
Dera Ismail Khan
Hangu
Haripur
Karak
Kohat
Kohistan
Lower Dir
Mansehra
Mardan
Nowshera
Peshawar
Shangla
Swabi
Swat
Upper Dir
Malakand
Lakki Marwat
Waziristan
Bajaur Agency
Torghar

Balochistan
Awaran
Dera Bugti
Kalat
Kharan
Khuzdar
Killa Abdullah
Lasbela
Mastung
Nasirabad
Panjgur
Quetta
Sibi
Zhob
Chaman
Dukki

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