IDEAS | INSTITUTE OF DEVELOPMENT AND ECONOMIC ALTERNATIVES

Political Attitudes in Lahore and the 2018 Elections

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EXECUTIVE SUMMARY

This brief presents results from a political attitudes survey in three national assembly constituencies in Lahore, including the tightly contested NA 122, and its neighbors NA 121 and NA 124 where PML-N won by a substantial margin in 2013. It is important to note that the results cannot be generalized to all Lahore, Punjab or Pakistan.

Issues that matter for 2018 elections: Voters are concerned most about economic issues such as purchasing power and unemployment (**Figure 1**). Corruption is an important issue for a sizeable minority but anti-corruption campaigns that do not tackle economic issues are unlikely to resonate. Several public services including education, health, water, electricity and security matter for voters, but improvement in no one service is likely to swing the election.

There is **cautious optimism** among voters regarding their own financial condition (**Figure 2**). They are also giving **measured praise** to PML-N for its performance in tackling their issues (**Figure 3**).

Honesty and Development: While voters are polarized on the question of Nawaz and Shahbaz Sharif's honesty (**Figure 4**), a big majority thinks they are capable of taking Pakistan into the league of developed nations (**Figure 5**). An overwhelming majority rejects that Imran Khan is dishonest (**Figure 4**), but at this stage of Election 2018, and in these three constituencies, he is seen less favourably as the leader to take Pakistan into the league of developed nations (**Figure 5**).

Party Support and Voting Intent: PTI is trailing behind PML-N in terms of party support in all three of our surveyed constituencies (**Figure 6**). In terms of voting intention, there is a large proportion of voters who are still undecided and the election will rest on where they sway (**Figure 7**). The proportion who state they will vote for PML-N are close to, but not quite, a majority. **The survey findings are an important indication of how political parties need to fine tune their election campaigns as they gear up for the 2018 election.**

Introduction

As Pakistan nears election year, it is the right time to begin tracking the political attitudes of voters on critical issues that are likely to shape the general election in 2018. The best way to do this is to hear directly from voters about what they think. The Political Economy Group at the Institute of Development and Economic Alternatives (IDEAS) is planning a series of political attitude surveys that aim to ascertain which issues matter to voters, which political campaign messages are resonating with them and their support for different political parties, candidates and leaders.

What value does our survey add to the information provided by existing surveys and political commentary? Standard surveys in Pakistan give a picture of how a sample of national or provincial voters is thinking and not how voters are thinking in specific constituencies. This is because their sample is representative at the national and provincial levels and not at the constituency level. However, constituency contests make or break elections and hence it is important to read the pulse at the level of individual constituencies. The IDEAS political attitudes survey will provide information on how voters are thinking in constituencies of interest.

An important feature of our survey is that it is based on in-home interviews, which result in much higher response rates (71%) than is globally the case with online and internet surveys (which can be as low as 10-20%). Our sampling methodology ensures that we draw a random sample that is representative of male and female registered voters in specific national and provincial assembly constituencies of interest.

Our first political attitudes survey focuses on Lahore, the battle ground between the PML-N and PTI in the 2013 general elections. Reputable analysts expect a highly competitive Lahore election in 2018. Although PML-N has traditionally dominated the city's politics, Lahore has a large demographic of educated and young voters that is argued to play in PTI's favour. Hence, we kick off our series with Lahore. In the future, we plan to extend the survey to a wider set of constituencies that represent important battlegrounds critical to the 2018 general election.

Our first political attitudes survey analyzes what registered voters think in NA 122 where PML-N won by a whisker in 2013 and again in the 2015 by-election. To gain contrast we also conducted surveys in its neighbouring constituencies, NA 121 and NA 124, where PML-N won by a substantial margin in the 2013 general election. However, in these two constituencies we restrict our sample to PP-146 and PP-149 where PML-N also won by a large margin in the last election. This mix of constituencies is interesting because they lie in the heart of the city, are contiguous, vary in the intensity of electoral competition and comprise mixed settlements of people belonging

to different socio-economic and income classes. We surveyed a total of 2,127 respondents over the age of 18, which included 51% female and 49% male respondents.

How should we interpret these results? It is important to recognise that our survey gives the pulse of male and female voters' opinion in our sample constituencies during January-February 2017. However, voter choices and attitudes are dynamic and will respond to many things such as campaigns, changing events and candidate choices made by parties. Therefore, tracking attitudes is as important as insights gained from a snapshot. It is also important to keep in mind that these results are not representative of all Pakistan, Punjab or Lahore constituencies. It is representative of a key battle ground seat and two safe seats in the heart of Lahore. Our questionnaire was carefully designed and included questions that enable us to triangulate responses and this gives us tremendous confidence in our results.

The IDEAS political attitudes survey is non-partisan and was devised with the input of reputable political economists associated with recognized institutions. We are committed to providing expertise that advances understanding of the Pakistani electorate to any interested party, as part of our broad commitment to public engagement and impact. To ensure transparency the last section of this brief provides details on the sampling methodology and we report the margin of error for each result.

1. Which issues will matter in 2018?

The survey asked voters to report three issues that will matter most in the 2018 general elections. The results are given in **Figure 1**.

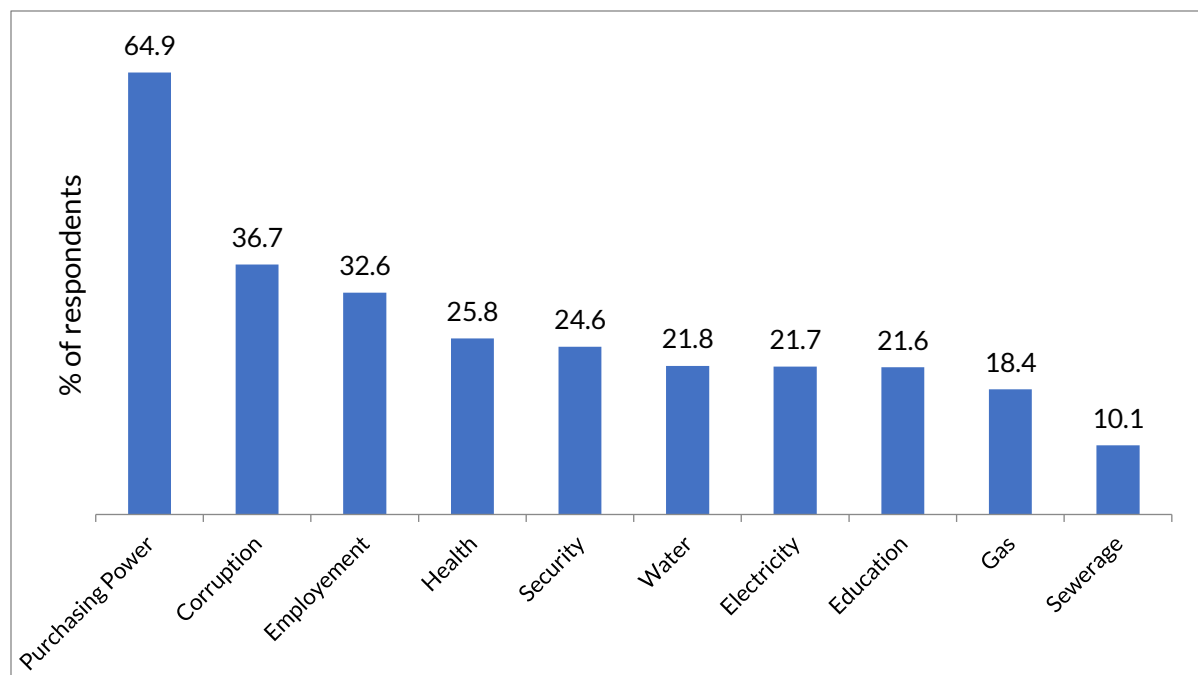## Figure 1: What issues matter most in the 2018 general elections?

Figure 1: What Issues will Matter Most in 2018 Elections? Note: Margin of error is ±1.7%. We only report issues that were cited by at least 10% of our respondents. Since each respondent was asked to provide three issues the percentages don't add up to 100.

The important takeaways from **Figure 1** are:

- **The issue that stands out by a large margin is purchasing power or *kuwat-e-kharid*. Close to two-thirds of our respondents suggest that this issue will matter most in the next election.** At the heart of the issue are improved earnings from jobs and price stability of goods that affect household living standards. This suggests that whether the rates of growth of earnings and employment achieved by the PML-N governments can meet voter aspirations is crucial for the next election. Economic shocks that slow down earnings or lead to price inflation or rising prices for goods that are important components of household baskets (like electricity) have the potential to put the incumbent party at serious risk.

- **Nearly one-third of our respondents also cite employment as an issue that will matter for the next election.** The high weight placed by our respondents on purchasing power and employment shouldn't be surprising, since past polls have reported these as critical issues for voters in the 2008[1] and 2013[2] general elections. Economic outcomes, particularly growth, employment and earnings are at the heart of the political assessment being made by voters. Surprisingly, these economic issues are not being acknowledged in the current political discourse and there is little discussion on them. There is a clear gulf here between the concerns voters are expressing and the issues being raised in the media debate by anchors and politicians.

- **Slightly more than one-third of our respondents cite corruption as an important issue.** Governance concerns continue to resonate with voters and are likely to shape their perceptions in the upcoming election. A build-up of adverse voter perceptions about corruption under the current PML-N governments have the potential to affect a minority vote, but a sizeable minority vote. Successful campaigns on this issue have the potential to put the opposition parties in the running. However, they are unlikely to swing electoral outcomes in these constituencies in their favour unless they are seen as credible alternatives on economic issues. This is the big message for PTI.

- **Between one-fourth and close to one-fifth of respondents cite effective service delivery (education, health, water, electricity, gas and security) as an important issue. The message here is that service delivery matters but improvement in no one service is likely to swing the election.** For voters, no one service stands out over and above others. PML-N can only have a big electoral effect through service delivery improvements if it improves the delivery of the bundle of services that matter for voters (see **Figure 1**). Put another way, big investments in the delivery of one or two services are unlikely to matter if there is a perceived deterioration in earnings or prices.

- **Within service delivery, electricity doesn't stand out as the most important issue.** This is what the current survey shows but this could reflect seasonality as the survey was conducted in winter months with low load shedding. This issue needs to be tracked closely

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[1] http://mobile.reuters.com/article/idUSISL48294
[2] http://gallup.com.pk/wp-content/uploads/2016/07/1061.pdf

in the future. The extreme emphasis placed by our respondents on purchasing power would suggest that the future direction of voter concerns regarding electricity is unlikely to be around availability and instead will be around electricity prices. Given that electricity supply was one of the main manifesto items for the PML-N in 2013, any negative shocks to electricity supply before the election could still end up hurting them.

- **Public transport isn't resonating as an important issue with a sizeable pool of voters in these constituencies.** It doesn't show up in **Figure 1** because less than 10% of our respondents report it as an issue that matters. This could be because our sample lies in the heart of the city. Getting real earnings up promises a much higher political dividend in our sample constituencies than massive investment in public transport. That said, public transport may still be an important factor for constituencies outside the heart of the city and this needs to be probed.

2. Voter perceptions about their financial conditions

Given the importance of real earnings and employment it is important to ask whether our respondents are optimistic or pessimistic about their own financial condition. Our survey asked respondents two questions in this regard:

- a. Please tell us on a scale of 1-5, how your household's current financial condition compares to its condition one year ago, where 1 means it is a lot worse, 3 means it is is the same and 5 means it got a lot better.

- b. Please tell us on a scale of 1-5, how different your household's financial condition is likely to be next year compared to its current condition, where 1 means it will be much worse, 3 means it will stay the same and 5 means it will get much better.

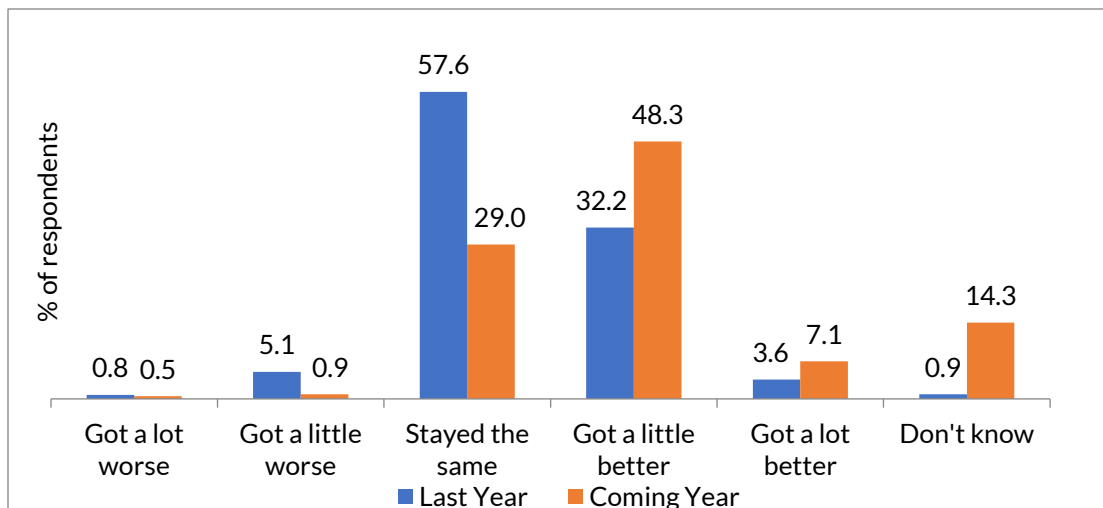## Figure 2: How voters see their own financial situation

Figure 2: Respondents' Perception of their Own Financial Condition. Margin of error is ±2.3.

There are two important takeaways in **Figure 2**:

- **Close to one-third of our respondents report a little improvement in their current financial condition compared to last year and a very small proportion report a worsening condition.** This is what we would expect with a small but positive increase in the rate of growth since the PML-N governments came into office in 2013.[3] The question for PML-N is whether this increase is enough?

- **What is encouraging for PML-N governments is the cautious optimism among close to half our respondents who expect the coming year to be a little better financially than the current year.** This suggests that our respondents are experiencing a positive upward trend in their real earnings. However, this puts pressure on the incumbent governments to sustain the positive real earnings momentum, created by rising growth rates in the election year. Again, the message for the opposition is that it has to present a credible economic policy agenda that resonates with voters. Currently no opposition party is articulating an economic policy agenda that speaks to the economic concerns of voters.

3. Voter perceptions about government performance

It is also instructive to analyze the perception of respondents about how the incumbent government has handled the three issues they say will matter most in the 2018 general elections. We asked respondents to give their rating of how the government has handled these issues on a scale from 1-5, where 1 is very badly, 3 is neither badly nor well and 5 is very well.

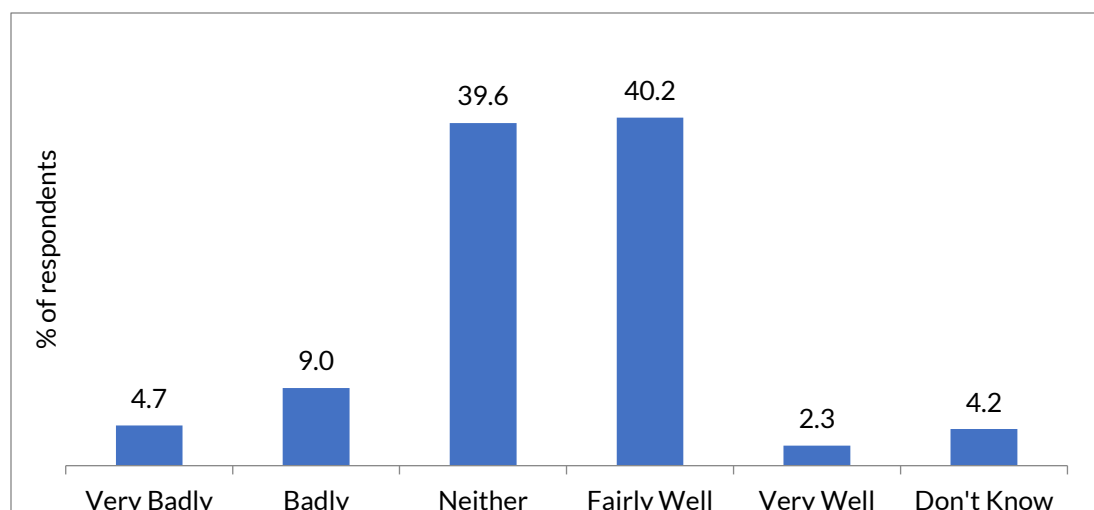## Figure 3: Voter perception of government performance

Figure 3: Respondents' perception of how the government has handled the three issues they say will matter most in the 2018 general election. Margin of error is ±2.3%.

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[3] Pakistan's GDP growth rate has remained between 3.68% and 4.71% since 2012.

Figure 3 finds that:

- **Our respondents are giving measured praise for how well the incumbent PML-N governments have done in addressing the issues that matter, with 40% saying they have done fairly well.** For the incumbent party, it is encouraging that an extremely small percentage of respondents say that the government has done fairly or very badly. This reinforces our earlier point about cautious optimism with government.

- **Given the issues voters are raising and their cautious optimism about their financial condition and government delivery it is important for opposition parties to present a positive case on the economy and delivery as part of their campaign - otherwise with the current trends in respondent perceptions they are likely to lose considerable electoral ground.** It is also important to understand that there is room to campaign on this issue as there is a tiny set of respondents who think that the PML-N governments are doing very well at handling important electoral issues.

4. How do voters assess party leaders on development and political honesty?

PML-N and PTI have structured their campaigns in very different ways. PML-N's campaign is about development whereas PTI's campaign is about political honesty and anti-corruption. What is our respondents' assessment of the three main parties' leaders regarding these two campaign issues? We asked voters two questions in this regard:

(a) Overall would you say <leader> is honest, neither honest nor dishonest or dishonest? It is important to point out that our respondents interpreted this question broadly as "political" honesty and not "financial corruption." The results must be read with this distinction in mind.

(b) Overall would you say that <leader> is capable of taking Pakistan into the league of developed nations yes, neither yes nor no and no

These questions were asked about Mian Nawaz Sharif, Mr. Imran Khan, Mr. Asif Ali Zardari, Mian Shahbaz Sharif and Mr. Bilawal Bhutto Zardari. The respondents were also given the option of saying they don't know.
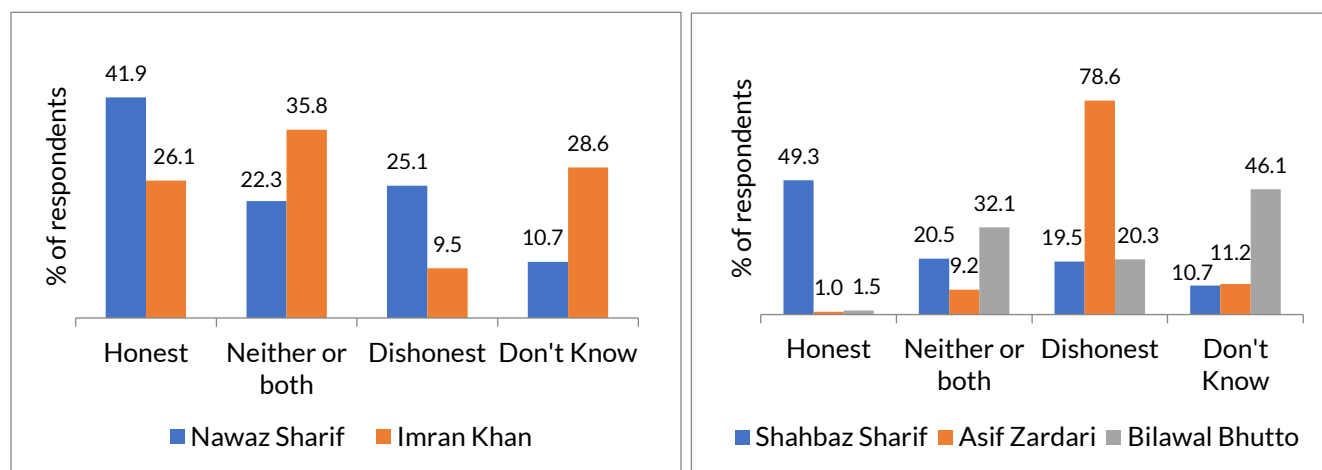
Figure 4: How honest are the leading candidates?

Figure 4: Leadership perception: Is <<Leader>> Honest? Margin of error is ±1.4% and ±1.6% for left and right panel respectively.

Figure 4 presents the findings for the "honesty question:"

- **Respondents are extremely polarized on the question of Mr. Nawaz and Shahbaz Sharif's honesty**. While a very large proportion (42% for Mr. Nawaz Sharif and 49% for Mr. Shahbaz Sharif) considers them honest, a sizeable minority (25% for Mr. Nawaz Sharif and 21% for Mr. Shahbaz Sharif) views them as dishonest. It is hard to tell whether the perception of dishonesty in this sizeable minority is a consequence of the Panama campaign or whether PTI's panama campaign is responding to this sizeable minority. This is an important distinction for PTI to figure out. If the Panama campaign is responsible for creating the perceptions in this sizeable majority, an adverse Panama case verdict is likely to benefit PTI electorally as it may move other voters and increase the size of the anti-Sharif vote. However, if the PTI campaign is a response to this sizeable anti-Sharif minority (a large majority of whom declare themselves as PTI supporters in our survey) that hasn't been able to shift the perceptions and support of other voters then PTI could get hurt electorally because winning over this minority isn't sufficient to give them an electoral win. We cannot analyze this distinction on the basis of our current snap shot.

- **While there is an overwhelming rejection of the view that Mr. Imran Khan is dishonest (less than 10% view him as dishonest), this has failed to create a majority that views him as politically honest (26% view him as honest).** This suggests that PTI's Panama campaign has failed to create a positive perception about the political honesty of their leader among a majority of voters. We are unable to say what lies behind these perceptions – is the PML-N campaign about Mr. Khan's alleged political u-turns succeeding? It is important for PTI to spend time listening to voters on this important issue.

- **An extremely large majority of respondents (78%) consider Mr. Zardari as dishonest and this perception is likely to be a very big disadvantage for the PPP in the forthcoming election.** Our survey also shows that Mr. Bilawal Bhutto's recent emergence on the Punjab scene is not having the effect expected by the PPP.

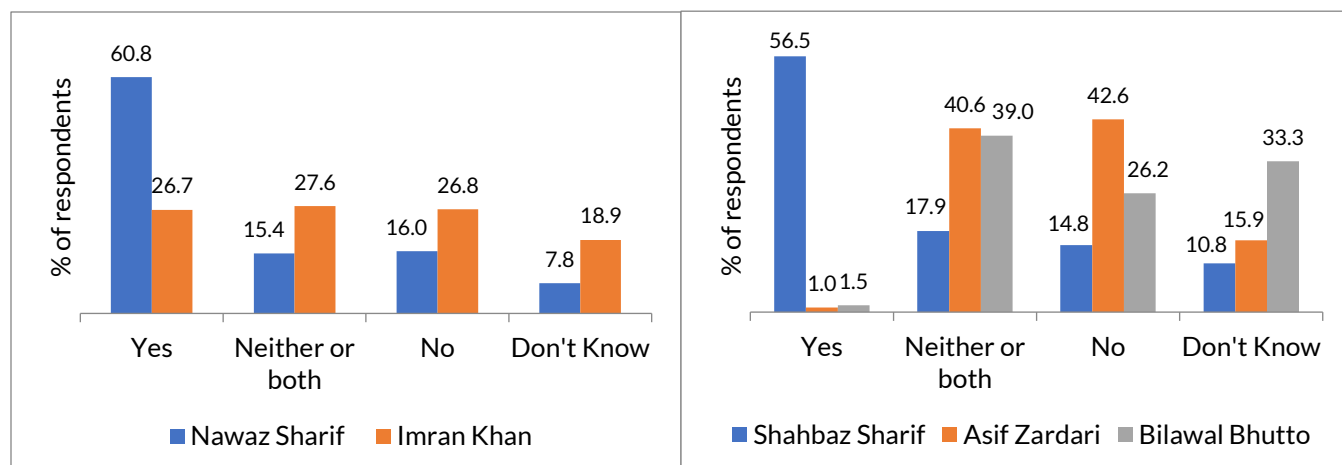# Figure 5: Can leading candidates turn Pakistan into a developed country?

Figure 5: Leadership perception: Is <<Leader>> capable of taking Pakistan into the League of Developed nations? Margin of error is ±1.7% and ±1.9% for left and right panel respectively.

Figure 5 presents the findings for the "development question:"

- **A significant majority of respondents thinks that Mian Nawaz (60%) and Shahbaz Sharif (56%) are capable of taking Pakistan into the league of developed nations.** It is the issue of development and the economy that clearly sets the Sharif brothers apart from the other leaders in our constituencies. This should be worrying for all opposition parties given that the economy is by far one of the most important issues in the eyes of voters in our constituencies. The question for the opposition parties is whether this is a consequence of abdicating the economic development space entirely to PML-N. After all, **Figure 2** and **Figure 3** suggest that our respondents think the growth and delivery performance under the current government has done reasonably but not very well.

- **A minority (26%) thinks Mr. Imran Khan is capable of delivering on the economy and development.** This reinforces our last point that the space on the economy has been abdicated by the PTI by placing its entire energy into the corruption campaign. While it is PTI's prerogative to run the campaign it chooses, to be electorally effective in constituencies like those we surveyed it needs to be perceived as the party with the better economic agenda.

- **The present PPP leadership simply isn't perceived by voters as a leadership capable of delivering on the economy.** To become competitive in constituencies such as ours, the PPP has to completely reinvent its image and put together a campaign and a policy agenda that has the potential to resonate with our voters on issues that matter to them. Mr. Bilawal Bhutto's emergence is not going to be sufficient to turn around constituencies like ours – where the PPP used to be highly competitive.

5. What is the current snapshot of party support and voting intent?

This section reports the findings on party support. The survey asked respondents to rank their support on a scale from 0-100 (where 0 is doesn't support at all, 50 is medium support and 100 is complete support) for the top two national assembly candidates who contested the last election[4]. We label respondents as having "even-support" if they give the same score to both candidates in the race. We label them as PML-N supporters if they give a higher score to the PML-N candidate and a PTI supporter if they give a higher score to the PTI candidate.
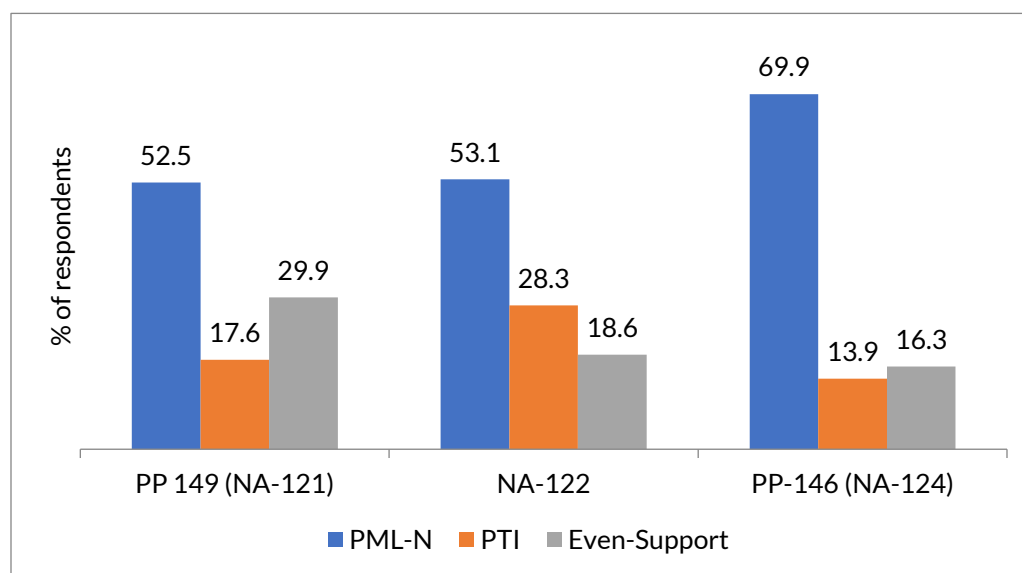
Figure 6: Party support in surveyed constituencies

Figure 6: Support for party candidates who contested the last election. Margin of error is ±2.5%.

Figure 6 shows:

- In terms of party supporters (i.e. respondents who give a higher score to one party's candidate over the other) PTI candidates are trailing PML-N candidates by a big margin in all three constituencies. PTI's party support is higher in NA 122 (28%) but it is struggling badly in the other two constituencies (14% and 17%). PTI candidates and the party should be extremely concerned with this lagging party support. **The proportion of even-supporters is highest in PP-149 in NA-121 (30% as opposed to between 16% and 19% in the other constituencies), implying that this is the constituency where there is the most room for movement on these support numbers.**

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[4] PML-N candidates included Mehar Ishtiaq Ahmed for NA 121, Sardar Ayaz Sadiq for NA 122, and Sheikh Rohale Asghar for NA 124. PTI candidates included Barrister Hammad Azhar for NA 121, Abdul Aleem Khan for NA 122 and Walid Iqbal for NA 124. We asked about these candidates because they are directly involved in the management of these constituencies.

- However, when we include even-supporters, prospects begin to look somewhat tighter in terms of support for PML-N in NA 121 and 122. All else equal if PTI can swing even-supporters in the upcoming election, two out of our three races would become tight for PML-N. However, to be in the running PTI will need to make major inroads among even-supporters. It is instructive to compare the results for party support against the 2013 general election results for NA 121 and NA 124 and against the 2015 By-Election result for NA 122. In NA 122, PML-N won 49% of the votes cast against PTI's 48%. In NA 121, PML-N got 57% of the vote against PTI's 34% and in NA 124 PML-N received 68% of the vote against PTI's 24%. PML-N candidates appear to have maintained or marginally increased their support in NA 122 and 124 but there is some loss of support in NA 121. If the forthcoming election is going to be similar to 2013, even-supporters will turn out in a large majority for PTI in our three sample constituencies, resulting in two competitive races. What should worry PTI, however, is whether the even supporters in our survey were PTI voters in 2013, in which case this is a picture of lost ground for PTI. We cannot differentiate this on the basis of our data and both political parties need to analyze this issue methodically and carefully.

Our survey also asked questions about voting intent in the 2018 general election. The survey asked respondents whether they have decided to vote in the 2018 general elections in their relevant national assembly constituency and which party they have decided to vote for.
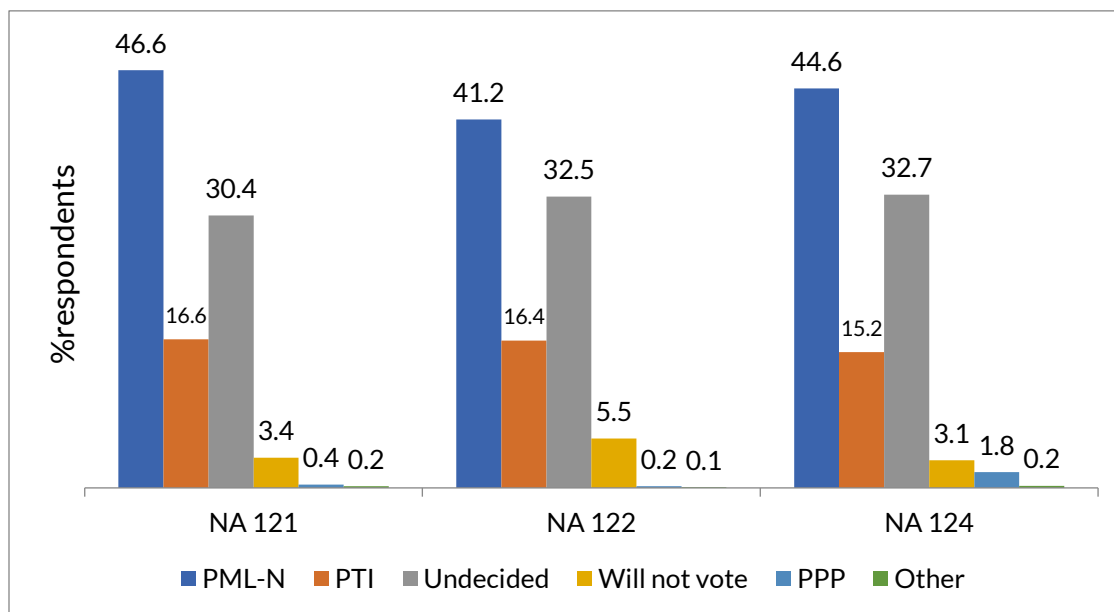
Figure 7: How respondents intend to vote

Figure 7: Voting Intent in 2018 General elections. Margin of error is ±3.4%.

A comparison of **Figure 6** and **Figure 7** shows:

- **Intent to vote for PML-N candidates (Figure 7) is lower than the current support for their candidates (Figure 6) in each constituency. This is because there is a much higher percentage of respondents in each constituency who have not decided whether they will vote or whom they will be voting for.** The challenge for both PTI and PML-N is to draw

these undecided voters to voting booths and craft campaigns that appeal to them. Based on historic turnout data we know a large proportion of these voters will not turn out to vote. This large pool of undecided voters will make or break these electoral races in 2018.

- **No other political party appears to be in the running in these constituencies.**

6. Sampling Methodology

We drew our sample from three National Assembly constituencies in Lahore (NA 122, NA 121, NA 124), further selecting four Provincial Assembly constituencies (PP146, 147, 148, 149) and conducted the survey in 43 Union Councils. This included all the Union Councils that fall predominantly in these constituencies except for two Union Councils in NA 122 that are composed mostly of elite housing. Our sampled Union Councils house more than 90% of the registered voters in NA 122 where we dropped these two Union Councils.

Respondents were chosen through five random GPS points in the Union Council; where we conducted 10 surveys per point with a random male and a female respondent over the age of 18 from each household. This gave us roughly 50 surveys per Union Council totalling 2,127 surveys in 43 Union Councils. Households were selected using the "random walk method" to select a starting point and then using the Left Hand Rule to start a skip pattern to select households for an interview. A random number generator was used to select respondents who were registered voters within these randomly selected households. No monetary or in-kind incentives were provided to respondents for completing the survey. The surveys were conducted through in-person, at home interviews on tablets by trained male and female enumerators for male and female respondents respectively. The response rate was 71.3%.

Our sample size of 2,127 respondents allows us to be representative of the four provincial assembly constituencies we surveyed with a fairly narrow margin of error. In each provincial constituency, we have a sample between 455 and 618, allowing us to be representative of each provincial constituency with a margin of error of roughly 2-3%. The margin of error reported in each figure is the highest margin of error for any of the quantities in that figure, meaning that we have given a *conservative* estimate of the degree of our confidence.

In comparison, the sample size of the Gallup US Daily poll is 500 and the Gallup Poll Social Series is 1000. Both of these are representative of the United States. Gallup Pakistan runs polls on a variety of issues with a nationally representative sample of less than 2,000, as low as 1,200 in some cases. According to FiveThirtyEight, one of the most credible sources on polling in the US: *"Surveying 2,000 voters substantially reduces error compared with surveying 400 of them, but surveying 10,000 voters will produce only marginal improvements in accuracy compared with the 2,000-person survey"*.[5]

The following example illustrates how a margin of error should be interpreted:

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[5] http://fivethirtyeight.com/features/how-were-tracking-donald-trumps-approval-ratings/

Figure 1 states that 64.9% of our respondents mention 'purchasing power' as one of the three most important issues for the 2018 general elections. The figure gives a margin of error of ±1.7%. All of our margins of error are calculated given a 95% confidence interval, which is standard in academic research and political polling.

This means that if we had drawn our sample of 2,127 respondents 100 times and conducted a survey with them (at the same time period and in the same constituencies), then we are confident that 95 out of those 100 times, the proportion of respondents who mention 'purchasing power' as one of the three most important issues for the 2018 elections would be 64.9% ±1.7%, or in other words, between 63.2% and 66.6%.