



# Malaysia General Elections XIV Outlook Prospects and Outcome II 2 May 2018

# Presentation Overview

**Data Sources and Methodology**

**National Direction Update**

**Voting Motivation Drivers**

**Electoral Terrain and Prospects**

Party Support & Prospects

- National
- Johor
- Kuala Lumpur
- Negeri Sembilan
- Pahang
- Perak

**Projected Outcomes**

# Data Sources

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

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

Covering Peninsular Malaysia

## GE 14 Daily Tracking Survey

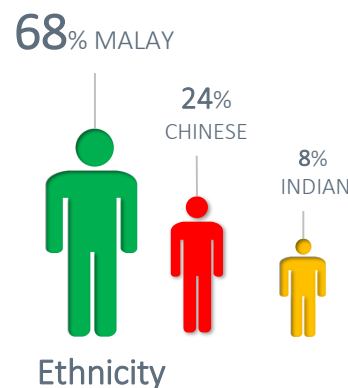
28 April – 01 May 2018; n = 875

## Reference state-level surveys:

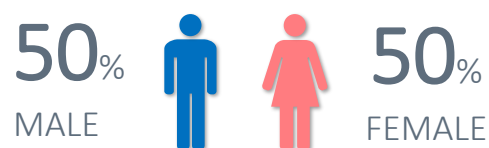
- Kedah (n=1200, 24th – 26th April 2018)
- Wilayah K. Lumpur (n=600, 18th – 21st April 2018)
- Johor (n=1250, 14th – 20th April 2018)
- Negeri Sembilan (n=479, 19th – 23rd April 2018)
- Melaka (n=240, 19th – 23rd April 2018)
- Pahang (n=460, 17th – 18th April 2018)

# Standard Survey Methodology & Respondent Profiles

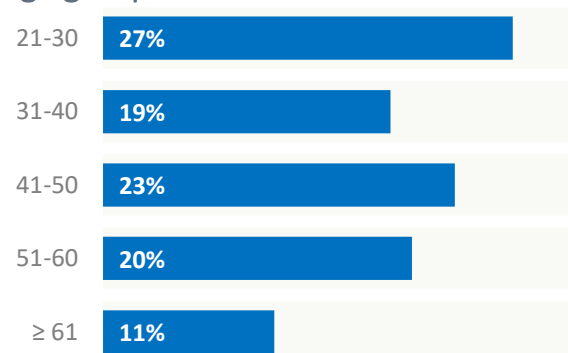
- **875** voters aged 21 and above were interviewed via telephone (fixed and mobile lines)
- The survey respondents are from all states across **Peninsular Malaysia**.
- **70 most marginal seats only**.
- Voters were selected through random stratified sampling method along the lines of ethnicity, gender, age and parliament constituencies.
- All of the constituencies (**12** states and across **70** 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 **28<sup>th</sup> April – 1st May 2018**.



## Gender

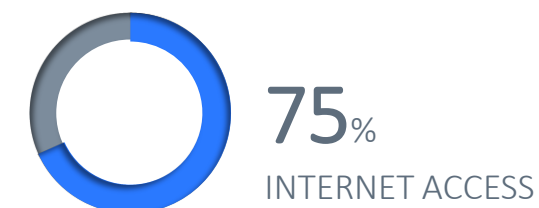


## Age group

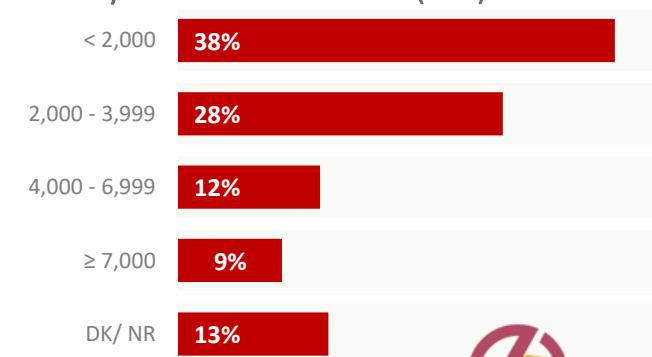


## Occupation/ Sector

41%	Private
17%	Homemaker
19%	Self – employed/ business
8%	Retired
9%	Government/ GLC
6%	Student/ Unemployed/ Others



## Monthly Household Income (RM)



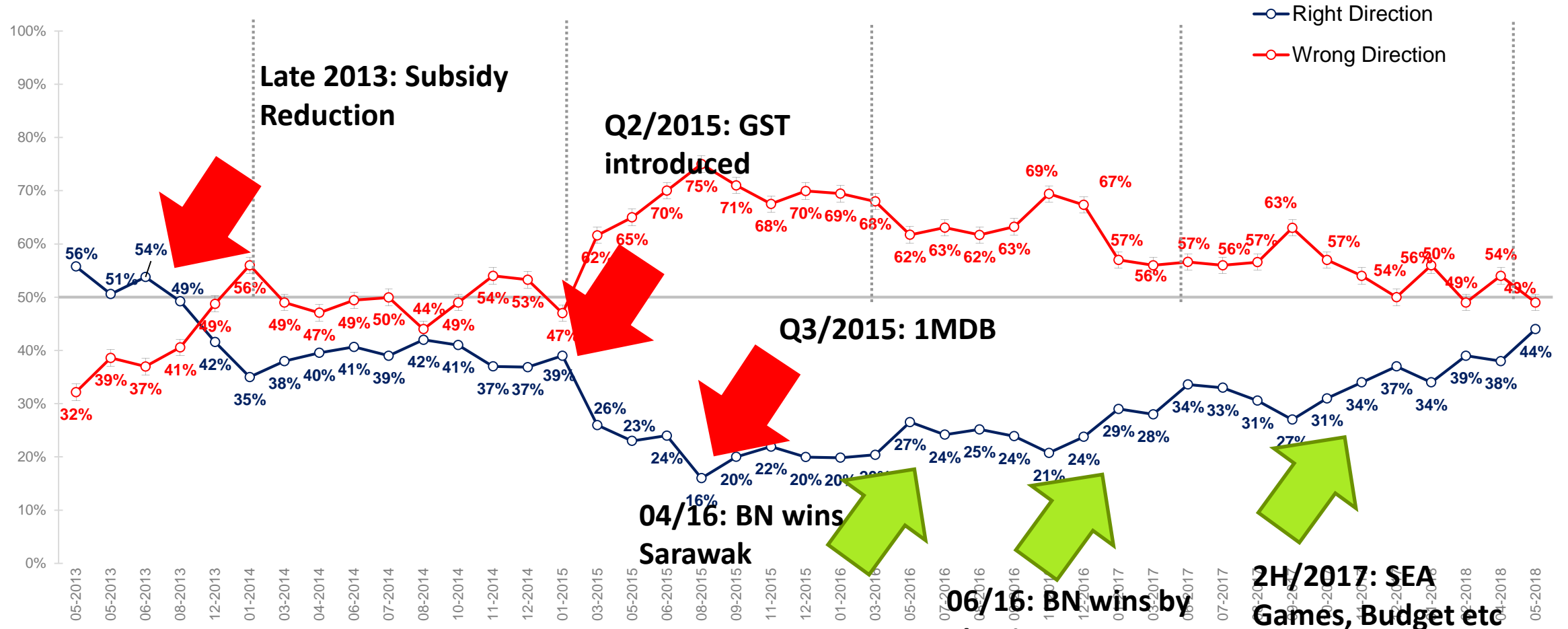




# National Direction

# Direction of the Country

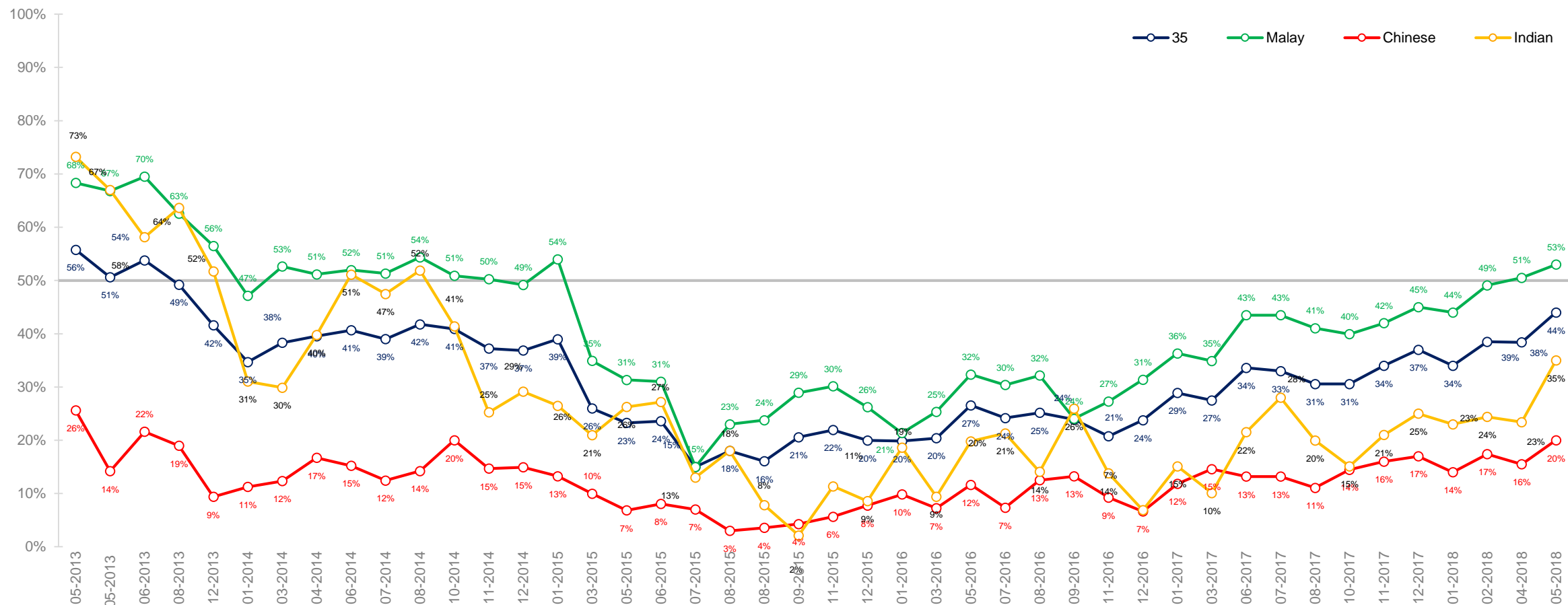
Right versus Wrong direction



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?

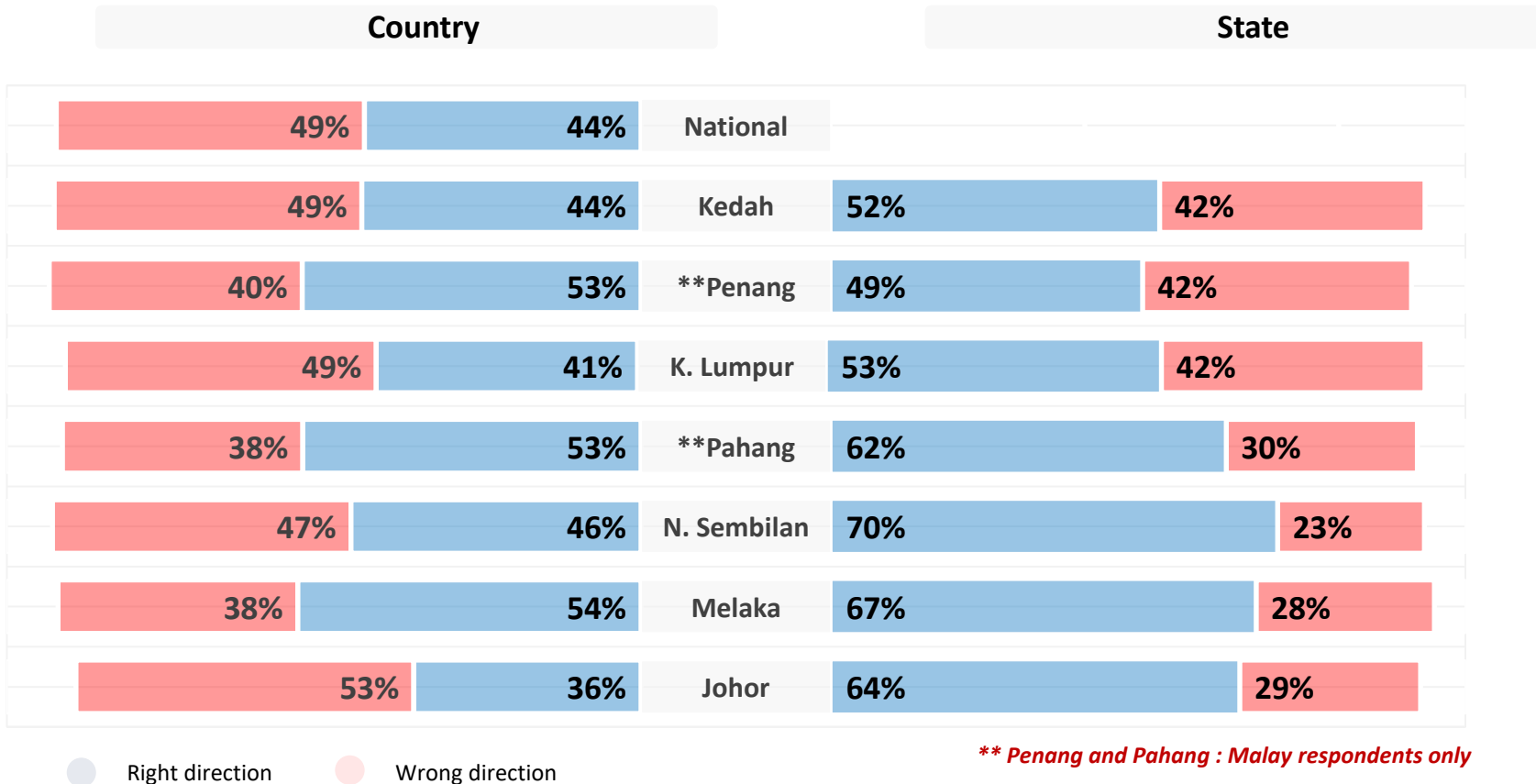
# Direction of the Country

## Right direction across Ethnicity



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 and State



- Note that voters in several states have more positive views towards their respective state governments compared to the central govt.

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

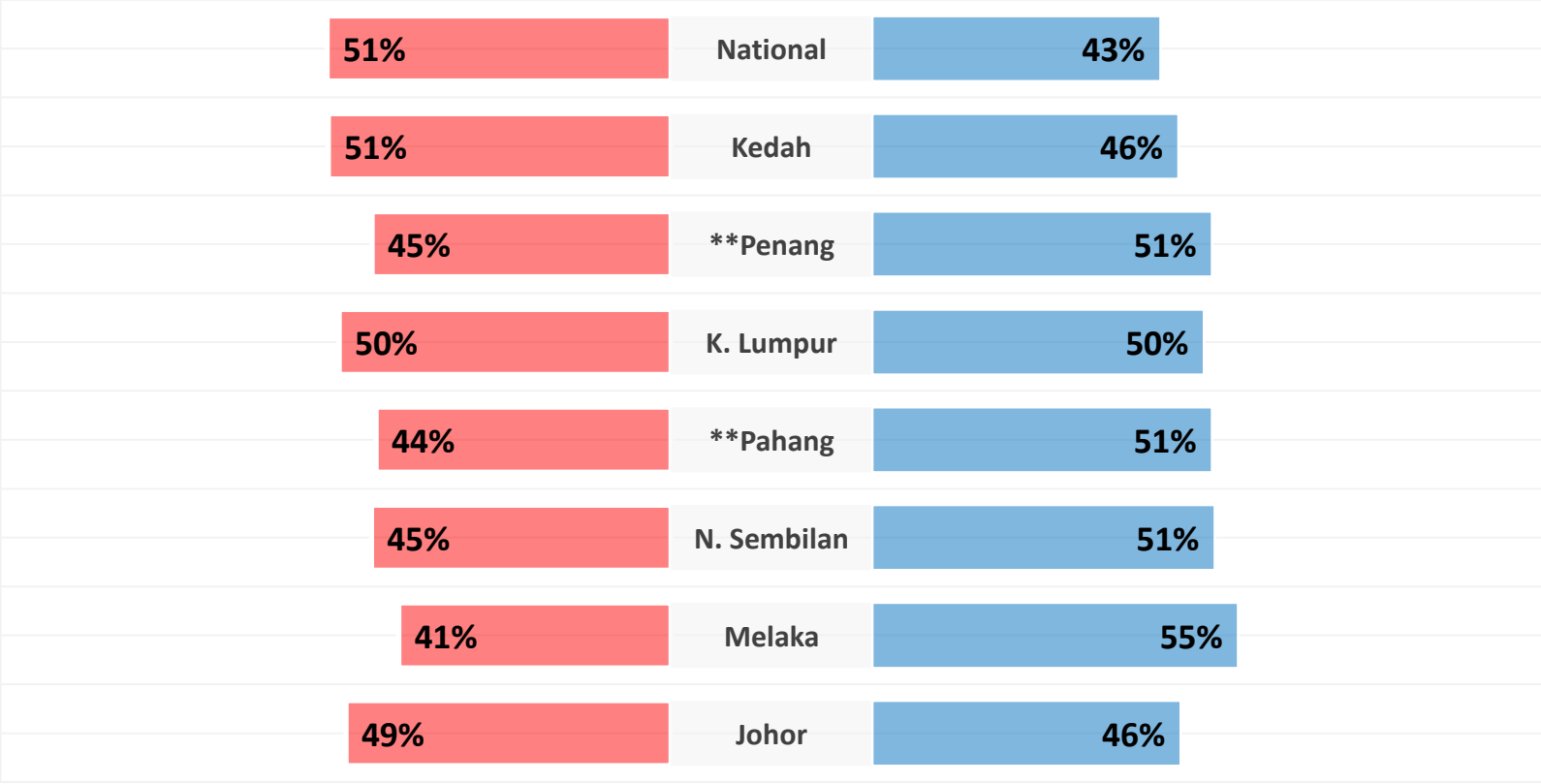


# Top Issues in Selected States

	TOTAL AVERAGE	STATE							
		NATIONAL	KEDAH	PENANG	KL	PAHANG	N. SEMBILAN	MELAKA	JOHOR
Economy concern (inflation, job opportunities, lower income, etc)	39%	45%	43%	39%	36%	44%	37%	39%	32%
Corruption	16%	20%	16%	15%	19%	15%	15%	16%	15%
Housing	10%	4%	5%	12%	11%	11%	9%	11%	15%
Preservation of Malay rights/Fair treatment of all races	6%	8%	6%	6%	8%	4%	8%	7%	4%
Weakness of the leadership	5%	8%	4%	5%	5%	5%	4%	3%	4%
Political instability	4%	4%	4%	4%	4%	5%	4%	4%	3%
1MDB case	3%	-	3%	4%	3%	3%	3%	-	-
The allegations against the integrity of Najib Razak	2%	-	2%	2%	2%	2%	4%	2%	-
Infrastructure and public transportation	2%	2%	1%	1%	2%	1%	2%	1%	5%
Worsing race relations	2%	2%	1%	2%	2%	2%	3%	2%	-
Implementation of Hudud law	2%	1%	2%	2%	1%	3%	1%	2%	-

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

# Satisfaction Towards Federal Govt



● Satisfied ● Not satisfied

**\*\* Penang and Pahang : Malay respondent**

Q How satisfied or dissatisfied are you with the performance of **Federal government** today?

- Nationally, voters are split in their assessment of the federal govt.
- Fairly reflective of the popular vote



# Voting Factors

# Malaysian Political Drivers

**Political outcomes are the result of political party fulfilment of voter's expectations on key areas of interests. The interplay between tangibles and intangibles remain.**

## **Tangible Performance**

- Economics – macro economic results are stellar but trickle down is slow, mismatch between GDP growth figures and consumer sentiments
- Governance – mirrors global trend in declining trust in institutions
- Service Delivery – moderate ratings
- Leadership – confidence levels have improved slightly, though not close to 2013 levels, it is adequate for a BN victory

## **Intangibles**

- Politics remain a platform advancing communal interests; advocating for equal treatment, better rule of law; and ensuring continued political hegemony
- Use of race and religious as commodity to mobilize political support
- BN continues to hold the lead here among Malay voters

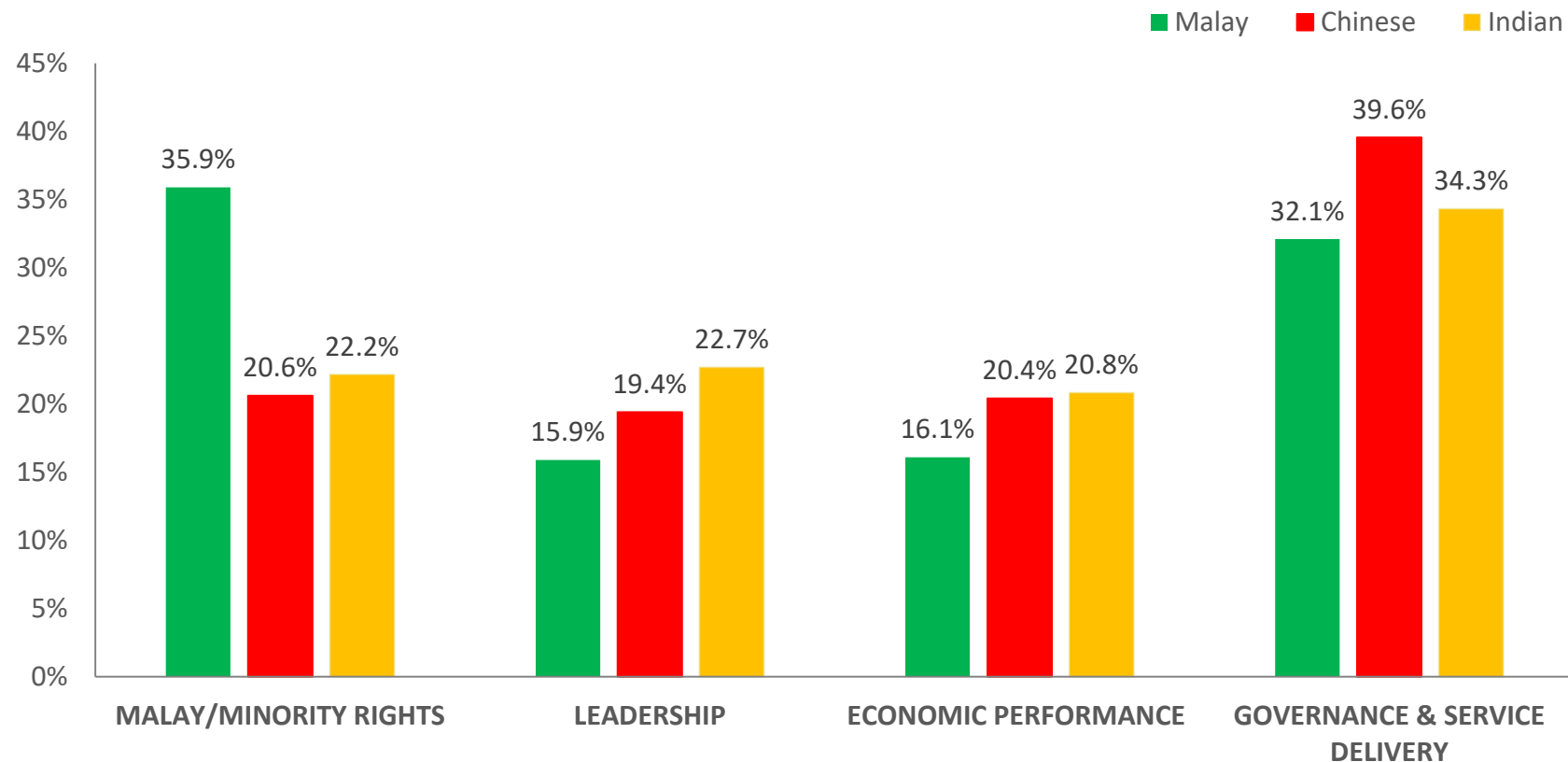
While minority voters are driven by perceptions towards parties, Bumiputera voters appear to be leadership driven.

In areas where Opposition have clear and prominent leaders, political competition is more intense.



# 2018: Factors Summarized

Factors determined to be important among voters were tested in 2017 and 2018 for relative importance in driving voter choice at the ballot booth.

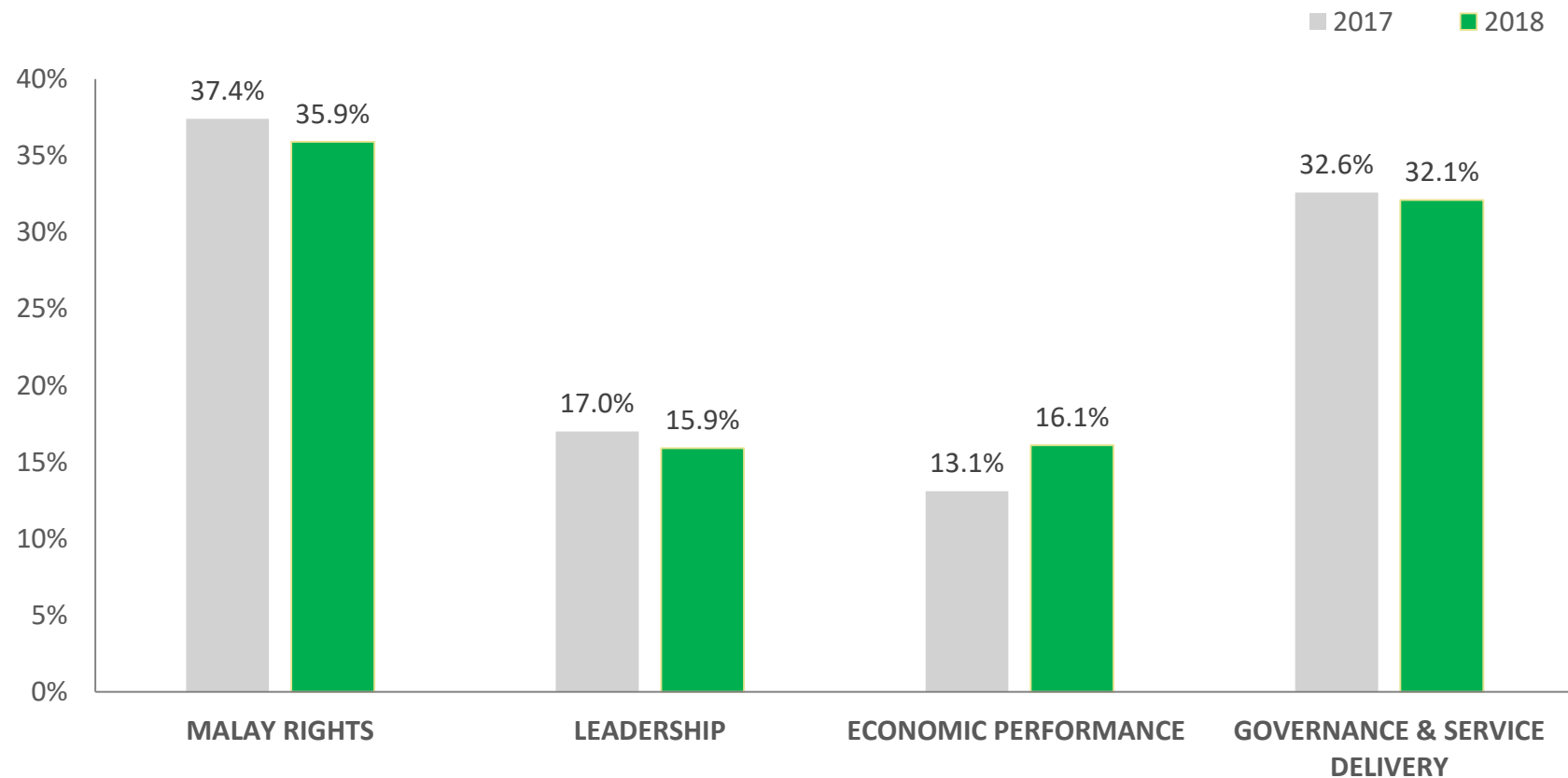


Clear continued dichotomy in priorities placed by voters in the parties they choose along ethnic lines.

Parties that cannot fulfil priority issues will face challenge in gaining support.

Given significance of the Malay vote, parties that are able to persuade on critical issue of Malay rights will likely retain/gain their support

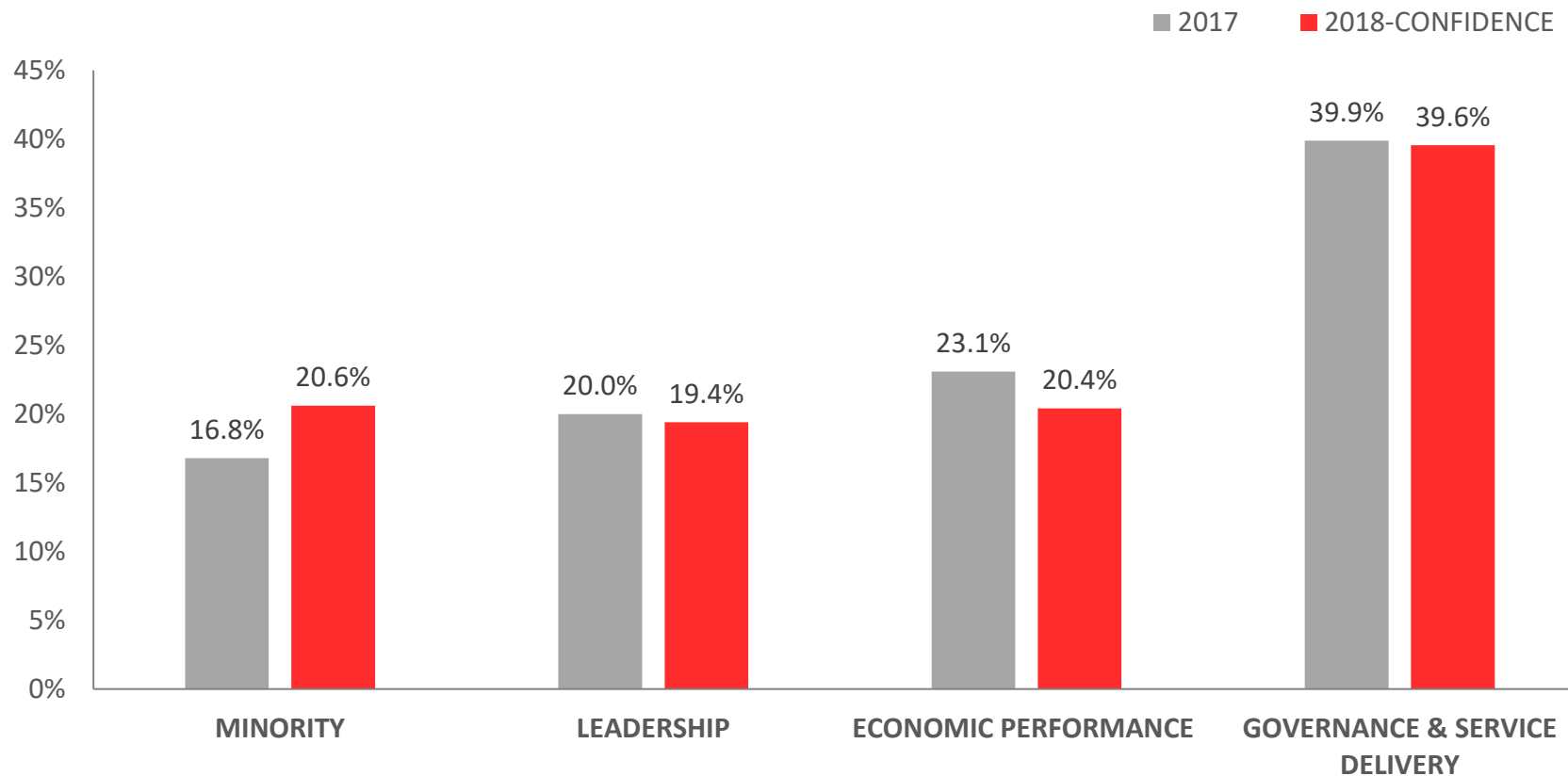
# Voting Drivers (Malays) as at late Feb 2018



Malay voter drivers did not materially change during 2018 despite major political events as the admission of Dr Mahathir as PH chairman.

Voter concerns over economic matter increased slightly compared to 2017.

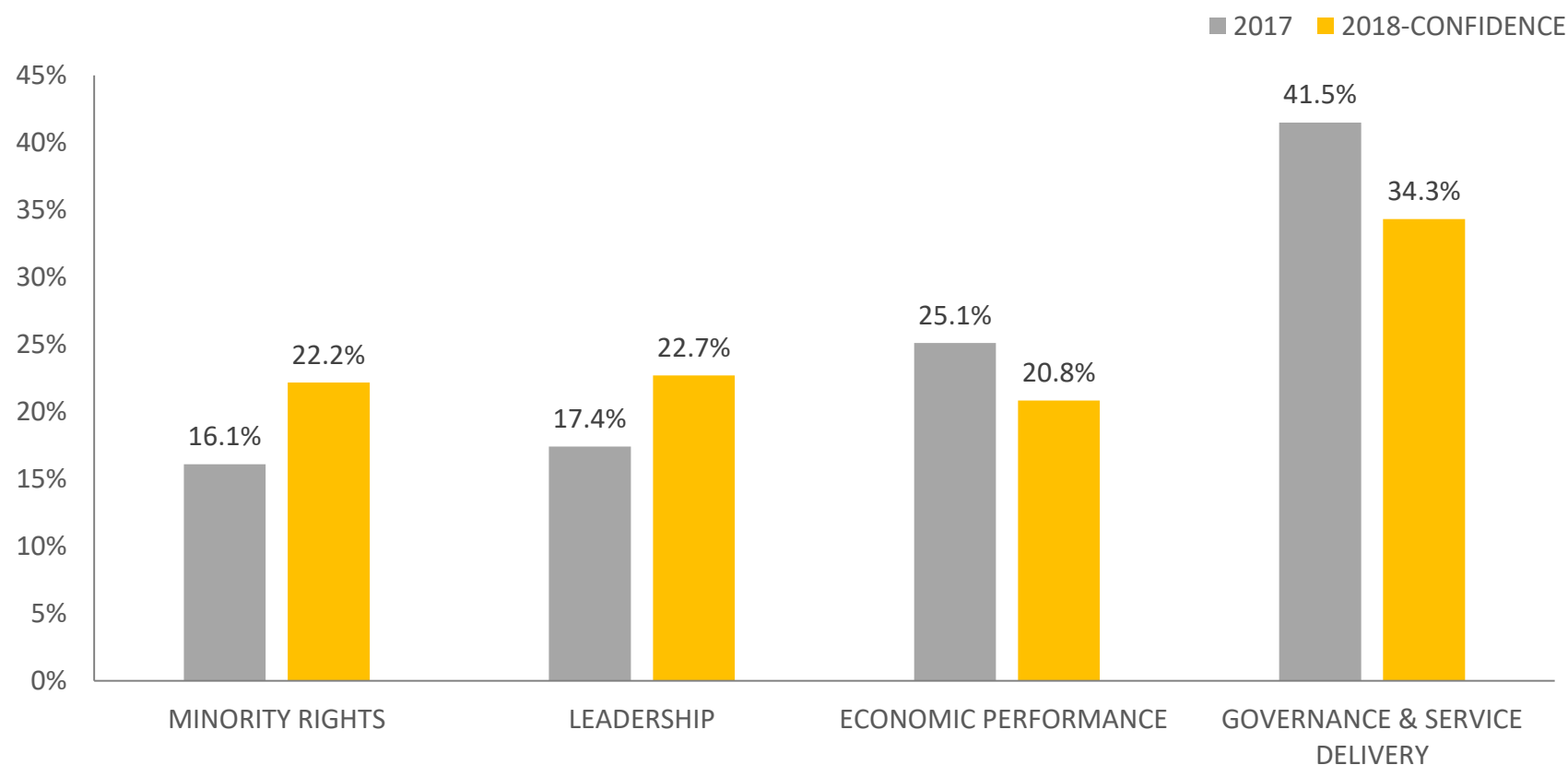
# Voting Drivers (Chinese) as at late Feb 2018



Voting drivers for non-Malay voters increased in weights accorded to minority rights as increased reporting on RUU355 during 2017.

Improving overall economic climate reduced the factor slightly as a vote driver.

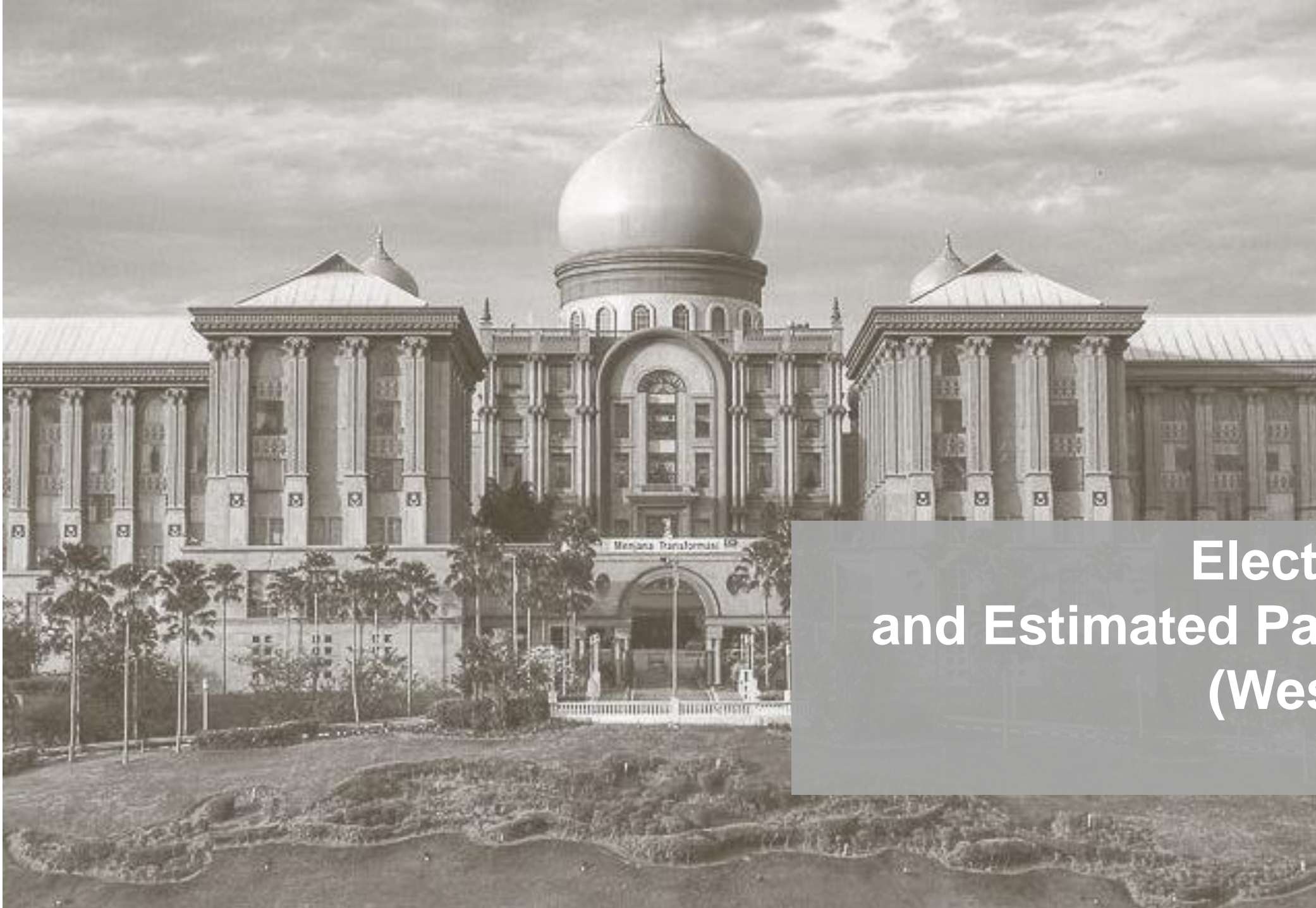
# Voting Drivers (Indians) as at late Feb 2018



Increase in weights accorded to minority rights as increased reporting on RUU355 during 2017.

Concerns over service delivery declines as Govt promises measures to address Indian community socio-economic issues in Budget 2018 and launch of Malaysian Indian Blueprint.





# Electoral Terrain and Estimated Party Support (West Malaysia)

# Electoral Contest as at 01 May 2018

- 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

# 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%

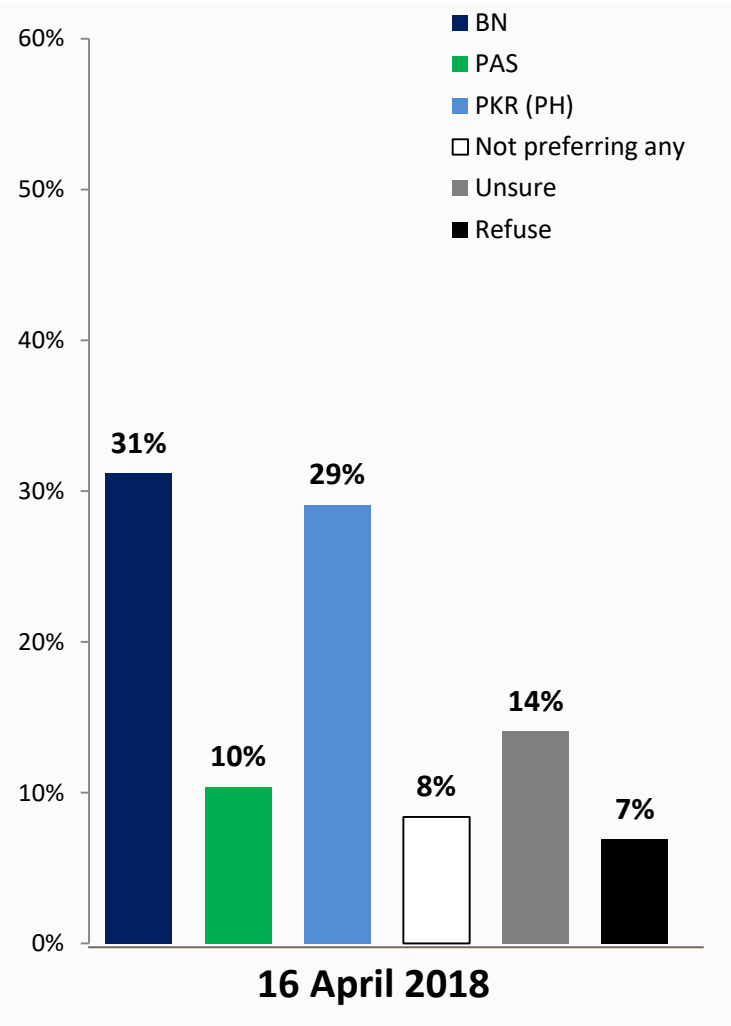
Outcome of the election will be determined by Malay voters.

- 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

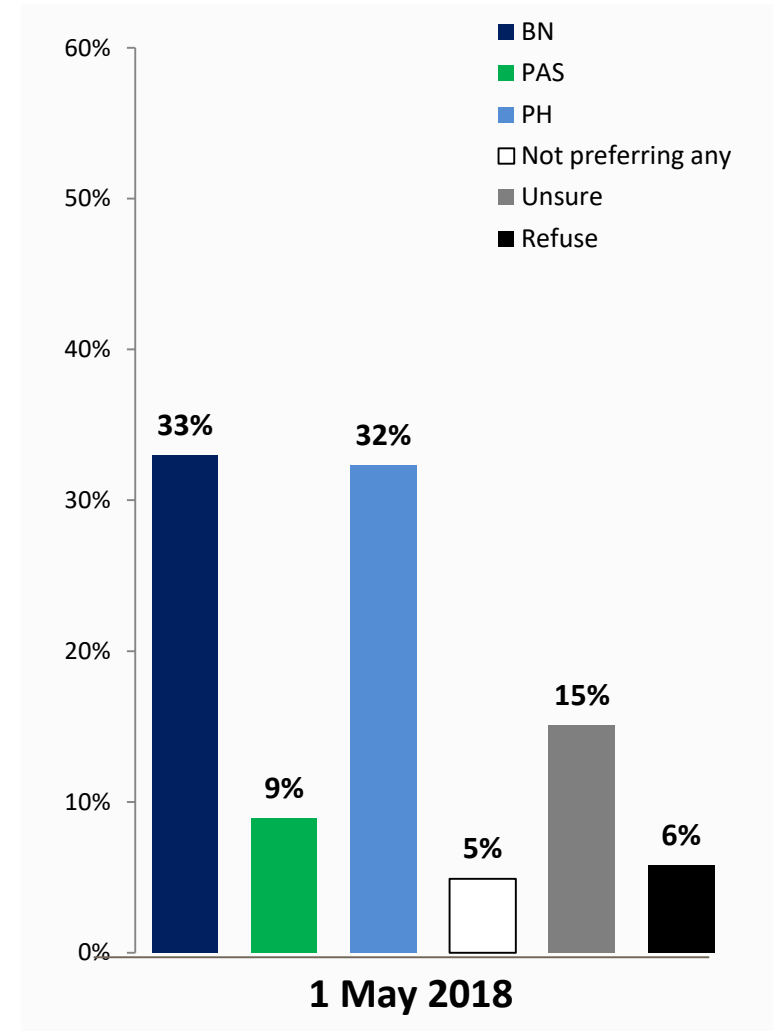
# BN vs PAS vs PH

## Overall



## Notes

Actual survey results before adjustment of non-responsive voters responses

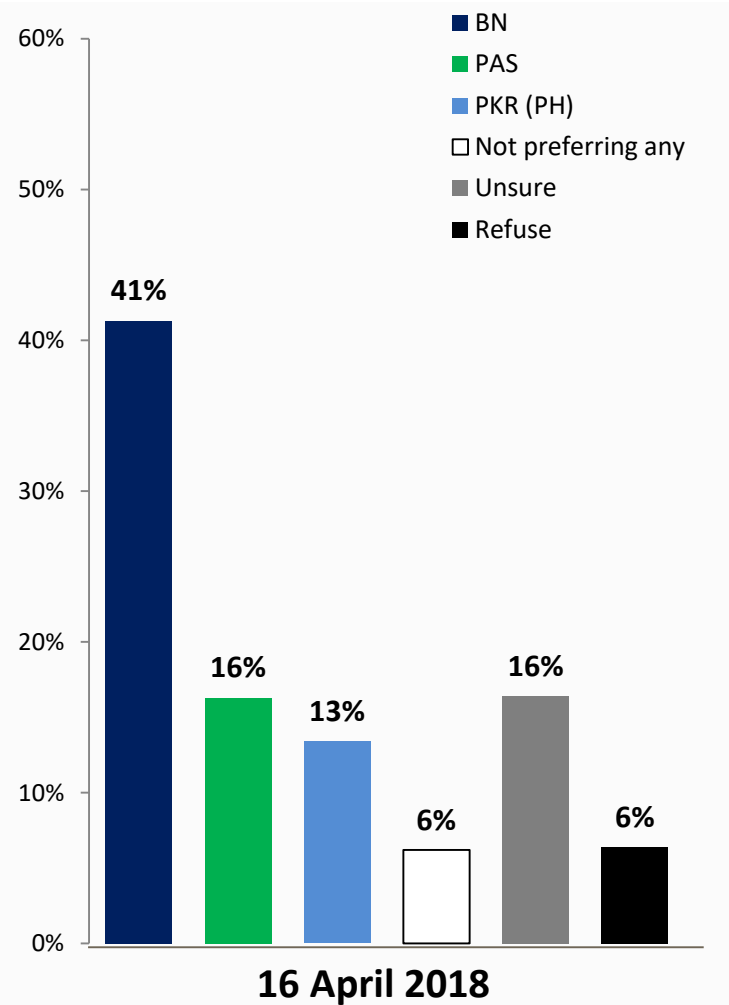


Q: Between BN, PAS and PH which party do you prefer to represent you?



# BN vs PAS vs PH

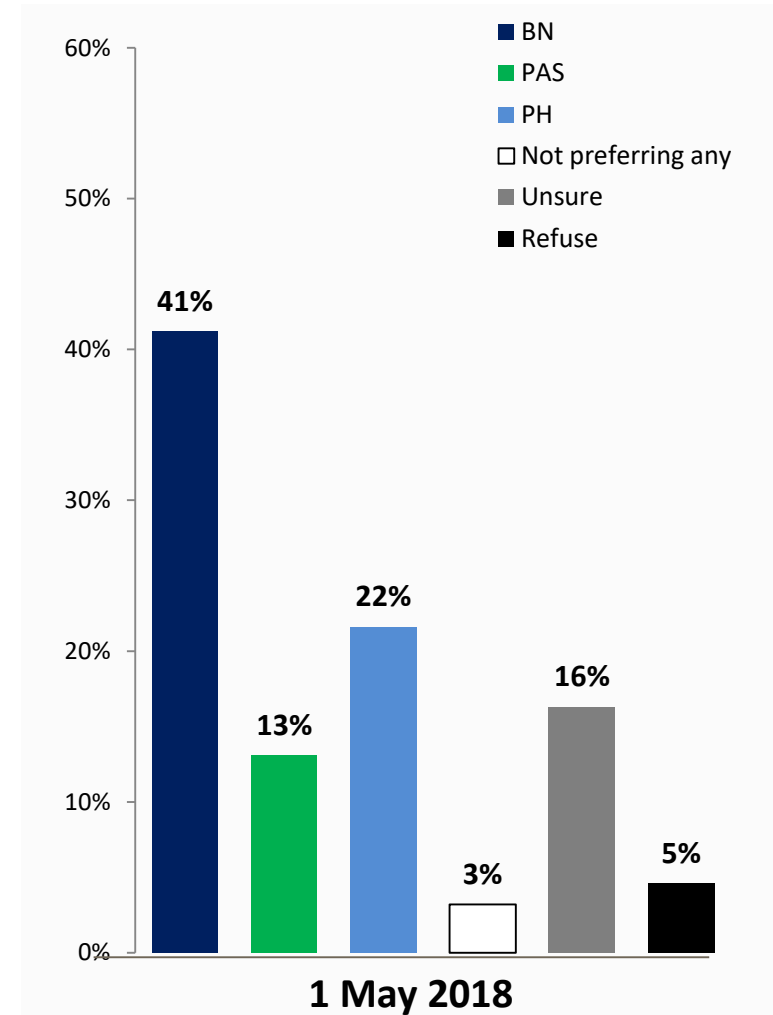
Malay



## Notes

Actual survey results before adjustment of non-responsive voters

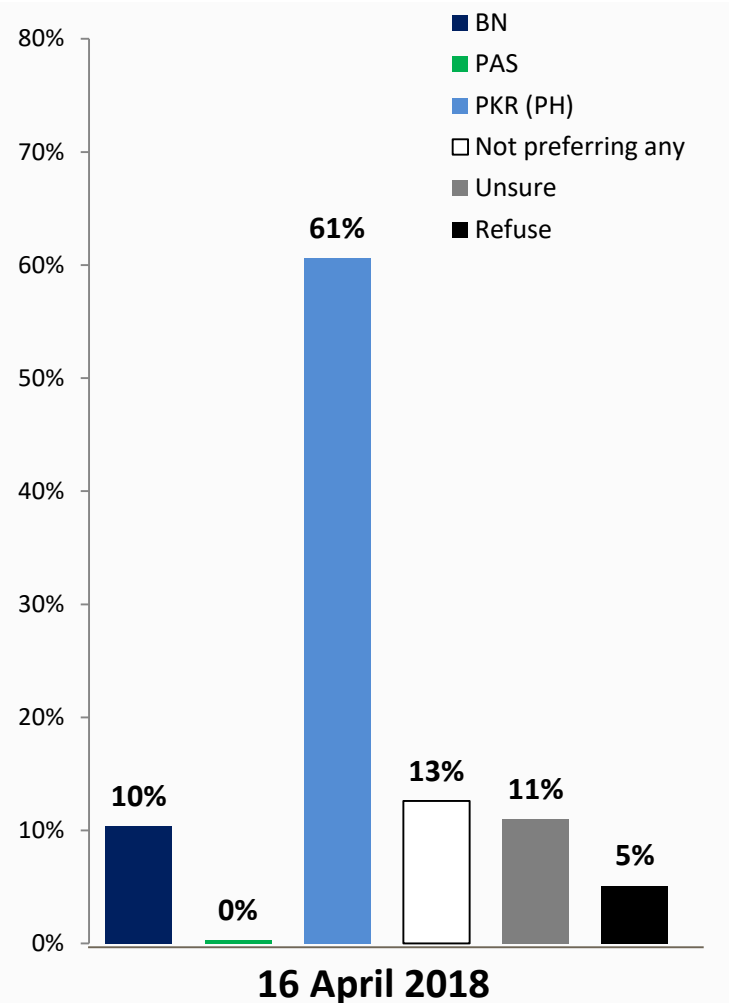
Note the decline in Malay voter support for PAS and increase in favor of PH. Stable figures for BN



Q: Between BN, PAS and PH which party do you prefer to represent you?

# BN vs PAS vs PH

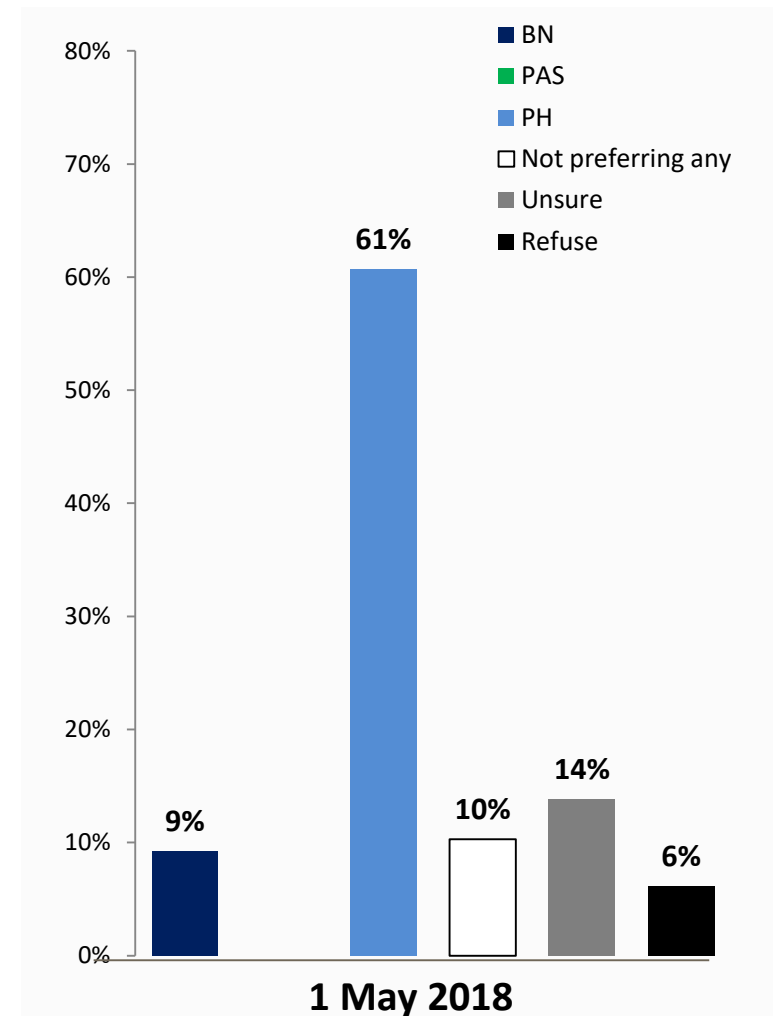
Chinese



## Notes

Actual survey results before adjustment of non-responsive voters responses

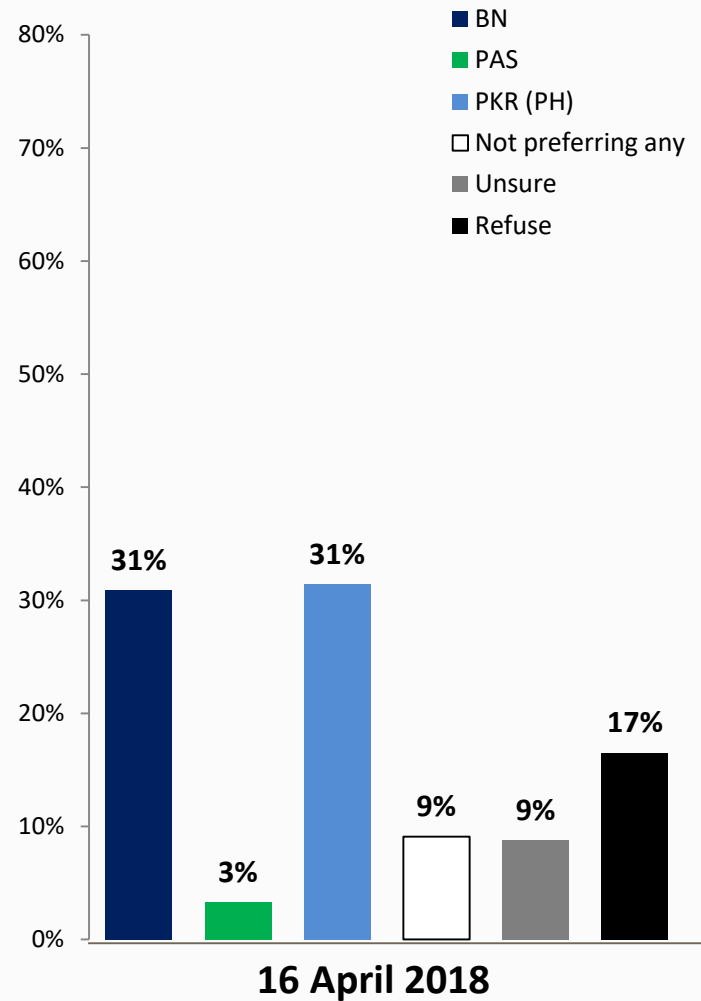
Almost unchanged preferences before and after nomination day



Q: Between BN, PAS and PH which party do you prefer to represent you?

# BN vs PAS vs PH

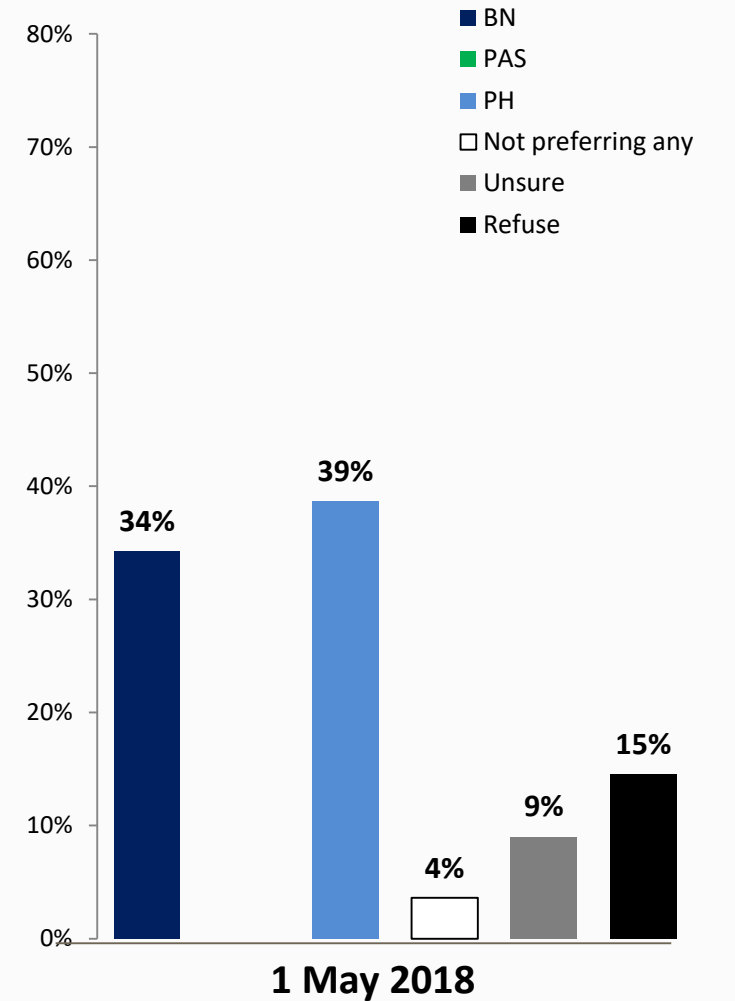
Indian



## Notes

Actual survey results before adjustment of non-responsive voters responses.

Note the slight increase of preference for BN and PH.



Q: Between BN, PAS and PH which party do you prefer to represent you?

# Estimated Support for Political Parties (W Msia)

## as at 1 May 2018

	Malay	Chinese	Indian	Other	Est Popular Vote 01 May 2018 WM
<b>BN</b>	51.2% (53.0)	14.7% (15.0)	49.0% (41.0)	90%	40.3%
<b>PH</b>	27.8% (20.0)	85.3% (85.0%)	50.8% (54.0%)	5%	43.7%
<b>PAS</b>	20.9% (27.0)	<1.0% (<1.0)	<1.0% (5.0)	5%	16.0%

# Malay Support Threshold

	Threshold Conditions	Malay Vote Support <b>As at 01 May18</b>	Malay Vote Required (surplus/ <b>shortfall</b> )	Chinese	Indian	Other	Estimated Popular Vote (W Msia)
BN	<ul style="list-style-type: none"> <li>Maintain status quo</li> <li>95 seats in WM</li> </ul>	51.2%	<b>47.5%</b> <b>(-3.7%)</b>	15%	41%	90%	<b>37.8%</b>
PH	<ul style="list-style-type: none"> <li>Win 100 seats in WM</li> </ul>	27.8%	<b>34.0%</b> <b>(-6.2%)</b>	85%	54%	5%	<b>50.5%</b>
PAS	<ul style="list-style-type: none"> <li>Maintain 20 seats in WM</li> </ul>	20.9%	<b>39.5%</b> <b>(-18.6%)</b>	0%	5%	5%	<b>24.5%</b>

- BN has lost some 8% Malay support compared to 2013 (61%) but the loss is mitigated by split opposition.
- 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?

# 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			
Survey date: 24 – 26 April (Previous : 20 March - 02 April)	<b>BN</b>	<b>Pakatan Harapan</b>	<b>PAS</b>	Pakatan Threshold to win
<b>Malay</b>	<b>45.6%</b> (53.4%)	<b>28.9%</b> (26.2%)	<b>25.4%</b> (20.4%)	Pakatan needs 10% more Malay support
<b>Chinese</b>	<b>17.8%</b> (17.6%)	<b>82.2%</b> (80.8%)	<b>0.0%</b> (1.6%)	
<b>Indian</b>	<b>41.2%</b> (64.5%)	<b>55.7%</b> (32.5%)	<b>3.1%</b> (3.0%)	
<b>Others</b>	<b>90.0%</b> (90.0%)	<b>5.0%</b> (5.0%)	<b>5.0%</b> (5.0%)	
<b>Total Est Popular Vote as at April 2018</b>	<b>42.1%</b> (49.5%)	<b>37.9%</b> (34.1%)	<b>20.0%</b> (16.4%)	

# PENANG: Ethnic profile of PH contested seats

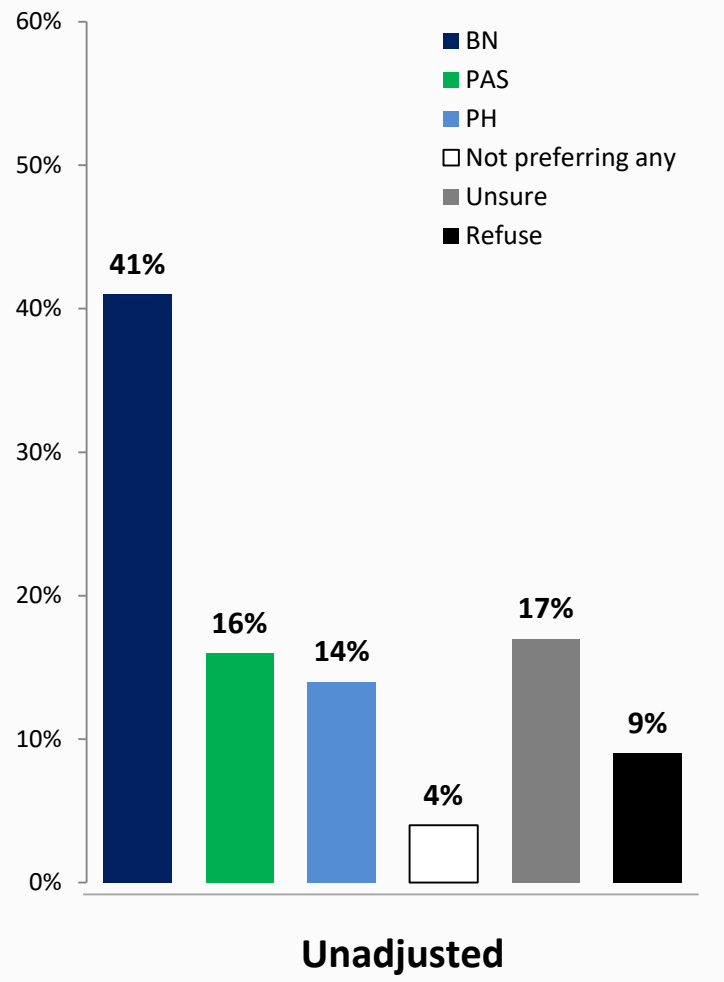
**Ethnic Composition: Malay : 56%, Chinese : 32% , Indian : 9%, Others : 2%**

Parties	Parliament Seats	Malay	Chinese	Indian	Other
PKR	4	56.00%	33.77%	9.56%	0.66%
DAP	7	15.85%	70.51%	12.94%	0.70%
BERSATU	1	78.21%	14.70%	6.54%	0.54%
AMANAH	1	78.56%	17.01%	4.16%	0.28%

Parties	State Seats	Malay	Chinese	Indian	Other
PKR	14	49.13%	39.45%	10.70%	0.72%
DAP	19	14.67%	71.31%	13.26%	0.75%
BERSATU	3	72.94%	20.06%	6.67%	0.33%
AMANAH	3	73.91%	22.71%	3.02%	0.36%

# Penang: Estimated Support for MALAY Voters

Survey date: 20<sup>th</sup> – 21<sup>st</sup> April 2018



Malay		After Adjusted : Estimated Support		
		BN	Pakatan Harapan	PAS
METHOD 1*	Total Est Popular Vote as at April 2018	49.9%	23.1%	27.1%
METHOD 2*	Total Est Popular Vote as at April 2018	52.3%	23.1%	24.6%
<b>AVERAGE</b>	<b>Total Est Popular Vote as at April 2018</b>	<b>51.1%</b>	<b>23.1%</b>	<b>25.9%</b>

\*Only 4 marginal seats are selected: Tasek Gelugor, Permatang Pauh, Nibong Tebal and Balik Pulau

# PAHANG: Ethnic profile of PH contested seats

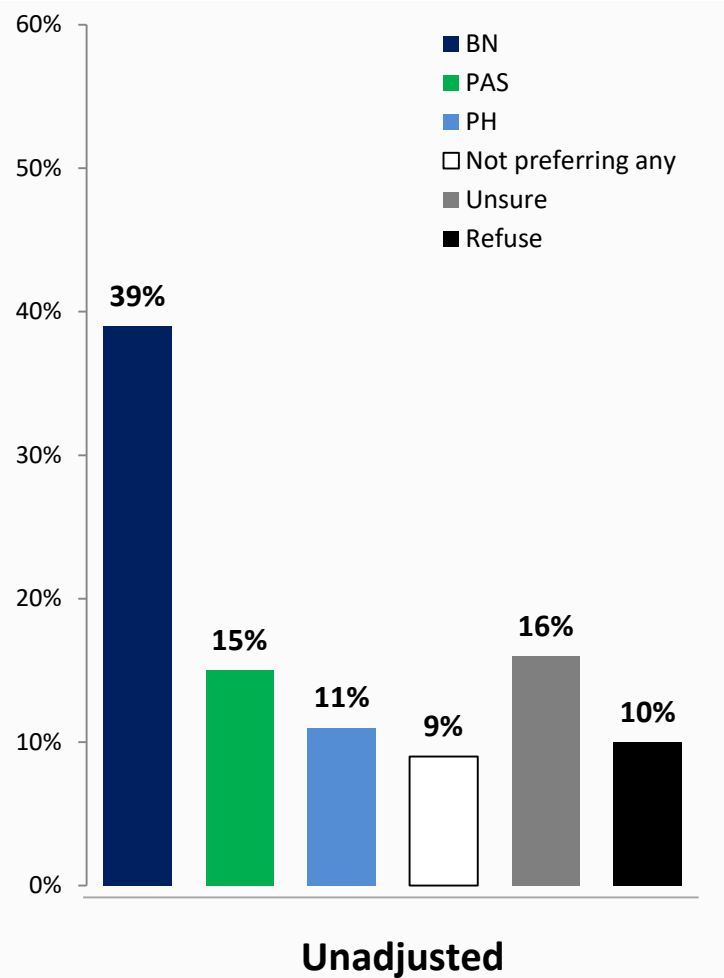
**Ethnic Composition: Malay : 72%, Chinese : 18% , Indian : 4%, Others : 5%**

Parties	Parliament Seats	Malay	Chinese	Indian	Other
PKR	4	70.58%	21.96%	3.42%	4.05%
DAP	3	43.93%	36.44%	9.97%	9.67%
BERSATU	6	85.10%	8.74%	2.37%	3.79%
AMANAHA	1	66.45%	22.52%	8.07%	2.97%

Parties	State Seats	Malay	Chinese	Indian	Other
PKR	15	73.36%	16.79%	4.22%	5.63%
DAP	8	40.72%	45.03%	10.24%	4.00%
BERSATU	8	86.40%	2.15%	1.72%	9.73%
AMANAHA	11	83.87%	10.96%	2.35%	2.82%

# Pahang: Estimated Support for MALAY Voters

Survey date: 17<sup>th</sup> – 18<sup>th</sup> April 2018



Malay		After Adjusted : Estimated Support		
		BN	Pakatan Harapan	PAS
METHOD 1*	Total Est Popular Vote as at April 2018	50.7%	19.1%	30.2%
METHOD 2*	Total Est Popular Vote as at April 2018	57.4%	19.0%	23.6%
<b>AVERAGE</b>	<b>Total Est Popular Vote as at April 2018</b>	<b>54.1%</b>	<b>19.0%</b>	<b>26.9%</b>

\*Only Marginal seat is selected

# WP KUALA LUMPUR: Ethnic profile of PH contested

## seats

Ethnic Composition: Malay : 51.9%, Chinese : 37.5% , Indian : 8.37%, Others : 2.20%

Parties	Parliament Seats	Malay	Chinese	Indian	Other
PKR	4	60.9%	25.9%	10.5%	2.7%
DAP	5	12.6%	77.5%	8.5%	1.3%
BERSATU	2	82.1%	9.1%	6.1%	2.6%
AMANAHAH	-	-	-	-	-





# WPKL: Threshold and Estimated Support

Survey date: 18<sup>th</sup> – 21<sup>st</sup> April 2018

		Estimated Support		
	Ethnicity	BN	Pakatan Harapan	PAS
METHOD 1*	Malay	52.1%	27.6%	20.3%
	Total Est Popular Vote as at April 2018	47.1%	35.4%	17.5%
METHOD 2	Malay	53.6%	28.4%	18.0%
	Total Est Popular Vote as at April 2018	45.6%	43.1%	11.3%
AVERAGE	Malay	52.9%	28.0%	19.2%
	Total Est Popular Vote as at April 2018	46.4%	39.3%	14.4%

\*Only 5 marginal seats are selected: Wangsa Maju, Setiawangsa, Titiwangsa, Lembah Pantai and Bandar Tun Razak

# NEGERI SEMBILAN : Ethnic profile of PH contested

## seats

**Ethnic Composition: Malay : 57.6%, Chinese : 26.8% , Indian : 13.2%, Others: 2.38%**

Survey date: 19th – 23rd April 2018

Parties	Parliament Seats	Malay	Chinese	Indian	Other
PKR	2	57.9%	21.7%	18.6%	1.8%
DAP	2	39.0%	42.2%	16.9%	1.9%
BERSATU	2	69.9%	19.5%	8.6%	2.0%
AMANAHAH	2	63.7%	23.8%	8.7%	3.8%

Parties	State Seats	Malay	Chinese	Indian	Other
PKR	11	62.6%	19.7%	14.9%	2.8%
DAP	11	27.0%	53.5%	17.7%	1.8%
BERSATU	6	77.3%	10.5%	8.8%	3.4%
AMANAHAH	7	75.9%	15.6%	6.5%	1.9%

# MELAKA: Ethnic profile of PH contested seats

**Ethnic Composition: Malay : 62.3%, Chinese : 29.6% , Indian : 6.68%, Others: 1.43%**

Survey date: 19th – 23rd April 2018

Parties	Parliament Seats	Malay	Chinese	Indian	Other
PKR	2	66.5%	26.6%	4.6%	2.3%
DAP	1	37.4%	57.0%	4.0%	1.6%
BERSATU	2	71.9%	18.6%	8.3%	1.1%
AMANAH	1	73.3%	16.2%	9.8%	0.7%

Parties	State Seats	Malay	Chinese	Indian	Other
PKR	8	72.0%	19.1%	6.7%	2.2%
DAP	8	44.1%	46.5%	8.0%	1.4%
BERSATU	6	75.0%	18.7%	5.3%	1.0%
AMANAH	6	75.2%	17.8%	5.8%	1.2%

# Melaka/ Negeri Sembilan: Threshold and Estimated Support

Survey date: 19<sup>th</sup> – 23<sup>rd</sup> April 2018

		Estimated Support		
Ethnicity		BN	Pakatan Harapan	PAS
METHOD 1*	Malay	57.9%	19.1%	23.0%
	Total Est Popular Vote as at April 2018	50.9%	30.0%	19.1%
METHOD 2	Malay	60.8%	22.9%	16.3%
	Total Est Popular Vote as at April 2018	48.8%	40.4%	10.8%
AVERAGE	Malay	59.4%	21.0%	19.7%
	Total Est Popular Vote as at April 2018	49.9%	35.2%	14.9%

\*Only 6 marginal seats are selected: Seremban, Kuala Pilah, Port Dickson, Rembau, Alor Gajah and Hang Tuah Jaya



Outcomes

# Current Trajectories

## PH

- Making slow gains in Kedah and Johore
- Retain Selangor and Penang
- Gains at the expense of PAS

## Barisan Nasional

- Support levels among Malay voters declined slightly but remain in position to maintain lead

## PAS

- Kingmaker gambit likely to fail
- Wiped out from West Coast Peninsula M'sia



Malaysia General Elections XIV Outlook  
Prospects and Outcome II

**THANK YOU**