



SPECIAL PRESS RELEASE

Gallup Pakistan Exit Poll Survey 2024

Turnout among youth rises considerably in 2024, PTI popularity in first time voters and among relatively educated and better income segments made it the highest vote puller in the country:
Gallup Pakistan findings from Election Day and Post Election Survey 2024

(Islamabad Lahore Karachi): Gallup Pakistan, continuing its tradition of doing election day survey/Exit poll, has released report on 2024 election. The results have been compiled using a survey of almost 4000 voters from almost all districts of Pakistan covering both urban and rural areas.

Commentary from **Bilal Gilani, Executive Director Gallup Pakistan:** This Exit poll report when combined with Gallup Pakistan's other election related work shows a shifting Political Landscape in Pakistan. In some ways this election is a water shed. In the ever-evolving realm of politics, understanding the nuances that shape electoral outcomes is paramount. The recently concluded 2024 elections in Punjab and at the national level have left us with a wealth of data, offering a bird's eye view into the intricate dance of voter sentiments, demographic shifts, and the evolving dynamics between political juggernauts. **One** striking observation surfaces from the sea of election data: a static vote share. Unlike the usual ebb and flow witnessed in previous elections, the numbers paint a picture of remarkable stability. The vote share between 2018 and 2024 remains surprisingly unmoved, challenging conventional expectations and prompting a closer examination of the underlying factors at play. **Beneath this apparent steadiness** lies a fascinating revelation—the changing composition of votes. Despite the overall constancy in vote share, the traditional strongholds of political entities have been rattled. PMLN, once a formidable force in central Punjab, finds itself losing ground, while unexpected territories witness a surge in its support. The electoral map is being redrawn, signaling a shift in the political landscape within Punjab. **Central to this transformation is the rise of the youth vote**, a demographic once considered unpredictable and elusive. The youth, constituting a substantial portion of the electoral rolls, have broken free from historical affiliations. The data suggests that PTI has successfully tapped into **this demographic's quest for identity and rebellion** against established norms, making it their home in a political landscape that was previously dominated by older affiliations. **A generational divide has emerged**, crystallizing the ideological battle between PMLN and PTI. The older generation aligns with the former, while the younger demographic rallies behind the latter. This divide, which has intensified over the past two elections, reflects a broader societal shift and sets the stage for a battle of ideas that transcends traditional political lines. **Economic prosperity has played a pivotal role in shaping this political metamorphosis.** The newfound class of individuals, having tasted the fruits of a better standard of living, now seeks more than just material gains. Their aspirations extend beyond economic growth; they yearn for a share in the political pie, reshaping the political landscape in unforeseen ways.



12 KEY LEARNINGS FROM EXIT POLL BY GALLUP PAKISTAN FOR 2024 ELECTIONS

1. PTI is the most popular choice (31% voters voted for it) among voters of most age groups, followed by PML-N (24% voted for it). Among 50+ age group, PMLN- leads, showing a generational divide in voting preferences.

AGE-WISE VOTER BEHAVIOUR

	2013					2018					2024				
	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 +	New voters (Age 18-24)	Age 25 – 29	Age 30 - 34	Age 35 – 49	50 +
All Pakistan	<i>Among those who voted for (Col %)</i>					<i>Among those who voted for (Col %)</i>					<i>Among those who voted for (Col %)</i>				
PML-N	35	26	33	32	39	21	23	25	26	23	22	20	23	24	30
PTI	26	21	14	16	12	35	33	34	29	33	38	35	28	25	20
PPP	12	14	15	16	16	14	12	13	12	17	15	16	15	13	13
All others	27	39	38	36	33	31	31	28	33	27	26	29	34	38	37
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

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

2. PML-N's share of new voters (age 18-24) increased by 1% since the last elections, going from 21% in 2018 to 22% in 2024, while PTI has been the most popular choice of new voters (age 18-24) in the recent elections
3. Age composition of Party voters: the Pakistani voter who voted in the 2024 election is overwhelmingly young- 35% of those who voted were under 30 years of age. However, a sizeable 17% were also 50+ years of age.
4. PML-N with the highest share of illiterate voters in 2024 at 29%, followed by PPP (23%) and PTI (21%).

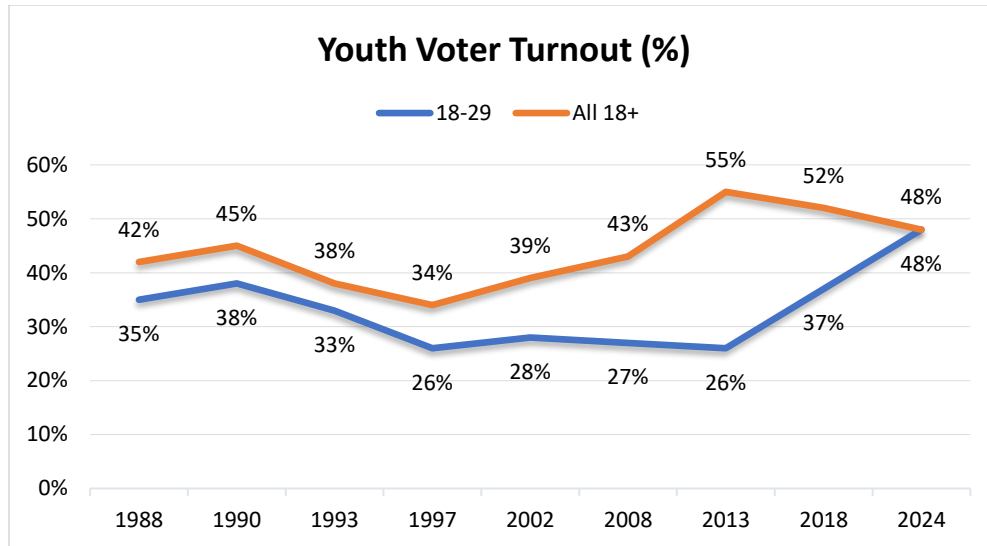
EDUCATION-WISE VOTER BEHAVIOUR

	2013				2018				2024			
	Illiterate	Up to Middle School	High School and Intermediate	Bachelors and Masters	Illiterate	Up to Middle School	High School and Intermediate	Bachelors and Masters	Illiterate	Up to 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>				<i>Among those who voted for (Col%)</i>			
PML-N	33	38	30	23	25	27	23	21	29	31	23	15
PTI	11	13	22	28	24	32	35	40	21	26	30	35
PPP	20	14	13	12	17	12	11	12	23	15	12	10
All others	36	35	35	37	33	30	31	27	27	29	35	40
Total	100	100	100	100	100	100	100	100	100	100	100	100

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



5. Youth turnout: According to Gallup Exit Poll 2024, youth voter turnout was roughly similar to the national voter turnout. This marks a massive improvement from earlier years where youth voter turnout was half or a third less than national average. As can be seen below the Election 2024 youth voter turnout is 11% higher than 2018 and 22% higher than 2013.

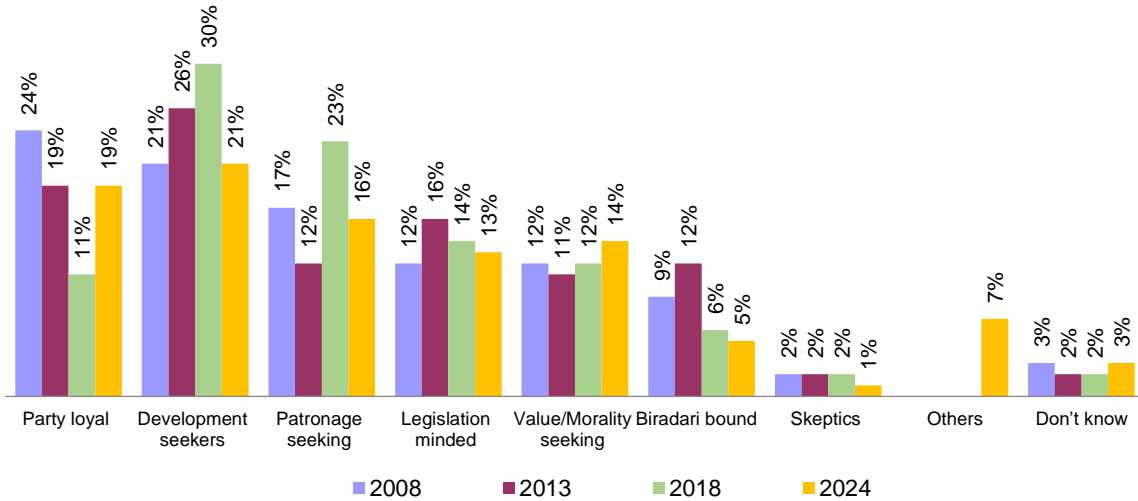


Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

- The Exit Poll data of GE 2024 suggests that PPP was the most popular second choice of PML-N voters (48%), while majority of the PTI voters chose MQM as their second-best choice (45%).
- The share of patron seeking voters sees a fall of 8% since the last elections – 16% in 2024 compared to 23% in 2018.

Percentage of Respondents

	2008	2013	2018	2024
Party loyal	24%	19%	11%	19%
Development seekers	21%	26%	30%	21%
Patronage seekers	17%	12%	23%	16%
Legislation minded	12%	16%	14%	13%
Value/Morality seekers	12%	11%	12%	14%
Biradri bound	9%	12%	6%	5%
Skeptics	2%	2%	2%	1%
Others	-	-	-	7%
Don't know	3%	2%	2%	3%

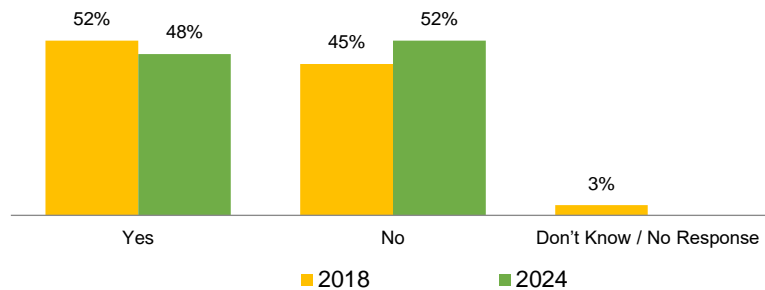


Source: Gilani's Index of Electoral Record, based on Gallup Exit Poll data

8. Almost 6 in 10 voters (64%) voted for a candidate not belonging to their Biradari, compared to 59% in 2018.
9. 48% voters' Biradari together made the decision to cast their vote, compared to 52% in 2018.

Percentage of Respondents

	2018	2024
Yes	52%	48%
No	45%	52%
Don't know / No Response	3%	-



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

10. 3% less voters in GE 2024 (82%) than GE 2018 (85%) believe that their vote will be helpful improving the condition of the country.
11. Compared to 2018 (17%), 29% more voters in 2024 (46%) advice the new government to provide electricity, roads, education, health facilities and employment to the public.
12. A vast majority (79%) of voters agree that all political parties should set aside their differences and work together.



DETAILED FINDINGS OF EACH SECTION

Section 1: Voting Behavior and Profile of Leading Political Parties Vote Bank

PTI is the most popular choice (31% voters voted for it) among voters of most age groups, followed by PML-N (24% voted for it). Among 50+ age group, PMLN- leads, showing a generational divide in voting preferences.

- i- The age wise voting behavior of the Exit Poll data suggests in the recent elections PTI retained its position as the most favored party by most age groups. PTI has a significant lead in all age groups except in the age category of 50+ years old where PML-N is ahead.
- ii- Among new voters, the PTI vs. PMLN gap was 14% in 2018, but has increased to 16% in 2024.
- iii- On the other hand, among 35–49-year-olds, PML-N has narrowed the gap between 2018 and 2024 to only 1% from 9%, and in 50+ years-olds, PML-N now leads with a 10% edge as compared to 10% loss against PTI.

PML-N's share of new voters (age 18-24) increased by 1% since the last elections, going from 21% in 2018 to 22% in 2024, while PTI has been the most popular choice of new voters (age 18-24) in the recent elections

- i- Among new voters, 38% voted for PTI but only 26% voted for PML-N. However, among 25+ year olds or older, the gap between PML-N and PTI was only 2%, with PTI in the lead. This was a substantial 6% in 2018.
- ii- In this young voter range, PML-N's share has increased by 1% since General Elections 2018. It was 21% in the last elections as compared to 22% in this election.
- iii- PTI's fortunes have increased by 3% in this age bracket. PTI's share was 35% in the last elections and 38% in GE 2024. PPP also saw a minor increase in their share. It was 14% in 2018, while it is 15% now.
- iv- In the age category of 25+, PML-N lost 1% voters since the last elections. PTI lost 5% voters, while PPP gained 1% voters.

New and educated voters – PML-N vs. PTI: Compared to 2018, 5% more voted for PTI while 2% fewer voted for PML-N

- i. Defined as voters aged 18-24 years and with education up to high school and above.
- ii. PTI has been the choice of more “new and educated” voters than PML-N since 2018 – 41% of them voted for PTI in 2024 compared to the 36% in 2018.
- iii. Alternatively, PML-N being the choice of this category of voters has seen a decline of 2% since the last elections – falling from 23% votes in 2018 to 21% in 2024.

Young, educated and upscale voters – PML-N vs. PTI: Compared to 2018, the gap between PTI and PML-N has increased from merely 1% (27% PML-N and 28% PTI) to a massive 22%.



- i. Defined as New voters (Age 18-24) who are educated to a level of High School and above and are earning more than Rs. 30,000.
- ii. PTI in the lead with almost half (47%) young, educated and upscale voters while PML-N sufficiently lacks with 15% voters.
- iii. Compared to 2018, the gap between PTI and PML-N has increased from merely 1% (27% PML-N and 28% PTI) to a massive 22% in this category.

Age composition of Party voters: the Pakistani voter who voted in the 2024 election is overwhelmingly young- 35% of those who voted were under 30 years of age. However, a sizeable 17% were also 50+ years of age.

- i. The data shows turnout among young voters was significantly higher than previous years. In 2013, 25% of voters who voted were under 30; in 2018 31% were under 30 and in 2024, 34% were under 30 years of age.
- ii. PTI voter is significantly younger. Whereas 19% of average voters were first time voters, among PTI voters, a quarter of the voters were first time voters (25%). PTI had on the other hand has lower share of the older voter (50+ age group) at 12% compared to the national average of 17%.
- iii. The converse was true for PML-N, who had a higher-than-average share of 50+ age group (22%). PPP seems to be close to average proportion with respect to all age groups.

PML-N with the highest share of illiterate voters in 2024 at 29%, followed by PPP (23%) and PTI (21%).

- i. Since General Elections 2018, PTI has seen a 3% decrease in illiterate voters, while PML-N's vote bank has seen an increase of 4%, and PPP's vote bank has had a 6% increase in illiterate voters.
- ii. PML-N has the highest share among voters who are educated up to middle school (31%), followed by PTI (26%) and then PPP (15%). PTI takes lead among voters who are educated till high school/intermediate level (30%) and those who have obtained higher education (35%).

The PPP and PML-N vote bank have a notably higher share of illiterate voters. PTI vote bank has a higher share of High School and Intermediate voters compared to the other.

- i. At all Pakistan level, there are 18% illiterate voters, 18% voters educated up to middle school, 41% educated to a level of high school/intermediate and only 23% who hold a bachelors/master's degree.
- ii. PTI has 5% less illiterate voters than the percentage of illiterate voters at all Pakistan level, while PML-N has 4% more illiterate voters while PPP has 11% more illiterate voters.
- iii. PML-N has 6% more voters and PPP has 1% more voters than the country's total share of voters in the category of education up to middle school, PTI has 1% less share as the country's share of such kind of voters.
- iv. Only PTI's share of voters is greater than the country's share of voters among voters who have acquired higher education.

Section 2: Perceptions on Impartiality



The same proportion of voters in 2024 as 2018 found the polling staff to be partial to a particular candidate (11%).

- i. The Exit Poll data suggests that the same proportion of voters in the recent most elections felt that a particular candidate was favored by the polling staff as they did in the last election – 11%.
- ii. Fewer people found the polling staff to be impartial in 2024 (82%) as compared to GE 2018 (83%), but more thought the polling staff was impartial as compared to GE 2013 (80%).

More people think the 2024 elections would be free and fair (78%) than not (22%).

Section 3: Tips For Party Leaders About Voters' Choices for Political Alliances

11% fewer PTI voters listed PML-N as their second-best choice in the GE 2024 (8%) as compared to GE 2018 (19%).

- i. The respondents were asked about their second-best choice to vote for. Among PML-N voters, PTI was the most popular choice (17%), while PTI voters preferred PPP (8%) and PML-N (8%) the most over all other parties.
- ii. PPP voters listed PTI as their most common pick (as their second-best choice) at 27%, while MQM (48%) and independent candidate voters (16%) also picked PTI.

The Exit Poll data of GE 2024 suggests that PPP was the most popular second choice of PML-N voters (48%), while majority of the PTI voters chose MQM as their second-best choice (45%).

- i. Among those who gave a second choice, 30% of PTI voters listed PML-N as their second-best choice, while 31% of PML-N voters favored PTI.
- ii. Among PPP voters, PML-N (29%) and PTI (29%) were popular choices while most independent candidate voters listed PML-N (12%) as their second-best choice.

Section 4: How Voters Make Their Choice

The share of patron seeking voters sees a fall of 8% since the last elections – 16% in 2024 compared to 23% in 2018.

- i. The voters have been classified in seven different categories based on their motivations to vote for a particular candidate.
- ii. Since GE 2018, the proportion of party loyal voters has increased by 7% (11% to 19%), while development seeking voters have seen a fall in their proportion (30% to 21%). Patron seeking voters have decreased, as have legislation minded voters (14% to 13%).
- iii. Morality seeking voters have also increased (12% to 14%) but the Biradari bound voters have decreased by 1% (6% to 5%). The proportion of skeptic voters has remained about the same (2% in 2018 vs. 1% in 2024).



Almost 6 in 10 voters (64%) voted for a candidate not belonging to their Biradari, compared to 59% in 2018.

- i. To see how Biradari plays a role in voting decisions, respondents were asked if the candidate they voted for belonged to their Biradari.
- ii. To this only 15% said that the candidate did belong to their Biradari while, majority (64%) said that the candidate did not belong to their Biradari. 20% said that they are not associated to a specific Biradari.

48% voters' Biradari together made the decision to cast their vote, compared to 52% in 2018.

- i. Voters were asked if their Biradari together made a decision to cast their vote. To this 48% said that it did, while 52% said it did not.
- ii. In 2018, it was the other way around where 52% made the decision to vote together with their Biradari and 45% did not.

Section 5: Voter's Sense of Empowerment

3% less voters in GE 2024 (82%) than GE 2018 (85%) believe that their vote will be helpful improving the condition of the country.

- i. In comparison to GE 2018, 3% fewer voters are optimistic about their vote making a difference in these elections, but this number has seen a rise of 2% since GE 2008 (80%).
- ii. The percentage of those who think that their vote will not be helpful has remained at 8% across 2018 and 2024, increasing from 6% in 2013.

Section 6: New Federal Government

7 in 10 (70%) voters said one party should form the government.

- i. The Exit Poll survey asked the respondents, whether one party should form the government or there should be a coalition government.
- ii. To this 70% said that one party should form the government while 20% said more than one party should form a coalition government. 10% said they did not know or did not respond.

Compared to 2018 (17%), 29% more voters in 2024 (46%) advice the new government to provide electricity, roads, education, health facilities and employment to the public.

- i. In comparison to GE 2018, 9% fewer people want the new government to make Pakistan a modern and powerful country (27% in 2018 vs. 18% in 2024), while 12% fewer advice it to protect the faith and values of Muslims (35% in 2018 vs. 23% in 2024).
- ii. 5% fewer voters want the government to give opportunity to educated people to make the government instead of themselves – 18% in 2018 to 13% in 2024.

A vast majority (79%) of voters agree that all political parties should set aside their differences and work together.



- i. The respondents were asked whether all political parties should set aside their differences after the elections and work together.
- ii. In response to this, 79% were in the favor of parties working together but 15% opposed it.

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