

GE14 SURVEY

Preliminary results and observations from a survey of 104,340 voters to gauge voter preferences in a 3-corner contest



I-CPI
Centre for Policy Initiatives

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Introduction to I-CPI

- The INVOKE Centre for Policy Initiatives (I-CPI) is an independent and progressive social change policy center with a focus on practical and applicable policies
- Our approach is to focus on results-oriented policies that have measurable, tangible and commercial results. Our research places emphasis on leveraging statistical tools for big data analytics



Introduction to I-CPI

- I-CPI delivers the following:
 - i. a monthly report on the state of Malaysian politics and economy, from the perspective of prominent opposition lawmakers, policymakers and thinkers
 - ii. policy papers on specific issues, allowing subscribers a unique window into the philosophy and thinking of opposition policymakers
 - iii. bespoke opinion research surveys on political, economic and social issues
- For more information, visit <http://cpi.invokemalaysia.org>



I-CPI Team

Shaun Kua

A law graduate of Oxford University, Shaun was one of the first three volunteers of INVOKE.

He is now the Chief Strategy Officer of INVOKE and responsible for developing the analytics-driven approach used by INVOKE, including the conceptualisation and implementation of the proprietary polling center.

Shaun was formerly an active student leader and the president of Oxford University's Malaysia Club.



I-CPI Team

Eric Lee

Formerly a lawyer with Zaid Ibrahim & Co and a consultant with Ernst & Young Advisory (Singapore), Eric holds a Master of Public Policy from the Blavatnik School of Government, Oxford University; LLM (Distinction) (Chevening Scholar) from University College London; and LLB (First Class)(Hons) from University of Wales.

He has completed the Bar Vocational Course at Nottingham Law School and is a Barrister-at-law (Gray's Inn).

Eric now heads I-CPI.



I-CPI Team

Najmuddin Noor Azam

Najmuddin has extensive call centre management experience including managing CIMB's and UOB's call centre that services international customers.

Najmuddin joined INVOKE from the banking industry and is currently the head of I-CPI's Polling Centre. He is responsible for managing the operational aspects of the proprietary computerized polling system.



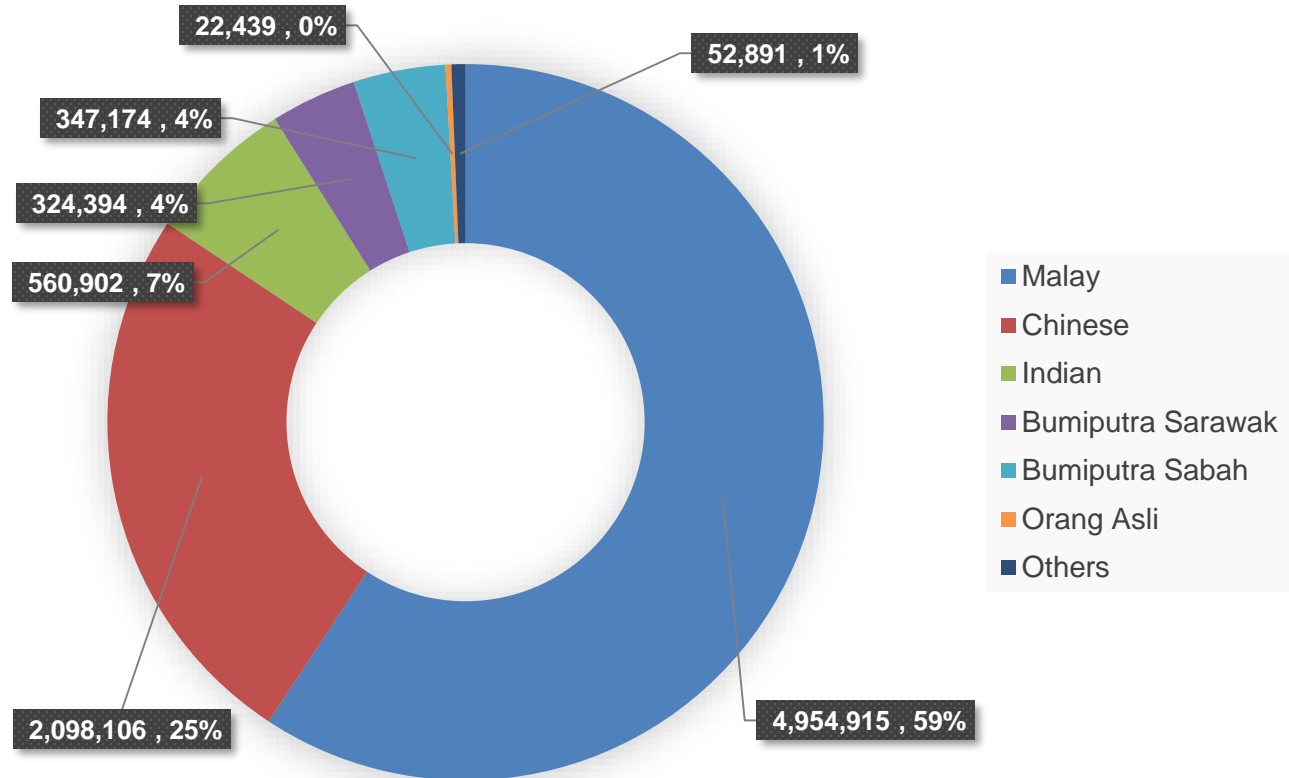
Background of GE14 Survey

- We telephoned 8.36 million Malaysians using our proprietary interactive voice response (IVR) recorded voice tool
- Out of 8.36 million numbers dialed, 104,340 answered the second question in the survey (ballot question)
- Surveys were conducted in Malay from Dec 25, 2016 to Jan 15, 2017. Call backs were received by our live call center operators
- We also included demographic questions, including age, gender and ethnicity



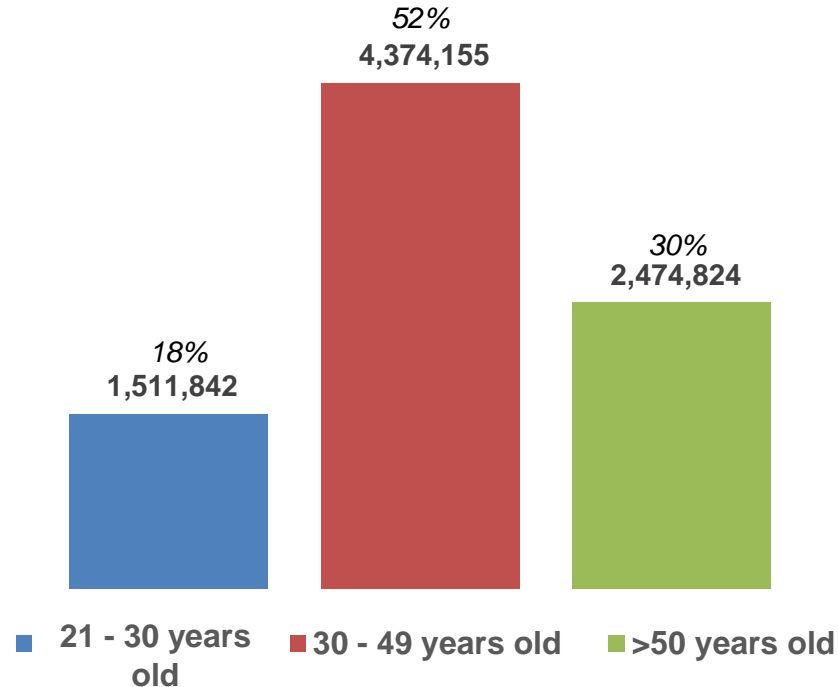
Profile of Voter Population Dialed

Breakdown by ethnicity of 8.36 million voters dialed



Profile of Voter Population Dialed

Breakdown by age of 8.36 million voters dialed



Demographics of Registered Voters

	Age 21-29	Age 30-49	Age 50+
Malay	78%	59%	49%
Chinese	13%	24%	33%
Indian	4%	7%	8%
Bumiputra Sabah	3%	5%	4%
Bumiputra Sarawak	1%	4%	5%
Orang Asli, Lain-Lain	1%	1%	1%



Demographics of Registered Voters

- There is a strong correlation between age and ethnicity among registered voters:
 - i. Among registered voters aged 50+, 49% are Malay and 33% are Chinese
 - ii. Among registered voters aged 21-29, 78% are Malay and 13% are Chinese



Demographics of Registered Voters

- This correlation may be due to a variety of factors:
 - i. Birthrate
 - ii. Migration
 - iii. Life expectancy
 - iv. Voter interest in registration
 - v. Registration by Election Commission



Key Findings from the GE14 Survey

In a 3-corner fight between Barisan Nasional, Pakatan Harapan and PAS, which coalition or party would you vote for?

Press 1 for Barisan Nasional, UMNO, MCA or MIC.

Press 2 for Pakatan Harapan, PKR, DAP, Amanah or Bersatu.

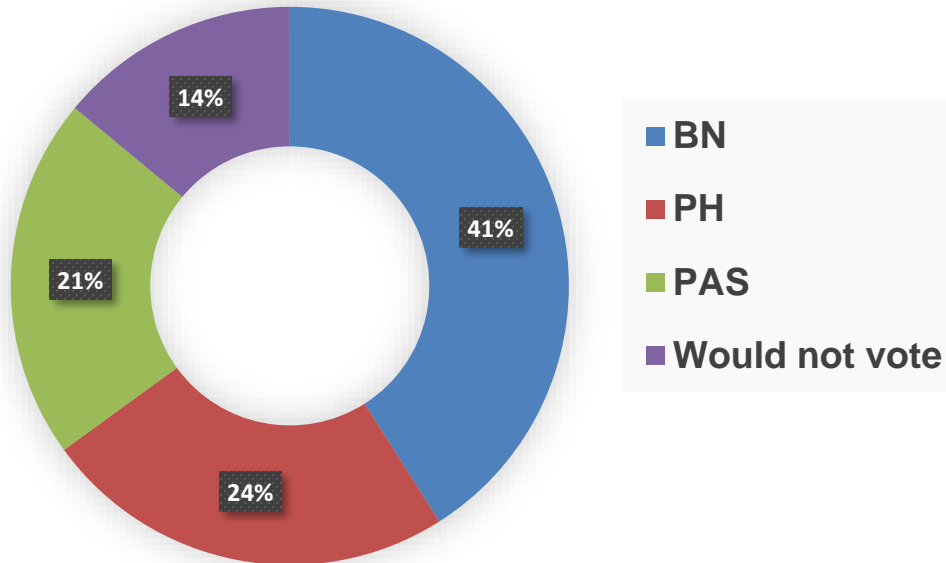
Press 3 for PAS.

Press 4 if you would not vote in this election.



Key Findings from the GE14 Survey

% of votes by coalition/party



Pakatan Harapan plus PAS support is greater than BN support

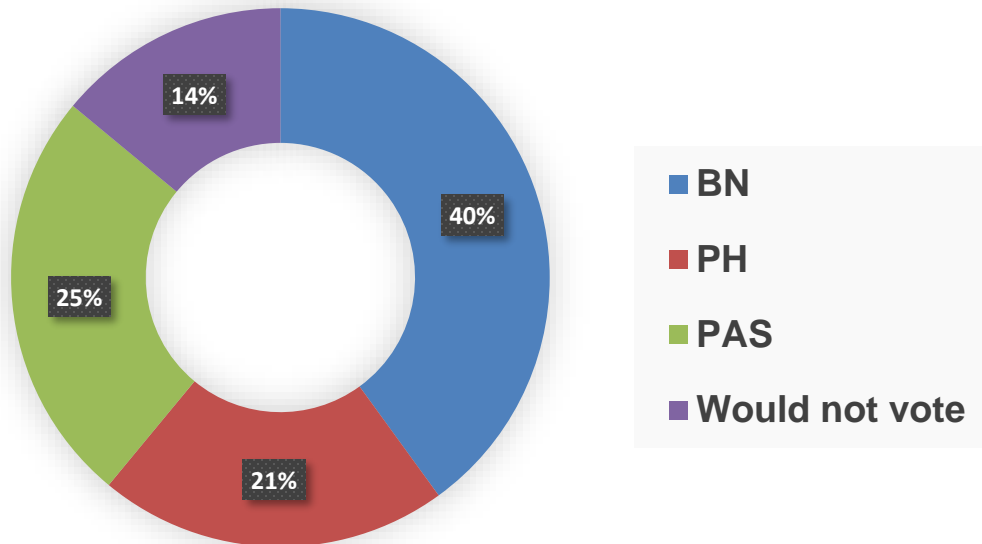
Note:

- *PH support level includes PPBM*
- *All surveys were conducted in Malay*



Key Findings from the GE14 Survey

% of votes by coalition/party
Malay voters only



Only 4 out of 10 Malay voters surveyed are likely to vote for BN in a 3-corner contest

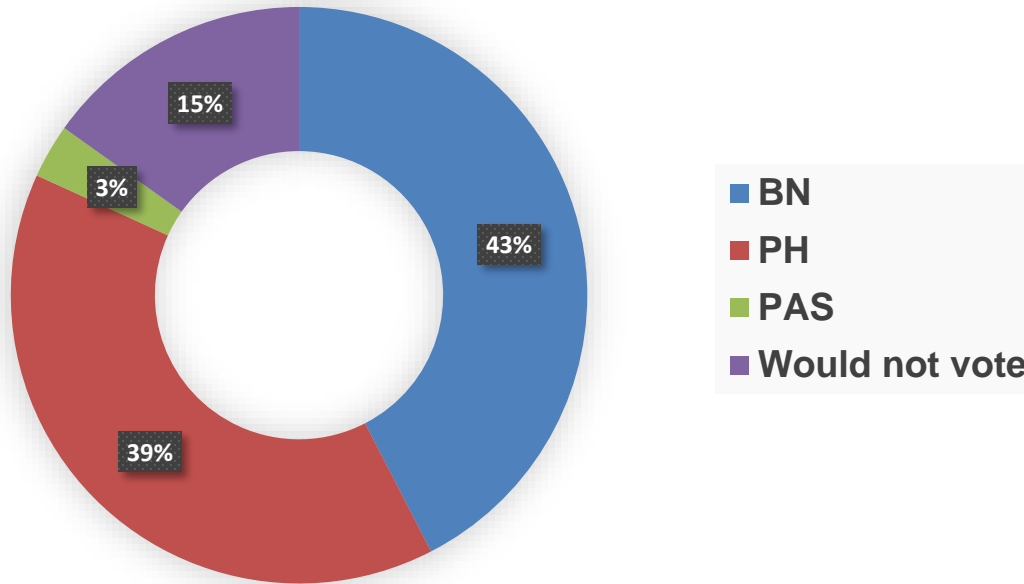
Note:

- *PH support level includes PPBM*
- *All surveys were conducted in Malay*



Key Findings from the GE14 Survey

% of votes by coalition/party
Chinese voters only



Chinese voters who respond to a Malay language survey are more likely to indicate support for BN

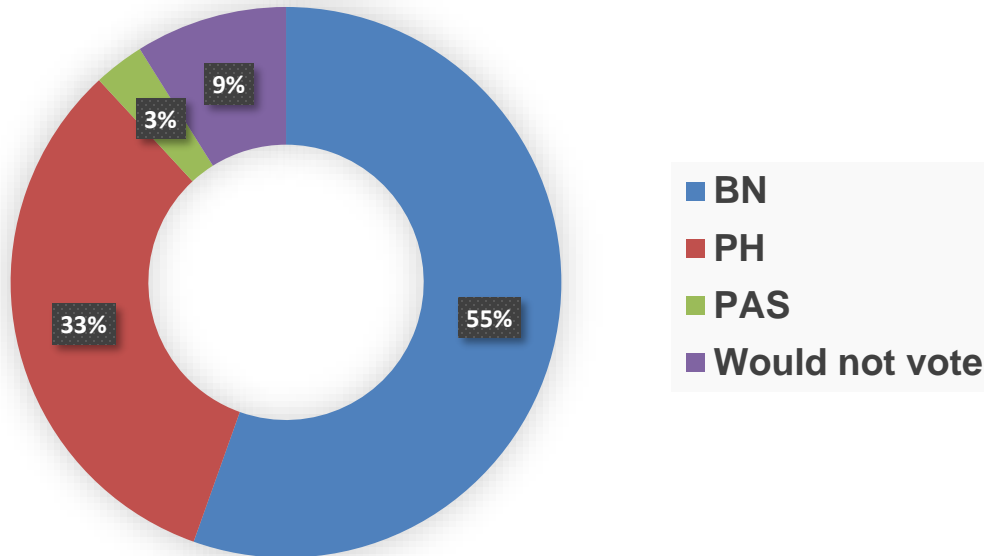
Note:

- *PH support level includes PPBM*
- *All surveys were conducted in Malay*



Key Findings from the GE14 Survey

% of votes by coalition/party
Indian voters only



Non-Malay support for PAS in a 3-corner contest is likely to be minimal at 3% (among Chinese and Indian voters)

Note:

- *PH support level includes PPBM*
- *All surveys were conducted in Malay*



Key Findings from the GE14 Survey

Among PAS voters only

In a 2-corner fight between Barisan Nasional and Pakatan Harapan, which political coalition or party would you prefer?

Press 1 *for Barisan Nasional, UMNO, MCA or MIC.*

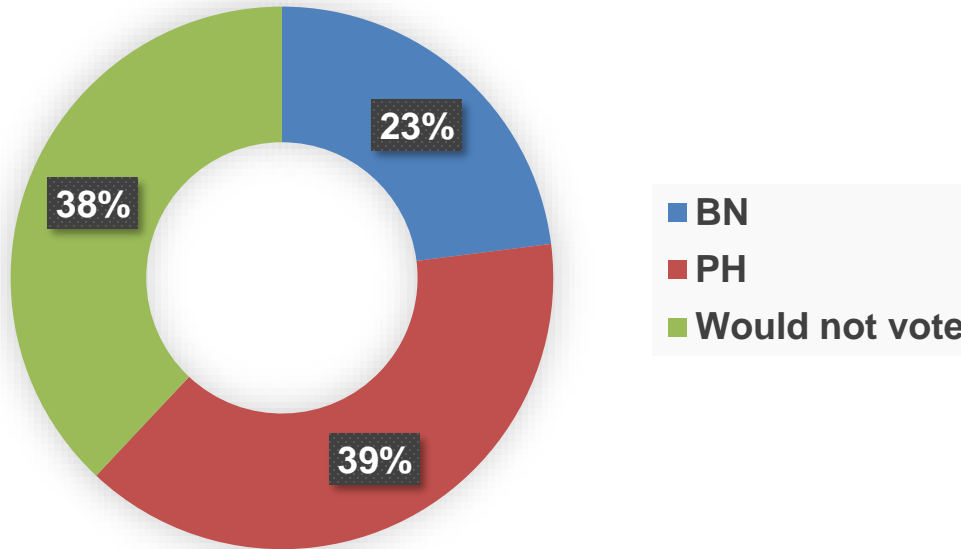
Press 2 *for Pakatan Harapan, PKR, DAP, Amanah or Bersatu.*

Press 3 *if you would not vote in this election.*



Key Findings from the GE14 Survey

% of votes by coalition/party
Among PAS voters only



By nearly 2 to 1, PAS voters are more likely to vote for PH than for BN

Note:

- *PH support level includes PPBM*
- *All surveys were conducted in Malay*



Key Findings from the GE14 Survey

- In a 3-corner contest, BN support among Malay voters is likely to be at its lowest level in years
- In a 3-corner contest, PAS is likely to lose all of its existing parliamentary and state seats
- In a 3-corner contest, PH (plus PPBM) is likely to retain Selangor and Penang state governments



Simulations Based on Different Levels of Support

<i>No. of parliamentary seats won</i>	BN	PH+	PAS
3-corner contest: if non-voting remains the same & Chinese voter support is at Kuala Kangsar/Sg Besar by-elections level	168	54	0
3-corner contest: if non-voting remains the same & Chinese voter support is at GE13 level	130	92	0



Simulations Based on Different Levels of Support

<i>No. of parliamentary seats won</i>	BN	PH+	PAS
3-corner contest: if half of non-voters vote for PH+ & Chinese voter support is at Kuala Kangsar/Sg Besar by-elections level	135	87	0
3-corner contest: if half of non-voters vote for PH+, 38% of PAS voters vote for PH+ & Chinese voter support is at Kuala Kangsar/Sg Besar by-elections level	125	97	0



Simulations Based on Different Levels of Support

<i>No. of parliamentary seats won</i>	BN	PH+	PAS
3-corner contest: if half of non-voters vote for PH+, 38% of PAS voters vote for PH+ & Chinese voter support is at GE13 level	96	126	0



Key Observations

- GE14 Survey results challenge the widely-held belief that BN is assured of parliamentary majority in GE13 if there is a 3-corner contest
- PAS is likely to lose all parliamentary and state seats in a 3-corner contest
- The key challenges for PH+ to win in a 3-corner contest:
 - i. Persuade disillusioned voters who disagree with BN to support PH+
 - ii. Maintain support among Chinese and Indian voters to match the GE13 support level



Thank you

The full GE14 Survey Report will be available for purchase shortly.

To register your interest, please contact cpi@invokemalaysia.org

