



PAKISTAN'S 11TH GE ELECTION 2018

Who Voted for Whom & Why

Based on Gallup Pakistan's Exit Poll Data, Post
Election Survey and Gallup Data Analytics Team
Compilation of Election Commission Data

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3 SOURCE OF DATA

❖ Gilani's Index of Electoral Record based on:

1. Gallup Pakistan Exit Poll (2018 + Exit Polls by Gallup since 1985)

A survey of N 3000+ Voters in 127 Constituencies as they exited the polling station on the election Day

2. Election Commission Pakistan Data (2018+ Election Results of past 10 Elections)

Gallup Pakistan Analytics team computerised the data at the polling station Level (Form 45 to 48) and analysed using statistical methods plus triangulated the data from other sources.

3. Post Election Survey by Gallup Pakistan

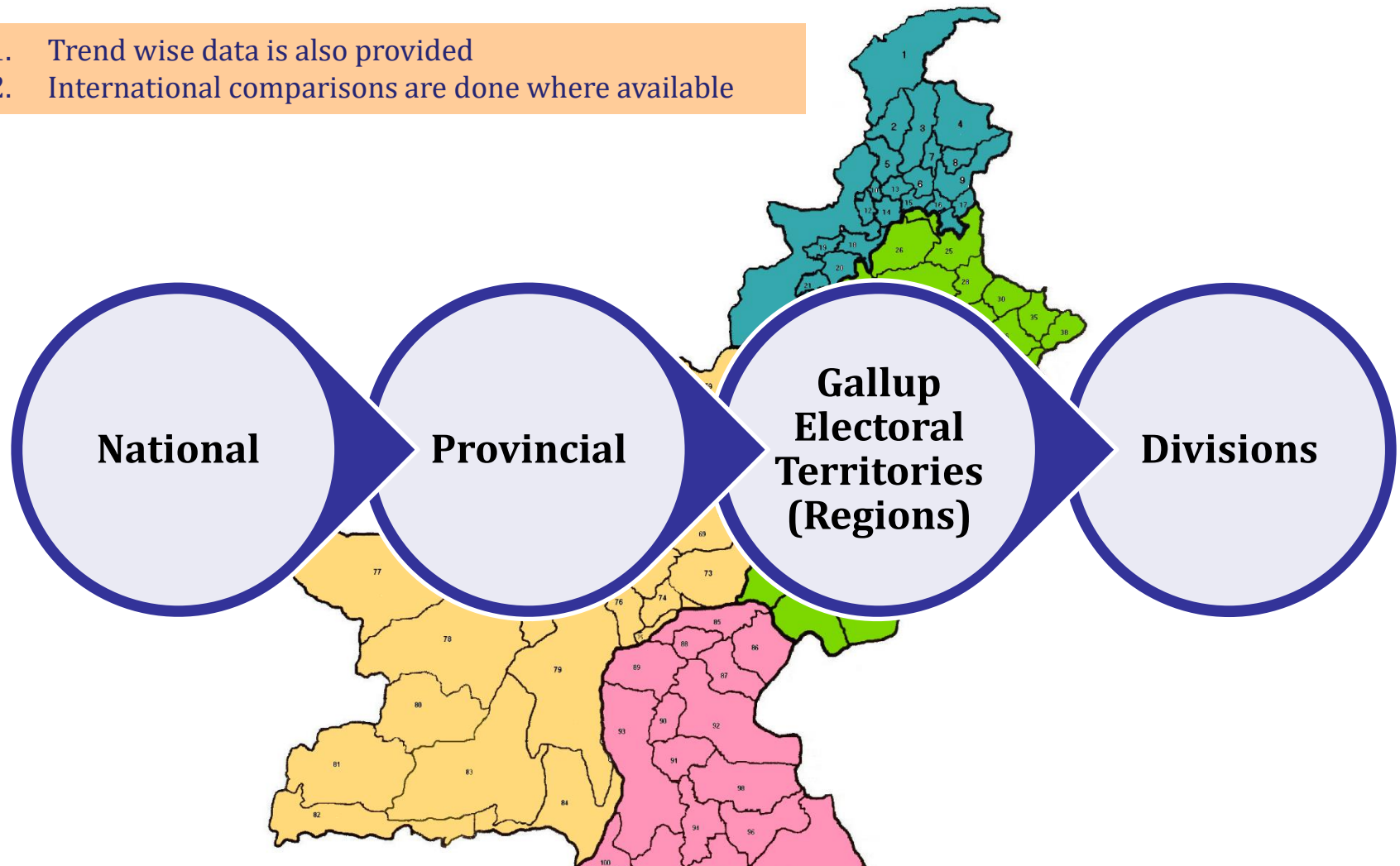
A survey with N 4000 Respondents across 2 weeks after Election covering Urban and Rural Areas

Note: Intellectual and Financial support for these data sources has been made available through internal means of Gallup Pakistan. No foreign or domestic funding or grant was utilised. This was done to ensure impartiality and objectivity in analysis



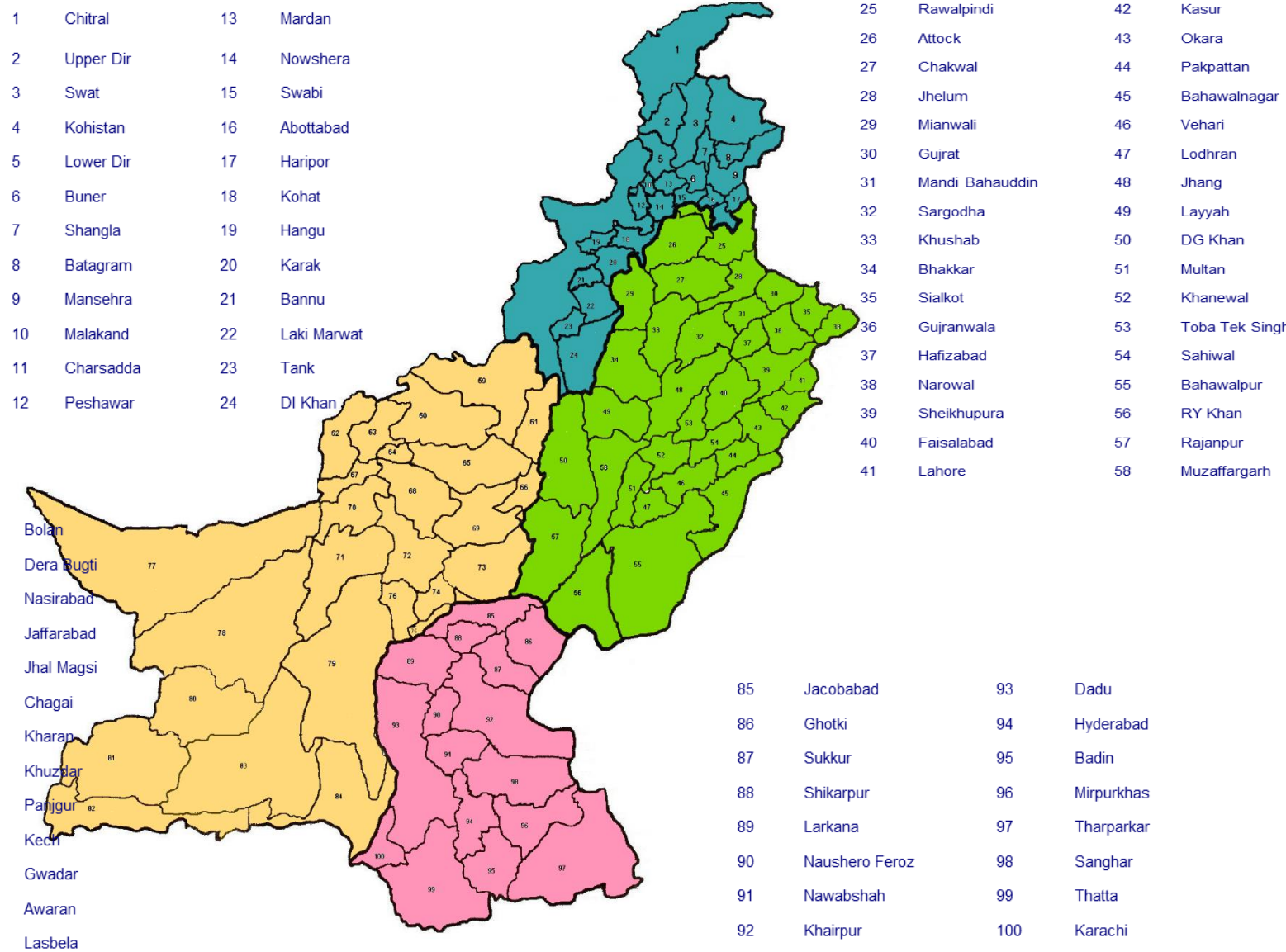
LENSE

1. Trend wise data is also provided
2. International comparisons are done where available



THROUGH OUT THE PRESENTATION WE WOULD BE DISECTING DATA THROUGH 4 KEY LENSES/ AREAS/METHODS. In other words data would be disaggregated at 4 levels starting from National and ending at Divisions (apart from constituency which is the founding block for elections results)

Pakistan District Map



Gallup Pakistan's Definition of 12 Electoral Territories

In addition to national and provincial breakdown of election results, Gallup Pakistan also provides data at sub-provincial level by distributing the country in 12 electoral territories. The definition of each of the 12 electoral territories has been provided below.

Karachi Region includes the following 5 Districts:

- Karachi Central District
- Karachi East District
- Karachi South District
- Karachi West District
- Malir District

Interior Sindh Region includes the following 16 districts:

- Badin District
- Dadu District
- Hyderabad District
- Thatta District
- Jacobabad District
- Larkana District
- Shikarpur District
- Mirpur Khas District
- Sanghar District
- Tharparkar District
- Umer Kot District
- Ghotki District
- Khairpur District
- Naushahro Feroze District
- Nawabshah District
- Sukkur



Gallup Pakistan's Definition of 12 Electoral Territories

Southern Punjab Region includes the following 11 Districts:

- Bahawalnagar District
- Bahawalpur District
- Rahim Yar Khan District
- Dera ghazi Khan District
- Muzaffargarh District
- Rajanpur District
- Khanewal District
- Lodhran District
- Multan District
- Pakpattan District
- Vehari District

Central Punjab Region includes the following 11 districts:

- Gujranwala district
- Gujrat district
- Hafizabad district
- Mandi bahauddin district
- Narowal district
- Sialkot district
- Kasur district
- Lahore district
- Okara district
- Sheikhupura district
- Sahiwal district



Gallup Pakistan's Definition of 12 Electoral Territories

Western Punjab Region includes the following 8 districts:

- Layyah District
- Faisalabad District
- Jhang District
- Toba Tek Singh District
- Bhakkar District
- Khushab District
- Mianwali District
- Sargodha district

Northern Punjab Region includes the following 5 Districts:

- Attock District
- Chakwal District
- Islamabad District
- Jhelum District
- Rawalpindi District

Peshawar Valley Region includes the following 5 districts:

- Mardan District
- Swabi District
- Charsadda District
- Nowshera District
- Peshawar

Southern KP Region includes the following 7 districts:

- Bannu District
- Lakki Marwat District
- D. I. Khan District
- Tank District
- Hangu District
- Karak District
- Kohat District



Gallup Pakistan's Definition of 12 Electoral Territories

Malakand Region includes the following 7 districts:

- Buner District
- Chitral District
- Lower Dir District
- Malakand protected area
- Shangla District
- Swat District
- Upper Dir District

Hazara Region includes the following 5 districts:

- Abbottabad District
- Batagram District
- Haripur District
- Kohistan District
- Mansehra District

Quetta Zone Region includes the following 9 districts:

- Chagai District
- Killa Abdullah District
- Pishin District
- Quetta District
- Barkhan District
- Killa Saifullah District
- Loralai District
- Musakhel District
- Zhob District

Kalat- Makran Market includes the following 17 Districts:

- Awaran District
- Kharan District
- Lasbela District
- Gwadar District
- Panjgur District
- Jaffarabad District
- Nasirabad District
- Kohlu District
- Ziarat District
- Kalat District
- Khuzdar District
- Mastung District
- Kech District
- Bolan District
- Jhal magsi District
- Dera bugti District
- Sibi District





Section 1: A NORMAL VOTER'S ELECTION DAY EXPERIENCE

Includes: Voter Turnout Analysis, Rejected Votes,
Perceived Fairness of Elections/ Staff, Home to
Electoral Booth Process Understanding,
Future Expectation from Government



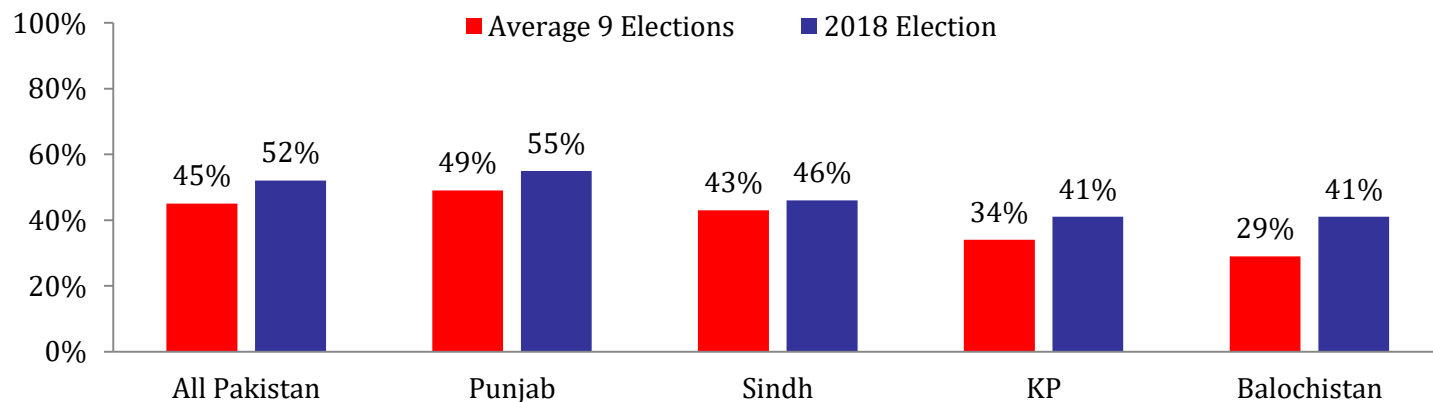
VOTER TURNOUT

Voter Turnout - Trend Analysis

TURNOUT AT NATIONAL AND PROVINCIAL LEVEL : Turnout was high as compared to previous trend but lower than 2013 GE

	Turn-out in 2018	43 year Average *	Gain over 43 year average
All Pakistan	52%	45%	7%
Punjab	55%	49%	6%
Sindh	46%	43%	3%
KP	41%	34%	6%
Balochistan	41%	29%	12%

*Note: Average Turn-out in 9 Elections since 1970 (1970-2013)

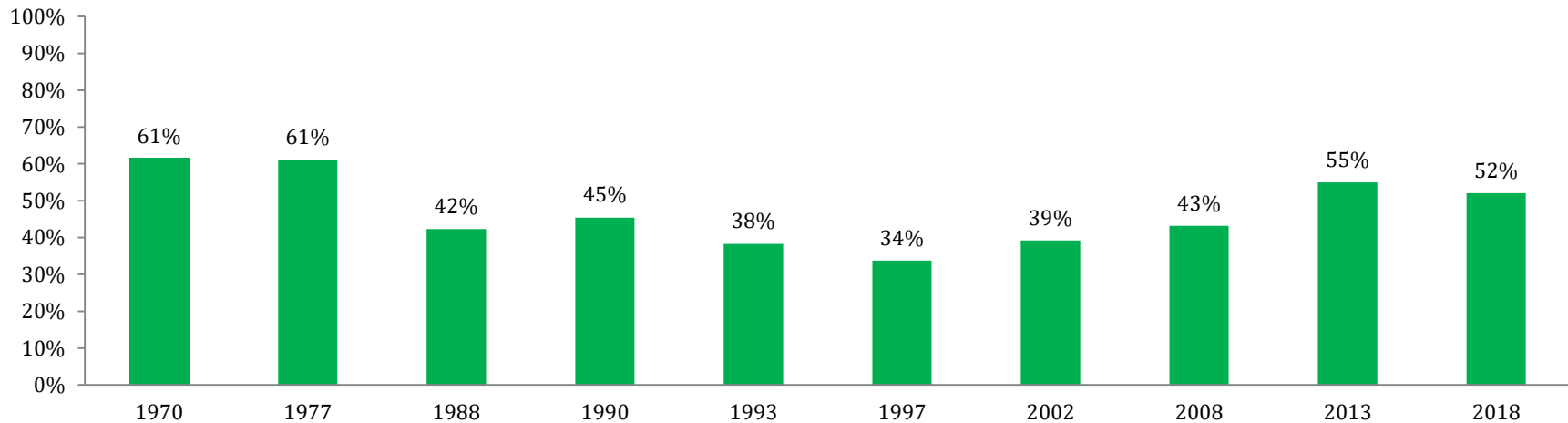


Source: Gilani's Index of Electoral Record, based on ECP data computed by Gallup Pakistan

Voter Turnout - Trend Analysis

All Pakistan

1. Turnout in 2018 is lower than 2013 by 3% points
2. Since 1997 Turnout had been increasing up till 2018 when it dropped



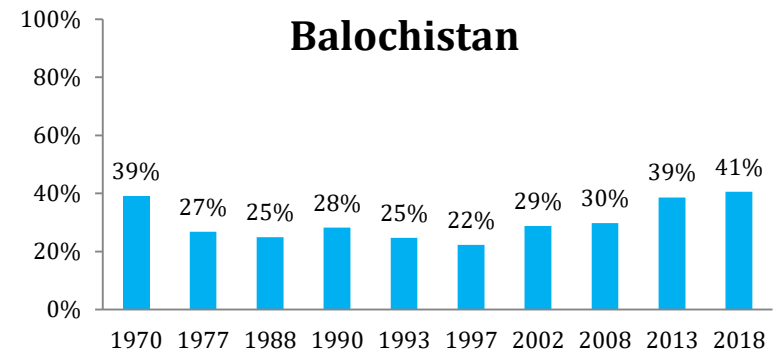
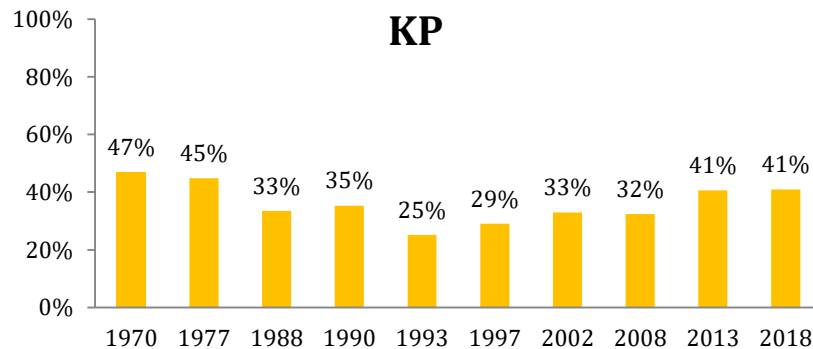
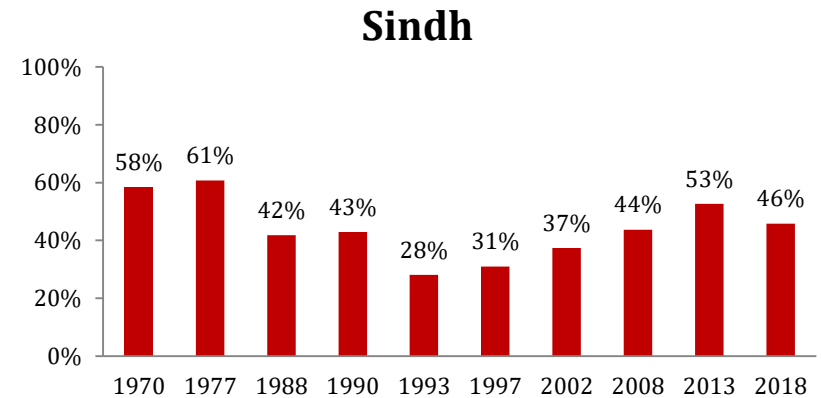
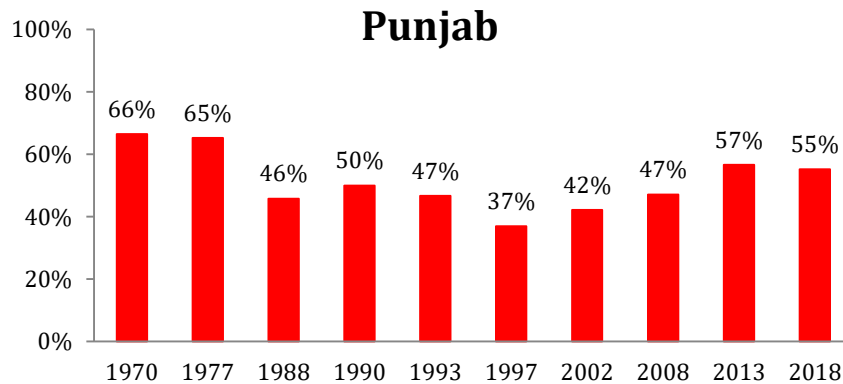
Discussion Point: Reasons for why the Turnout kept increasing till 2013 and why it dropped in 2018?

Can improvement be explained by: Improved Mobility ? Increased interest in politics ?
Reduction in 2018 sign of voter disillusionment , sympathy against non level playing field?
Weather extremity?

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

Voter Turnout - Trend Analysis by Provinces

1. Among all provinces Punjab continues to have higher turnout
2. Balochistan continues to improve from a low of 22% in 1997 to 41% (despite its law and order challenge)
3. Despite speculation Punjab has continued to have good turnout
4. Biggest decline in provinces between 2013 and 2018 is in Sindh where drop is of 7%. PPP has held on to its share of votes but decline in voter turnout may be a long term disillusionment with PPP



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

Voter Turnout - Sub Provinces Trend Analysis

1. Lowest turnout was seen in South KP(36%) and highest in Western Punjab
2. Karachi saw a dramatic fall of 9% showing possible revolt against electoral politics by Urdu Speaking voter. Karachi now has on average 12% lower turnout than national turnout

By Electoral Territories (11)	1970	1977	1988	1990	1993	1997	2002	2008	2013	2018
Southern Punjab	66%	65%	42%	49%	43%	39%	46%	46%	59%	58%
Central Punjab	70%	67%	46%	49%	47%	31%	35%	46%	55%	55%
Northern Punjab	58%	60%	53%	55%	53%	42%	48%	49%	56%	56%
Western Punjab	66%	66%	48%	51%	49%	42%	47%	50%	57%	59%
Interior Sindh	60%	65%	39%	42%	33%	32%	38%	42%	55%	51%
Karachi Region	54%	54%	49%	44%	17%	28%	37%	47%	49%	40%
Malakand Region	36%	37%	31%	32%	31%	23%	31%	25%	36%	41%
South KP	49%	48%	34%	35%	34%	33%	33%	36%	41%	39%
Peshawar Valley	59%	56%	35%	38%	17%	27%	33%	32%	39%	45%
Hazara Region	39%	36%	33%	35%	35%	30%	35%	37%	50%	47%
Quetta Region	44%	27%	25%	28%	27%	22%	27%	27%	43%	41%
Kalat and Makran Region	33%	-	25%	29%	23%	23%	30%	32%	35%	45%

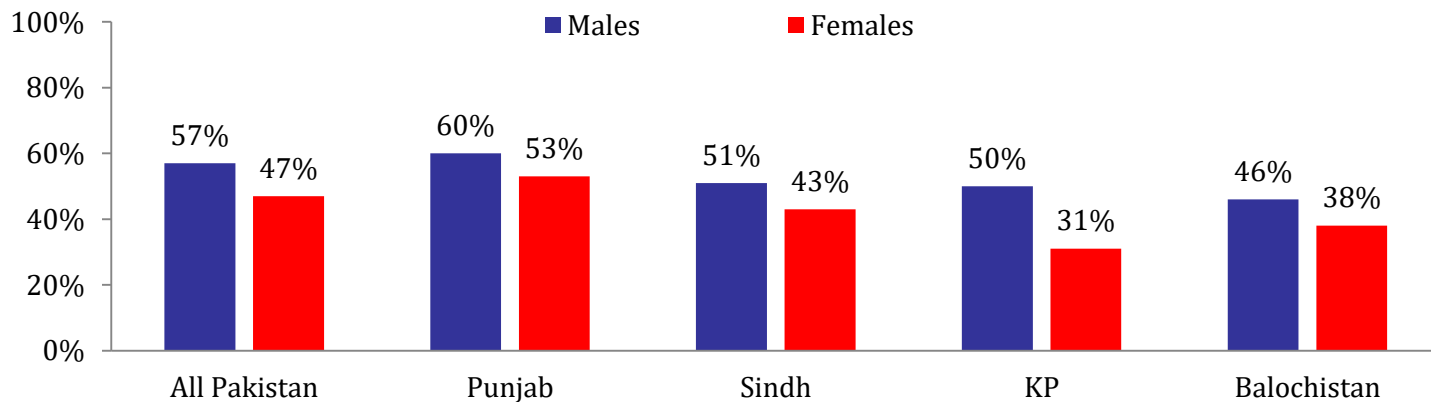
Red colour means decline between 2013 and 2018

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

Female Voter Turnout

TURNOUT: Female turnout was 10% lower than male turnout; lowest in KP (31%). Interestingly Gender Gap in Balochistan is at par with Sindh and very close to Punjab

	Males	Females	Gender Gap in Turnout
All Pakistan	57%	47%	10%
Punjab	60%	53%	7%
Sindh	51%	43%	8%
KP	50%	31%	19%
Balochistan	46%	38%	8%



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

Female Voter Turnout - Sub Provinces Trend Analysis

TURNOUT: Highest female turnout was in Southern Punjab (54%) and lowest in South KP (27%). Gender Gap is highest in Malakand

Karachi's female turnout of 34% is a source of concern and challenges assertions about reasons for lower female turnout.

By Electoral Territories (11)	Male	Female	Gender Gap by Region
Southern Punjab	60%	54%	6%
Central Punjab	58%	51%	7%
Northern Punjab	58%	54%	4%
Western Punjab	62%	54%	8%
Interior Sindh	55%	48%	7%
Karachi Region	45%	34%	11%
Malakand Region	56%	30%	26%
South KP	42%	27%	15%
Peshawar Valley	55%	32%	23%
Hazara Region	51%	38%	13%
Quetta Region	45%	33%	12%
Kalat and Makran Region	47%	42%	5%

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



Voter Turnout - Major Gainers & Losers by Region

GAINERS SINCE 2013

Gallup Regions	Voter Turnout in 2013	Voter Turnout in 2018	Top 4 Gainers
Kalat & Makran Region	35%	45%	10%
Peshawar Valley	39%	45%	6%
Malakand Region	36%	41%	5%
Western Punjab	57%	59%	2%

LOSERS SINCE 2013

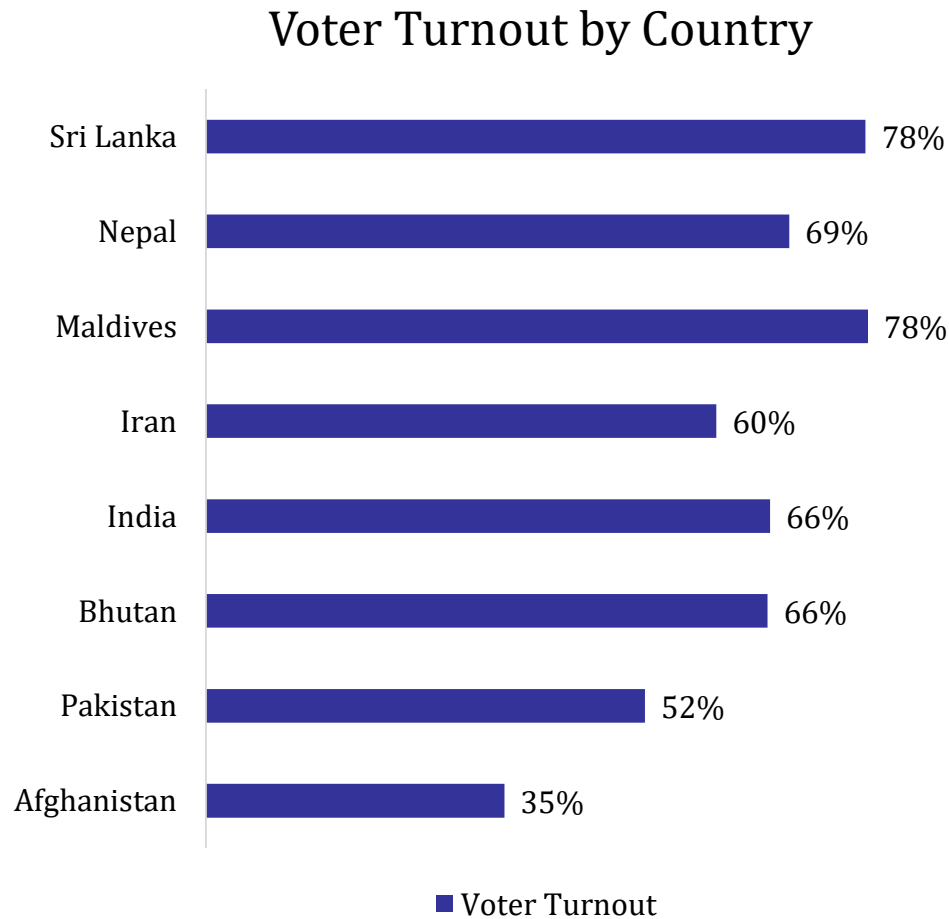
Gallup Regions	Voter Turnout in 2013	Voter Turnout in 2018	Top 4 Losers
Karachi Region	49%	40%	-9%
Interior Sindh	55%	51%	-4%
Hazara Region	50%	47%	-3%
Quetta Region	43%	41%	-2%

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

Fall in Karachi : Possibly shows revolt by Urdu speaking voter against the MQM factions. A significant portion of former MQM voter went to PTI as well as TLP. However, it seems that a large chunk decided not to vote



Voter Turnout in Pakistan and its Neighbours



Voter turnout in Pakistan although improved dramatically, is still quite low, second from bottom



Turnout by Age : Lowest in New Voters who are 50% point below average turnout, highest in mature 30-49 voters

	Turnout (Estimation)	Difference from average
New voters (Age 18-24)	22.88	-30%
Age 25 – 29	63.96	+11%
Age 30 – 49	74.36	+22%
50 +	31.72	-20%
All 18+	52%	

Source : Gallup Estimation based on profile of voters achieved through Exit poll conducted



3 Parting Points on Voter Turnout

1. **Turnout in Pakistan is one of the lowest in the region. However since 1997 it has been improving (with only a small reduction in 2018).**
2. **MQM loss and PTI gain in Karachi can also be partly explained by possible MQM voters staying at home.**

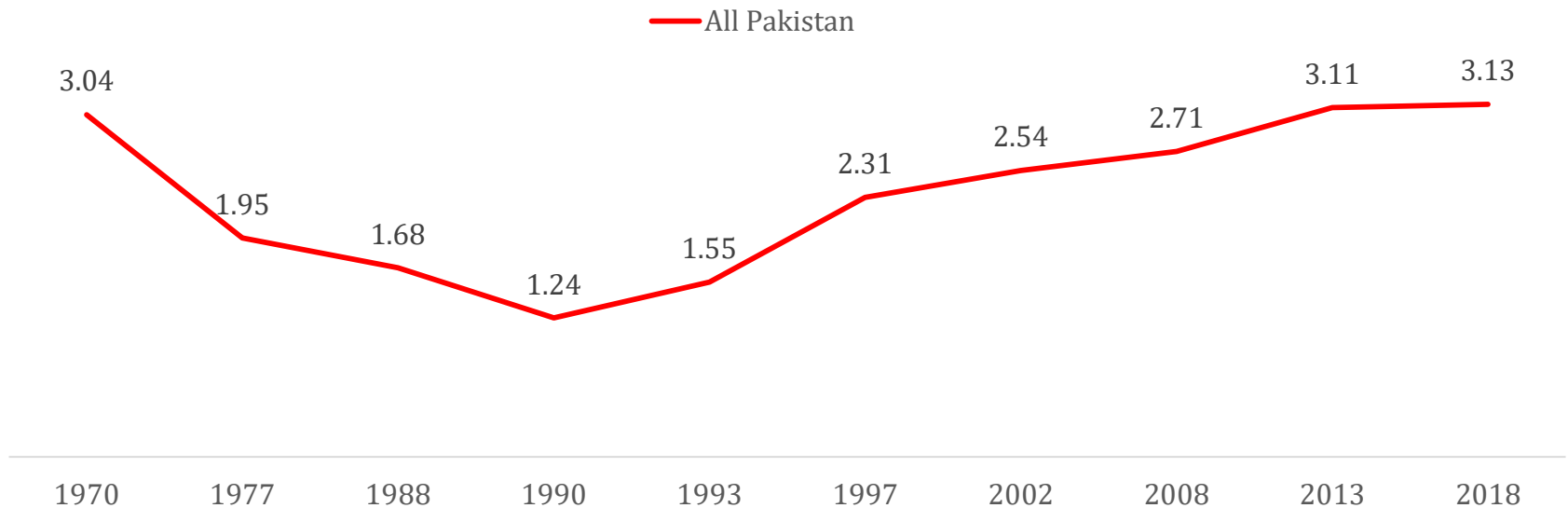
Our pre-election surveys, voter ambivalence / indifference was highest in Karachi

3. **Decline since 2013 election (which were conducted under significantly harder law and order situation and continuous Taliban threat) is a source of concern and needs to be understood more.**
3. **A 50% plus and rapid improvement in many regions of Balochistan is a moment of celebration of success for Election Commission**
4. **Difference in Voter turnout by Gender is significant and needs to be understood more (case of Karachi shows complexity of the issue)**

Rejected Votes

Rejected Voted as a Proportion of Total Votes – National Trend

Rejected votes as proportion of votes since 1970 elections: Since 1990 rejected votes have been increasing explained perhaps by better training of staff deputed to check whether a vote is acceptable or not.



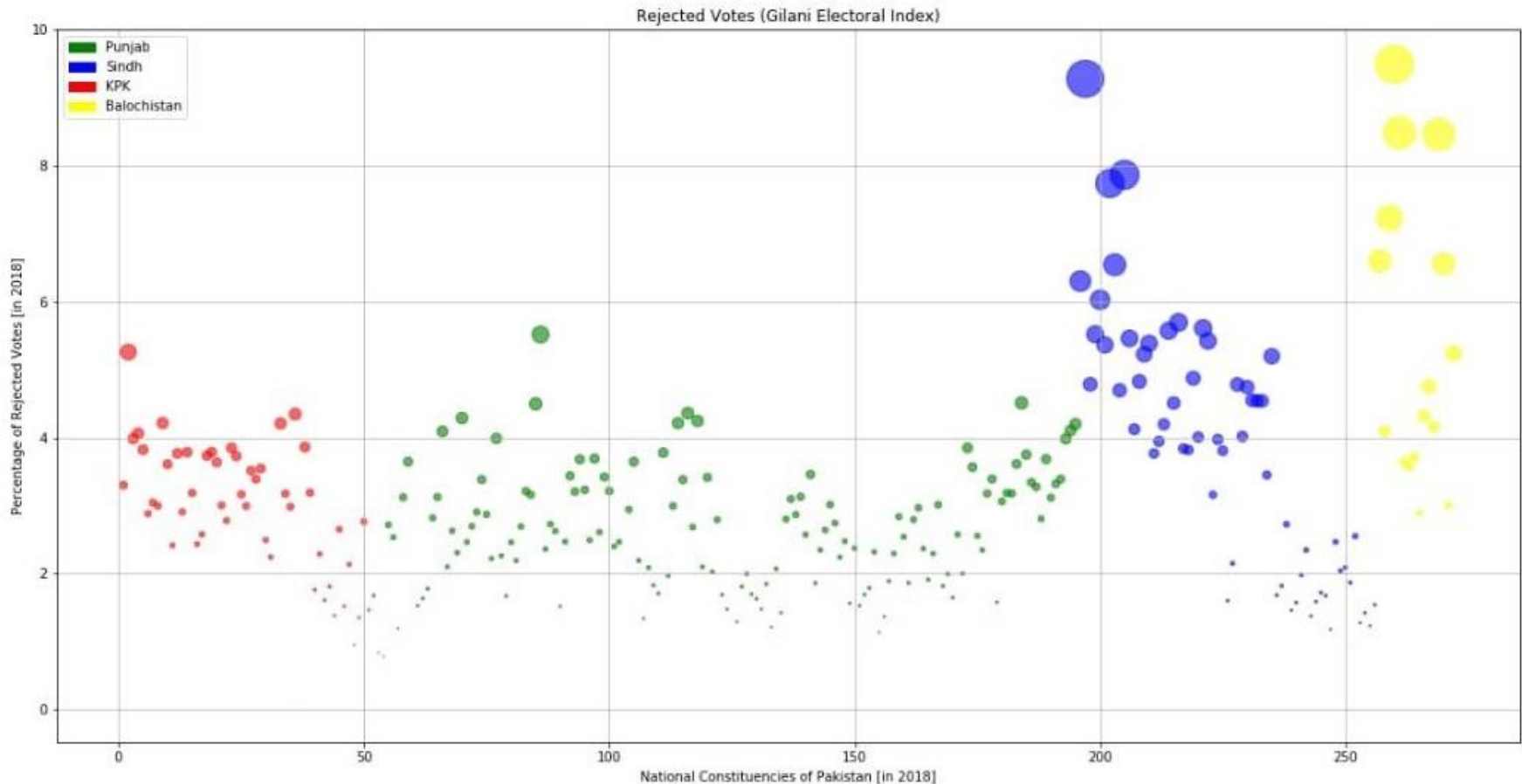
Source: Gilani's Index of Electoral Record, based on ECP data computed by Gallup Pakistan

REJECTED VOTES IN 2018 ELECTIONS WERE ONLY 0.02 PERCENT HIGHER



Spread of Share of Rejected Votes

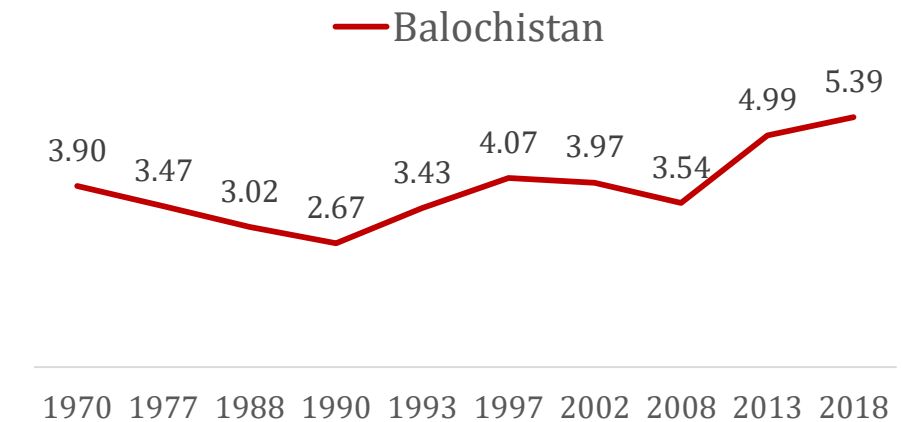
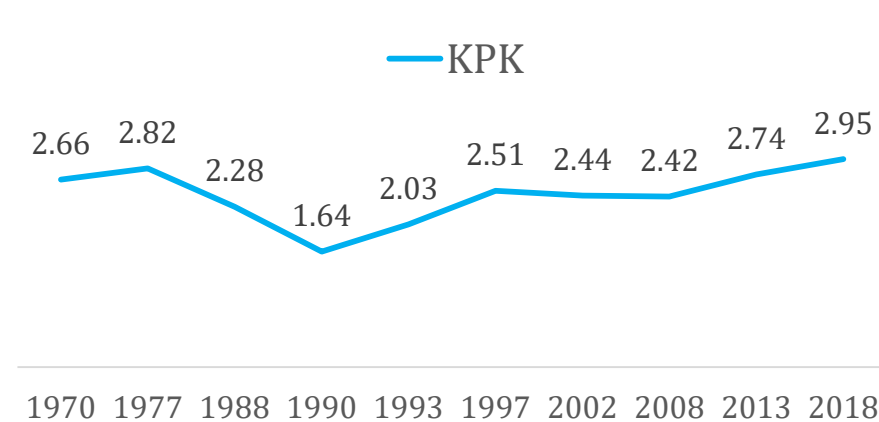
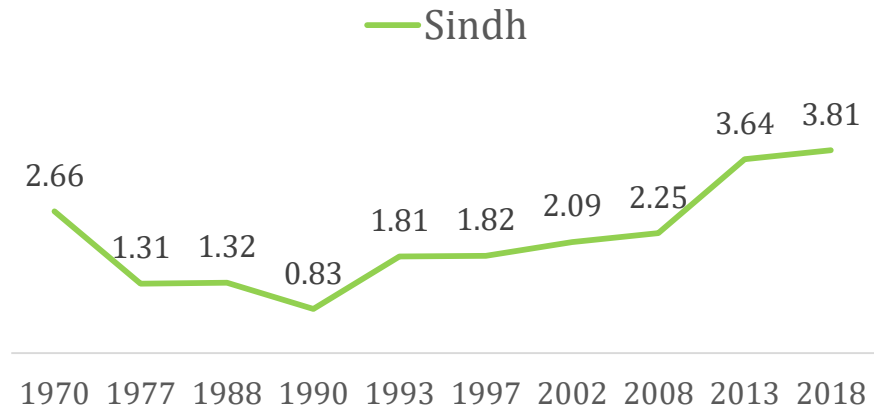
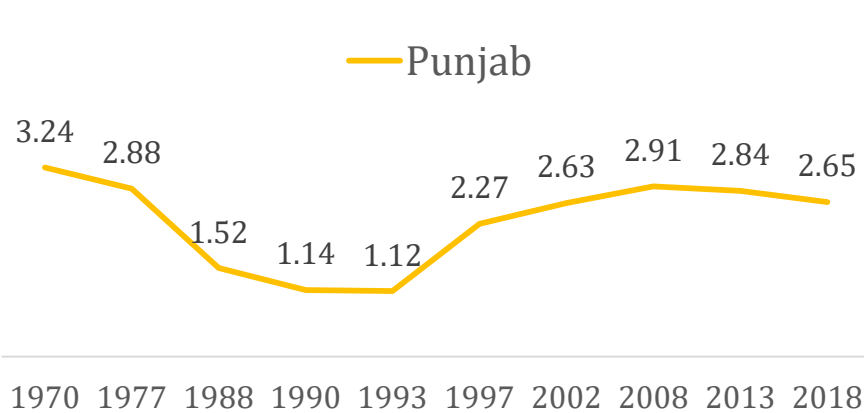
Spread of share of rejected votes across 270 constituencies: Sindh, Balochistan have a high number of rejected votes. Rejected votes in Punjab fairly uniform across all constituencies, with only a handful outliers.



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

Rejected Votes as a Proportion of Total Votes - Provincial Trend

In Punjab, rejected votes as a proportion of total votes has actually fallen by 0.2% and risen by around the same in Sindh



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

Rejected Votes as a Proportion of Total Votes – Top 5 Districts

Election results for percentage of rejected votes in 2013 and 2018 reveal that Nasirabad (NA-260) remains the district with the highest percentage of rejected votes in both 2013 and 2018. Though the percentage of rejected votes has decreased considerably in 2018.

Top 5 District in 2013 compared to 2018

NA 2018	District	Percentage of rejected Votes in 2013	Percentage of rejected Votes in 2018
226	Hyderabad	17.51	1.60
260	Nasirabad	15.86	9.49
256	Karachi	8.42	1.54
259	Sibi	7.67	7.23
254	Karachi	7.15	1.42

Top 5 District in 2018 compared to 2013

NA 2018	District	Percentage of rejected Votes in 2018	Percentage of rejected Votes in 2013
226	260	Nasirabad	9.49
260	205	Ghotki	7.87
256	202	Kamber	7.74
259	259	Sibi	7.23
254	257	Zhob	6.60

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

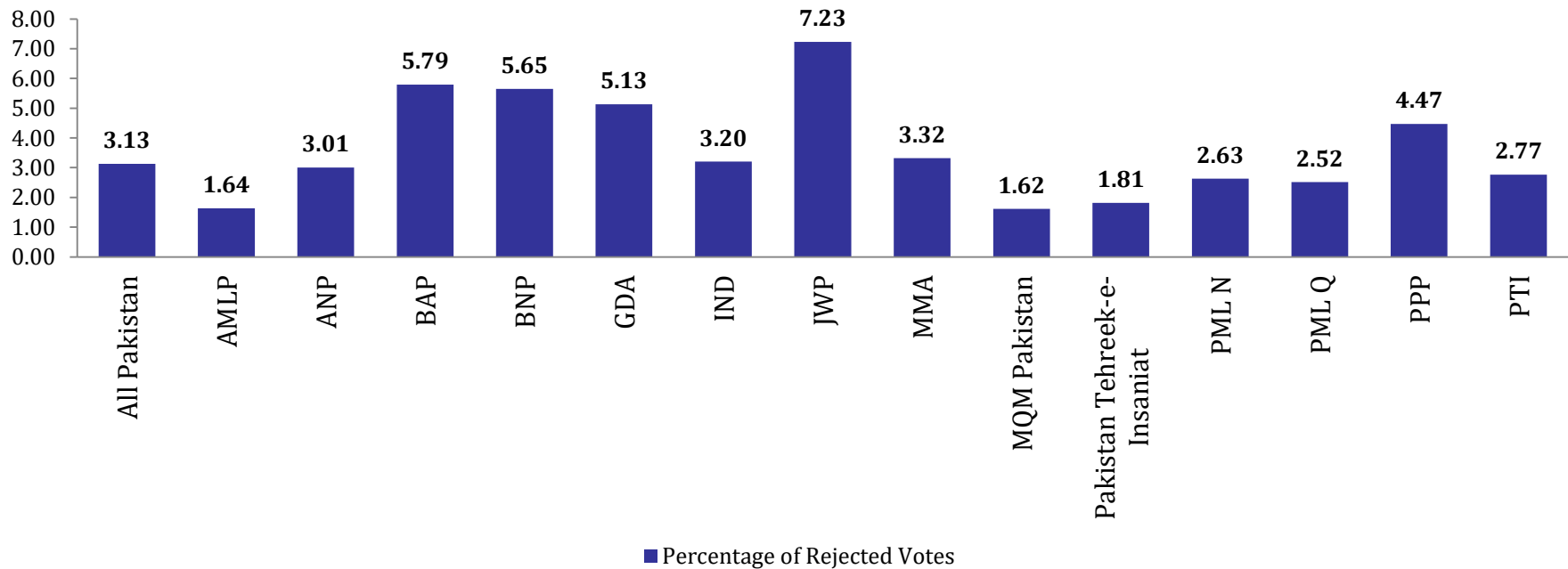


Rejected Votes by Winning Parties - National

Rejected votes by party winning: No significant difference in rejected votes among top parties winning a seat and rejected votes.

Rejected Votes on Seats where PMLN and PTI won is very small.

Rejected votes is a phenomenon explained by Geography rather than party . Rejected votes are highest in Sindh and Balochistan.



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

Rejected Votes by Winning Parties - Provincial

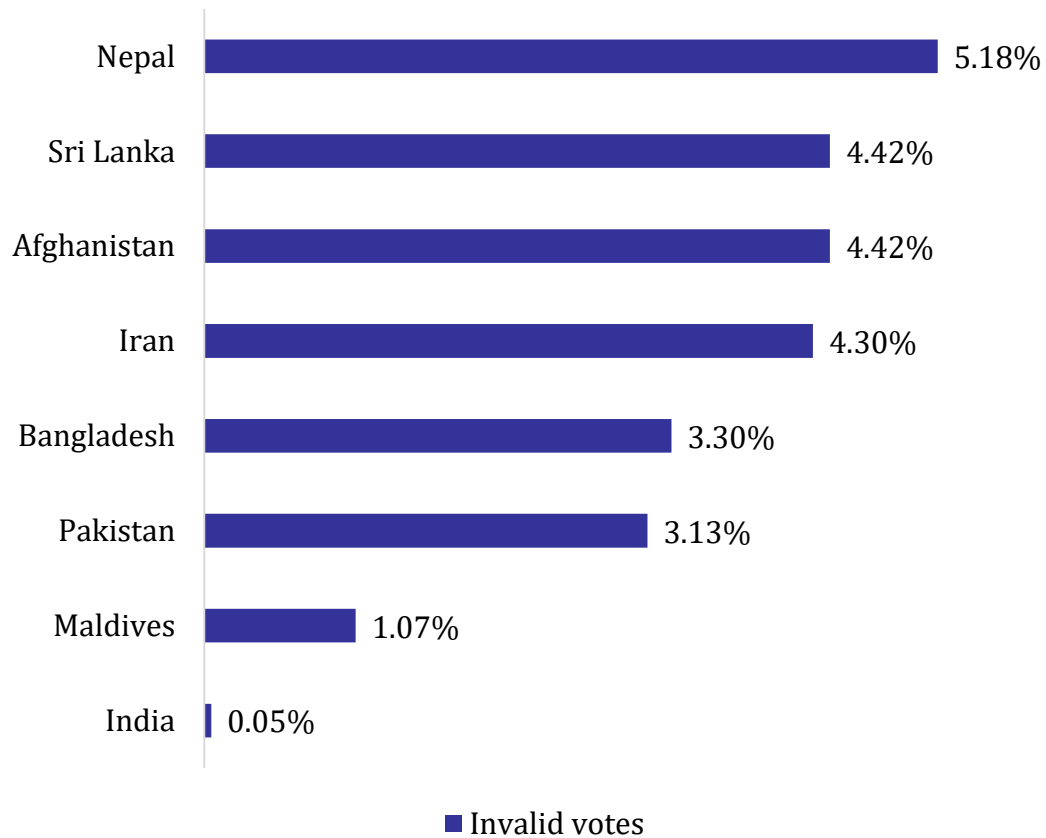
Among constituencies won by PTI in Punjab, the rejected votes were 2.61%, as compared to 2.59% for PML-N. **Data showing rather a random spread of rejected votes in constituencies even if looked at within provinces and party who won**

Winning Party	Punjab	Sindh	KP	Balochistan
All Pakistan	2.65	3.81	2.95	5.39
PPP	3.48	4.72	1.52	
IND	2.98	5.84	1.78	5.24
PTI	2.61	2.08	3.18	5.69
PML N	2.59		3.53	
PML Q	2.52			
AMLP	1.64			
GDA		5.13		
MMA		2.05	2.59	4.46
MQM Pakistan		1.62		
ANP			3.01	
Pakistan Tehreek-e-Insaniat			1.81	
JWP				7.23
BAP				5.79
BNP				5.65

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

Invalid / Rejected Votes - Pakistan and its Neighbours

Invalid votes by Country



Invalid votes in Pakistan are higher than India and Maldives



3 Key Points on Rejected Voter Phenomenon

- 1- Despite the discourse in media and by parties , we see that rejected votes:
 - A- Have risen by a negligible 0.02% of total votes casted
 - B- They have actually fallen in Punjab where most of the allegations are levelled
2. Rejected votes are fairly randomly spread when it comes to political parties. There is negligible difference between rejected votes where PTI and PMLN have won
3. Rejected votes are explained mostly by Geography . The phenomenon is highest in low HDI Index (Education/literacy/income) districts of Balochistan and Sindh)





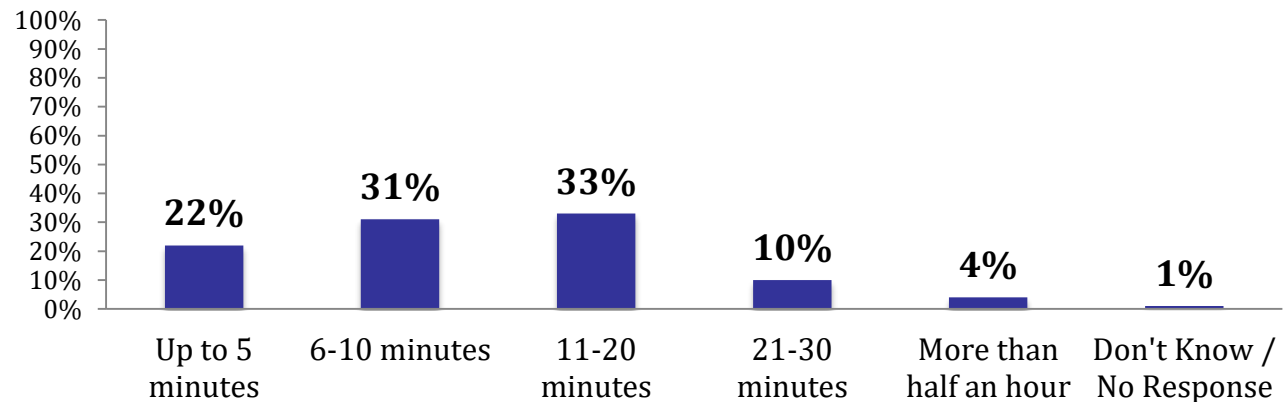
UNDERSTANDING THE VOTER JOURNEY FROM HOME TO POLLING BOOTH

How, when and opinion of the election
process client/customer on the
performance of the process

Understanding the Voter Journey

Commuting Time To Polling Station :
Very Close by Polling Station for most – 50% report Commute time of under 10 minutes, for nearly 85% the commute time is under 30 min

There were over 175,000 Polling booths in the country



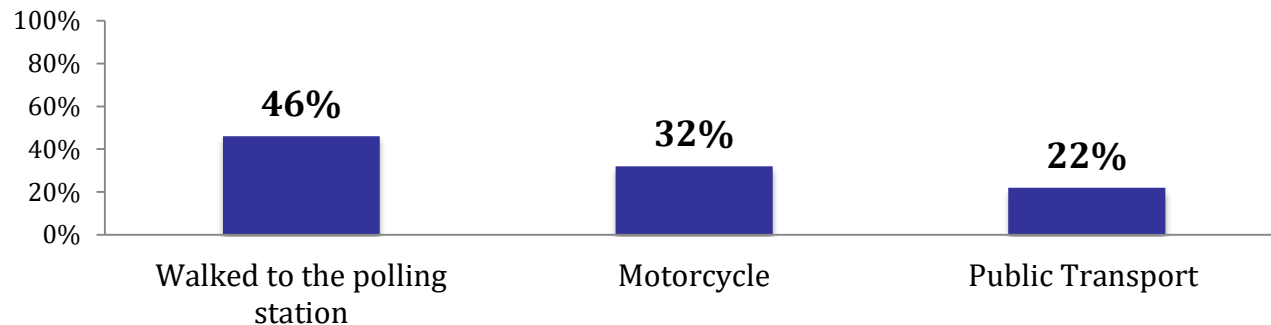
It took 50% Pakistani voters less than 10 minutes to reach polling station to cast vote in General Election 2018.

Source: Gallup Pakistan Post Election Survey



Understanding the Voter Journey

Mode of Transport: Most people walked on the election day



Most people walked to the polling station; nearly 1 in 5 voters used public transport to reach polling station.

Since the distance to the Poling station was short, the above numbers are quite understandable.

Having said this 1 in 4 voter used public transport and 32% used their own private means, which means casting the vote meant out of pocket expense for half the voters. Considering the income poverty in the country, this may explain low voter turnout.

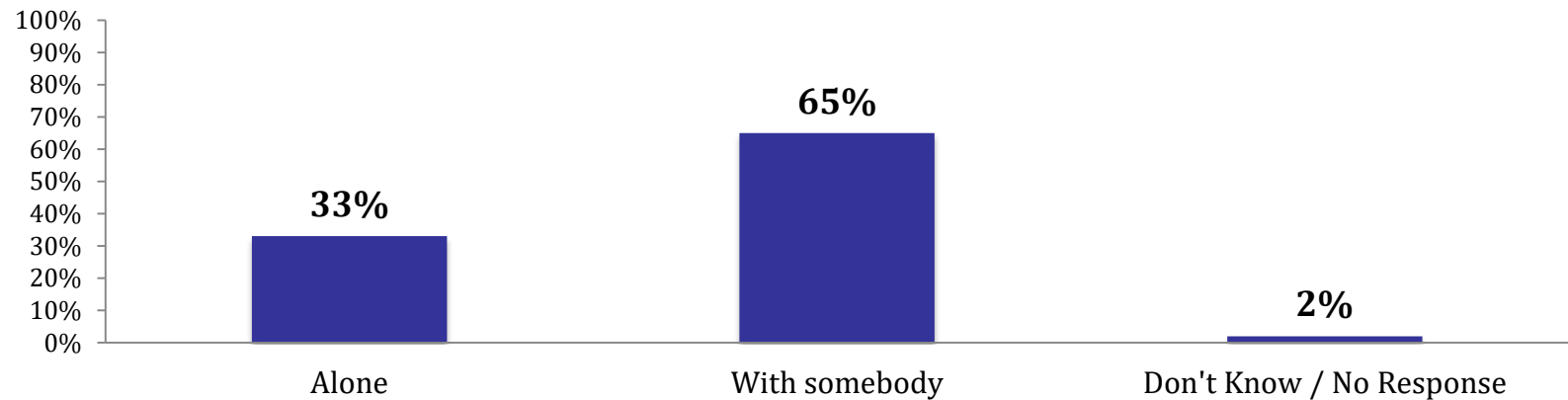
For both Election Commission and Political parties therefore there is still a room to work on.

Source: Gallup Pakistan Post Election Survey



Understanding the Voter Journey

Voting – A Social Activity



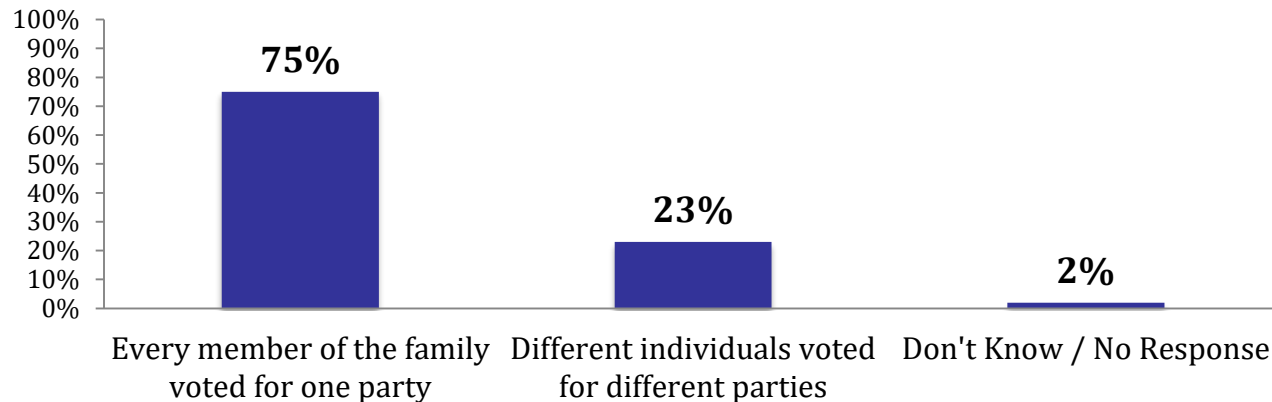
Nearly 2 in 3 voters say they went to vote accompanied by other people

Source: Gallup Pakistan Post Election Survey



Understanding the Voter Journey

Polarization in Elections : Nearly a Quarter Households report difference on party lines within the household !



Nearly 1 in 4 families polarized by elections.

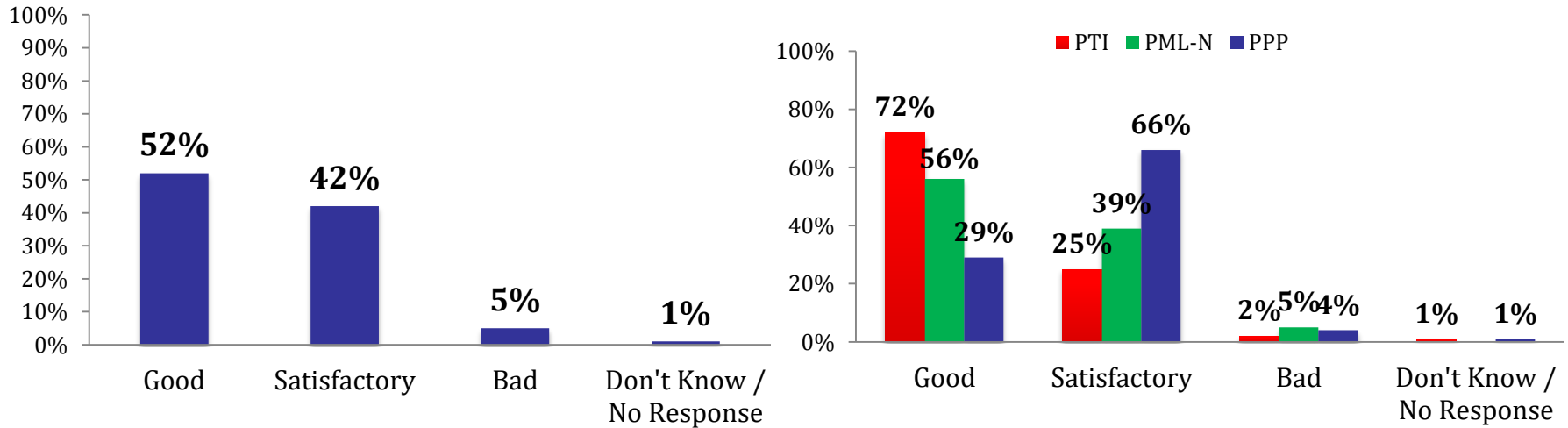
In a post-election survey by Gallup Pakistan with around 1800 men and women across the country, 1 in 4 respondents said that different family members voted for different parties in GE 2018. However, 75% said entire household voted for same party

Source: Gallup Pakistan Post Election Survey



Understanding the Voter Journey

Satisfaction with Facilities at Polling Station: Overwhelming number of Voters somewhat or very satisfied



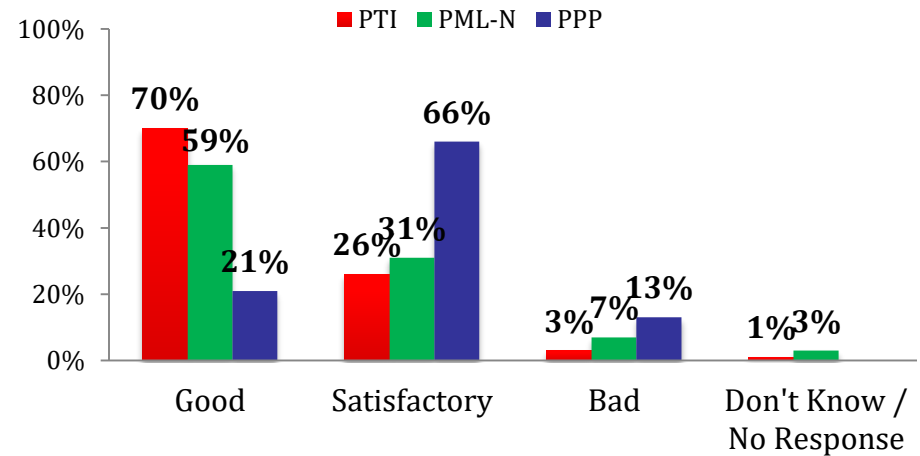
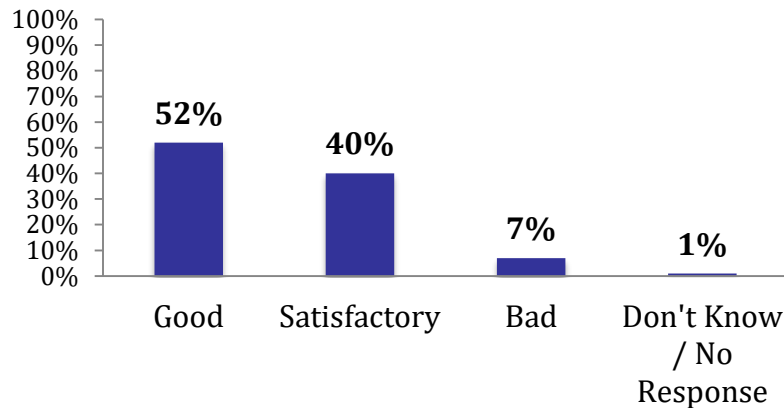
52% voters found the facilities in the polling station good, another 42% found them satisfactory.

Compare this with most Political Parties who alleged mismanagement. THIS MAY EXPLAIN WHY THE DRIVE AGAINST ELECTION RESULTS DID NOT PICK PACE. VOTER DISAGREES WITH POLITICAL PARTIES ON CONDUCT OF ELECTIONS

Source: Gallup Pakistan Post Election Survey

Understanding the Voter Journey

Treatment of Polling Staff toward Voters: OVERWHELMING SATISFACTION – However variation on party lines as PMLN supporters were less satisfied



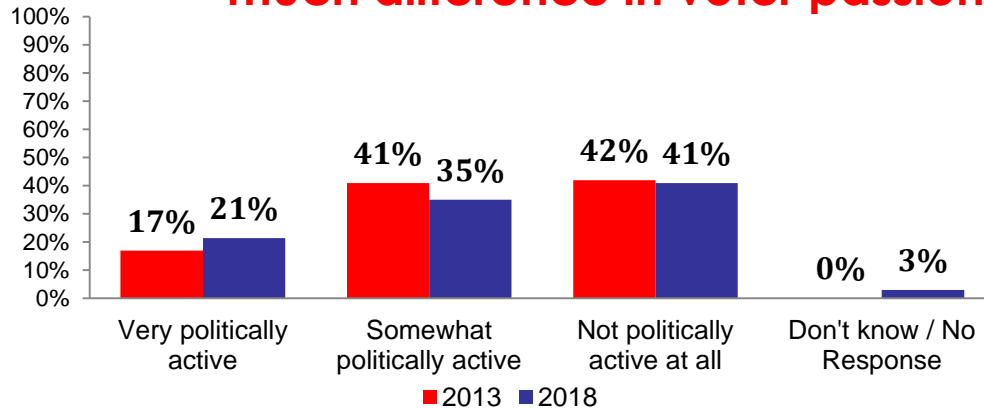
More than half voters found the polling staff's behavior towards voters good; another 40% say it was satisfactory. 70% PTI voters found the polling staff's behavior good compared to 59% PML-N voters and 21% PPP voters.

Source: Gallup Pakistan Post Election Survey

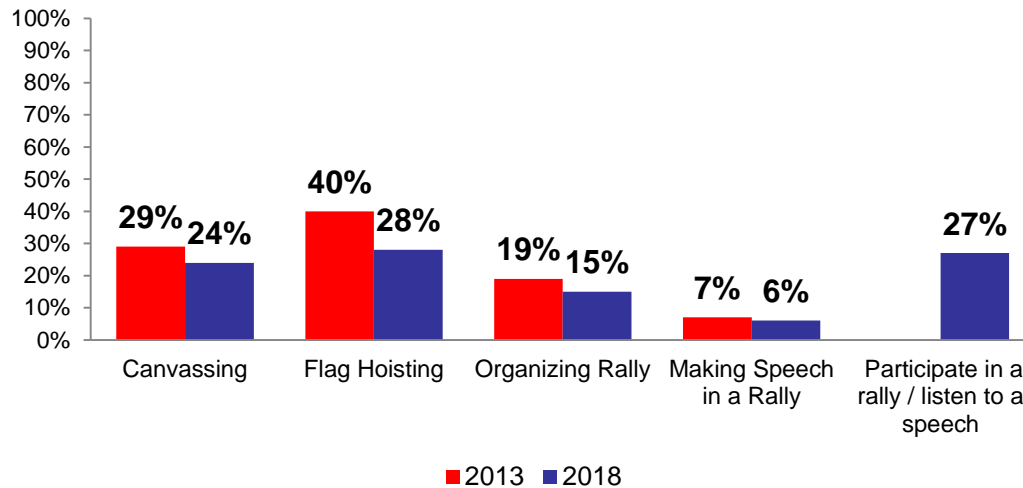


Understanding the Voter Journey

Political Activism BEFORE THE ELECTION: A CHARGED VOTER IN PAKISTAN- MYTH OF UNMOBILISED VOTER – not much difference in voter passion wrt 2013 GE and 2018 GE



21% of the respondents claimed to be very politically active.



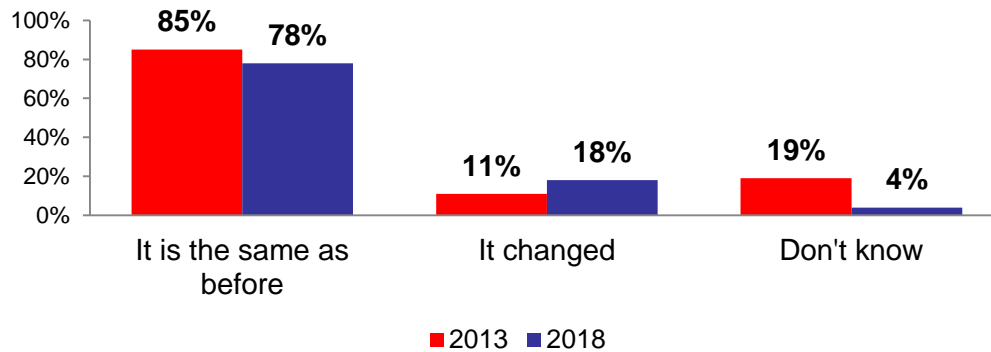
Participation in election campaigning: 28% claimed to have put flags of a party on house/shop or car/bike.

Source: Gallup Pakistan Exit Poll

Understanding the Voter Journey

WHO INFLUENCED THE VOTER?

Effect of Political Media Campaign (Television on Voting Decision)



Nearly 1 in 5 respondents claimed that their voting decision changed due to political campaigning on television.

Switching Behavior : PML N lost to PTI during the campaign period

Voted for on Election Day 2018			
Percent share in Gain and Loss			
Switching Behaviour	PML-N	PTI	PPP
Switched To (Gain)	12	42	10
Switched Away (Loss)	39	20	13
Net Gain	-27	+22	-3

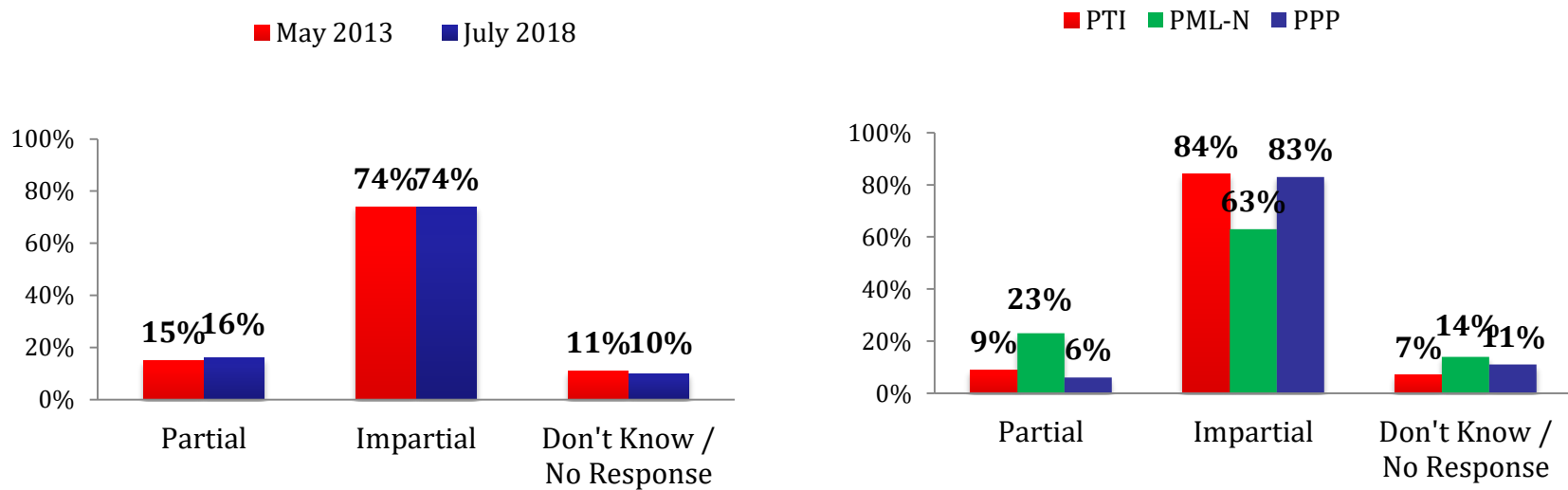
Among the 18% voters who changed their voting decision due to political media campaign on television, PTI gained 22% vote bank due to the political campaigning on television. On the other hand, PML-N and PPP have lost -27% and -3% of their vote bank respectively.

Source: Gallup Pakistan Exit Poll

Understanding the Voter Journey

Voter Perceptions on Impartiality of Polling Staff : PERCEPTION OF PARTIALITY IS VERY SMALL AND REMAINS SMALL BETWEEN 2013 AND 2018

HOWEVER NEARLY 1 IN 4 PMLN VOTER FELT STAFF WAS PARTIAL



Nearly 3 in 4 voters (74%) from across the country perceived that the polling staff was impartial on the Election Day. Nearly a quarter (23%) PML-N voters found the polling staff to be partial.

Source: Gallup Pakistan Post Election Survey

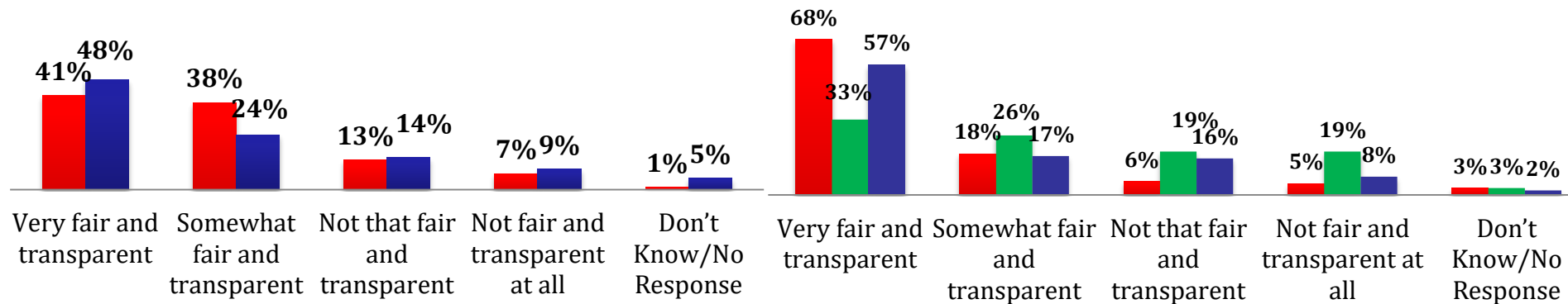


Understanding the Voter Journey

**Voter Perceptions on Fair and Transparent Election : a 7% RISE IN PERCEPTION OF ELECTIONS BEING VERY FAIR , ONLY 3% RISE IN ELECTIONS BEING NOT FAIR SINCE 2013 GE
PMLN voters were 30% less likely to say that process was very transparent and more likely by 12% edge to say they were not transparent at all**

■ May 2013 ■ July 2018

■ PTI ■ PML-N ■ PPP



Majority (72%) of voters reported the election was fair and transparent. 38% PML-N and 24% PPP voters reported the elections were not fair and transparent.

Source: Gallup Pakistan Post Election Survey



3 Key Points on VOTER JOURNEY AND EXPERIENCE

1. On average 10 minutes to reach polling station is quite hopeful situation and perhaps explains the rising voter turnout in past 2 decades.
2. Voter perception of quality of service at the polling station is exceptionally high
3. Perception of Fairness by voter;
 - a. Only a small minority (15-20%) felt issues of rigging /unfairness
 - b. The passion with which fairness of elections was felt by the other 75-80% saw an increase between 2013 and 2018 GE.
 - c. No or very small rise in feeling of unfairness in elections.
4. PML N voters majority also found the elections to be transparent , impartial and fair. However they were less convinced than PTI as well as PPP.

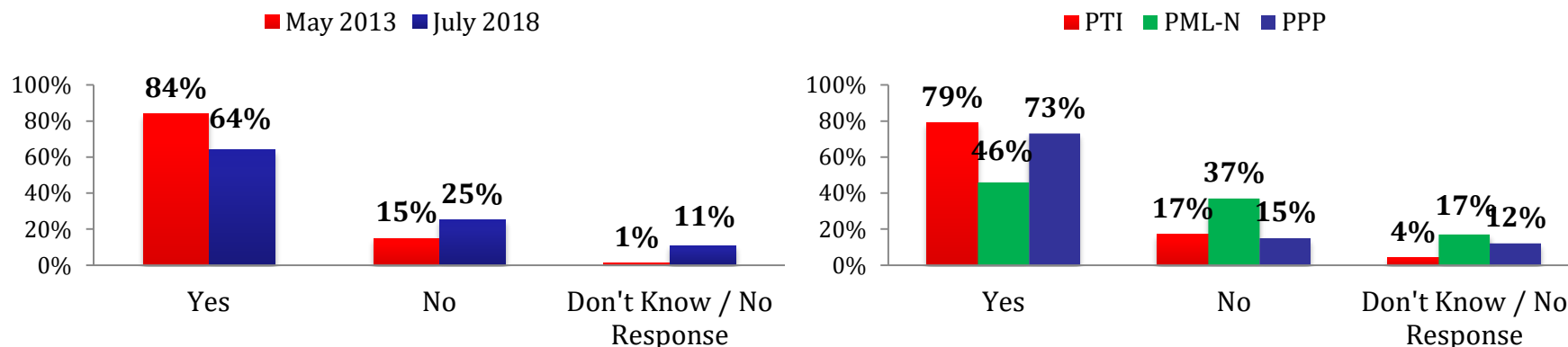
Continued high Trust in process of Elections and Election Day participation is a sign of hope for Democratic process in the country. THIS EXPLAINS LOW AGITATION AND VIOLENCE ON ELECTION AND POST ELECTION AND SMOOTH TRANSITIONS POST ELECTION IN PAKISTAN. HAVING SAID THIS IT IS CRUCIAL THAT THIS TRUST IS NOT BREACHED BY ALL STAKEHOLDERS INCLUDING NON POLITICAL CONTENDERS OF POWER



EXPECTATIONS FROM NEW GOVERNMENT

EXPECTATIONS FROM NEW GOVERNMENT

NEW POLITICAL REGIME: BETTER OR WORSE? High hopes and cross partisan support- MAJORITY OF PML-N VOTERS ALSO HOPEFUL



More than 6 in 10 Pakistanis positive that a better political regime would be introduced after the 2018 elections, a 20% decline compared to 2013 findings.

CROSS PARTISAN SUPPORT AFTER ELECTIONS FOR THE GOVERNMENTS IN POWER SHOWS STRENGTHENING OF DEMOCRATIC FEELING AT THE VOTER LEVEL! EVEN THOUGH PTI GOT 32 % THOSE FEELING THAT PTI CAN DO GOOD FOR THE COUNTRY IS TWICE THE AMOUNT OF ITS VOTERS

IMPORTANT FOR PARTIES IN POWER TO ACT AS GOVERNMENT OF VOTER AND NON VOTERS OTHERWISE THIS HOPE OF NON-VOTER WOULD GO. GREAT OPPORTUNITY

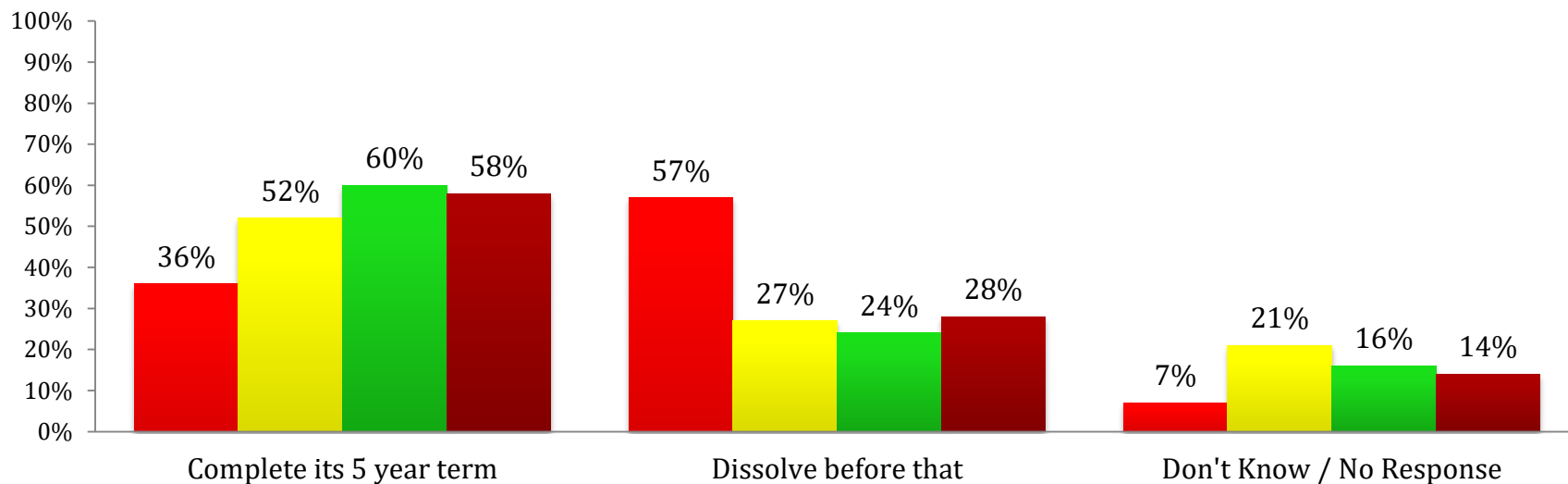
Source: Gallup Pakistan Post Election Survey

EXPECTATIONS FROM NEW GOVERNMENT

WOULD THE GOVERNMENT COMPLETE ITS FIVE YEAR TERM?

An increasing number of Pakistanis are hopeful since 2002 election – shows possible democratic consolidation in Pakistan

■ December 2002 ■ March 2008 ■ May 2013 ■ July 2018



58% of the respondents are confident that the government will complete its 5 year term which is only 2% less than previous election.

An increasing proportion of Pakistanis now believe in greater continuity of democratic process in the country.

Source: Gallup Pakistan Post Election Survey



Section 2:
**FINDINGS FROM
GILANI'S INDEX OF
ELECTORAL RECORD**

Based on ECP Data



ELECTION SCORECARD

Party Positions in Various Provinces
and Regions of the Country

What's Different we are trying to do – 3 keys extensions to analytical frame work of understanding elections both for practitioner and for social scientist

1. Votes vs Seats

Most of the post election discussion happens on Seats won or lost. However in First Past Post system there could be significant difference between Votes and Seats. We want to fill the void by discussing spread of votes as well as seats

Discussion on votes is critical for a better evaluation of the extent of gain or extent of loss of a party. At the end of the day it's the votes that determine seats. Small shifts in votes can bring down seats !

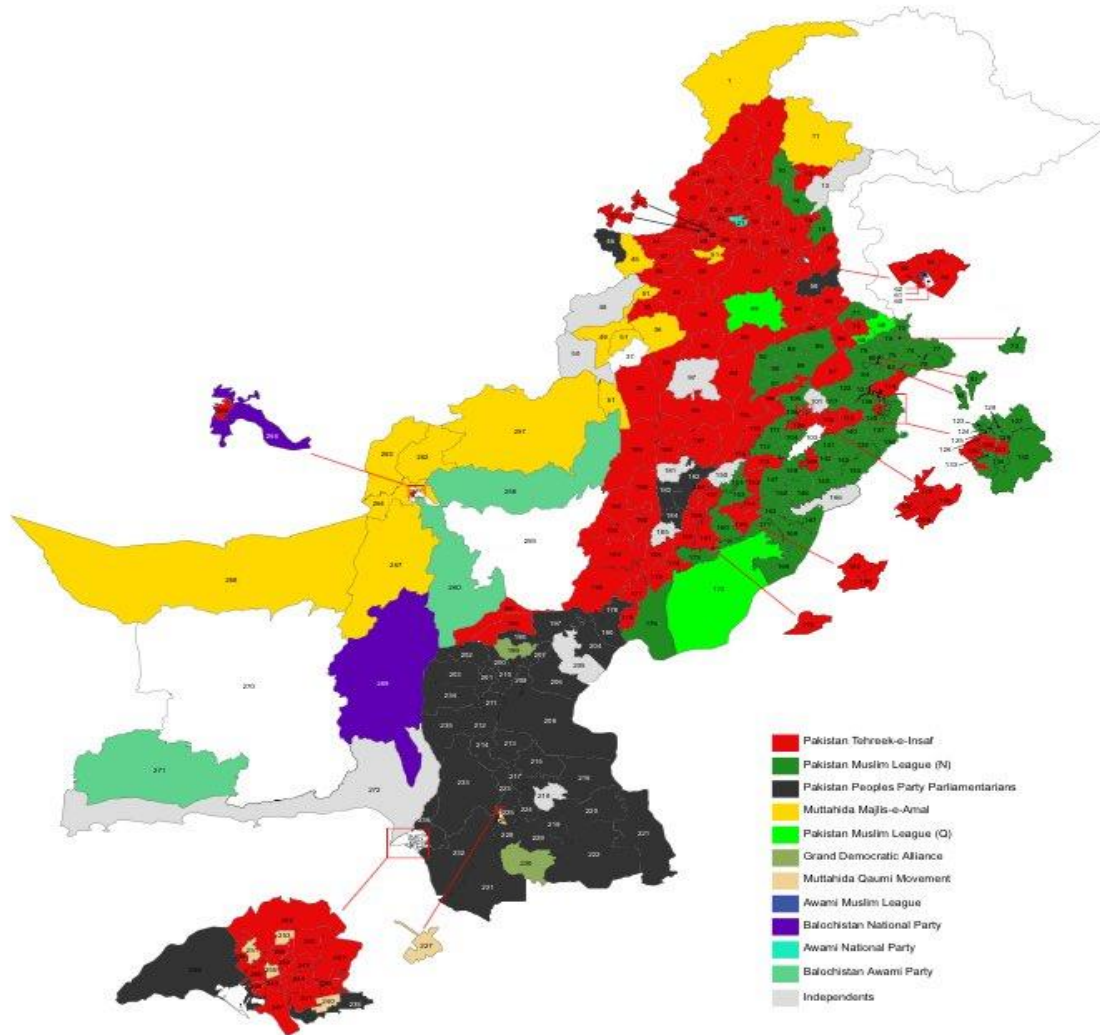
2. Analysis Level

Most discussion happens at National or Provincial level (which is too High/large for any practical discussion or at Constituency level (which is too granular/small). National /Provincial is too general and constituency analysis is too specific. We introduce sub provincial distribution of national elections (at regional level)

3. Distribution of votes by types of parties

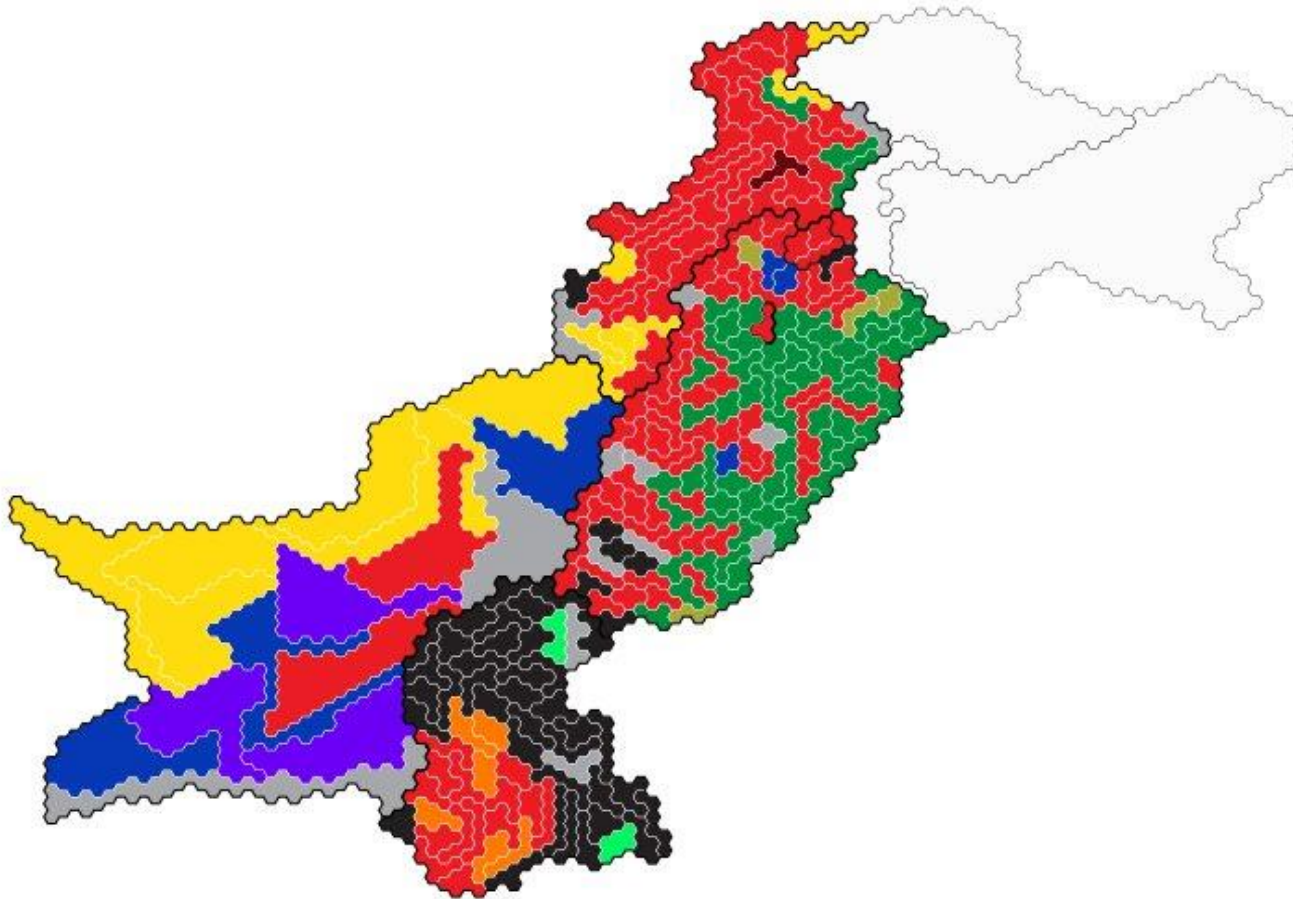
For long term implication of elections, vote distribution needs to be considered under broad party clusters and typologies of parties. Shifts in votes may happen frequently within parties but very slowly between clusters. For Social Science perspective it is these clusters which needs analysis . Voting behaviour of clusters and shifts in it are reflective of shifts in public preferences. Party shifts within the cluster however may not represent that social class shift. We therefore introduce concept of clusters and types .

Election Geography



Fascinating geography of this election. The PTI belt starts all the way from Swat in the North to RYK in the South and of course Karachi. PML(N) dominates the entire eastern part of Punjab, as PPP sweeps Interior Sindh, its best performance since 1988.

Election Geography



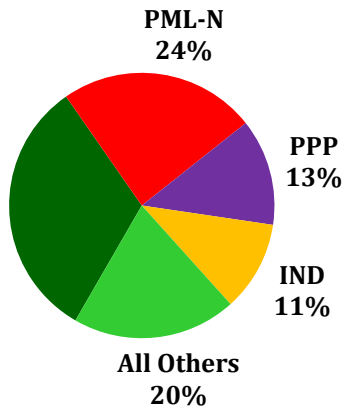
PML(N) has well and truly dominated Central Punjab, when circumstances for its defeat couldn't have been better. The creation of a South Punjab province will have electoral implications as well, including an almost certain PML(N) control for the near future.

All Pakistan Score of Votes and Seats

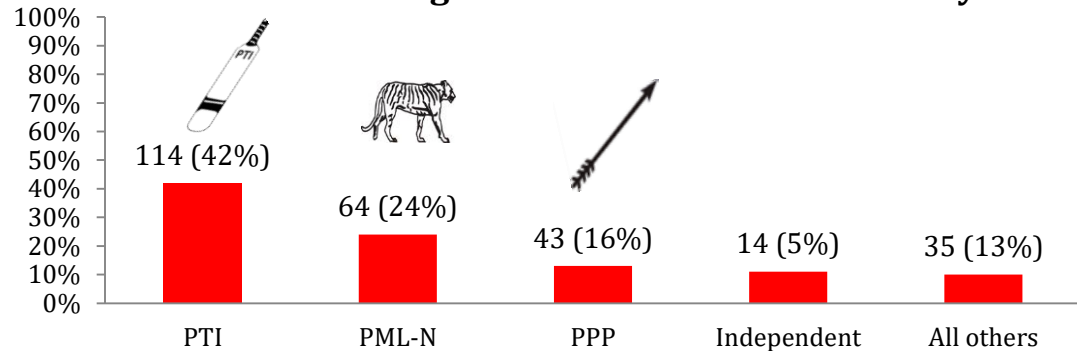
	Votes %	Votes (n)	Seats (n)	Seats %	Discrepancy in Seat Vote
PTI	32%	~ 16 million	114	42%	10%
PML-N	24%	~ 12 million	64	24%	0%
PPP	13%	~ 7 million	43	16%	3%
IND	11%	~ 6 million	14	5%	-6%
MMA	5%	~ 2.5 million	12	4%	-1%
MQM	1%	~ 0.7 million	6	2%	1%
All Others	14%	~ 6 million	17	7%	-7%
Total	100%	~ 53 million	270	100%	

Votes Percentage

The seats by parties reported here are as of national election. Before formation of government many independents joined different parties (mainly PTI which may explain difference with other statistics)



Seats & Percentage of Seats in National Assembly



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

All Pakistan Score of Votes and Seats - Top Parties (2013- vs 2018 situation)

Seats Analysis

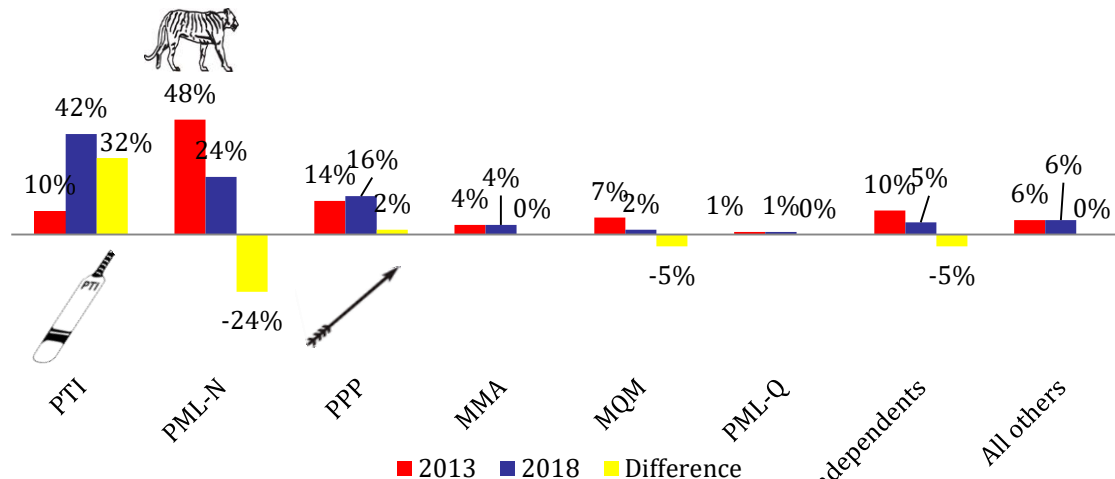
PTI witnessed a dramatic increase of 32% in seats between 2013 and 2018. This is one of the highest rise in electoral fortunes witness in Pakistan's electoral history. Similar is the case for PMLN loss.

Votes Analysis

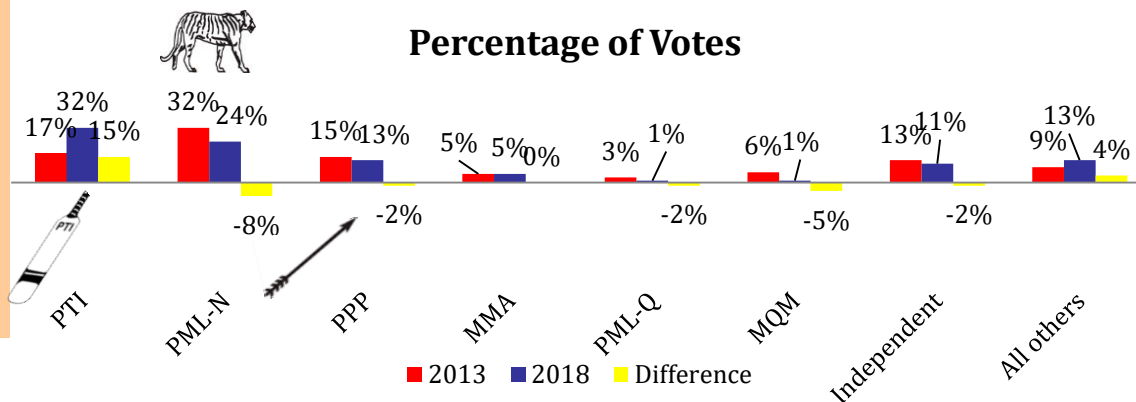
PTI has nearly doubled its votes between 2013 and 2018 (an 88% increase)

PML-N has declined by 25%

Percentage of Seats in National Assembly



Percentage of Votes



RISE OF PTI IN VOTES IS PARTLY EXPLAINED BY FALL OF VOTES OF PMLN BUT NOT COMPLETELY. **RISE OF PTI IS AT COST OF OTHER PARTIES AS WELL.**

RISE IN PTI IS VERY DRAMATIC BUT COLLAPSE OF VOTES OF PML-N IS LESS DRAMATIC THAN IT APPEARS

THIS IS PRIMARILY BECAUSE OF SEAT VOTE ISSUE. THE COLLAPSE OF PML -N SEAT WISE IS VERY DRAMATIC (A 50% DECLINE) . VOTE WISE DECLINE HOWEVER IS NOT VERY DRAMATIC (25%).

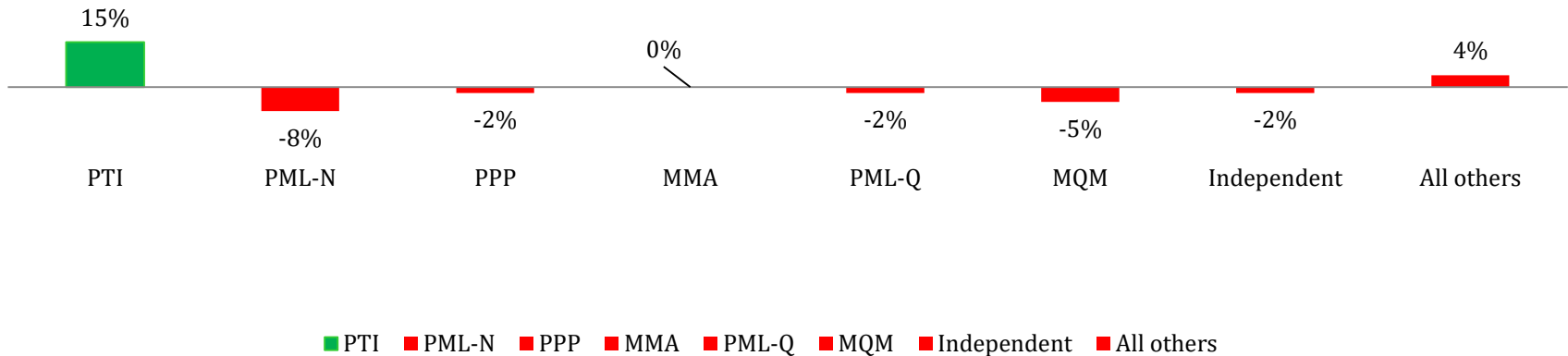
Important implications for both PTI to maintain its lead and for PML-N to possibly rectify its loss

Rise and Fall of Electoral Fortunes of Main Parties between 2018 and 2013 :

PTI is the only party which sees a rise , PPP loses 2% ground nationally , PML-N 8% .

PML-Q NATIONAL VOTE BANK IS REDUCED BY 2% AS WELL

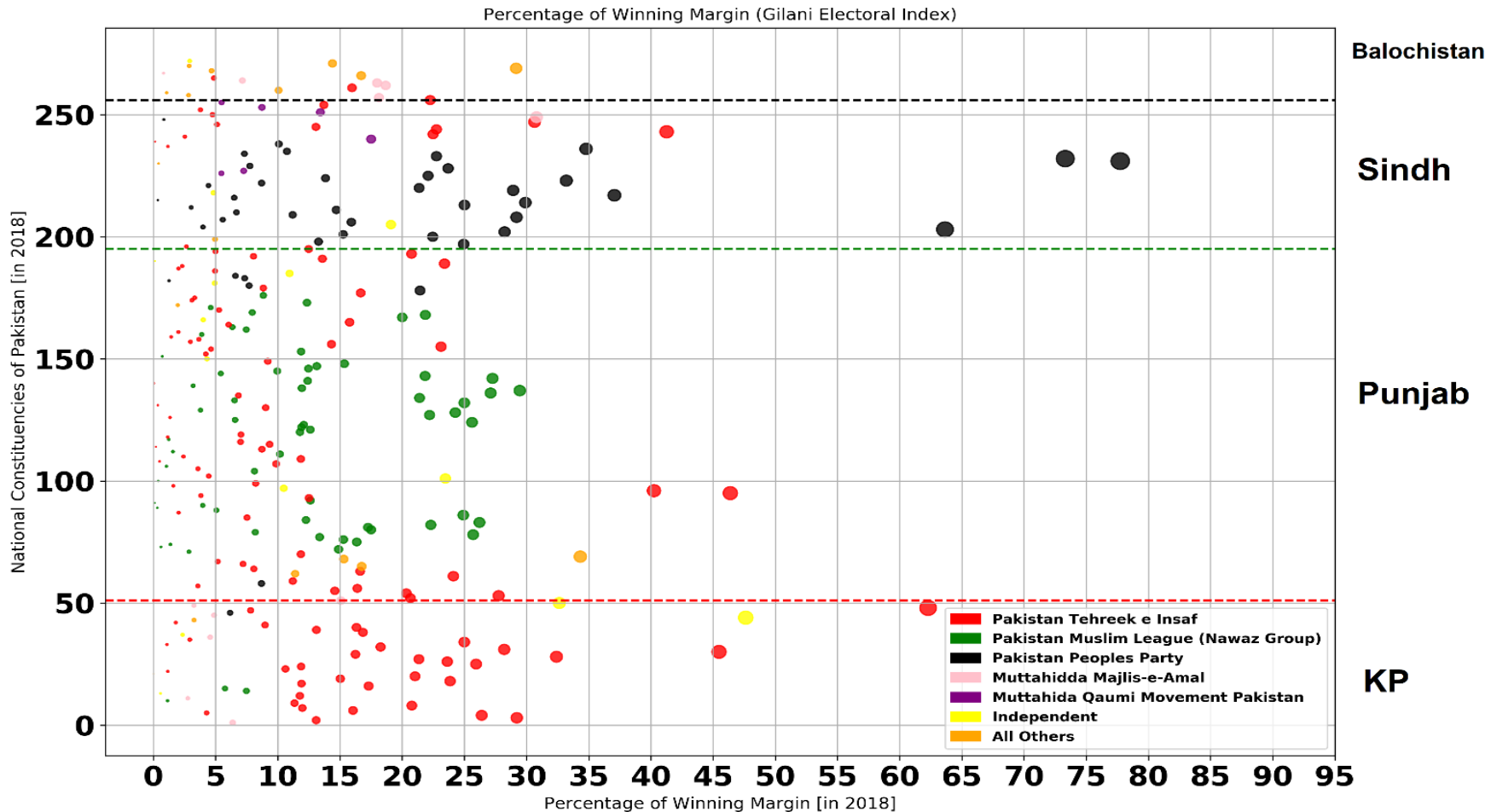
50% OF PTI RISE IS AT COST OF PMLN , 33% BY



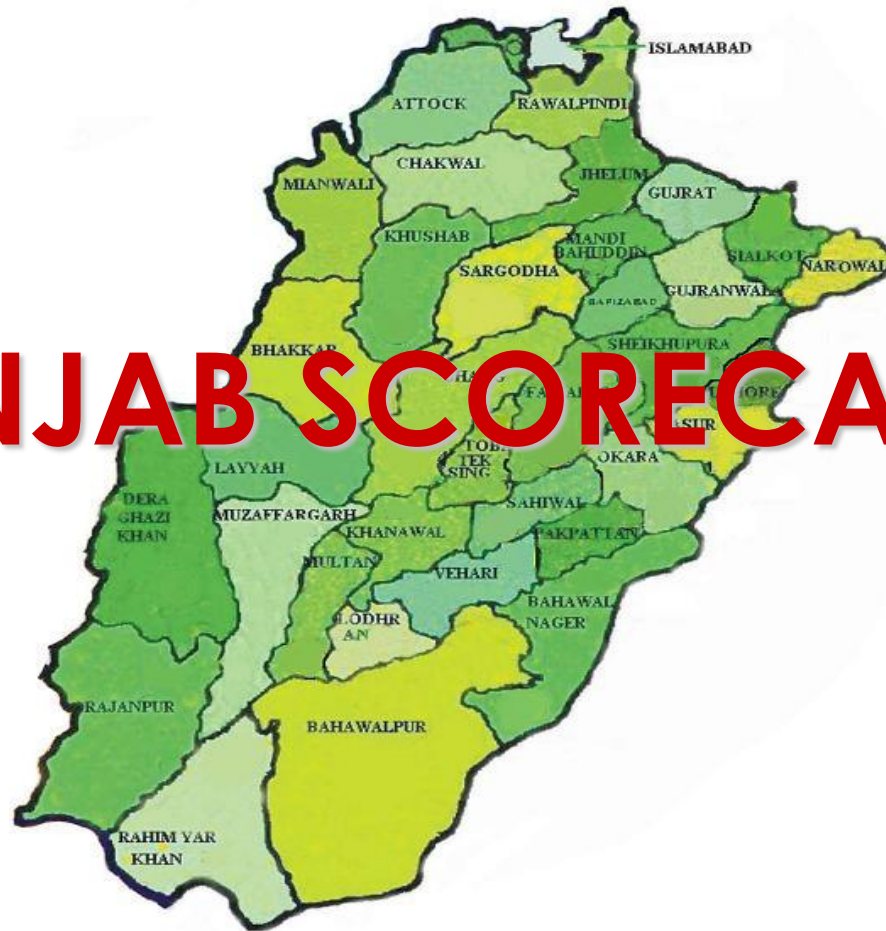
Graph shows rise and fall in achieved percentage vote at national level by various political parties

How Competitive were elections in Pakistan – 37% seats would switch sides between winner and runner up with only 5% votes changing direction

NA Constituencies and Margin of Victory



PUNJAB SCORECARD

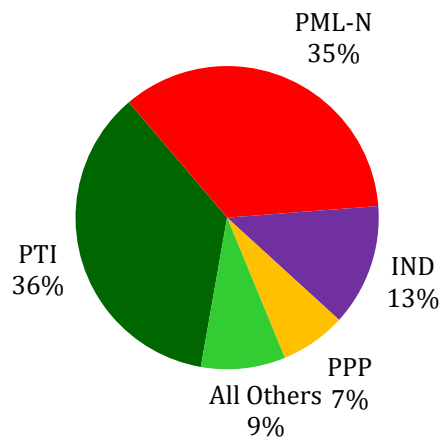


Punjab Score of Votes and Seats

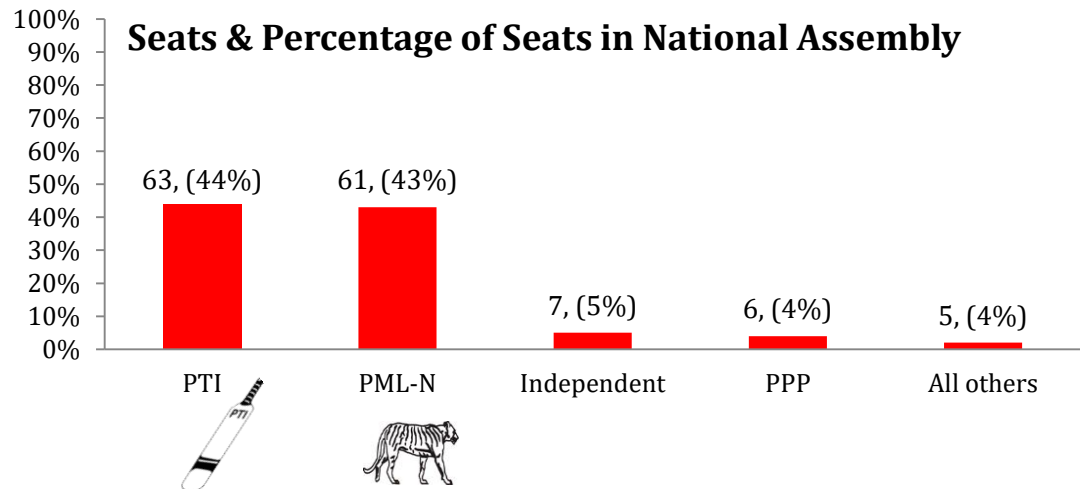
Punjab Score of Votes and Seats: A virtual tie in seats and votes in PUNJAB , difference in vote is less than 500,000 voters between PML N and PTI

	Votes %	Votes (n)	Seats (n)	Seats %
PTI	36%	~ 12 million	63	44%
PML-N	35%	~ 11 million	61	43%
IND	13%	~ 4 million	7	5%
PPP	7%	~ 2 million	6	4%
PML-Q	1%	~ 0.4 million	4	3%
All Others	8%	~ 3 million	1	1%
TOTAL	100%	~ 33 million	142	100%

Votes Percentage



Seats & Percentage of Seats in National Assembly



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

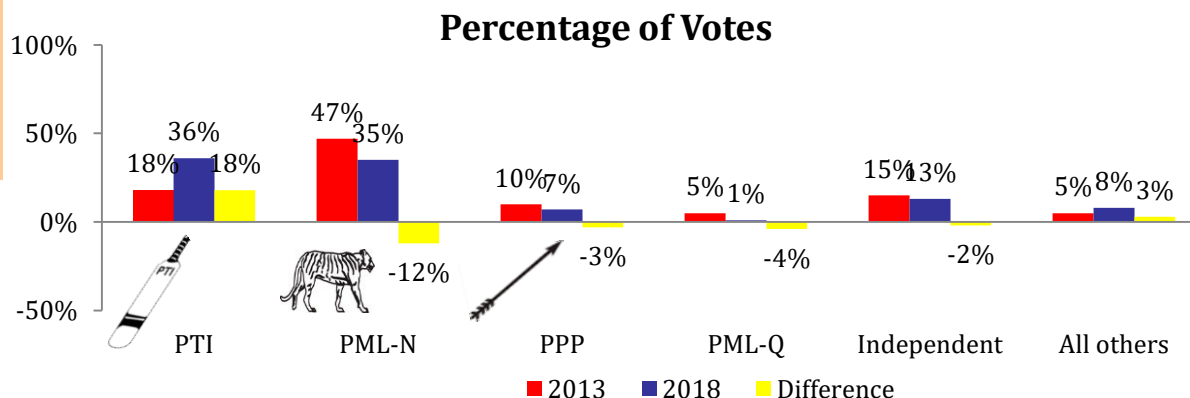
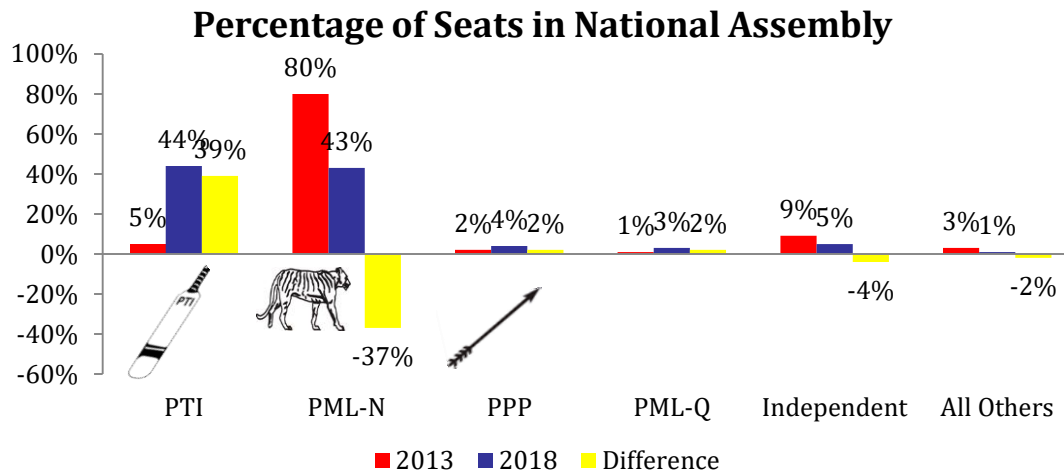
Punjab Score of Votes and Seats

Punjab Score of Votes and Seats – Top 3 Parties (After virtual monopoly on seats, Punjab returns to a two party system in 2018 GE)

Seat Wise

PTI rise is phenomenal. From 5% seats in 2013 to 44% seats in 2018. This is almost 780% rise.

PML-N loss is quite extraordinary from 80% of seats to under 43%.



Vote wise

PTI has nearly doubled its vote in Punjab. PML-N on the other hand has shed 26% of its voters.

Even though PML-Q has 2% more seats, it has 4% less votes than 2013

PTI has eaten into vote share of PML-N but also of what remained of PPP (-3%) and interestingly also of PML-Q (-4%) and independents (-2%).

PUNJAB ELECTION 2018 : A virtual tie in Punjab in votes and Seats

1. Despite significant optics of a clear majority and a strong government , PTI is in a virtual tie in largest province of Punjab.

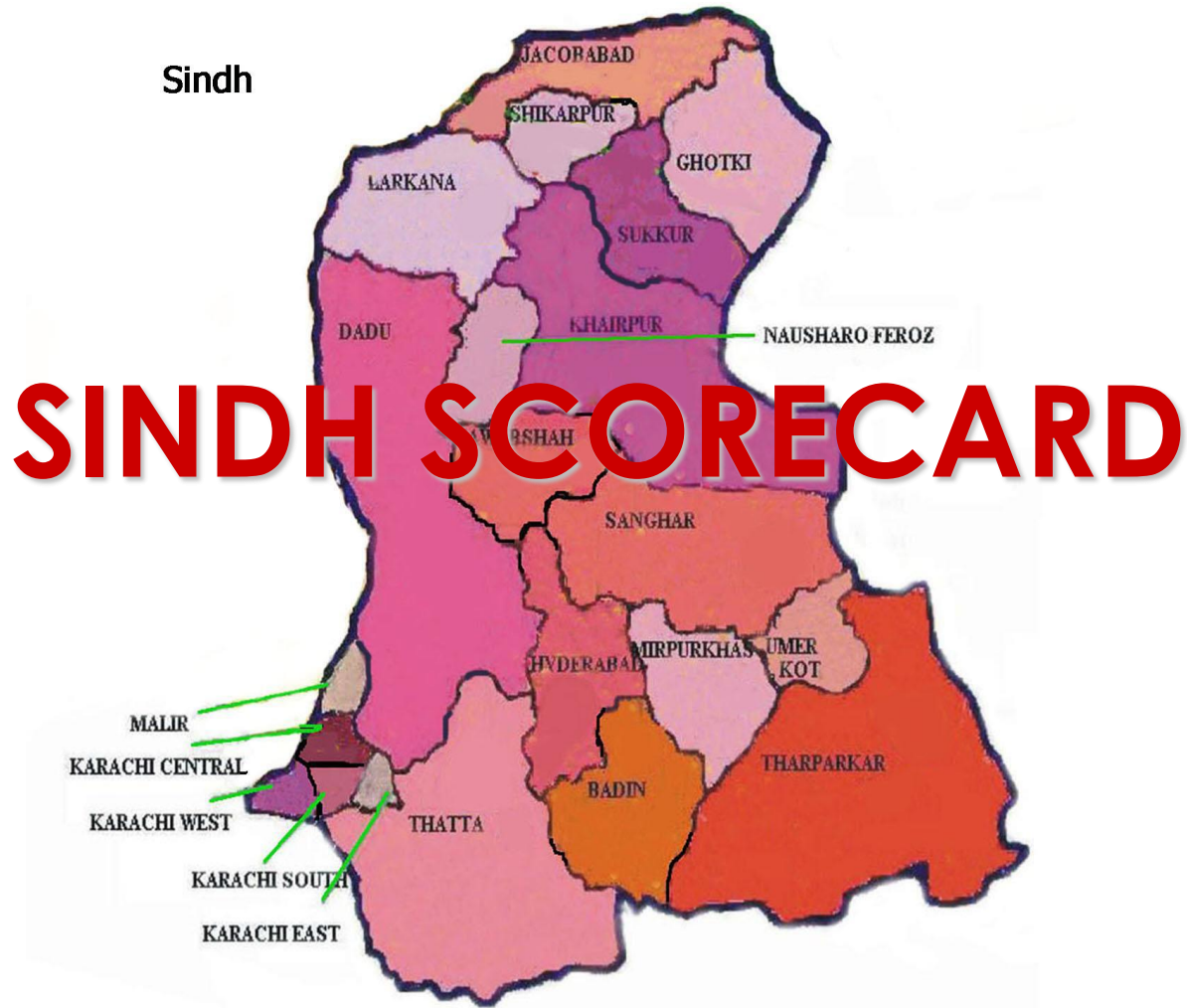
2. Our Analysis reveals that PTI – PMLN tie situation could have been different in case voters from other parties had not switched to PTI.

It is the switching of PPP (2%) PML Q (3%) , Independents (2%) which lead to the edge that PTI has in Punjab.

IF THE VOTE HAD REMAINED WITH PPP PML Q INDEPENDANTS EVEN THEN PML N WOULD HAVE BEEN IN THE LEAD .

THE REAL DECISIVE FACTOR FOR PMLN WAS NOT THE LOSS OF ITS OWN VOTERS , IT'S THE CONGREGATION OF OPPOSITION VOTE WITH PTI , THAT HELPED IT BRIDGE THE GAP AND REACH THE POST

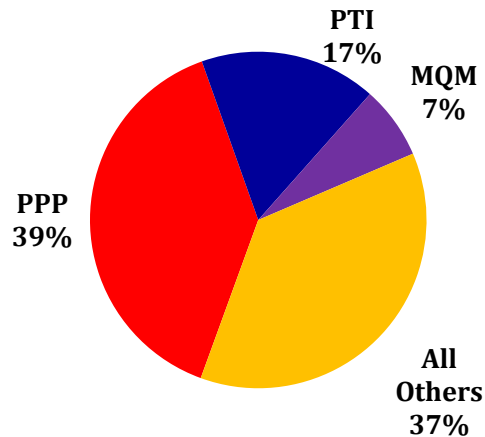
Sindh



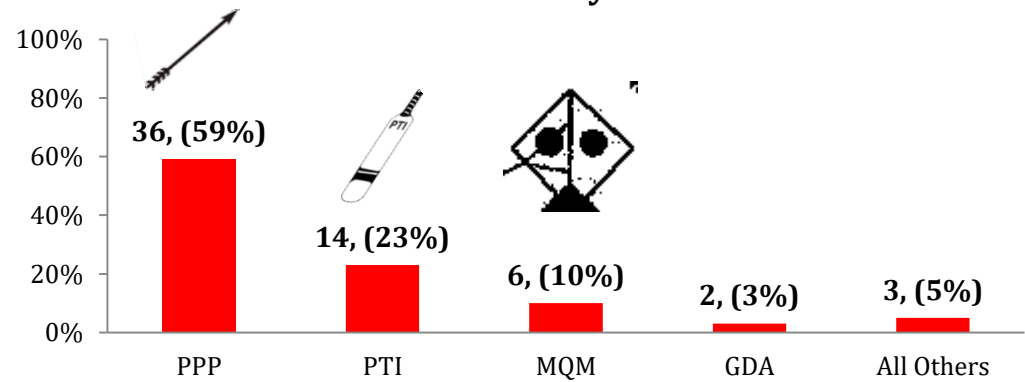
Sindh Score of Votes and Seats

	Votes %	Votes (n)	Seats (n)	Seats %
PPP	39%	~ 4 million	36	59%
PTI	17%	~ 2 million	14	23%
MQM	7%	~ 0.7 million	6	10%
GDA	12%	~ 1 million	2	3%
IND	6%	~ 0.6 million	2	3%
MMA	7%	~ 0.8 million	1	2%
All Others	12%	~ 1 million	-	-
Total	100%	~10 million	61	100%

Votes Percentage



Seats & Percentage of Seats in National Assembly

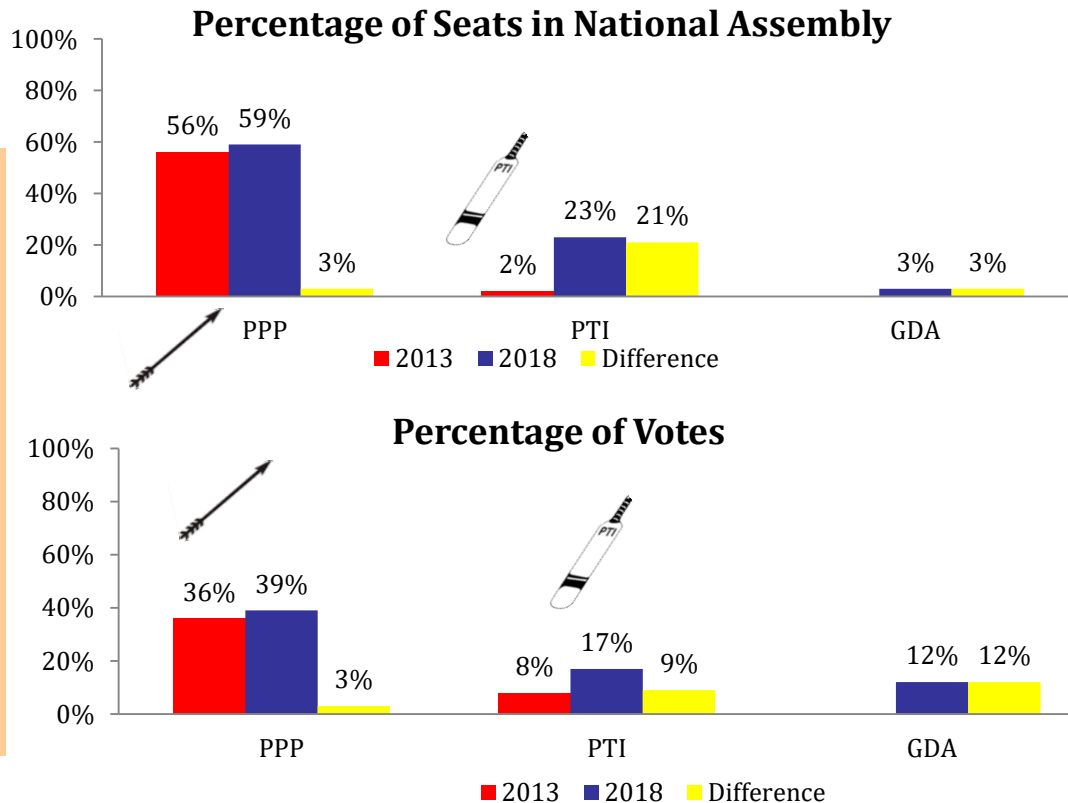


Source: Gilani's Index of Electoral Record, based on ECP data computed by Gallup Pakistan

Sindh Score of Votes and Seats - Top 3 Parties- PPP SEES A 3% RISE IN ITS HOME GROUND

Seat Wise

PTI rise in Sindh is remarkable. From 2% seats in 2013 to 23% seats in 2018. This is an over 1000% rise

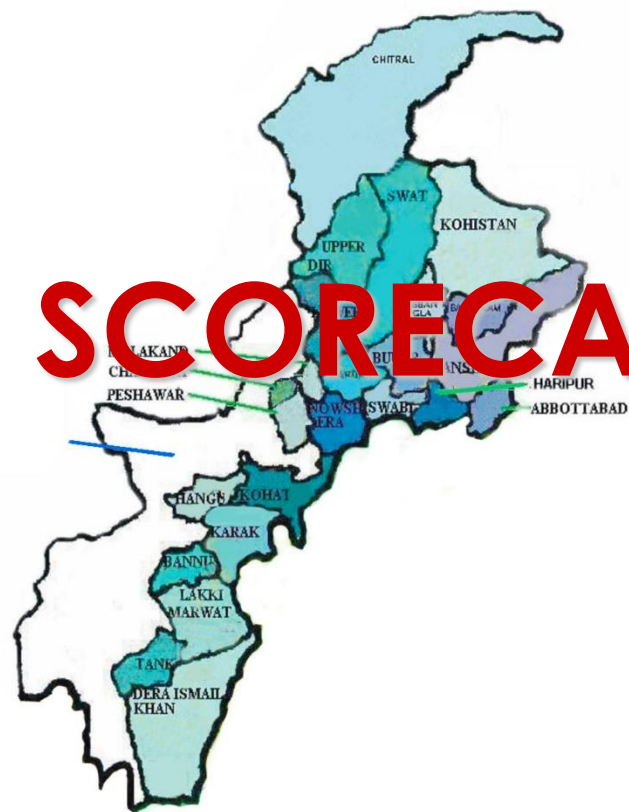


Vote wise

From 5% vote bank in GE 2013, PTI vote has increased by more than 100% to 17% in GE 2018.

All analysis of Sindh electoral position should be done keeping in mind that Sindh witnessed a significant decline in turnout. A significant portion of interior Sindh and Karachi voters have shown their political inclination by not voting despite PPP's significant canvassing as compared to 2013. Could this decline in turnout be an indicator of downward journey for PPP in Sindh?

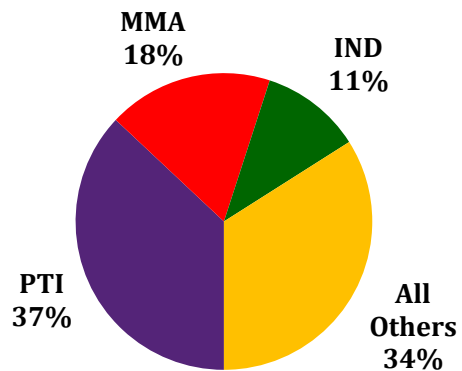
KP SCORECARD



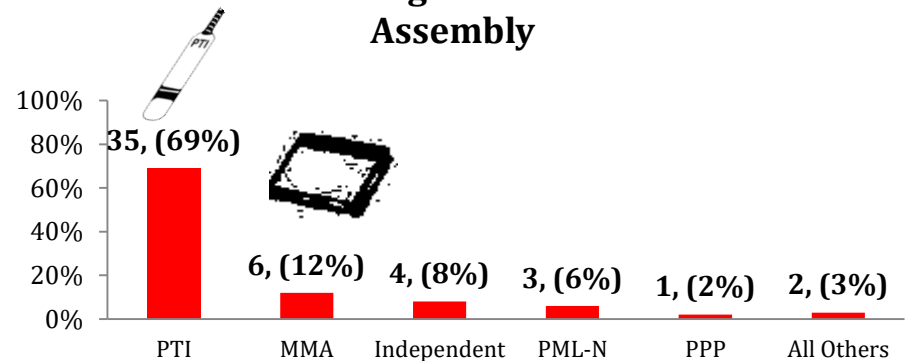
KP Score of Votes and Seats

	Votes %	Votes (n)	Seats (n)	Seats %
PTI	37%	~ 2.7 million	35	69%
MMA	18%	~ 1.3 million	6	12%
IND	11%	~ 0.8 million	4	8%
PML-N	12%	~ 0.9 million	3	6%
PPP	8%	~ 0.6 million	1	2%
ANP	10%	~ 0.7 million	1	2%
All Others	4%	~ 0.3 million	1	1%
TOTAL	100%	~ 7 million	51	100%

Votes Percentage



Seats & Percentage of Seats in National Assembly



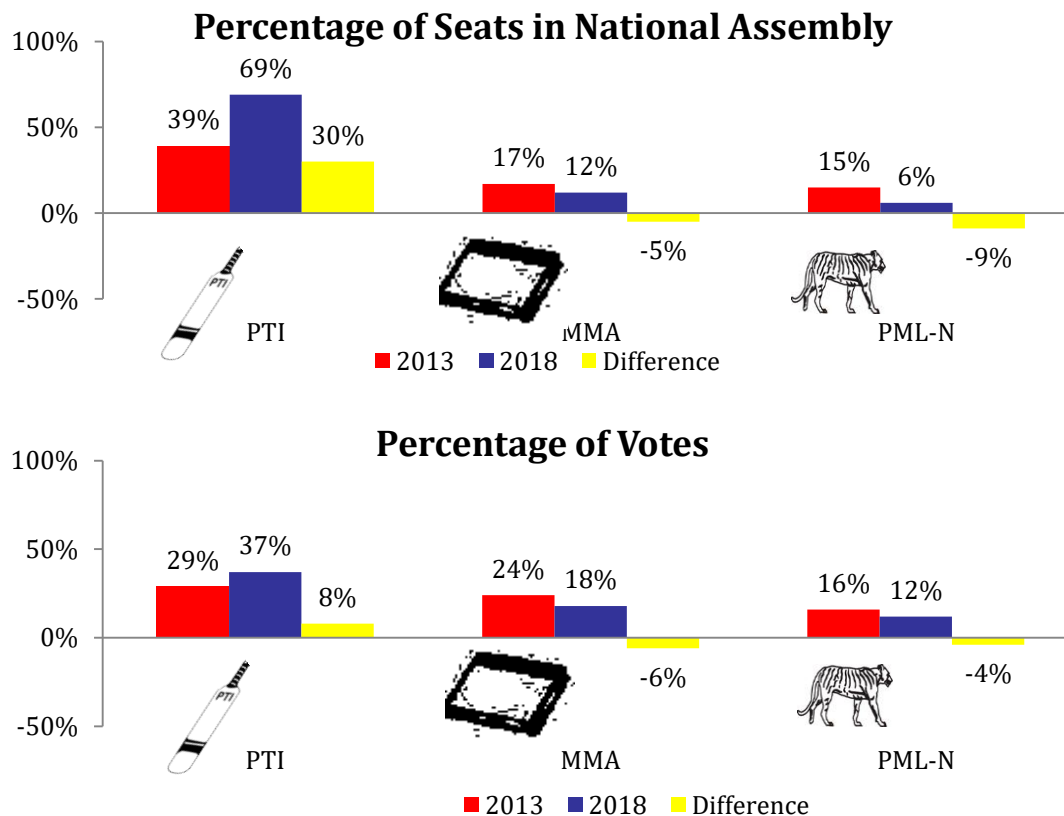
Source: Gilani's Index of Electoral Record, based on ECP data computed by Gallup Pakistan

KP Score of Votes and Seats - Top 3 Parties – RISE OF PTI IN KP IS ALMOST ENTIRELY AT COST OF MMA

Seat Wise

PTI has gained approximately 80% more seats compared to GE 2013. From 39% seats in 2013 to 69% seats in 2018.

MMA has lost 29% seats. From 17% seats in 2013 to 12% in 2018.



Vote wise

PTI has gained 28% more voters. MMA and PML-N on the other hand have lost 25% of their voters.

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



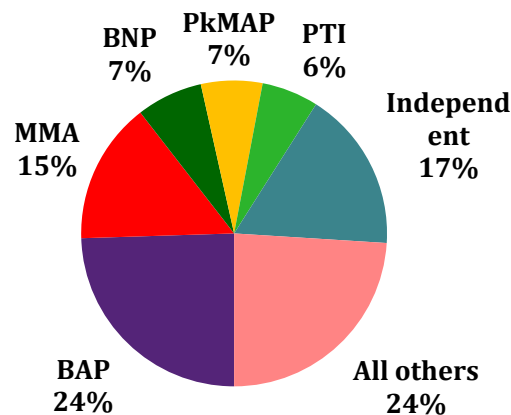
BALUCHISTAN SCORECARD



Balochistan Score of Votes

	Votes %	Votes (n)
BAP	24.5%	~ 0.4 million
MMA	15%	~ 0.3 million
BNP	7%	~ 0.1 million
PkMAP	6.5%	~ 0.1 million
PTI	6%	~ 0.1 million
Independent	17%	~ 0.3 million
All others	24%	~ 0.4 million
Total	100%	~ 1.8 million

Votes Percentage



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

Summary Scorecard by Regions

PTI win is quite widespread and national

In 3 out of 4 regions of Punjab, 4 out of 4 regions of KP, 1 out of 2 regions in Sindh, it is ahead in vote and seats.

PML-N retains its position in Central Punjab and PPP in Interior Sindh.

Gallup Electoral Regions	2018 Results by Votes: Who is ahead by votes (%)	2018 Results by Seats: Who is ahead by seats (%)
Punjab	PTI (36%)	PTI (44%)
Central Punjab	PML-N (45%)	PML-N (73%)
Northern Punjab	PTI (38%)	PTI (79%)
Western Punjab	PTI (41%)	PTI (58%)
Southern Punjab	PTI (36%)	PTI (49%)
Sindh	PPP(39%)	PPP(59%)
Karachi Region	PTI (31%)	PTI (62%)
Interior Sindh	PPP(52%)	PPP(85%)
KP	PTI (37%)	PTI (69%)
Malakand Region	PTI (37%)	PTI (82%)
South KP	PTI (32%)	PTI (53%)
Peshawar Valley	PTI (44%)	PTI (93%)
Hazara	PTI (33%)	PTI (43%)
Balochistan	BAP (24.5%)	

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



PML-N Vote Loss between 2013 and 2018 by Regions

Gallup Region	Share of Votes by PML-N in 2013	Share of Votes by PML-N in 2018	Vote Loss
Punjab	47%	35%	-12%
Western Punjab	48%	30%	-18%
Northern Punjab	45%	30%	-15%
Southern Punjab	39%	29%	-10%
Central Punjab	53%	45%	-8%
Sindh	5%	3%	-2%
Interior Sindh	7%	1%	-6%
Karachi Region	2%	8%	6%
KP	16%	12%	-4%
Hazara	41%	34%	-7%
Peshawar Valley	9%	5%	-4%
South KP	6%	4%	-2%
Malakand Region	13%	12%	-1%
Balochistan	6%	4%	-2%
Kalat and Makran Region	6%	2%	-4%
Quetta and Zhob Region	5%	5%	0%

1. PML-N's major loss was in Punjab. Its loss in other provinces was small (as was its share in those provinces to begin with)
2. In Punjab PML-N lost about 12% voters (about 1.5 million in number) and managed to retain 6-8 million)
3. Loss in Western Punjab was highest were drop was 18% , followed by North Punjab , South Punjab 10% and Central Punjab 8%
4. Outside of Punjab, in KP , even though loss in Hazara area was 8%, it continues to be a major force with 34% vote bank .
5. Among all regions Gallup analysed there was a negative growth in all 10 zero in 1 and positive growth in 1 region
6. The smallest negative growth was in Malakand region (-1%)
7. The only region where PML-N actually gained votes proportion was Karachi, where it showed an increase by 6%

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

PTI Vote Gain between 2013 and 2018 by Regions

PTI gain was omnipresent. Among provinces highest growth was in Punjab where its votes doubled and witnessed an 18% growth.

However, growth was seen in Sindh (9%), KP (8%) and Balochistan (3%)

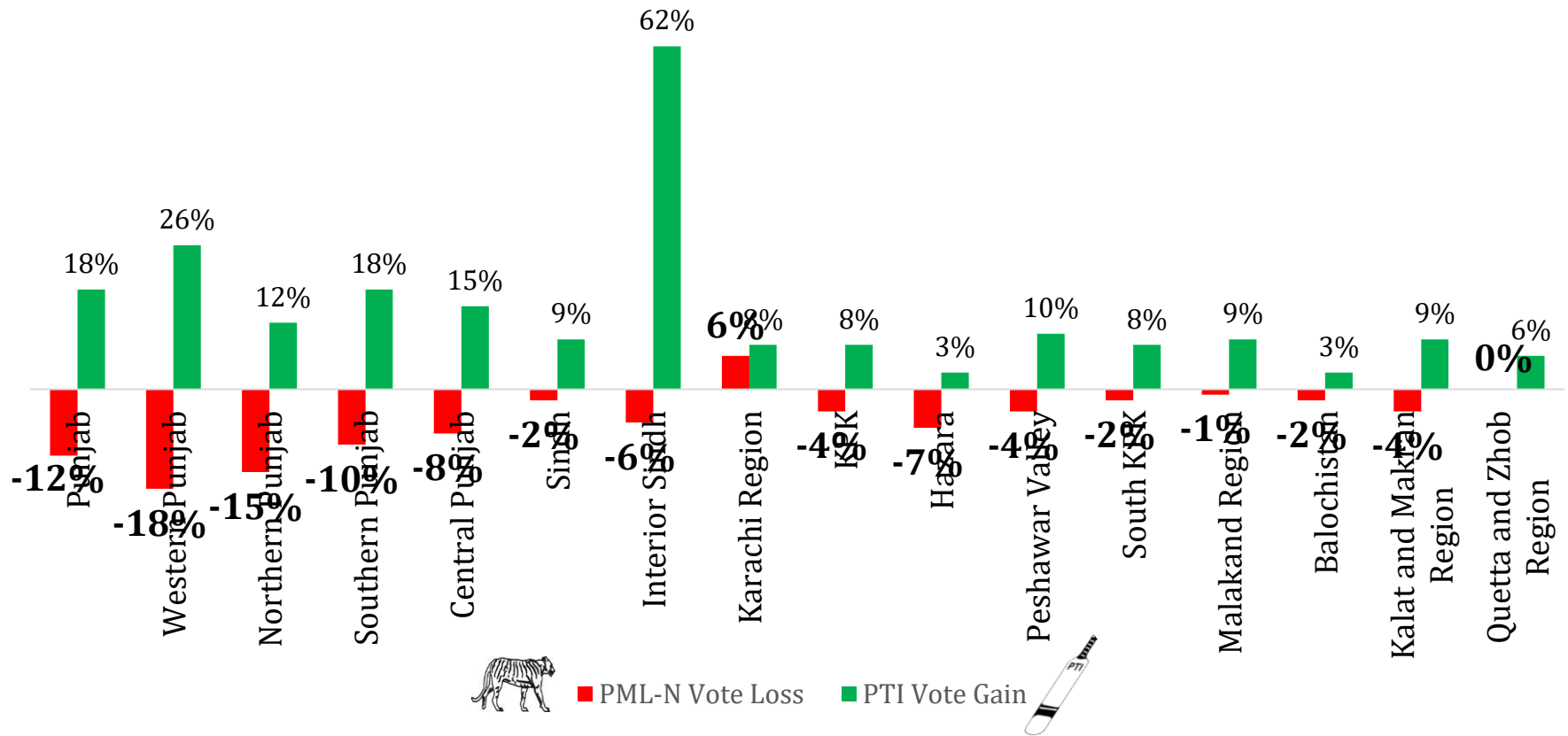
Among different regions, PTI saw growth in all 13 regions.

Highest growth was in Western Punjab (a phenomenal additional 26% voters voted for PTI) and the smallest growth was in Hazara (3%)

Gallup Region	Share of Votes by PTI in 2013	Share of Votes by PTI in 2018	Vote Gain
Punjab	18%	36%	18%
Western Punjab	15%	41%	26%
Southern Punjab	18%	36%	18%
Central Punjab	18%	33%	15%
Northern Punjab	26%	38%	12%
Sindh	8%	17%	9%
Karachi Region	18%	31%	13%
Interior Sindh	3%	11%	8%
KP	29%	37%	8%
Peshawar Valley	34%	44%	10%
Malakand Region	28%	37%	9%
South KP	24%	32%	8%
Hazara	30%	33%	3%
Balochistan	3%	6%	3%
Kalat and Makran Region	1%	10%	9%
Quetta and Zhob Region	5%	11%	6%

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

PML-N Vote Loss & PTI Vote Gain between 2013 and 2018 by Regions



As can be seen in many regions including in Punjab fall in votes of PML-N is lower than gain in votes by PTI , showing that PTI rise is also at the cost of other parties.

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

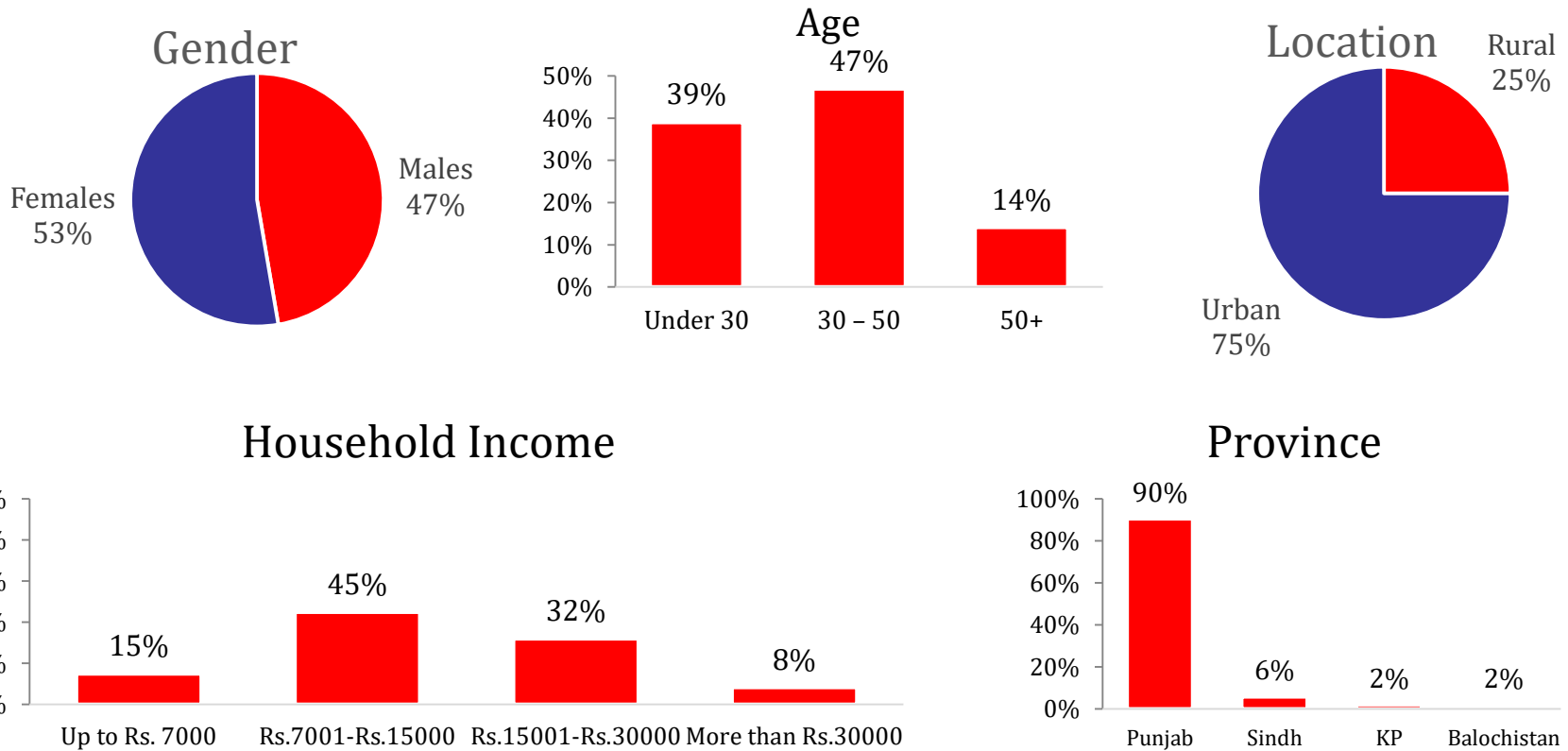
PML-N Seat Loss between 2013 and 2018 by Regions

Gallup Region	Share of Seats by PML-N in 2013	Share of Seats by PML-N in 2018	Seat Loss
Punjab	80%	42%	-38%
Northern Punjab	69%	0%	-69%
Western Punjab	84%	36%	-48%
Southern Punjab	66%	29%	-37%
Central Punjab	93%	73%	-20%
Sindh	2%	0%	-2%
Karachi Region	5%	0%	-5%
Interior Sindh	0%	0%	0%
KP	15%	6%	-9%
Hazara	57%	29%	-28%
South KP	11%	0%	-11%
Malakand Region	13%	9%	-4%
Peshawar Valley	0%	0%	0%
Balochistan	7%	0%	-7%
Kalat and Makran Region	13%	0%	-13%
Quetta and Zhob Region	0%	0%	0%

1. Seat Loss for PMLN is phenomenal. It is one of the highest electoral collapse in one election for any party.
 2. Since nearly all seats PMLN won were from Punjab (95%), the loss has been majorly in Punjab where it got 38% less seats.
 3. The collapse within Punjab is most pronounced in Northern Punjab where it managed to get no seat at all (it had gotten 69% seats in 2013).
 4. Within Punjab, the loss is minimal in Central Punjab but there too it lost 20% of seats.
 5. Outside KP, the highest loss is in Hazara, where it lost 28% seats as compared to 2013 GE.
- As a result of this, PML-N which was already a majorly Punjab party has now become completely Punjab only party and within Punjab it has no representation in North Punjab.

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

Who left PML-N between 2013 and 2018 Elections?



Disproportionately more female voters, mature age (30-50), more urban, middle income and mostly living in Punjab. Interestingly, these were the segments in which PML-N had a major decisive skew against PTI. It is the loss of this strong base that made the loss so significant.

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



Section 3:
**WHO VOTED
FOR WHOM AND WHY**



**“WHO VOTED FOR
WHOM”**

Registered Voters in Pakistan- 4% Gender Gap in Voter Lists/ Registered voters

Province / Area	Male Voters		Female Voters		Total Voters
Punjab	33,690,140	55.51%	27,007,278	44.49%	60,697,418
Sindh	12,438,375	55.54%	9,955,837	44.46%	22,394,212
KP (including FATA)	10,220,103	57.29%	7,619,742	42.71%	17,839,845
Balochistan	2,487,470	57.82%	1,814,834	42.18%	4,302,304
Federal Area	407,801	53.21%	358,659	46.79%	766,460
Grand Total	59,243,889	55.89%	46,756,3504	44.11%	106,000,239

Gender GAP in Voter Registration in Pakistan is significant and should be improved. In total population Men are 52% of population but are over represented in the registered voters by 3%. Women are 48% of Pakistani population and are under represented by 4% in the voter lists.

Provincial Distribution : The issue is most acute in KP and Balochistan where the female gap in registration reached 6%.

“WHO is an average Voter in Pakistan?”

Average Voter	
Age	37 years
Gender	Male (60%)
Education	7 years
Income	24,247
Rural Respondent	69%
Urban Respondent	31%
Punjab	63%
Sindh	19%
KP	14%
Balochistan	3%

1. Younger age groups – especially new voter aged 18-24 vote less. Therefore average age of voter is 37 years
2. Even though Gender ratio is 52% male and 48% female WITH RESPECT TO TOTAL POPULATION , turnout among females is lower (around 46%). Therefore, a voter is disproportionately male (but not very disproportionate)
3. Voters are generally more educated. Close to majority Pakistanis in 18+ plus age group are illiterate. However the average age of a voter is 7 years of education.
4. Nearly a quarter Pakistanis are on less than 2 USD per day income, which translates to around 15,000 PKR per month. A voter however earns around 24,000 PKR per month , showing relatively better economic standing
5. Nearly 2/3rd voters reside in rural locations.
6. Majority (63%) voters were from Punjab, a province that had the highest turnout as well



PTI Voter's Profile 2018- more male /only a bit younger, but truly Pakistani Party in terms of rainbow of ethnicities it captures

	Average Voter	PTI Voter	Difference
Age	37 years	36 years	-1
Gender	Male (61%)	Male (61%)	0
Education	7 years	8 years	+1
Income	24,247	25,498	+1,251
Rural Respondent	69%	68%	-1
Urban Respondent	31%	32%	+1
Punjab	63%	72%	+9
Sindh	19%	11%	-8
KP	14%	16%	+2
Balochistan	3%	1%	-2%

Despite usual discussion, in 2018 Election , profile of PTI voter in general /on average is very similar to a voter in the country. However there are some very small skews

- a) Slightly younger (only 1 year younger)
- b) On average 1 year more educated than an average voter
- c) Only 1000 PKR (10 USD) per month more wealthy
- d) Slightly more urban (only 1%)
- e) On average, 9% more PTI voters belong to Punjab

HOWEVER IT IS SIGNIFICANTLY MORE NATIONAL IN CHARACTER THAN PMLN IN 2013 AND PPP IN 2008

Source: Gallup Pakistan Exit Poll





PML N Voter's Profile 2018

	Average Voter	PML-N Voter	Difference
Age	37 years	37 years	0
Gender	Male (61%)	Male (54%)	-7%
Education	7 years	7 years	0
Income	24,247	25,246	+999
Rural Respondent	69%	65%	-4
Urban Respondent	31%	35%	+4
Punjab	63%	91%	+22
Sindh	19%	2%	-17
KP	14%	7%	-7
Balochistan	3%	0%	-3

Source: Gallup Pakistan Exit Poll

PMLN voter profile is very similar to an average voter (as was the case with PTI and PPP case).

The only skew is in terms of gender where, PML-N seems to have less support among males and slightly higher female support base.

On income as well , PML-N voter is slightly more wealthier than an average voter (but very similar income level as a PTI voter)

Compared to an average voter, PML-N voter is more urban (4%).

Provincially, compared to an average voter, 22% more PML-N voters are from Punjab





PPP Voter's Profile 2018

	Average Voter	PPP Voter	Difference
Age	37 years	37 years	0
Gender	Male (61%)	Male (60%)	-1%
Education	7 years	6 years	-1
Income	24,247	21,749	-2,498
Rural Respondent	69%	83%	+14
Urban Respondent	31%	17%	-14
Punjab	63%	33%	-30
Sindh	19%	58%	+39
KP	14%	8%	-6
Balochistan	3%	1%	-2

Source: Gallup Pakistan Exit Poll

An average PPP voter is very similar to an average voter of any other party except for Income where PPP voters are nearly 3000 RS per month poorer than an average voter.

Similarly, he/she is slightly less educated (by only 1 year) and slightly more female (by 1 percent)

Compared to an average voter, PPP voter is significantly more rural (14%).

Provincially, compared to an average voter, 39% more PPP voters are from Sindh



Profile of Voters of parties

In general we surmise following:

- a) Profile of Voters of top 3 parties (representing 71% of the total vote) shows that, mainstreaming of Vote Bank in Pakistan.

THE VOTER OF 3 MAJOR PARTIES IS NOT ENORMOUSLY DIFFERENT ON GENDER AGE EDUCATION URBAN RURAL ETC.

- b) After decades the largest party's in Pakistan (PTI) composition has share from all regions and walks of life. REPRESENTS DE-REGIONALISATION OF VOTE IN PAKISTAN.

- c) PML-N and PTI are more alike in their voter profile vs PPP which continues to represent poorer, lesser educated and more rural voters.

- d) Due to commonality of voter profile it can be expected that PTI and PML-N till next General Election may see migration of voters from one to the other.





“WHY VOTED” 7 TYPES OF VOTERS

Sources of Individual Voting Behavior

On what basis do voters decide how they will cast their ballot? Several basic factors can be identified as reasons for choosing a candidate in an presidential election. A voter may choose a candidate on the basis of one or more of the following considerations:

- ❑ Orientations on issues of public policy assessments of the performance of government evaluations of the personal traits of the candidates
- ❑ When voters are asked what they like or dislike about a specific candidate--i.e., what might make them vote for or against that candidate--most of their responses fall into one of the above three categories.
- ❑ These orientations and evaluations in turn are influenced by two more general attitudinal factors:

Party identification general ideological dispositions

Party identification and ideology are more general, long-run factors that influence voting behavior primarily by affecting the attitudes that are more immediate to the vote decision in a particular year.



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.



Voting Behaviour in Literature

The scientific study of voting behaviour is marked by three major research schools:

The sociological model, often identified as School of Columbia, with the main reference in Applied Bureau of Social Research of Columbia University, whose work begins with the publication of the book *The People's Choice* (Lazarsfeld, Berelson, & Gaudet, 1944) and focuses on the *influences of social factors*;

The central hypothesis of Lazarsfeld et al. (1944) was that the act of voting is an individual act, affected mainly by the personality of the voter and his exposure to the media

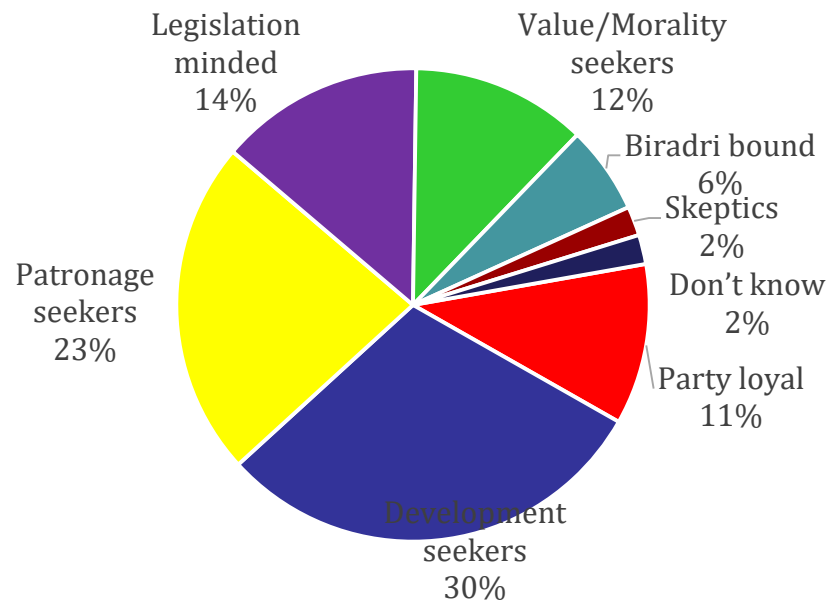
The psychosocial model, also identified as School of Michigan, which has its major reference in the work of Campbell, Converse, Miller and Stokes (1960) — *The American Voter* — and *assumes that party identification* is the main factor behind the behaviour of voters; and

The central concept of this model of voting behaviour is partisanship, which is designed as a psychological affinity, stable and lasting relationship with a political party that does not necessarily translate into a concrete link, namely registration, or consistently voting and systematically militancy with this party:

The rational choice theory, also referred to as a model of economic voting, or even as School of Rochester, whose landmark work is the work of Anthony Downs (1957) — *An Economic Theory of Democracy* — and that puts emphasis on variables such as *rationality, choice, uncertainty and information*.

How Voters Make their Choice: DEVELOPMENTIST CREDENTIAL TOPS REASON WHY PEOPLE VOTED FOR THEIR FAVOURITE CANDIDATE , FOLLOWED CLOSELY BY PATRONAGE

Types of Voters	2018	Rank
Development seekers	30%	1
Patronage seekers	23%	2
Legislation minded	14%	3
Value/Morality seekers	12%	4
Party loyal	11%	5
Biradri bound	6%	6
Skeptics	2%	7



Source: Gallup Pakistan Exit Poll



Types of Voters by Political Parties in GE 2018- PML N are more likely to say they like Development credentials/ PTI voters are more likely than others to be party loyal /legislation minded/ value seeker



Types of Voter	2018	PML-N	PTI	PPP
Party loyal	11%	11%	14%	10%
Development seekers	30%	35%	27%	33%
Patronage seekers	23%	25%	19%	27%
Legislation minded	14%	12%	17%	12%
Value/Morality seekers	12%	9%	12%	8%
Biradri bound	6%	5%	5%	7%
Skeptics	2%	1%	1%	1%

Source: Gallup Pakistan Exit Poll



Types of Voters – Difference between an Average Voter and Religious Voter- Not too different motivations to vote except for being significantly more value conscious

Types of Voter	All Voter	Religious Voter	Difference
Party loyal	11%	10%	-1%
Development seekers	30%	25%	-5%
Patronage seekers	23%	21%	-2%
Legislation minded	14%	14%	0%
Value/Morality seekers	12%	26%	+14%
Biradri bound	6%	2%	-4%
Skeptics	2%	0%	-2%

Source: Gallup Pakistan Exit Poll





Section 4:
**RELIGIOUS PARTIES
SCORECARD GENERAL
ELECTION 2018**

Most Pakistani voters are generally religiously inclined and therefore it is difficult to segment voters into religious and others

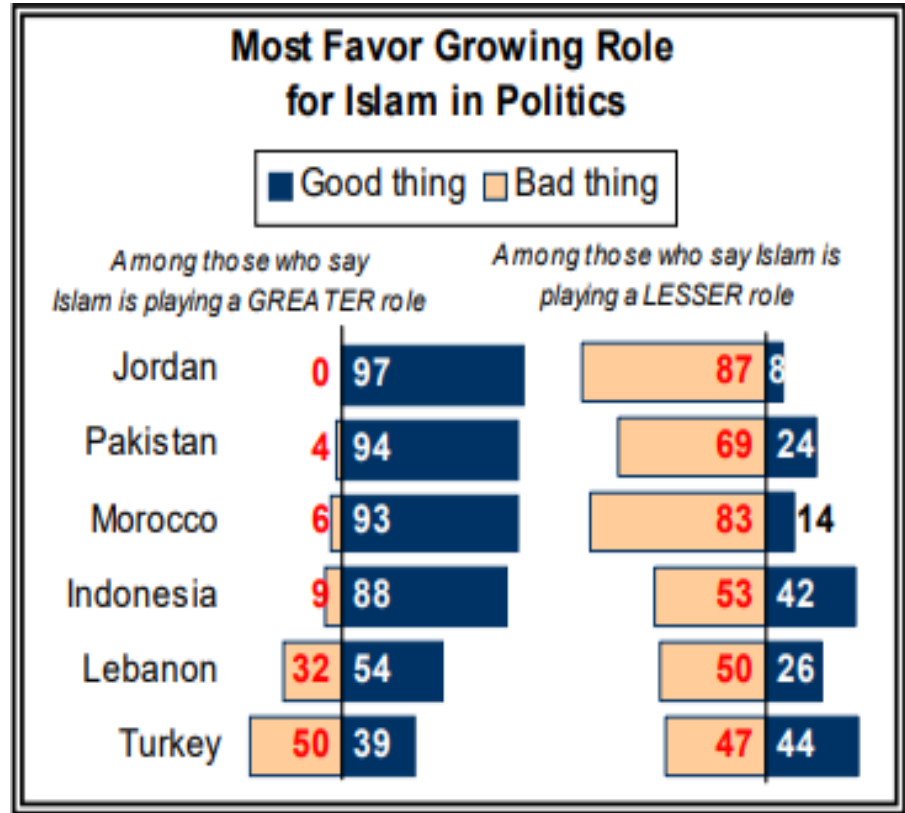
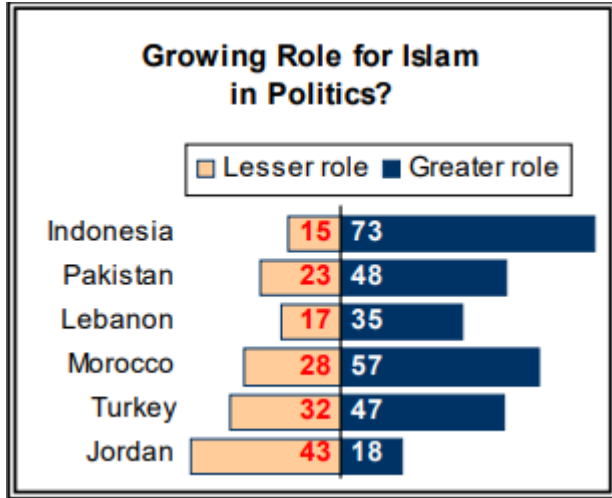


PAKISTAN RANKS THE TOP IN MUSLIM COUNTRIES SURVEYED BY PEW WHO SAY RELIGIOUS IDENTITY IS MORE IMPORTANT THAN COUNTRY IDENTITY. The importance of Islam in the political life of many countries where it is the predominant religion is underscored by the large percentages in these countries saying that they think of themselves first as a Muslim, rather than as a citizen of their particular country. Large majority in Pakistan (79%) say they self-identify first as Muslims, rather than as Pakistanis.

Source: PEW Global



Most Pakistani voters are generally religiously inclined and therefore it is difficult to segment voters into religious and others



48% in Pakistan say that Islam plays a very large or fairly large role in the political life of their country.

Pakistanis who believe Islam's political role is increasing are unanimous (94%) in thinking this is a good thing.

At the same time, most Pakistanis who see Islam playing a lesser role in politics view this as bad for Pakistan (69%).

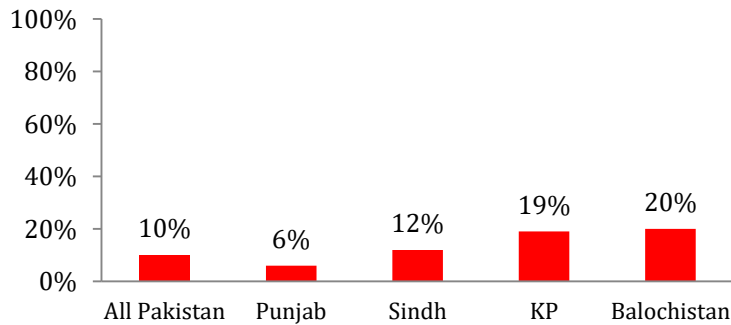
Source: PEW Global



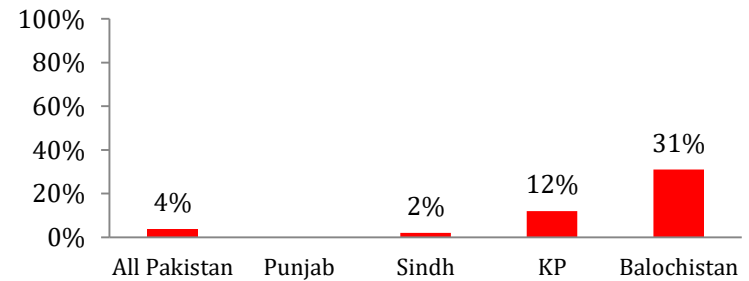
Religious Parties got 10% of all votes and 4% of seats : highest share in Balochistan and smallest in Punjab

	Votes %	Votes (n)	Seats (n)	Seats %
All Pakistan	10%	~ 5 million	12	4%
Punjab	6%	~ 2 million	-	-
Sindh	12%	~ 1 million	1	2%
KP	19%	~ 1.4 million	6	12%
Balochistan	20%	~ 0.3 million	5	31%

Percentage of Votes



Percentage of Seats in National Assembly



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

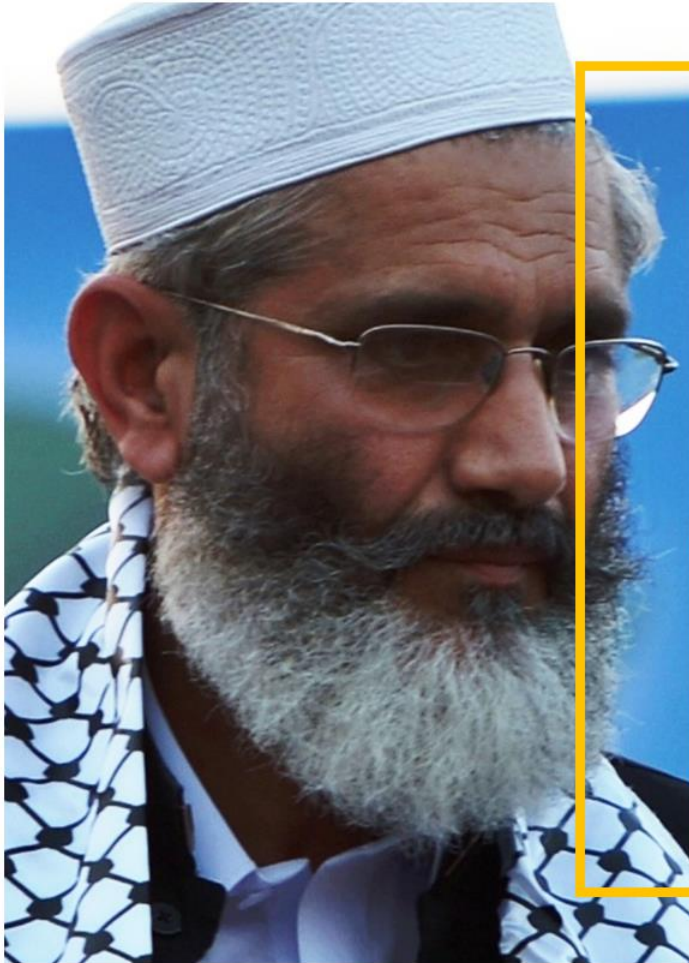


Gallup Territories Score of Votes and Seats of Religious Parties – Karachi pops out as an outlier – unpacking of MQM possibly explains the rise of religious vote - however more research is needed

	Votes %	Votes (n)	Seats (n)	Seats %
All Pakistan	10%	~ 5 million	12	4%
Northern Punjab	9%	~ 0.4 million	-	-
Western Punjab	5%	~ 0.3 million	-	-
Central Punjab	9%	~ 1 million	-	-
Southern Punjab	4%	~ 0.5 million	-	-
Karachi Region	24%	~ 0.8 million	1	5%
Interior Sindh	6%	~ 0.4 million	-	-
Malakand Region	19%	~ 0.3 million	1	9%
South KP	25%	~ 0.5 million	4	21%
Peshawar Valley	20%	~ 0.5 million	-	-
Hazara Region	11%	~ 0.2 million	1	14%
Quetta Region	33%	~ 0.3 million	4	50%
Kalat and Makran Region	9%	~ 0.09 million	1	13%

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

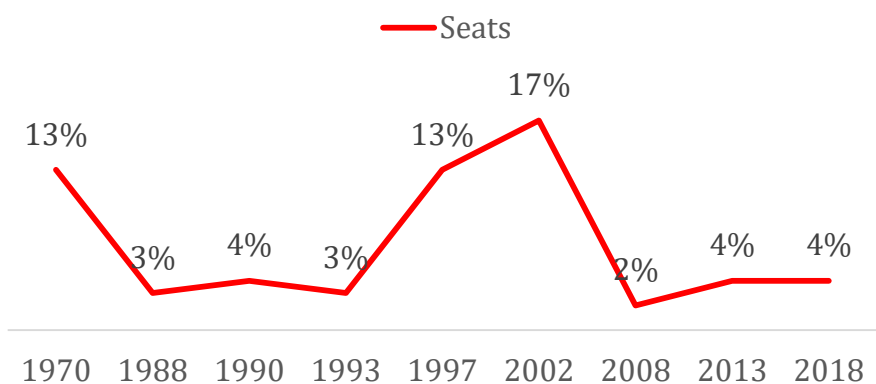
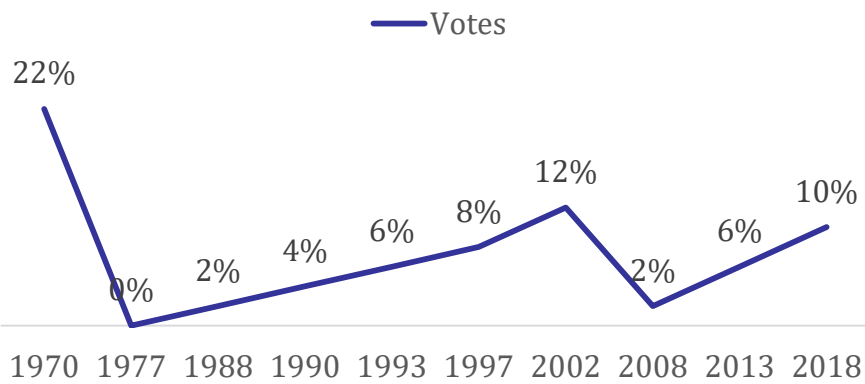




RELIGIOUS PARTIES SCORECARD - TREND

All Pakistan Score of Votes and Seats – Religious parties vote percentage is very similar to what it was in 2002 except that this time it is not followed by seat gain

Year	Votes %	Votes (n)	Seats (n)	Seats %
1970	22%	~ 3.4 million	18	13%
1977	0%	~ 0.01 million	-	-
1988	2%	~ 0.5 million	7	3%
1990	4%	~ 0.9 million	9	4%
1993	6%	~ 1.1 million	7	3%
1997	8%	~ 1.5 million	27	13%
2002	12%	~ 3.5 million	46	17%
2008	2%	~ 0.8 million	6	2%
2013	6%	~ 2.6 million	12	4%
2018	10%	~ 5.1 million	12	4%

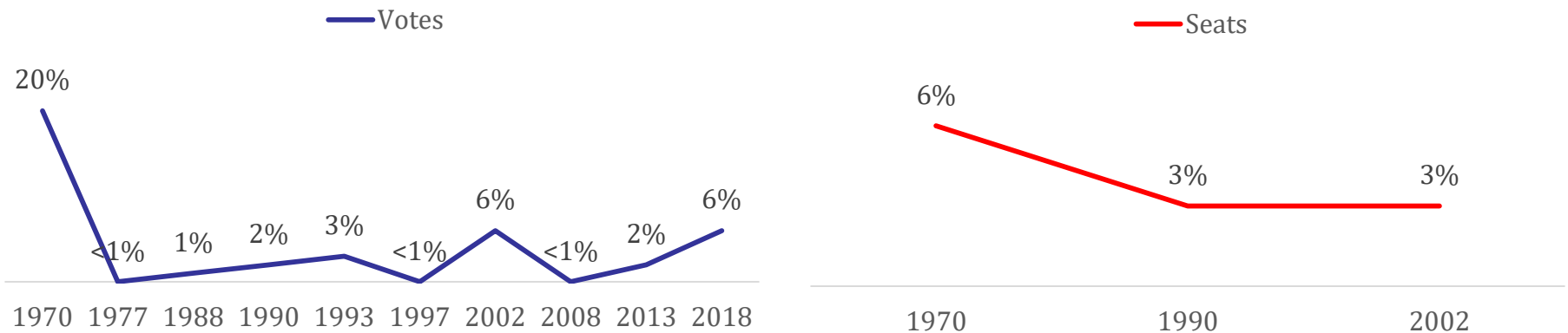


Source: Gilani’s Index of Electoral Record, based on ECP data computed by Gallup Pakistan



Punjab Score of Votes and Seats

Year	Votes %	Votes (n)	Seats (n)	Seats %
1970	20%	~ 2.2 million	5	6%
1977	<1%	~ 0.01 million		
1988	1%	~ 0.09 million		
1990	2%	~ 0.3 million	3	3%
1993	3%	~ 0.4 million		
1997	<1%	~ 0.02 million		
2002	6%	~ 1.1 million	5	3%
2008	<1%	~ 0.05 million		
2013	2%	~ 0.5 million		
2018	6%	~ 2.2 million		

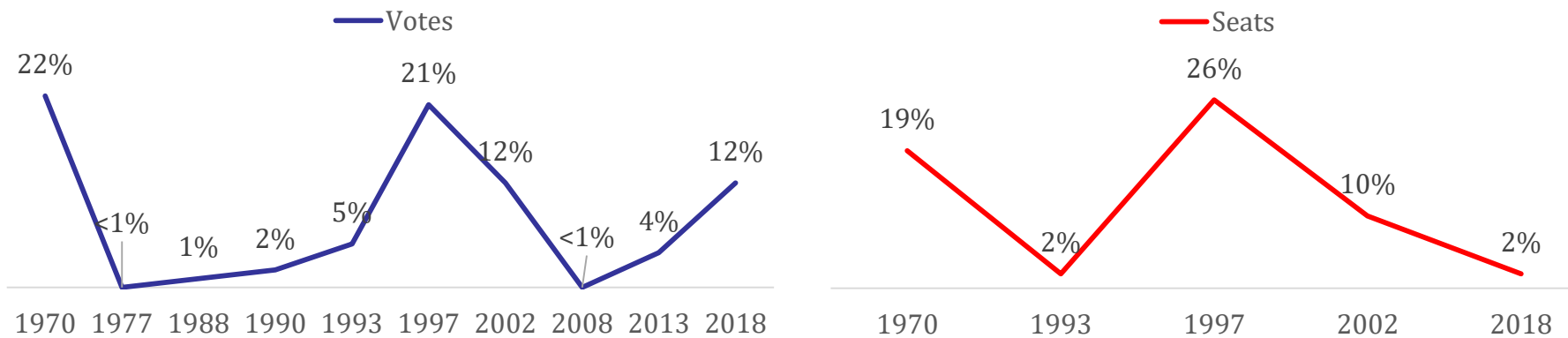


Source: Gilani's Index of Electoral Record, based on ECP data computed by Gallup Pakistan



Sindh Score of Votes and Seats

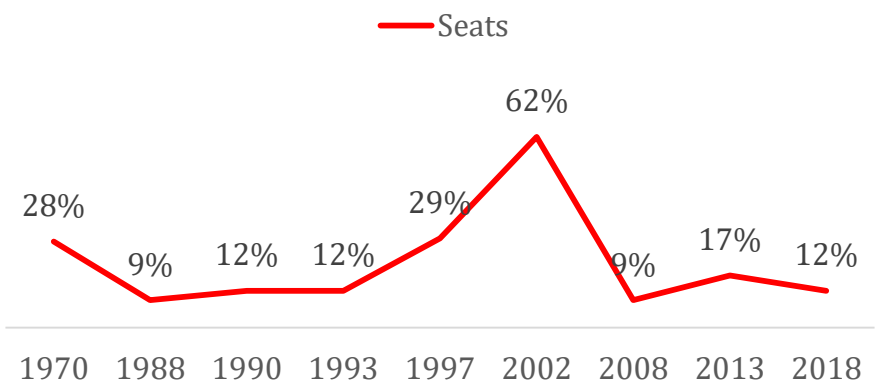
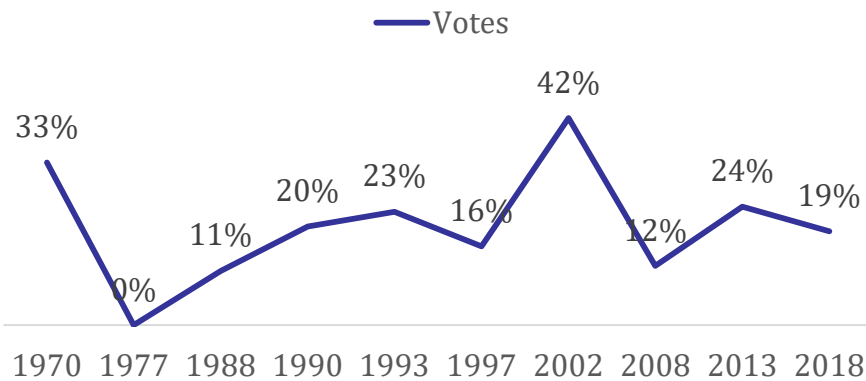
Year	Votes %	Votes (n)	Seats (n)	Seats %
1970	22%	~ 0.7 million	5	19%
1977	<1%			
1988	1%	~ 0.03 million		
1990	2%	~ 0.1 million		
1993	5%	~ 0.2 million	1	2%
1997	21%	~ 0.8 million	12	26%
2002	12%	~ 0.7 million	6	10%
2008	<1%	~ 0.07 million		
2013	4%	~ 0.4 million		
2018	12%	~ 1.2 million	1	2%



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

KP Score of Votes and Seats

Year	Votes %	Votes (n)	Seats (n)	Seats %
1970	33%	~ 0.5 million	7	28%
1977	0%			
1988	11%	~ 0.2 million	3	9%
1990	20%	~ 0.4 million	4	12%
1993	23%	~ 0.5 million	4	12%
1997	16%	~ 0.4 million	10	29%
2002	42%	~ 1.4 million	29	62%
2008	12%	~ 0.5 million	4	9%
2013	24%	~ 1.3 million	8	17%
2018	19%	~ 1.4 million	6	12%

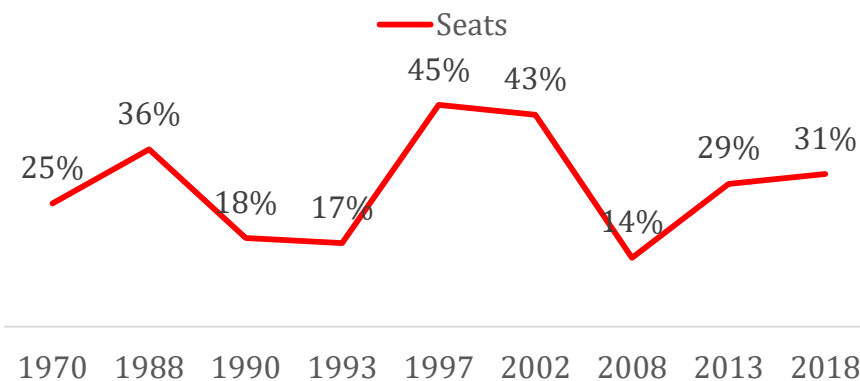
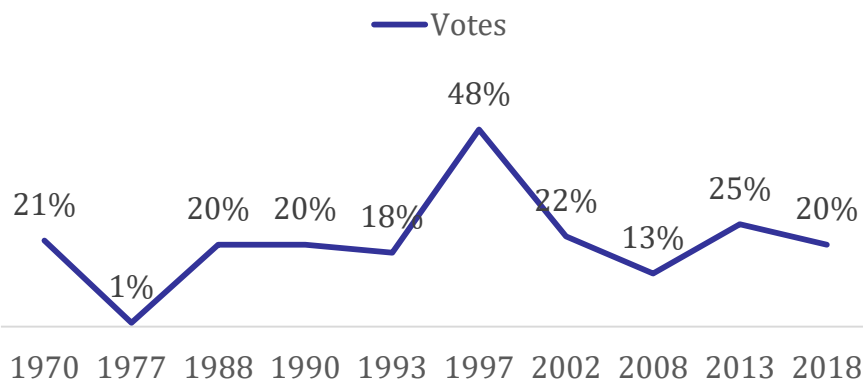


Source: Gilani's Index of Electoral Record, based on ECP data computed by Gallup Pakistan



Balochistan Score of Votes and Seats

Year	Votes %	Votes (n)	Seats (n)	Seats %
1970	21%	~ 0.08 million	1	25%
1977	1%			
1988	20%	~ 0.1 million	4	36%
1990	20%	~ 0.1 million	2	18%
1993	18%	~ 0.1 million	2	17%
1997	48%	~ 0.3 million	5	45%
2002	22%	~ 0.3 million	6	43%
2008	13%	~ 0.2 million	2	14%
2013	25%	~ 0.3 million	4	29%
2018	20%	~ 0.3 million	5	31%



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



GE 2018: WHO IS A RELIGIOUS VOTER?

PROFILE OF RELIGIOUS VOTERS

	Average Voter	Religious Voter	Difference
Age	37 years	34 years	-3
Gender	Male (61%)	Male (75%)	+14
Education	7 years	8 years	+1
Income	24,247	22,500	-1,747
Rural Respondent	69%	74%	+5
Urban Respondent	31%	26%	-5
Punjab	63%	39%	-24
Sindh	19%	25%	+6
KP	14%	29%	+15
Balochistan	3%	6%	+3

An average religious voter is 3 years younger than an average voter.

For income where religious voters are nearly 2000 RS per month poorer than an average voter.

Similarly, he/she is slightly more educated (by only 1 year) and disproportionately more male (by 14%)

Compared to an average voter, religious voter has less urban presence (by 5%).

Provincially, compared to an average voter, 15% more religious voters are from KP

Source: Gallup Pakistan Exit Poll



TLP SCORECARD GE 2018

TLP SCORE GE 2018

All Pakistan and Provincial Score of Votes- TLP RECEIVED 2.2 MILLION VOTES FROM ACROSS THE COUNTRY

	Votes %	Votes (n)
All Pakistan	4%	~ 2.2 million
Punjab	5%	~ 1.7 million
Sindh	4%	~ 0.4 million
KP	1%	~ 0.09 million
Balochistan	<1%	~ 0.01 million

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



TLP SCORE GE 2018

Gallup Territories Score of Votes and Seats- TLP WAS MOST SUCCESSFUL IN KARACI GETTING ALMOST 10% VOTES IN THE CITY, next success was in North PUNJAB (POSSIBLY CONTRIBUTING TO COMPLETE COLLAPSE OF PMLN IN TERMS OF ITS ABILITY TO GET ANY SEAT)

	Votes %	Votes (n)
All Pakistan	4%	~ 2.2 million
Northern Punjab	8%	~ 0.3 million
Western Punjab	3%	~ 0.2 million
Central Punjab	7%	~ 0.8 million
Southern Punjab	3%	~ 0.4 million
Karachi Region	11%	~ 0.4 million
Interior Sindh	1%	~ 0.04 million
Malakand Region	-	
South KP	1%	~ 0.01 million
Peshawar Valley	2%	~ 0.04 million
Hazara Region	2%	~ 0.03 million
Quetta Region	-	
Kalat and Makran Region	1%	~ 0.01 million



TLP EFFECT ON ELECTORAL OUTCOME/ OVERALL IMPACT

1. Only a small fraction 4% of Pakistani voters voted for TLP. However its cumulative effect was significant.
 - a) Nearly 19% of all National Assembly seats would have had a different outcome if TLP did not contest elections.
 - b) PML-N would have won nearly 30% more seats than their eventual seat count if TLP did not exist (with obvious assumptions).

2. Pakistani voter votes for All Pakistan parties but is very religiously inclined (as per PEW surveys already shared).

Therefore even with 4% vote the impact of religious parties including TLP in agenda setting for other parties is very significant.

Respondents do not agree with politics of religious parties but they agree with their motivations and ideas overwhelmingly.

IT'S THE AGENDA SETTING IMPORTANCE OF RELIGIOUS PARTIES WHICH IS MORE IMPORTANT THAN THEIR ELECTORAL SUCCESS WHICH WOULD MATTER MORE IN FUTURE.





**GE 2018: WHO IS
A TLP VOTER?**

PROFILE OF TLP VOTERS

	Average Voter	TLP Voter	Difference
Age	37 years	33 years	-4
Gender	Male (61%)	Male (74%)	+13
Education	7 years	8 years	+1
Income	24,247	20,365	-3,882
Rural Respondent	69%	58%	-11
Urban Respondent	31%	42%	+11
Punjab	63%	76%	+13
Sindh	19%	20%	+1
KP	14%	4%	-10
Balochistan	3%	<1%	-3

An average TLP voter is 4 years younger than an average voter.

For income, TLP voters are nearly 4000 RS per month poorer than an average voter.

Similarly, he/she is slightly more educated (by only 1 year) and disproportionately more male (by 13%)

Compared to an average voter, religious voter has more urban presence (by 11%).

Provincially, compared to an average voter, 13% more TLP voters are from KP

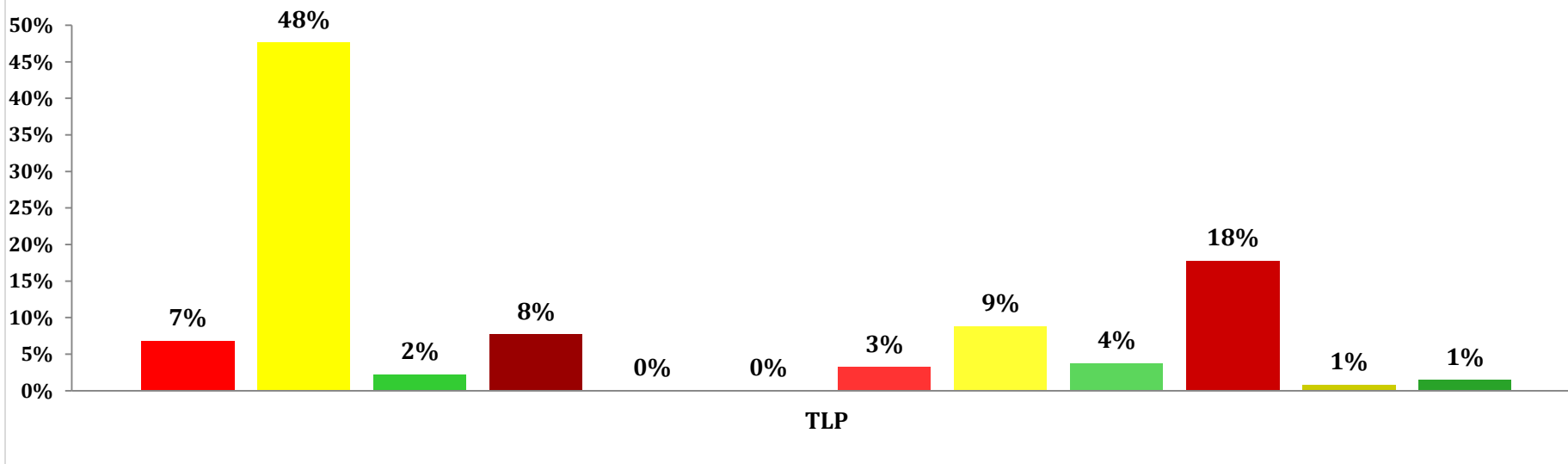
Source: Gallup Pakistan Exit Poll



PROFILE OF TLP VOTERS : 48% of TLP Voters are breakaway from PML-N , another 9% from MQM , 18% are new voters. Interestingly, 8% also say they had previously voted from PTI

Voting History

■ PPP
 ■ PML-N
 ■ PML-Q
 ■ PTI
 ■ JUI-F
 ■ NP
 ■ JI
 ■ MQM
 ■ Independent
 ■ Did not vote
 ■ Others
 ■ Don't know / No Response



Nearly half (48%) TLP voters voted for PML-N in GE 2013

Source: Gallup Pakistan Exit Poll

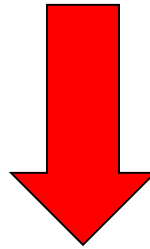




RISE OF TLP AND DENT ON ELECTION GAME

TLP VOTE SPOILER EFFECT – Nearly 1 in every 5 seat would have different outcome if TLP did not stand in election

51 National Assembly Seats where TLP effected electoral outcome



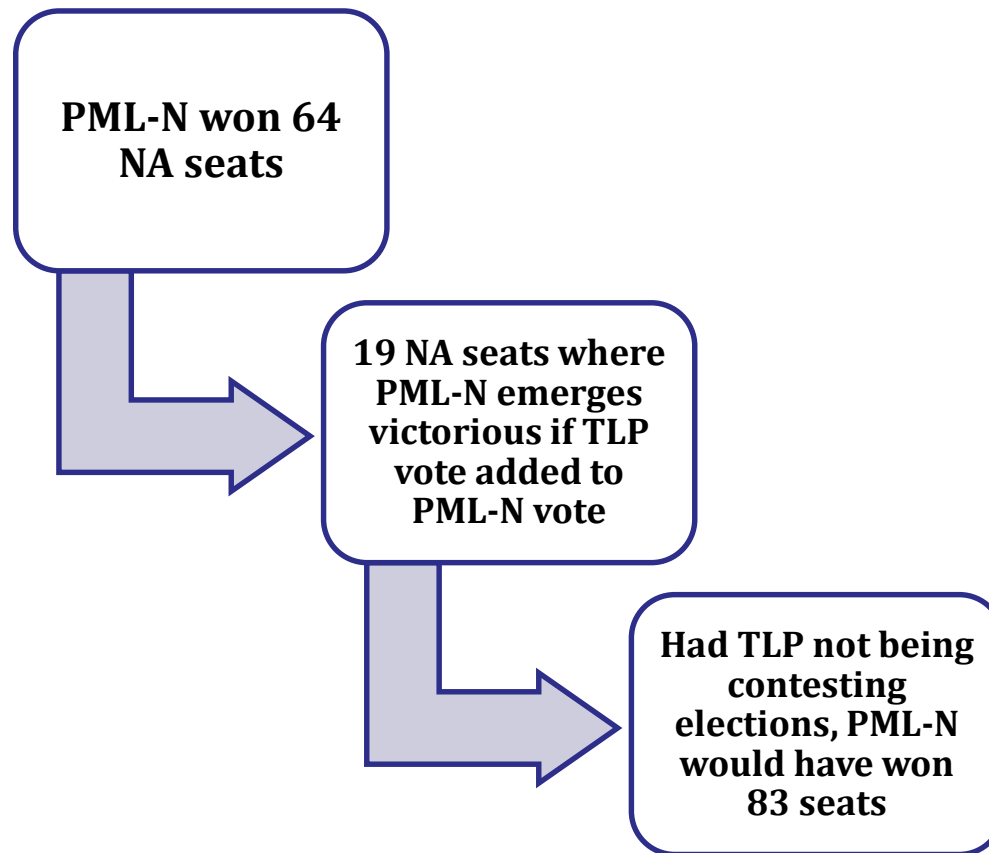
This translates into 19% NA seats

Method: Runner Up+ TLP Vote is greater than current winner

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

TLP VOTE SPOILER EFFECT – PMLN wins 30% more seats if TLP vote is added to PMLN vote

19 National Assembly constituencies where PML-N emerges as winner after adding TLP vote to PML-N vote



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

LIST OF CONSTITUENCIES WHERE PML-N EMERGES WINNER AFTER ADDING TLP VOTE – On majority PTI is current winner

Province	NA	Original Winning Party
KP	13	Independent
Punjab	57	PTI
Punjab	66	PTI
Punjab	67	PTI
Punjab	68	PML-Q
Punjab	87	PTI
Punjab	102	PTI
Punjab	108	PTI
Punjab	110	PTI
Punjab	118	PTI
Punjab	119	PTI
Punjab	126	PTI
Punjab	131	PTI
Punjab	140	PTI
Punjab	159	PTI
Punjab	172	PML-Q
Punjab	182	PPP
Sindh	241	PTI
Sindh	246	PTI

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

PARTING NOTE

THE 11TH GENERAL ELECTION IN PAKISTAN REPRESENTS BOTH HOPES AND FEARS FOR PAKISTAN.

Hope:

- a) Our analysis of election results does not show any significant Election Day rigging. People's vote was very close to what we predicted before Elections and on Election Day in Exit poll.
- b) Voters continued to be mobilised with majority thinking elections were fair , free and impartial.
- c) Larger and larger number of Pakistanis on the election day believe elected governments are going to complete terms , are going to be better and there is cross partisan support for such views
- d) Turnout is improving in the country , even in law and order prone provinces and among women.
- e) The voter profile of the main parties show a homogeneity of profile. No major ethnic / racial/ age/ gender / class skews to the extent of main parties. The largest party represents the Pakistani voter in more ways than it differs from them.

FEARS

- I. Pre-Election time period was marred by allegations of non-level playing field.
- II. Election day operational issues need to be fixed.
- III. Rise of religious parties close to election and their success in acting as a spoiler for the major parties (PMLN and MQM) is a source of grave concern and can effect long term legitimacy of elections.
- IV. Turnout of women with a 10% gender gap , falling turnout in Karachi and Sindh in general are sources of concern.



THANK YOU!

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