



Malaysia General Elections XIV Outlook Prospects and Outcome 26 April 2018

Data Sources

The survey findings discussed in the presentation covers only findings from Peninsular Malaysia along with several selected states.

National-level voter surveys (1200 respondents each) conducted:

- 10 – 18 January
- 19 - 26 February
- 15 - 24 March, and
- **9-16 April 2018**

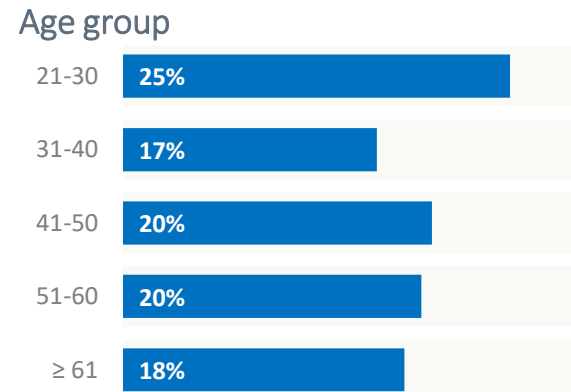
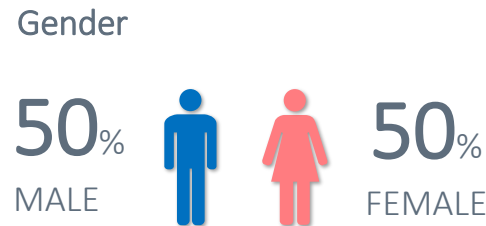
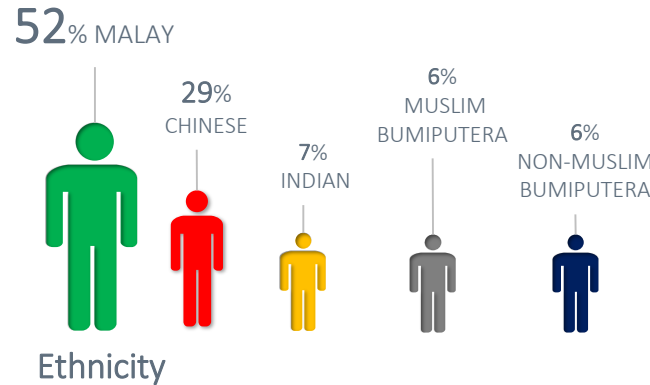
Covering Peninsular Malaysia, Sabah and Sarawak

Reference state-level surveys:

- Kedah (n=1500, March 2018)
- Perak (n= 1200, April 2018)
- Selangor (n=540, April 2018, n=1204, March 2018)
- Kelantan (n=400, Malay voters only, April 2018; n=1300, Jan 2018)
- Terengganu (n=400, April 2018, Malay voters only; n=1500, Dec 2017)
- Johor (n=1250, April 2018; n=1000, Jan 2018)
- Negri Sembilan-Melaka (n=720, Malay voters only, April 2018)
- Pahang (n=400, Malay voters only, April 2018)

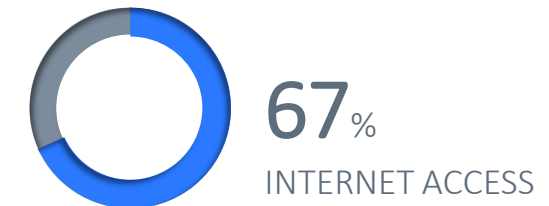
Standard Survey Methodology & Respondent Profiles

- **1,206** voters aged 21 and above were interviewed via telephone (fixed and mobile lines)
- The survey respondents are from all states across Peninsular Malaysia includes Sabah and Sarawak
- Voters were selected through random stratified sampling method along the lines of ethnicity, gender, age and parliament constituencies.
- All of the constituencies (**14** states and across **222** parliament constituencies) were surveyed and the selection of the respondents is proportional with respect to the population in each parliament constituency.
- Respondents were interviewed in their own language of preferences
- Survey margin of error estimated at **±2.82%**
- The survey was conducted on **9TH TO 16TH April 2018.**

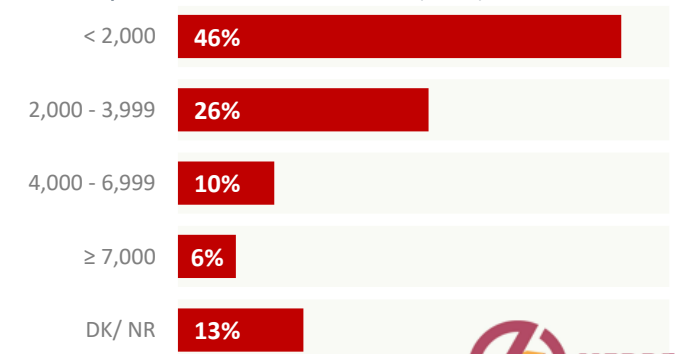


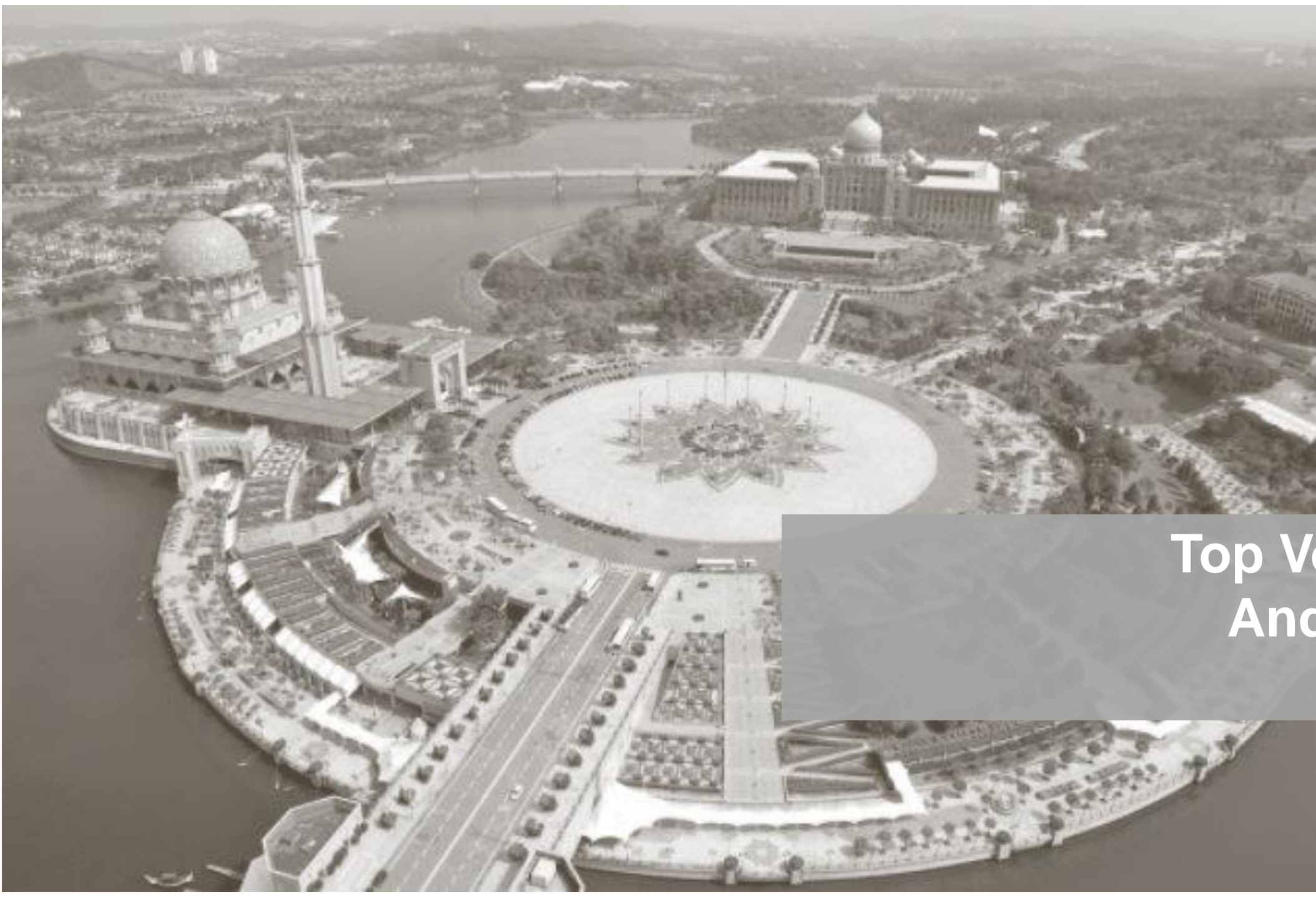
Occupation/ Sector

- 37% Private
- 19% Homemaker
- 19% Self – employed/ business
- 11% Retired
- 7% Government/ GLC
- 6% Student/ Unemployed/ Others



Monthly Household Income (RM)

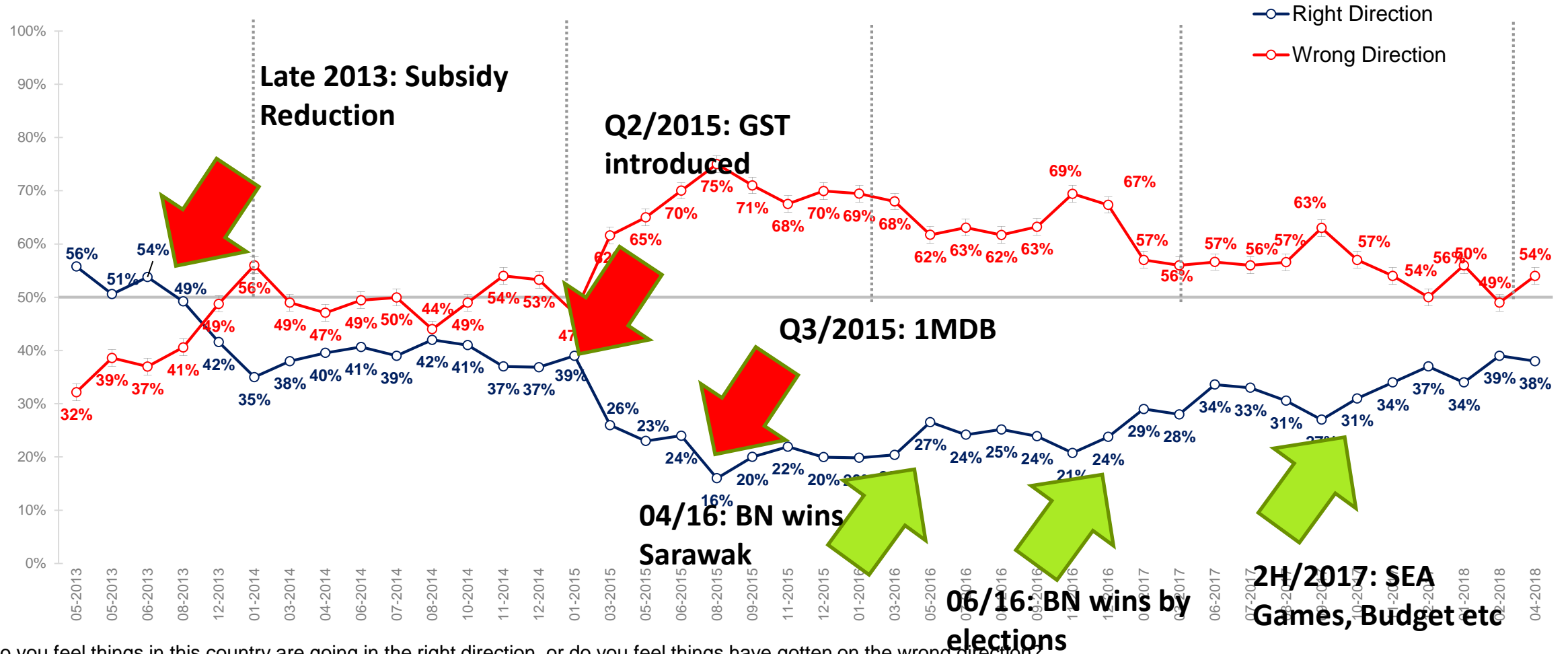




Top Voter Issues And Concerns

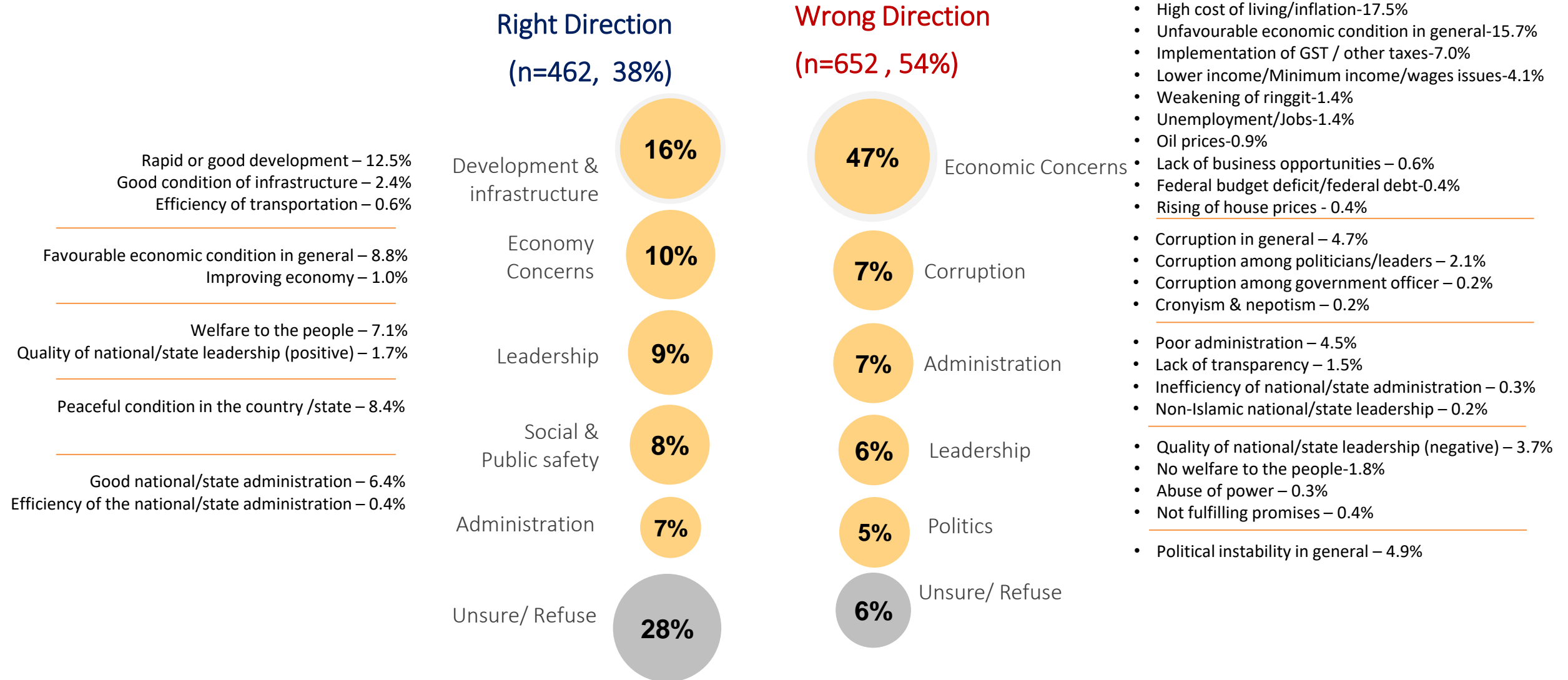
Direction of the Country

Right versus Wrong direction



Q: Do you feel things in this country are going in the right direction, or do you feel things have gotten on the wrong direction?

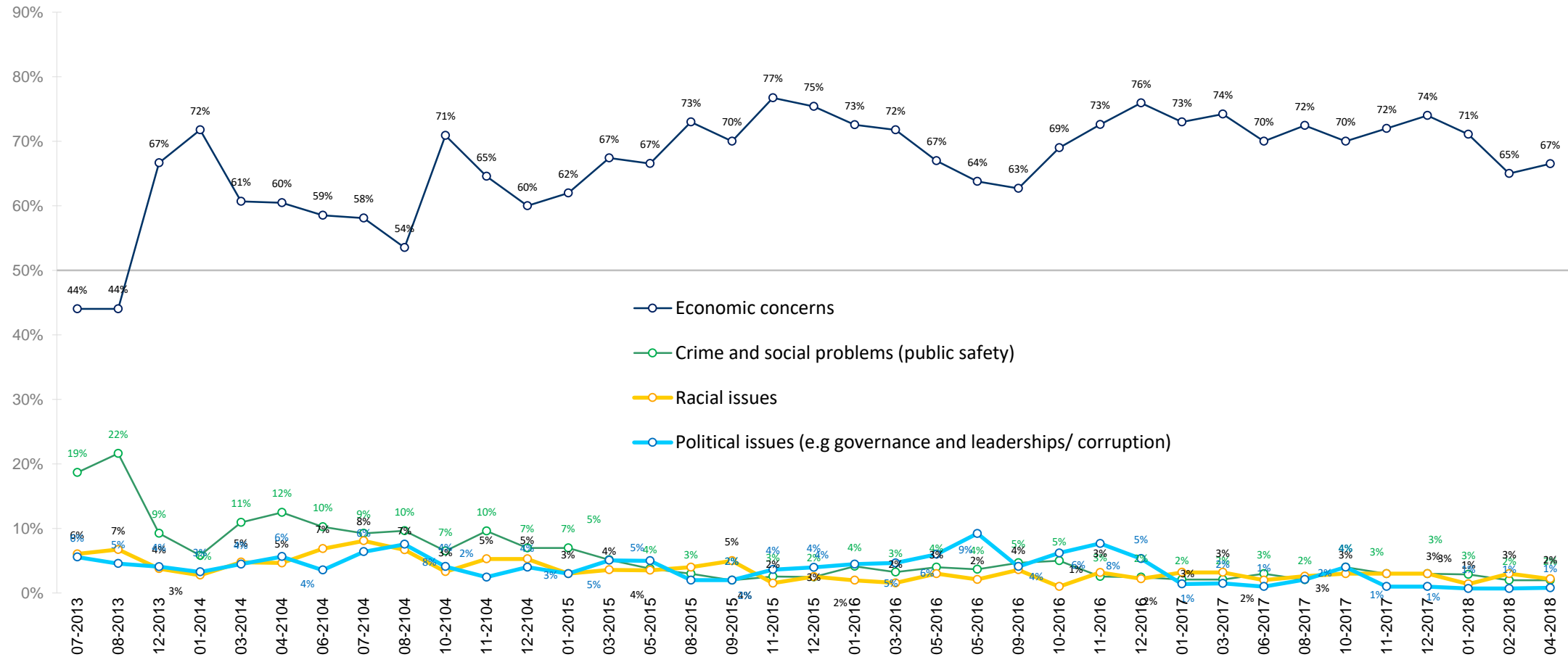
Direction of the Country: Issues



Q: Considering the condition in the country today, would you say that things are heading in the right direction or wrong direction? Why do you say so?

Issues

Top of Mind Concern: The Economy



Q: Being as specific as you can, what is the number one problem facing people in this country today? (open-ended)

Important Issues

Issues	Total	Malay	Chinese	Indian	Muslim Bumiputera	Non Muslim Bumiputera
Inflation	57%	60%	49%	59%	56%	70%
Corruption	37%	33%	53%	12%	29%	35%
Job opportunities	21%	24%	9%	40%	34%	22%
Housing	15%	18%	7%	15%	26%	12%
Preservation of Malay rights/Fair treatment of all races	12%	7%	22%	29%	4%	3%
Political instability	10%	11%	9%	5%	8%	12%
Weakness of the leadership	7%	9%	5%	5%	5%	8%
The allegations against the integrity of PM Najib Razak	6%	8%	5%	3%	4%	7%
1MDB case	6%	5%	6%	4%	5%	6%
Declining race relations	5%	5%	5%	3%	7%	3%
Public transportation	3%	2%	4%	4%	5%	1%
Implementation of Hudud law	2%	3%	1%	0%	1%	0%

Q: From the following, please choose two (2) current issues that are most important to you at present?

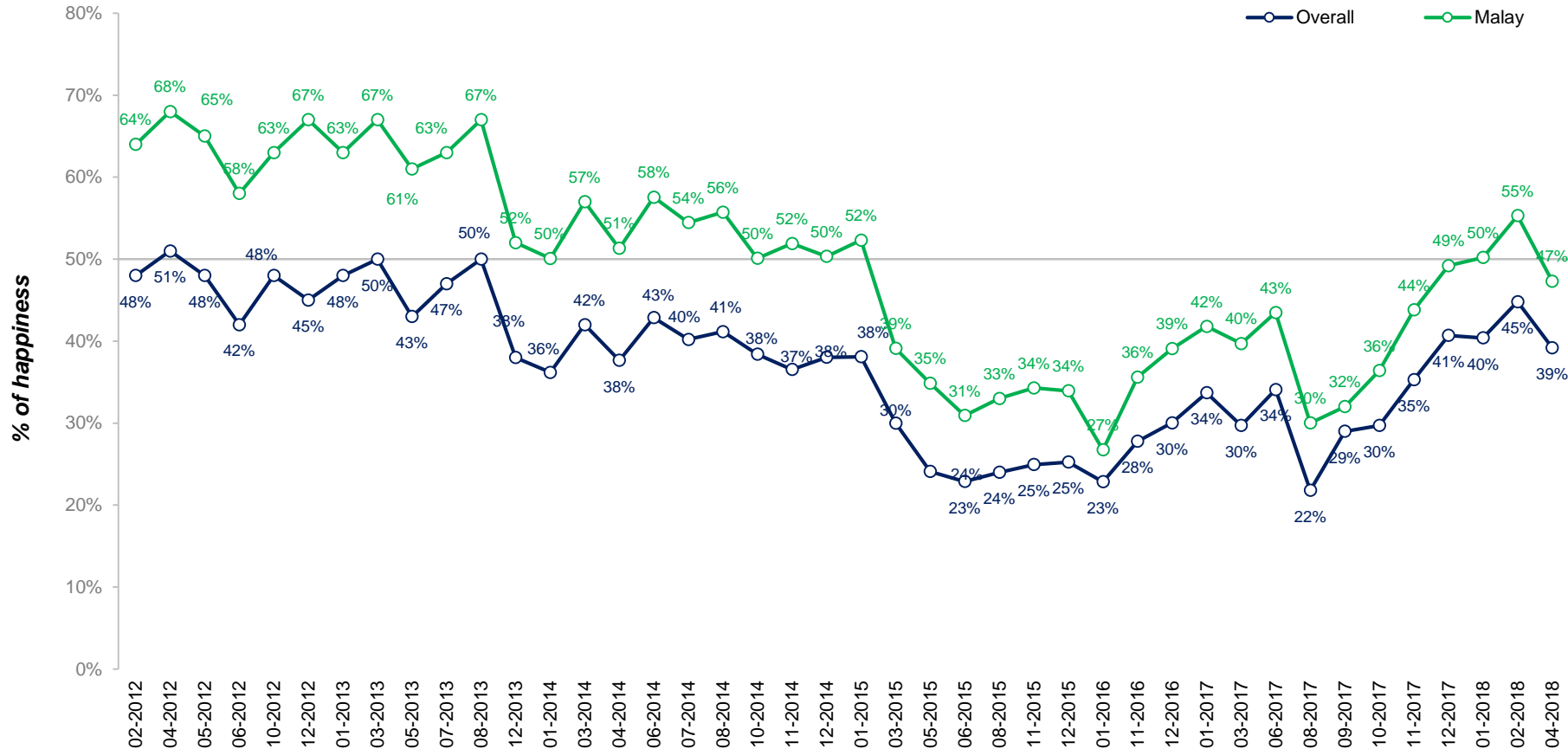


Govt and Party Ratings

Perception towards Federal Govt

Perception towards Federal Govt

% respondents expressing "happy" (positive)



Notes

Satisfaction towards federal govt is a close proxy to BN popular vote.

Survey shows general recovery since 2015.

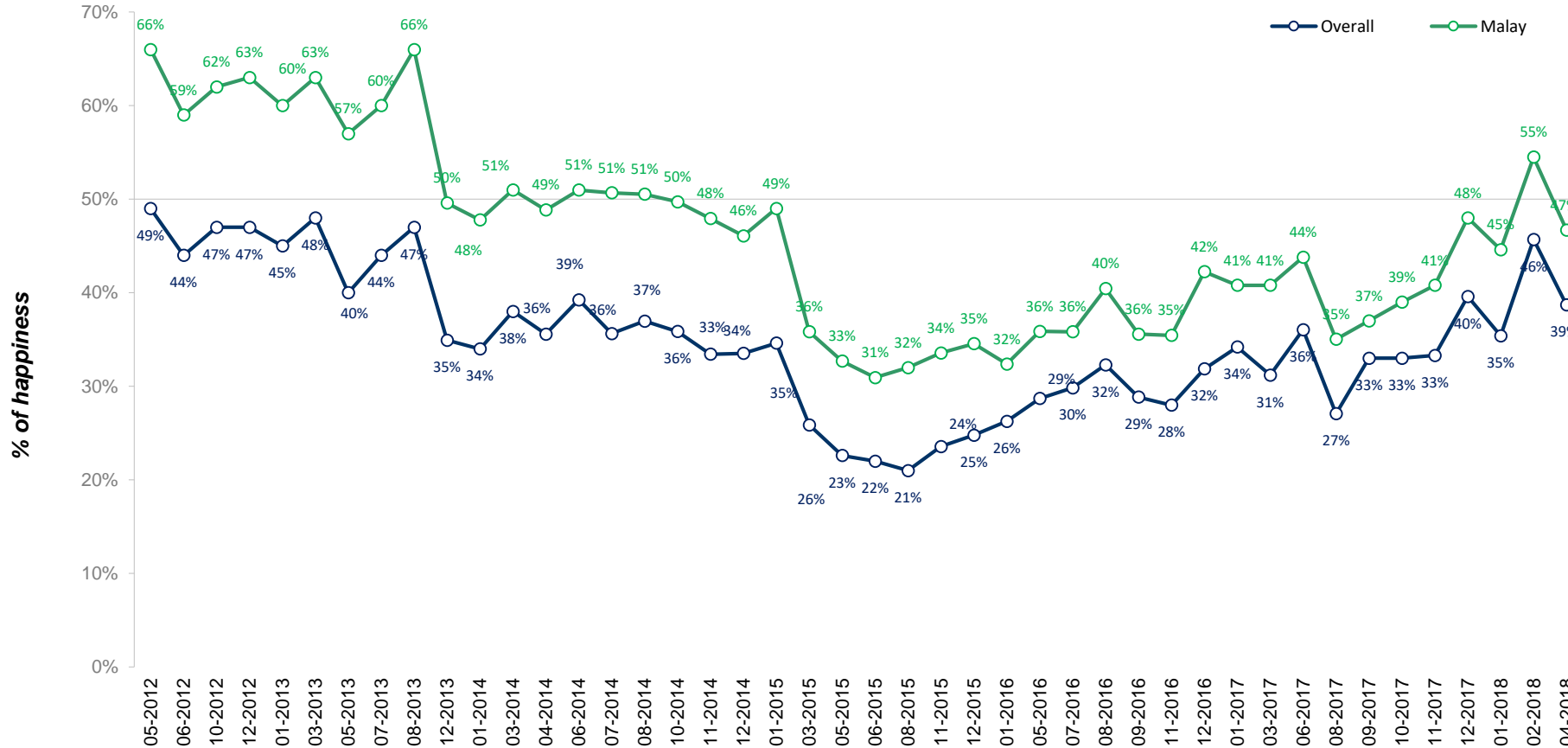
Voters perceived heavy handed attempts to secure incumbency in late Mar 2018, that drove sentiments negatively

Q: Some people say they are happy with ..., while others are dissatisfied and others say they are angry? Which one best describes how you feel?

Perception towards Barisan Nasional

Perception towards Barisan Nasional

% respondents expressing "Happy" (Positive)



Notes

Figures closely mirror Federal Govt satisfaction ratings.

Malay support have climbed to levels just prior to 2015 pre-GST introduction.

While lower than 2013, 39% attained in April 2018 is adequate to secure BN a victory in a multi-corner contest.

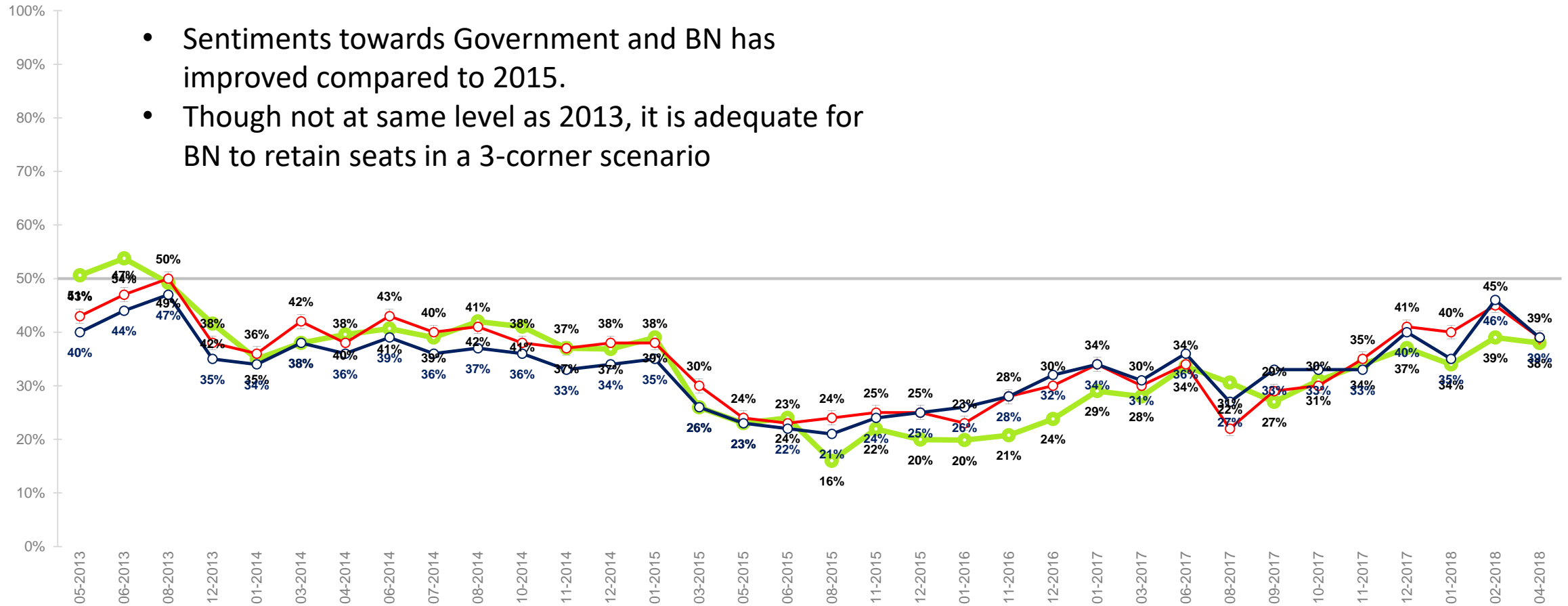
Q: Some people say they are happy with ..., while others are dissatisfied and others say they are angry? Which one best describes how you feel?

Right Track vs Federal Govt vs BN

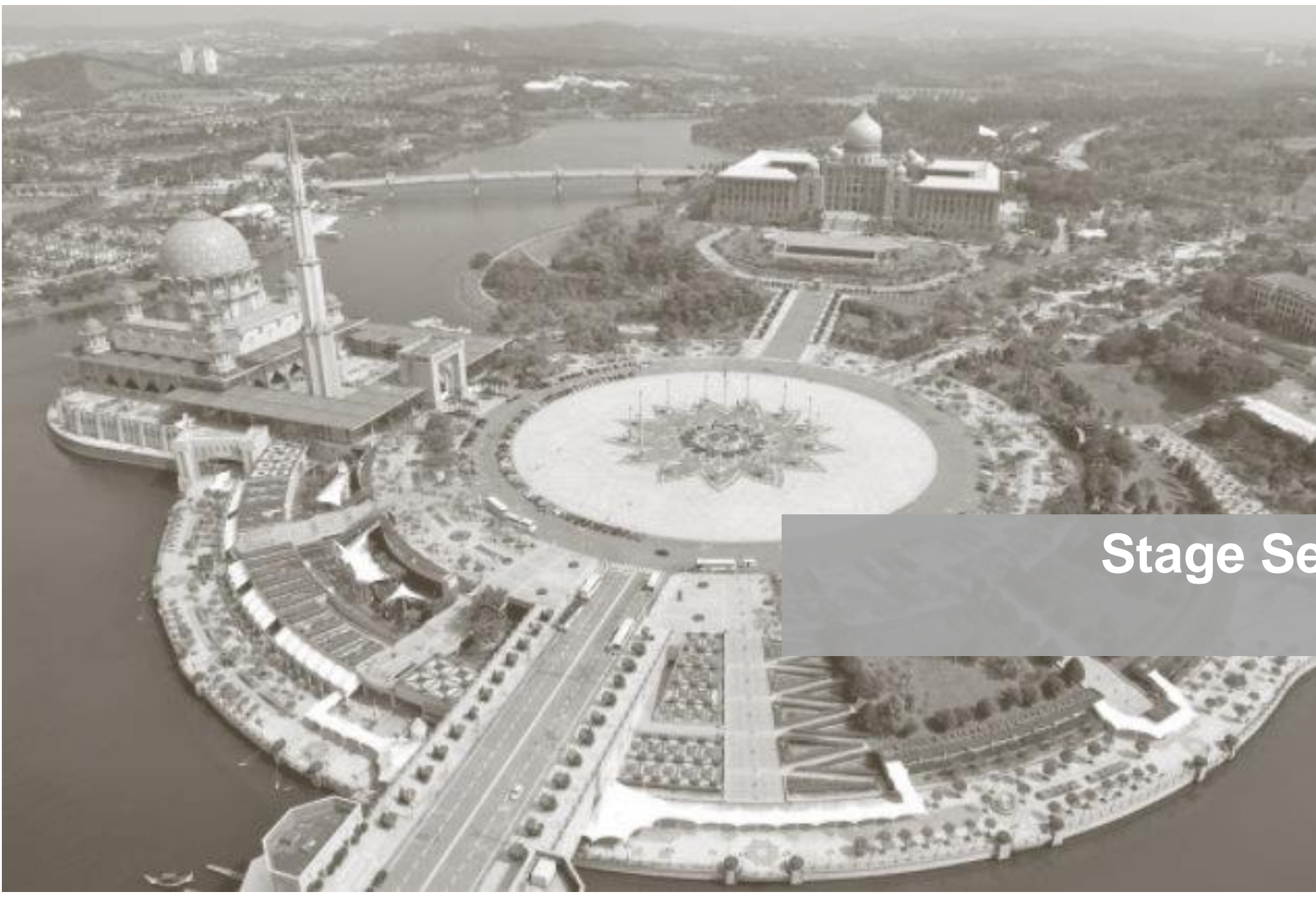
Positive ratings only

● Right Direction ● Federal Govt ● Barisan Nasional

- Sentiments towards Government and BN has improved compared to 2015.
- Though not at same level as 2013, it is adequate for BN to retain seats in a 3-corner scenario



Q: Do you feel things in this country are going in the right direction, or do you feel things have gotten on the wrong direction?



Stage Setting GE14

Stage setting GE14

- GE13 showed future contests to be tougher for BN. Declining younger voter support.
- Voter backlash from subsidy reduction and GST introduction
- BN performance hinges on Malay voter support, and it was in danger of decline.

Mitigation – Long Term Measures

More than coincidence:

- Inducing split of PR – offer Syariah bill to PAS, common cause on Malay Muslim agenda (same week as GST bill approval)
- Redelineation

Redelineation Impact (W Msia)

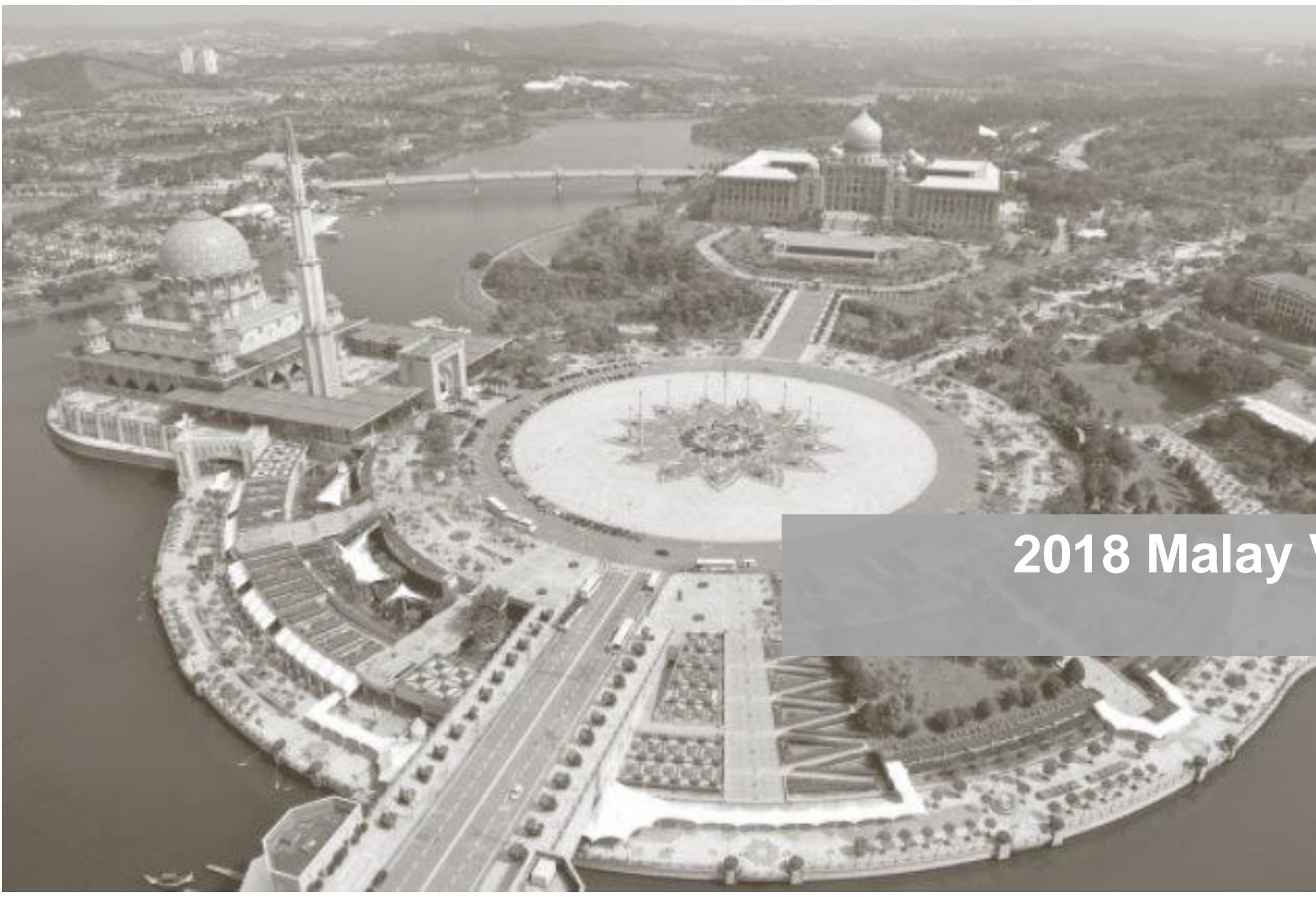
		Seats in Peninsular Malaysia		
		Before Redelineation	After Redelineation	Change
Malay Majority	70% and above	68	71	+3
	60% - 70%	27	31	+4
	50% - 60%	20	15	-5
Mixed Seats	Malay Majority	16	15	-1
	Chinese Majority	13	9	-4
Chinese Majority	50% - 60%	7	10	+3
	60% - 70%	2	3	+1
	70% and above	12	11	+1
Total		165	165	

Estimated Turnout (W Msia)

	2013	2018 est.	Change
Malay	87%	84%	-3%
Chinese	83%	78%	-5%
Indian	76%	72%	-4%
TOTAL	85%	81%	-4%

Turnout will likely be lower than 2013.

We project a reduction of about 4% overall

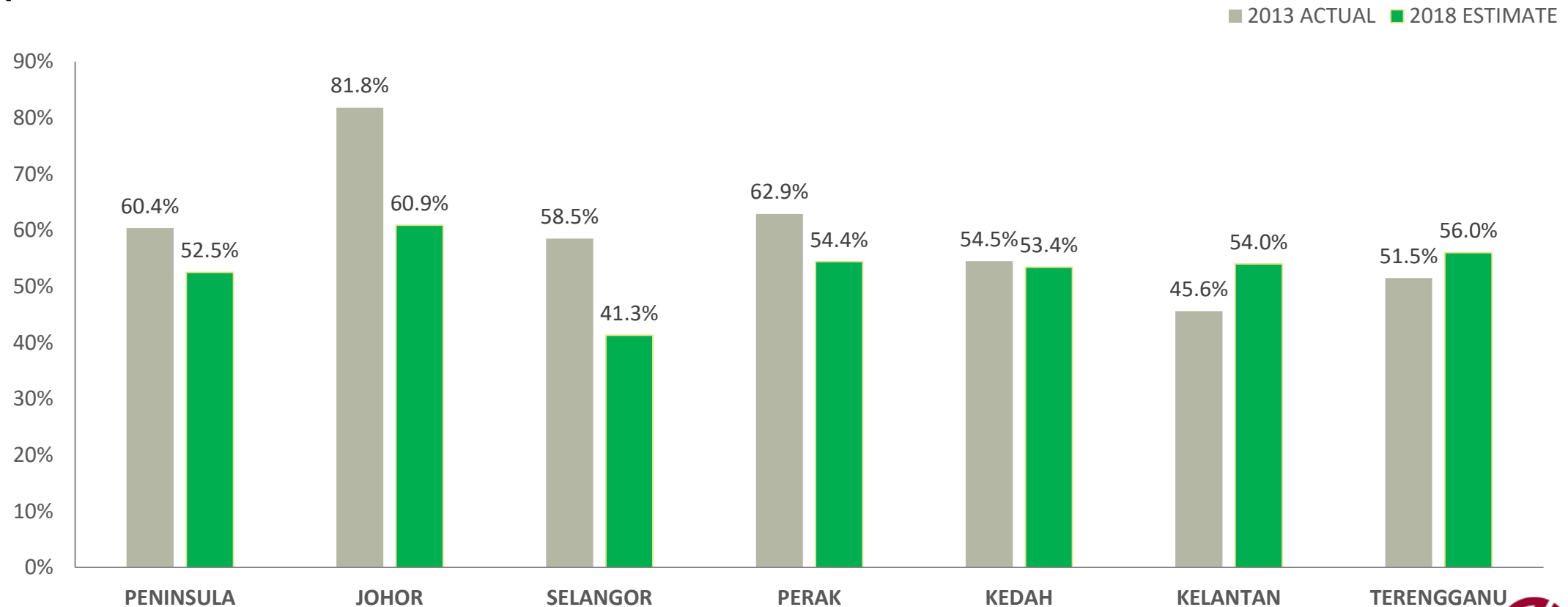


2018 Malay Vote Swing

Is there a Malay Tsunami?

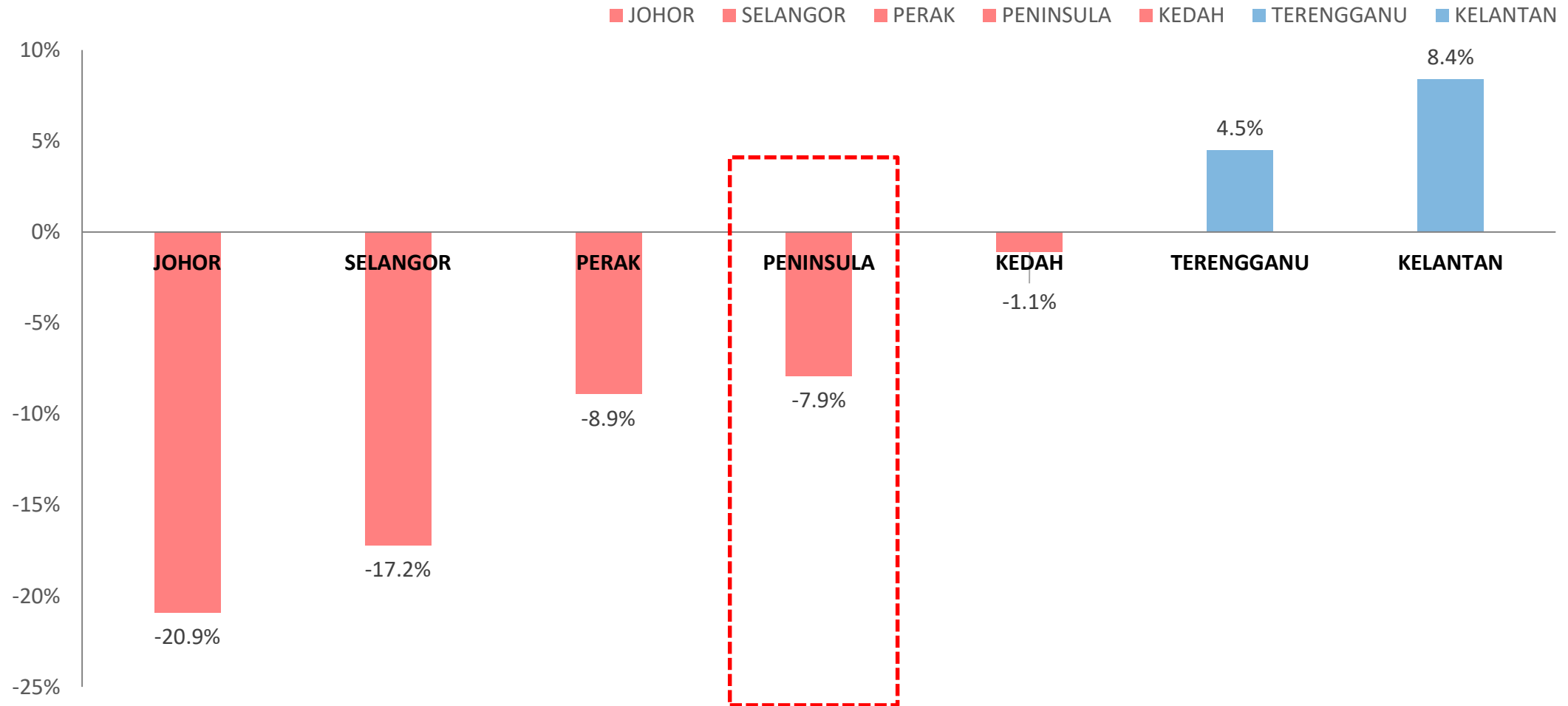
COMPARING BN MALAY SUPPORT BY SELECTED STATES 2013-2018

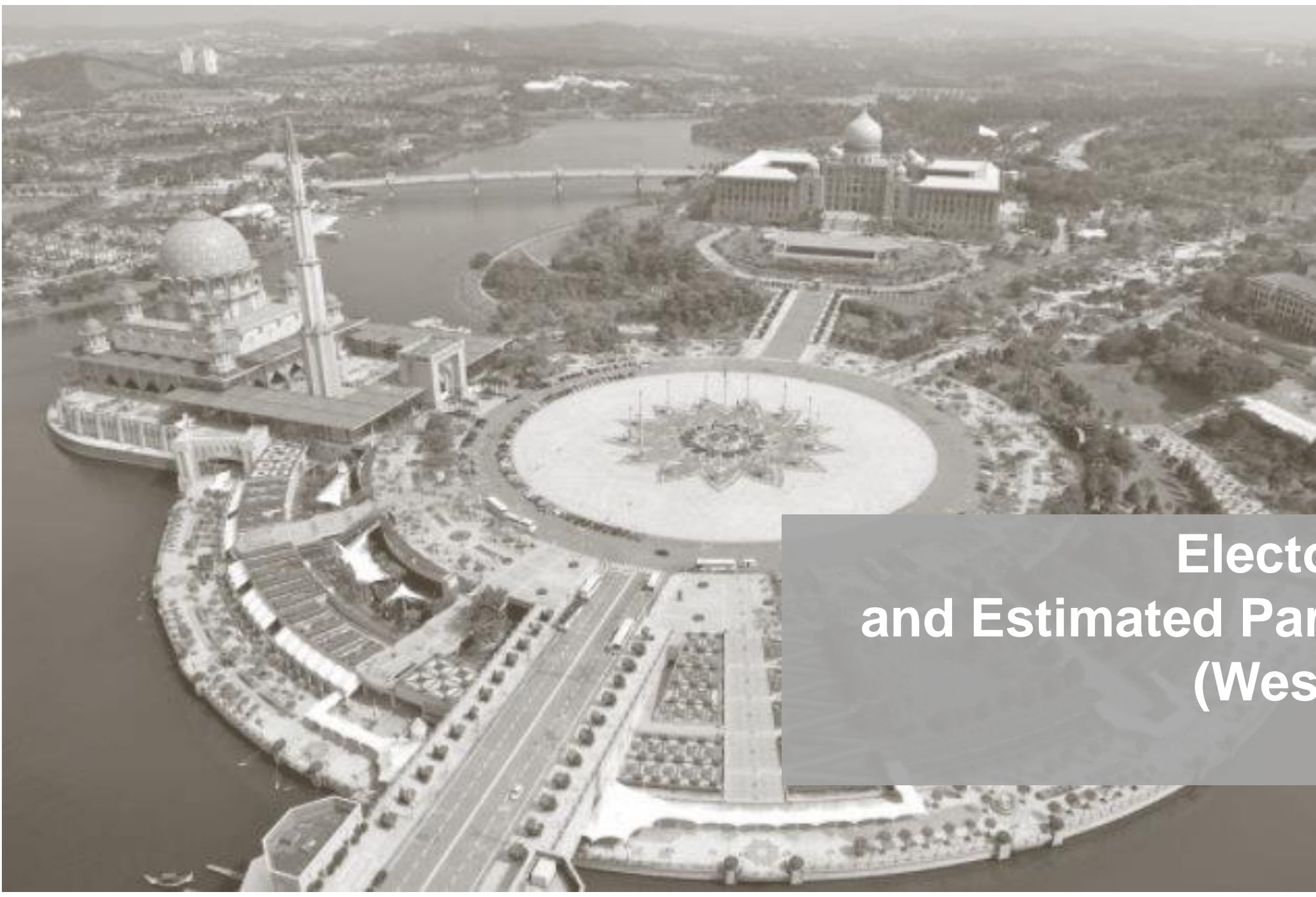
- **Yes but diffused across state and contesting parties**
- **Each state has its own unique dynamic reflective of local political history, contemporary conditions/developments, and relative strength of the local political actors**



Projected 2018 Malay Vote Swing

VARIANCE IN BN MALAY SUPPORT BY SELECTED STATES 2013-2018





Electoral Terrain and Estimated Party Support (West Malaysia)

Navigating the Electoral Terrain

- Straight line, popular vote estimates at national level does not provide useful information about outcomes
- Party seat profiles and estimates of support by demographic would be useful in projecting outcomes

50 of the 80 marginal seats from 2013 are Malay majority seats. All will see 3-corner contests involving BN vs PH vs PAS

In the wake of 3-corner contests, and based on our estimates of party support, number of marginal seats reduced to about 23

Malay Support Threshold

	Unique Threshold Conditions	Malay Vote Support As at 16 April 18	Malay Vote Required (surplus/ shortfall)	Chinese	Indian	Other	Estimated Popular Vote (W Msia)
BN	<ul style="list-style-type: none"> To maintain status quo 95 seats in WM 	53%	47.5% (+5.5%)	15%	41%	90%	37.8%
PH	<ul style="list-style-type: none"> Win 100 seats in WM 	20%	34.0% (-14.0%)	85%	54%	5%	50.5%
PAS	<ul style="list-style-type: none"> Maintain 20 seats in WM 	27%	39.5% (-12.5%)	0%	5%	5%	24.5%

- BN has lost some 8% Malay support compared to 2013 (61%) but the loss is mitigated by split votes towards PH and PAS.
- Despite going it alone, PAS continues to hold on to core Malay supporters. Denying them to Pakatan
- Assuming non-Malay support remaining unchanged, Pakatan Harapan still needs to increase Malay support to 32% if they are to pose strong challenge. But can they do so in the remaining days left?

Ethnic profile of PH contested seats (W Msia)

Parties	Contested Seats	Malay	Chinese	Indian	Other
PKR	51	60.30%	28.70%	9.97%	1.03%
DAP	35	28.80%	58.81%	11.61%	0.78%
BERSATU	52	82.73%	12.27%	3.62%	1.37%
AMANAH	27	76.33%	15.75%	7.26%	0.67%

Outcome of the election will be determined by Malay voters.

- With redelineation, number of Malay majority seats has increased
- BN retains lead among Malay voters and able to easily win due to PAS vs PH split votes

- Non-Malay voters will largely back Pakatan but with redelineation, their numbers will be concentrated in fewer seats.
- Aside from DAP and PKR, other PH parties will have high support threshold to overcome.
- PAS will lose potential in any seat less than 80% Malay

Projected Support for Political Parties (W Msia) as at 16 April 2018

	Malay	Chinese	Indian	Other	Est Popular Vote 9 April 2018 WM
BN	53%	15%	41%	90%	40.8
PH	20%	85%	54%	5%	42.0
PAS	27%	0%	5%	5%	17.2

Due to split of Malay opposition votes, the PH and PAS faces uphill challenge to win seats as the BN block of voters are fairly solid.

Split in opposition votes appear to prompt some undecided voters back to BN in some states as they are loyal to none of the parties but may be more pragmatic in their choices or want to be inspired by leaders

BN will prevail despite lower vote share

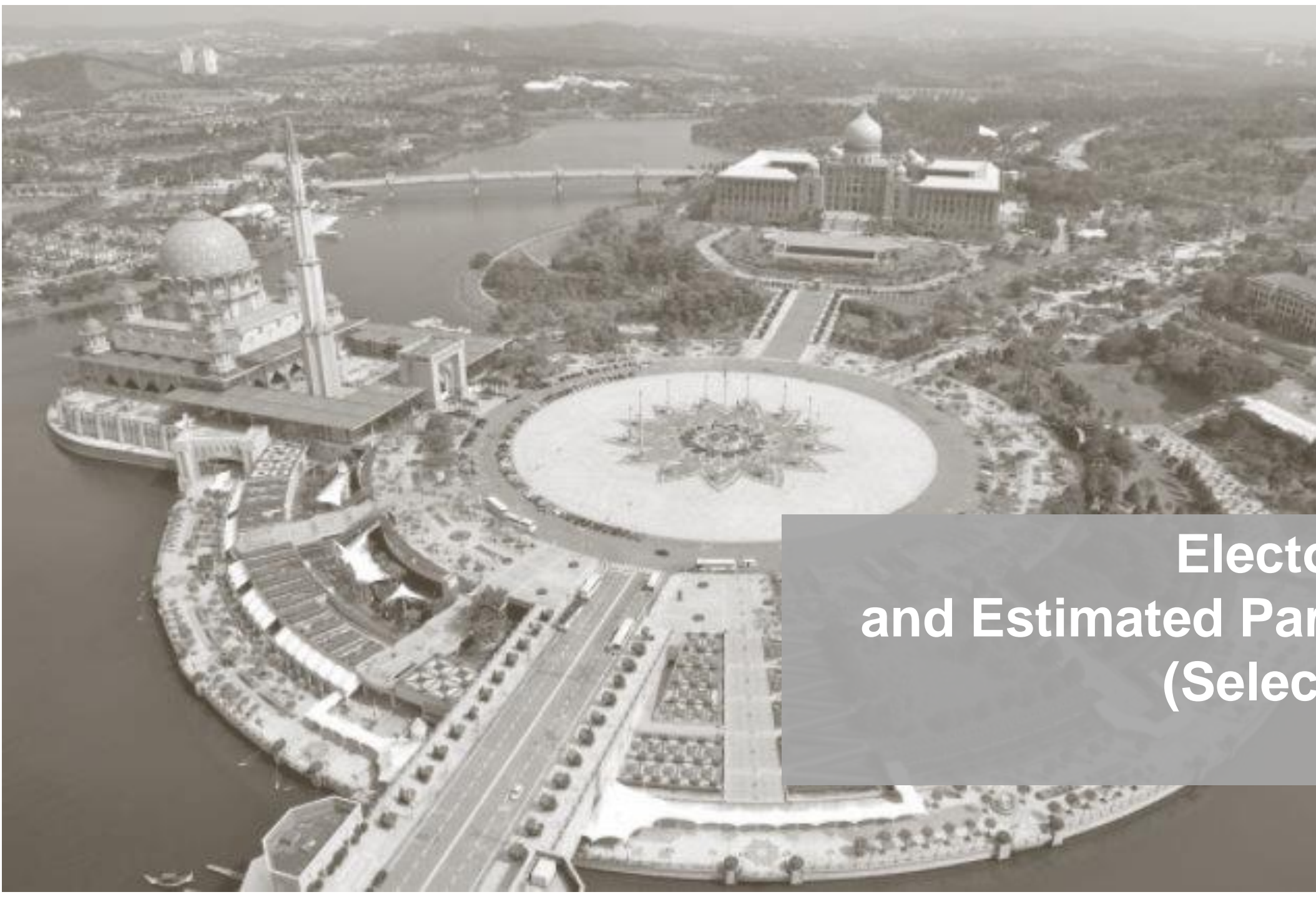
We have allocated undecided and non response voters according to potential preferences based on our election model.

Implication: 52 PPBM Seats W Msia Average Results

as at 16 April 18

	Malay	Chinese	Indian	Other	
Ethnic composition	82.73%	12.27%	3.62%	1.37%	
Estimated National Average Ethnic Support for PH	20%	85%	54%	5%	
	Ethnic Vote Share				Total Popular Vote
PKR - PPBM	16.5%	10.4%	1.9%	1.2%	30.1%
PAS	23.2%	0.0%	0.2%	0.1%	23.4%
BN	43.8%	1.8%	1.5%	0.1%	47.3%

- Due to continued presence of loyal PAS voters, PH – PPBM access to Malay votes is curtailed.
- Results somewhat resemble by-election outcomes at Sg Besar and Kuala Kangsar in June 2016



Electoral Terrain and Estimated Party Support (Selected States)

Terengganu : Profile and Estimated Support

Ethnic Composition: Malay : 96%, Chinese : 3% , Indian : 1%

Parties	Parliament Seats	Malay	Chinese	Indian	Other
PKR	2	94.7%	4.4%	0.4%	0.5%
DAP	-	-	-	-	-
BERSATU	3	98.9%	0.7%	0.1%	0.3%
AMANAH	3	95.5%	4.1%	0.2%	0.3%

	Estimated Support			
	BN	PH	PAS	PAS Threshold to win
Total Est Popular Vote as at April 2018	57.1%	10.9%	32.0%	15% - 20% more support needed



Kelantan: Profile and Estimated Support

Ethnic Composition: Malay : 95.1%, Chinese : 3.33% , Indian : 0.30%

Parties	Parliament Seats	Malay	Chinese	Indian	Other
PKR	2	96.1%	3.0%	0.3%	0.6%
DAP	-	-	-	-	-
BERSATU	7	94.8%	2.3%	0.2%	2.8%
AMANAH	5	94.4%	4.7%	0.4%	0.5%

	Estimated Support			
	BN	Pakatan Harapan	PAS	Pakatan Threshold to win
Total Est Popular Vote as at April 2018	55%	10%	35%	10% - 15% more support needed



Johor : Ethnic profile of PH contested seats

Ethnic Composition: Malay : 58%, Chinese : 35% , Indian : 6%

Parties	Parliament Seats	Malay	Chinese	Indian	Other
PKR	8	52.45%	38.60%	6.96%	1.99%
DAP	6	41.62%	47.95%	8.79%	1.63%
BERSATU	10	70.78%	24.50%	2.78%	1.94%
AMANAHAH	2	61.63%	30.03%	5.32%	3.02%

Parties	State Seats	Malay	Chinese	Indian	Other
PKR	12	68.61%	25.86%	3.69%	1.84%
DAP	14	35.23%	54.50%	8.62%	1.66%
BERSATU	18	65.06%	26.82%	5.74%	2.38%
AMANAHAH	12	62.35%	32.31%	3.57%	1.77%



Johor: Threshold and Estimated Support

	Estimated Support			
	BN	PH	PAS	Pakatan Threshold to win
Malay	60.9%	19.4%	19.7%	Pakatan needs 10% more Malay support
Chinese	22.4%	77.6%	0.0%	Pakatan needs 5% more Chinese support
Indian	64.3%	32.7%	3.0%	
Others	90.0%	5.0%	5.0%	
Total Est Popular Vote Share as at mid-April 2018	47.0%	42.0%	11.0%	

Survey found significant variation in support for PH and PAS within Johor, voters in northeast and southern part of the state exhibited slightly higher preference for PH but PAS retains sizable minority support in the west and interior areas of the state.

Kedah : Ethnic profile of PH contested seats

Ethnic Composition: Malay : 79%, Chinese : 13% , Indian : 6%, Others : 2%

Parties	Parliament Seats	Malay	Chinese	Indian	Other
PKR	6	66.56%	21.88%	11.00%	0.57%
DAP	-	-	-	-	-
BERSATU	6	82.73%	12.27%	3.62%	1.37%
AMANAH	3	87.64%	7.49%	2.91%	1.96%

Parties	State Seats	Malay	Chinese	Indian	Other
PKR	10	65.35%	19.79%	13.10%	1.76%
DAP	-	-	-	-	-
BERSATU	14	88.73%	7.00%	2.13%	2.14%
AMANAH	10	85.42%	10.90%	2.67%	1.01%



Kedah : Threshold and Estimated Support

	Estimated Support			
	BN	PH	PAS	Pakatan Threshold to win
Malay	53.4%	26.2%	20.4%	Pakatan needs 14% more Malay support
Chinese	17.6%	80.8%	1.6%	Assume no material movement
Indian	64.5%	32.5%	3.0%	
Others	90.0%	5.0%	5.0%	
Total Est Popular Vote as at Early April 2018	49.5%	34.1%	16.4%	





Outcomes

Factors Affecting Voter Choices

Issues affecting BN has lightened

- Economic/GST pressures remain but voters are coping, sentiments have improved slightly
- 1MDB effect has been priced in, keeps urban voters with PH

Voters' party affiliation holding out

- PH advances limited to states with strong leadership presence
- PAS has lost ground but core remains
- Outside of Selangor, PH does not appear to have breached threshold to attain victory

Outcome Determinants

Malay voter support critical in determining outcome

- Non-Malay support remains outside of BN reach
- BN and PAS continues to retain core support, confining PH below required 34% threshold

Impact of economic and governance issues limited

- While economic and governance issues had dented support for BN, it is not enough for PH to reach threshold

PH achieved limited gains in winning undecided Malay voters

- PH leadership lacked conservative credentials to win over larger numbers of Malay voters
- While support for PAS has eroded, there remains a sizable minority of supporters among ordinary Malay voters