



## **PRESS STATEMENT**

18<sup>th</sup> November 2022

### **15<sup>TH</sup> MALAYSIA GENERAL ELECTION SURVEY RESULTS**

From the 3<sup>rd</sup> to the afternoon of 18<sup>th</sup> November 2022, the Merdeka Center conducted a daily tracking survey comprising a total of 5,497 Malaysian voters aged 18 and above voting in Peninsular Malaysia. Voters were interviewed to seek their views on the upcoming election, leaders and political parties. Again, this survey yielded results which speak of the fluidity and uncertainty of contemporary Malaysian politics.

#### **Top Issues of Concern**

- As they did prior to the campaign, voters' principal concerns remained focused on inflation and cost of living (28%), economic growth (18%) and followed by corruption (13%).
- Younger voters showed a higher-than-average concern about the economy and employment issues at 5% compared to the 2% national average.
- We note that only 2% of Malay voters expressed concerns over their communal rights. Details in Slide# 4.

#### **Voting Drivers**

- We note that one day prior to the election day, factors driving the choice of voters have shifted markedly from their local candidate to the national leader or PM candidate.
- We found that who would be the national leader or prime minister was ranked highest at 29% compared to 23% on nomination day. This means, voter attentions were more focused on who they felt were more capable of leading the government. Details in Slide #5.

#### **Preferred PM Candidate**

- As we approach election day, we found that voters' preferences remained generally stable with Anwar Ibrahim by 33% of all voters, followed by Muhyiddin Yasin at 26% and Ismail Sabri at 17%.
- There was a significant difference across ethnic groups. Among Malay voters, Muhyiddin Yasin enjoyed plurality support at 39% followed by Ismail Sabri at 24% while Anwar Ibrahim was at 16%.

Preferred PM Candidate	All Peninsular Voters	Malay	Chinese	Indian
Anwar Ibrahim	32.6%	16.4%	57.8%	62.6%
Ismail Sabri	16.5%	24.2%	2.9%	7.6%
Muhyiddin Yasin	25.5%	39.1%	2.7%	5.1%
No preference/ No response	25.4%	20.3%	36.6%	24.7%

### Voter Turnout

- Voter turnout is much more difficult to discern. We had asked voters to rate their certainty of coming out to vote on a scale of 0 to 10, with 10 being “extremely certain”. Although there may be a certain margin of error in these figures, the overall trend indicates rising interest in the election and growing intention to vote. Our estimates based on responses as follows:

	All Peninsular Voters	Malay	Chinese	Indian
<b>Projected Turnout Rate</b>	77%	78%	76%	75%

- In view of the ongoing rainy season, we also asked voters if inclement weather would affect their ability to turn up and vote. Of those who report most likely to vote, 90% said that they will still vote even if it rains the entire day. Please see slide #7.

### Party Preference

- The moving average survey results from 16<sup>th</sup> November up to 12:00 noon on 18<sup>th</sup> November, found voters’ preferences as follows.

#### Total Voter Preference (figures in percentages)

Survey	BN	PN	PH	GTA and Others	Undisclosed
<b>16-18<sup>th</sup> Nov 2022</b>	15.4%	20.3%	33.6%	1.2%	29.5%

The overall figures above provide some indication of the overall preference of the contesting parties but a more instructive one is the results among ethnicity

#### Overall Malay Voter Preference (figures in percentages)

Survey	BN	PN	PH	GTA and others	Undisclosed
<b>16-18<sup>th</sup> Nov 2022</b>	21.3%	32.4%	13.3%	1.3%	31.7%

- These findings show a marked decline in overt preference for Barisan Nasional among Malay voters and an increase in support for Perikatan Nasional while Pakatan Harapan continues to draw strong support from Chinese and Indian voters as well as a stable level of Malay voters.
- We note that as many as 29% of voters refused to disclose their choices. From experience, we think it is likely that most of these undisclosed responses are likely to choose an opposition party.
- Post-election analysis from the Malacca and Johore state elections held at the end of 2021 and March 2022 respectively found that approximately 55% of undisclosed Malay voters ended up giving their votes to Perikatan Nasional while about 30% gave support to Barisan Nasional and 15% gave support to Pakatan Harapan.
- In this instance, we have opted to adjust these assumptions to modify the undisclosed Malay voters' responses to 60% for Perikatan Nasional, 20% for Barisan Nasional, and 20% for Pakatan Harapan and after considering the Peninsular-wide coverage as well as the fact that the federal elections might carry different dynamics as compared to state-level elections.

## **Expected Election Outcomes**

### Peninsular Malaysia







- From the rolling survey that we had implemented since 3<sup>rd</sup> November and ending on 18<sup>th</sup> November, we found that the three main coalitions with a strong base of support still needed to swing undecided and new voters to their side.
- In the ensuing campaign period, we noted that there was a discernible movement of Malay voters to Perikatan Nasional and to a lesser extent, Pakatan Harapan. This development was at the expense of Barisan Nasional.
- For the most part, non-Malay voters remained firmly in support of Pakatan Harapan.
- Reflecting upon the survey results and incorporating our assumptions on allocation of undisclosed voters, we estimate the results for the 164\* parliamentary seats in Peninsular Malaysia in the table below. (\*We note that the Padang Serai parliamentary constituency election will only take place on 7<sup>th</sup> December)

### Sabah and Sarawak

- While we did not carry out surveys in Sabah and Sarawak to coincide with the general election, we have made some calculated assumptions from our analysis of past surveys, state election results and qualitative research in the two states to reflect upon the contests taking place there.

### Overall Projection

Our projections for the election are as follows:

STATE	SEATS							OTHER	TOO CLOSE
PERLIS	3	-	-	1			-	-	2
KEDAH	14*	2	-	8			-	1	3
KELANTAN	14	-	1	13			-	-	-
TERENGGANU	8	-	-	8			-	-	-
P.PINANG	13	11	-	1			-	-	1
PERAK	24	11	-	5			-	-	8
PAHANG	14	1	3	3			-	-	7
SELANGOR	22	17	-	1			-	-	4
KUALA LUMPUR	11	10	-	-			-	-	1
PUTRAJAYA	1	-	-	1			-	-	-
N. SEMBILAN	8	5	1	-			-	-	2
MELAKA	6	4	-	-			-	-	2
JOHOR	26	15	6	1			-	-	4
LABUAN	1	-	-	-			1	-	-
SABAH	25	2	4	1	-	5	5	-	8
SARAWAK	31	4	-	-	24	-	-	-	3
	221*	82	15	43	24	5	6	1	45

\*Note that the tally above excludes Padang Serai where election will only take place on 7<sup>th</sup> December 2022.

- We note that the tight contest in this election has meant that the competition in many seats will be very close among the competing parties.
- The list below are the 45 seats which we consider to be too-close-to call, i.e., with vote margins less than 5%

State	Seats	Parliament Constituency
Perlis	2	Padang Besar Kangar
Kedah	3	Kuala Kedah Merbok Kulim Bandar Baru
Pulau Pinang	1	Kepala Batas
Perak	8	Gerik Lenggong Parit Buntar Kuala Kangsar Parit Tapah Lumut

<b>State</b>	<b>Seats</b>	<b>Parliament Constituency</b>
		Bagan Datuk
<b>Pahang</b>	7	Cameron Highlands Indera Mahkota Kuantan Paya Besar Kuala Krau Temerloh Bentong
<b>Selangor</b>	4	Sungai Besar Tanjung Karang Kuala Selangor Kapar
<b>Kuala Lumpur</b>	1	Titiwangsa
<b>Negeri Sembilan</b>	2	Jelebu Jempol
<b>Melaka</b>	2	Masjid Tanah Jasin
<b>Johor</b>	4	Ayer Hitam Simpang Renggam Pontian Tanjung Piai
<b>Sabah</b>	8	Kudat Putatan Penampang Tenom Pensiangan Libaran Batu Sapi Tawau
<b>Sarawak</b>	3	Lubok Antu Saratok Julau

## **About This Survey**

This survey was part of an exercise carried out between 3<sup>rd</sup> to 18<sup>th</sup> of November 2022.

The voter turnout and party choice estimates noted above was derived from survey data collected from 16<sup>th</sup> to 12:00 noon 18<sup>th</sup> November 2022, whereby feedback from 1,203 Malaysians aged 18 and above comprising 62% Malay, 29% Chinese, 9% Indian, were interviewed via fixed line and mobile telephones. Respondents were selected based on random stratified sampling along age group, ethnicity, gender and state. Respondents were sampled from each of the 165 parliamentary constituencies in Peninsular Malaysia.

The analysis above was based on data collected up to 12:00 noon on 18<sup>th</sup> November 2022. As such, any significant developments or events that may take place thereafter would not be reflected in these findings.

## **About Merdeka Center**

Merdeka Center was formally established in 2001 as an independent organization focused on public opinion research and socio-economic analysis. Merdeka Center's mission is to act as a bridge between ordinary Malaysians and other stakeholders with the leaders of the nation – by collecting public opinion studies and expressing them through survey results, analysis and position papers. For details visit [www.merdeka.org](http://www.merdeka.org)

### Contact:

Ibrahim Suffian

Director - Programs

Mobile: +6012 3791940

Email: [ben@merdeka.org](mailto:ben@merdeka.org)

Tan Seng Keat

Senior Research Manager

Mobile: +6012 3950316

Email: [sengkeat@merdeka.org](mailto:sengkeat@merdeka.org)