

# People's Election Pulse

A Survey of Innovision Consulting

## Report 2

March 15, 2025

# Innovision

Innovision Consulting is an international advisory and management consulting company. Our research, technical assistance, project management, and capacity development services support international development partners, multinationals and start-ups, national private sector, not-for-profit organizations, and government agencies to facilitate sustainable and inclusive growth.

Over the last 16 years, we have undertaken more than 480 projects in 22 countries in Asia and the Pacific, the Middle East, and North Africa (MENA), West Africa, and Southern Africa. Our works primarily focus on SDG 17 - Strengthen the means of implementation and revitalize the global partnership for sustainable development.

Innovision has long-standing partnerships with both Swisscontact and SDC.



22 Countries | 160+ Clients | 480+ Projects | 1.5mn~ beneficiary households

# Survey on 'People's Election Pulse'

People's Election Pulse is an opinion poll survey designed to capture voting age population's perceptions and choices on indicators related to politics, economics and social development.

It is a periodic survey with some questions that are repeated while other questions are revised or added to capture the status of quo of 'time.'

On August 5, 2024, following the fall of the previous government, INNOVISION launched BangladeshSpeaks, a micro-polling site for rapidly collecting and disseminating public opinion.

On September 10, 2024, INNOVISION released the results of its first online and field research.

Subsequently, INNOVISION's second field research was conducted from February 19 to March 3, 2025.

The results were published on March 8, 2025.

# Pulse Points

Expectation and performance of the Interim Government

Expectation from future government

Decision to vote and voting preferences

Media usage behavior for gathering information

# Methodology Brief

A nationwide survey conducted on 550 wards, villages and Mahallas from 8 divisions and 64 districts

Stratified simple random sampling with further purposive sampling among students and occupational groups

16 strata ( 8 divisions and Urban and Rural from each division)

2011 Population Census taken as the base as the enumeration area for 2022 is still not available

Data collected by field enumerators under supervisors between February 19- March 03, 2025

Data collected digitally using CAPI method; results were scrutinized by a panel of advisors

# Sampling

**Sample Size: 10,696 Voters**

**Survey Period: February 19, 2025 – March 3, 2025**

## Sample Distribution

Geographical Scope of Sample : **8 Divisions, 64 Districts**

Area-wise Sample : **71% Rural, 29% Urban**

Gender-wise Sample : **55% Male, 45% Female**

### Age-wise Sample Representation

Gen Z (18-28 years): **36%**

Millennials (29-44 years): **34%**

Gen X (45-60 years): **18%**

60+ years: **12%**

## Division-wise Sample

Dhaka Division **26%**

Chattogram Division **19%**

Rajshahi Division **13%**

Khulna Division **12%**

Rangpur Division **11%**

Mymensingh Division **7%**

Barishal Division **6%**

Sylhet Division **6%**

# Sampling

## Sampling by Ethnicity

Ethnic group	2%
Bangali	98%

## Male and Female Composition

Male	55%
Female	45%

## Type of Dwelling

Kancha	43%
Semi-pucca	31%
Pucca	23%
Jhupri	2%

## Sampling by Ethnicity

Slum	5%
Non Slum	95%

## Religions

Muslim	89%
Hindu	10%
Christian	0%
Buddhism	1%
Others	0%

## Occupational Representation

Homemaker	35%
Student	15%
Business	15%
Farmer	10%
Labour	8%
Private Job and NGOs	5%
Unemployed	4%
Others	3%
Retailer	2%
Government Job	1%
Teachers and Educators	1%
Healthcare Professionals	0%
Creative and Performing Artists	0%

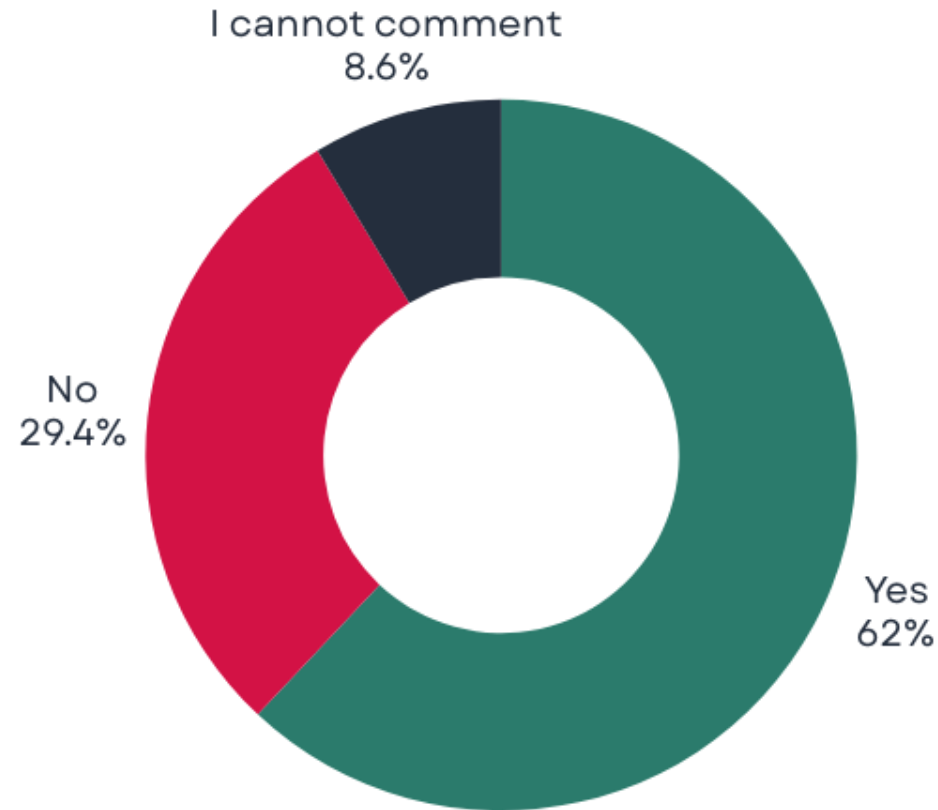
**Use the QR Code to Access First Report**





# Findings

# About one-third of the voters are undecided

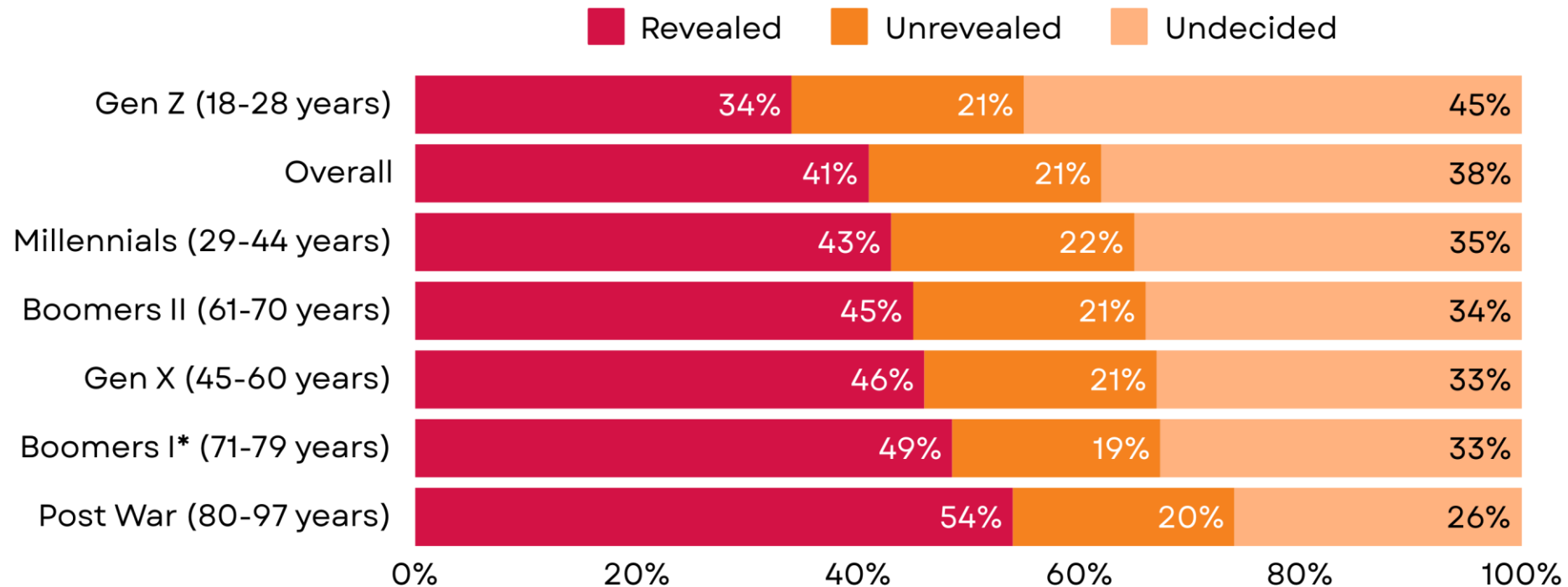


Of the 10,696 respondents, 29.4% reported that they are undecided. Who are these respondents? Why are they still undecided?

**Who are the undecided  
and unrevealed voters?**

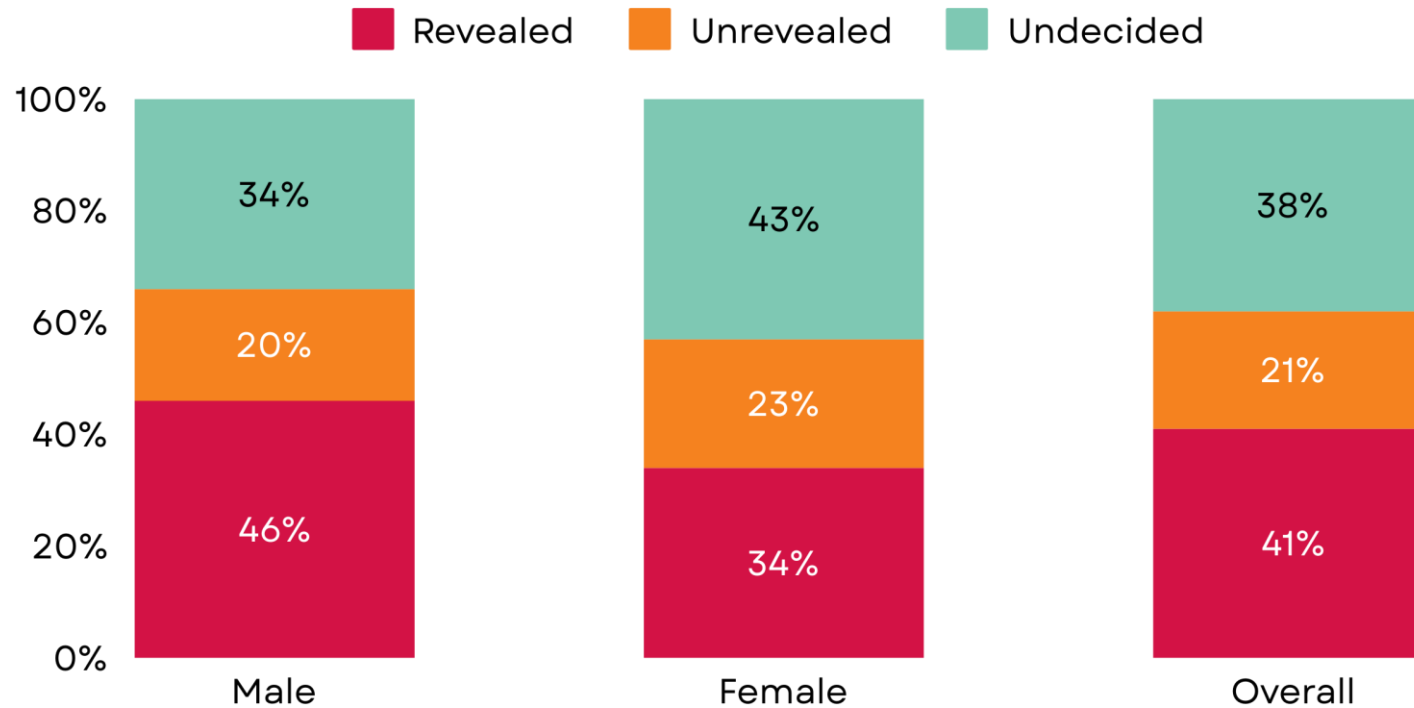
# Who are the undecided and unrevealed voters?

## Analysis by age groups



Almost half (45%) of the Gen Z voters reported that they are undecided. Proportion of unrevealed voter is same across age groups.

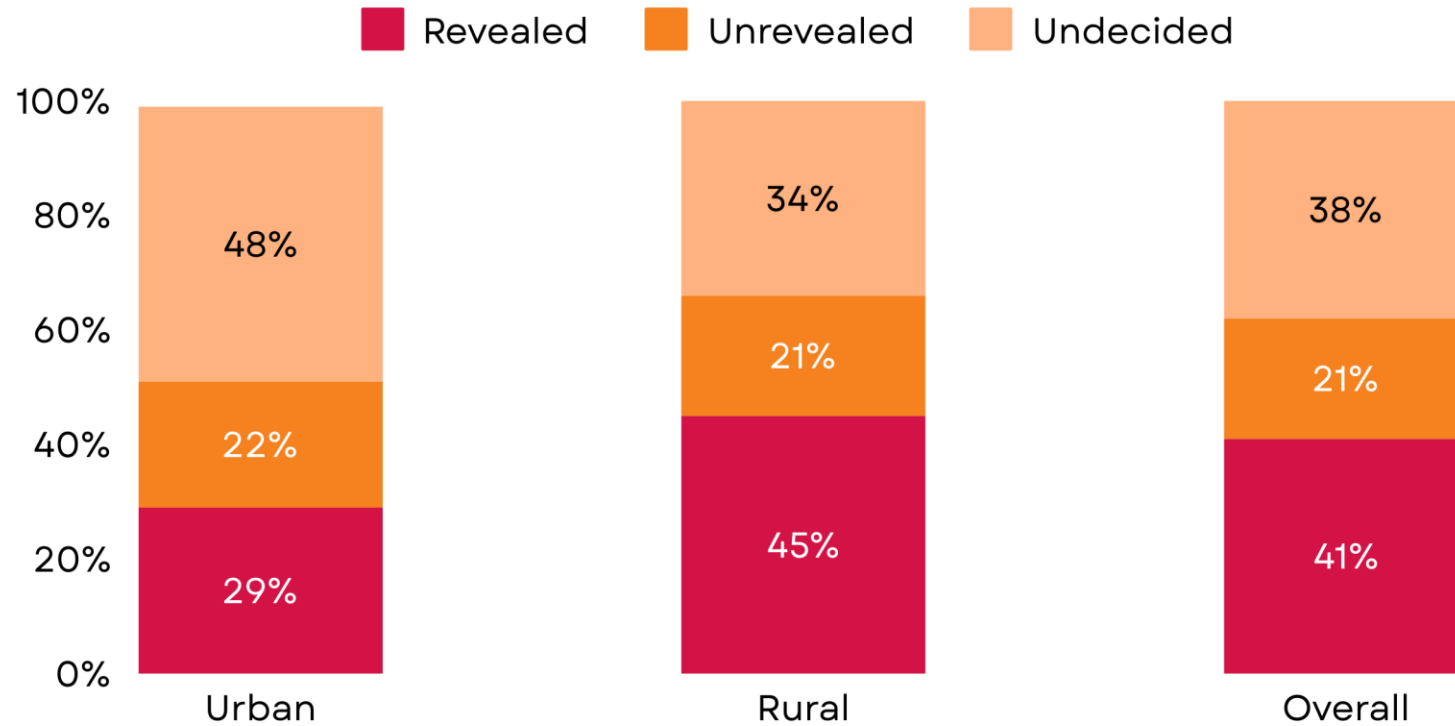
# Who are the undecided and unrevealed voters? Male vs Female



43% of the female voters remain undecided; much less proportion of male voters are undecided (34%)

# Who are the undecided and unrevealed voters?

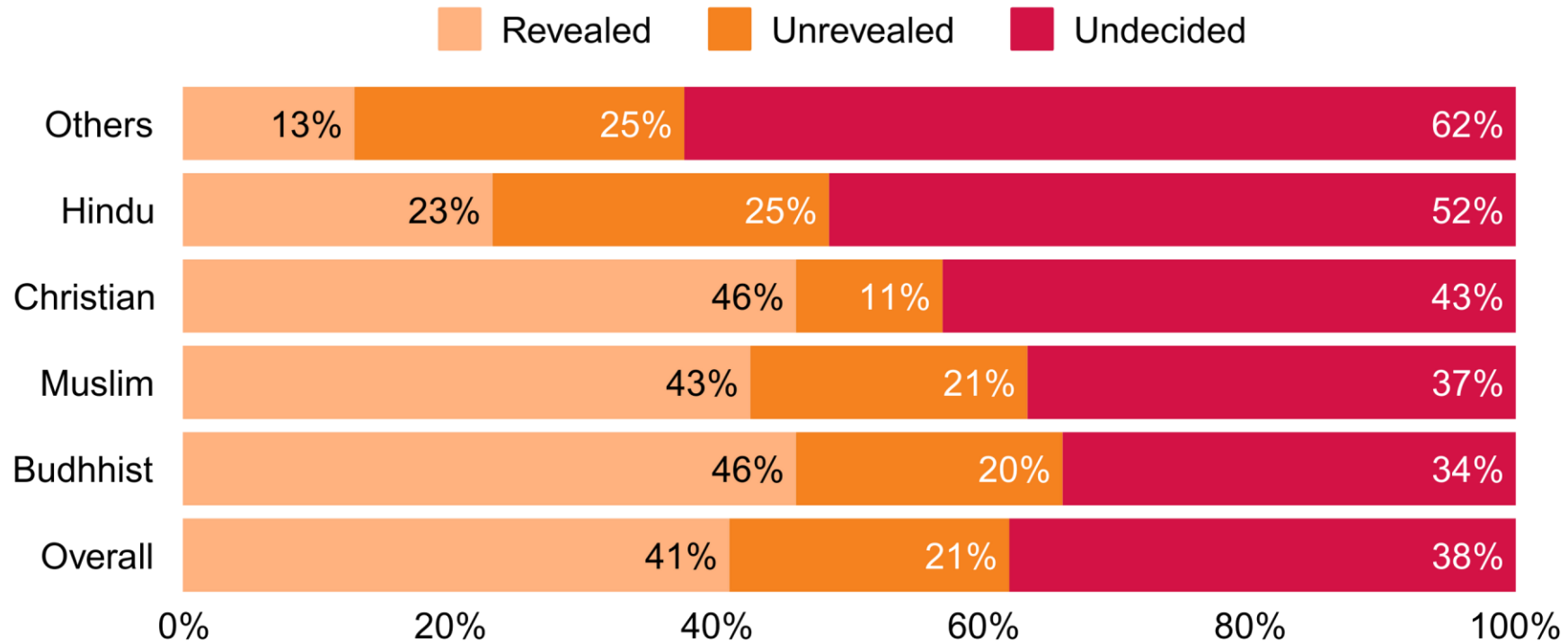
## Urban vs Rural



Almost half of the urban voters (45%) are undecided. Unrevealed voters remain similar between urban and rural areas.

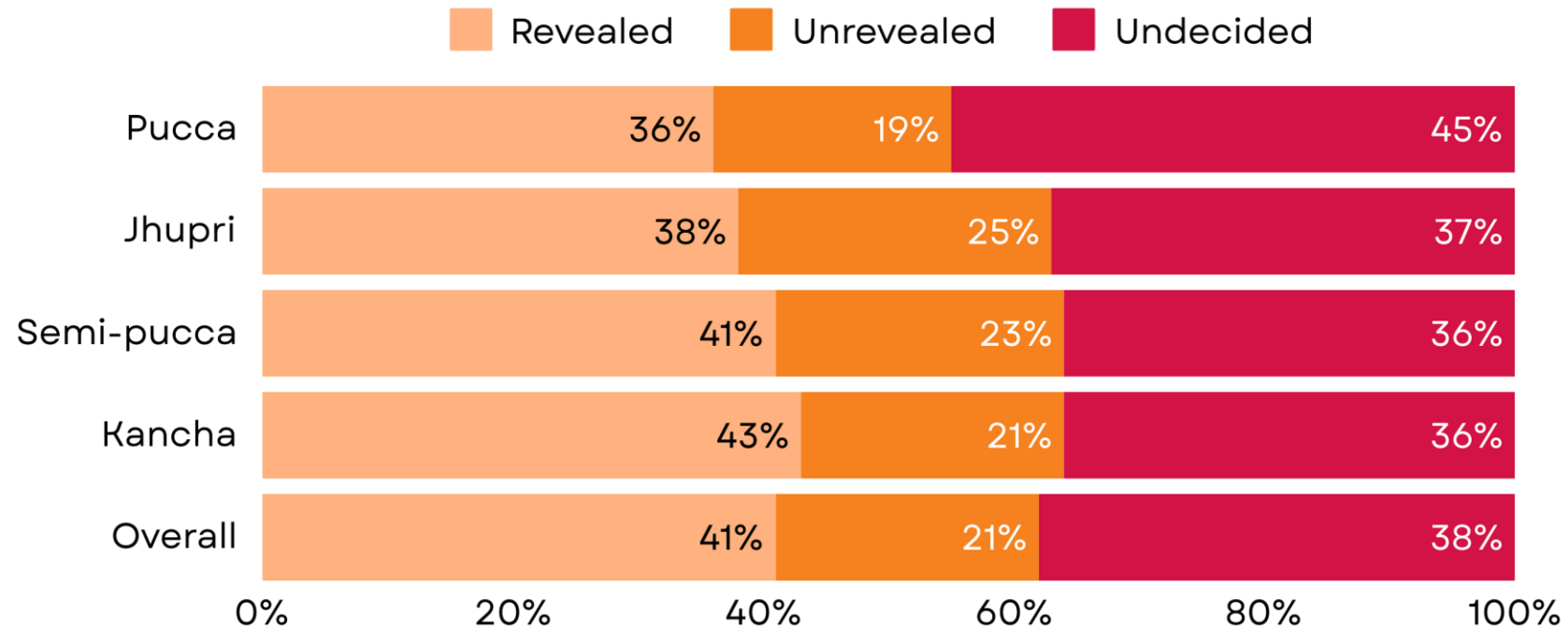
# Who are the undecided and unrevealed voters?

## Analysis by Religion



More than half of the Hindu voters remain undecided. Generally, minority religious groups remain mostly undecided. Statistic power is weak for Buddhism and Christians.

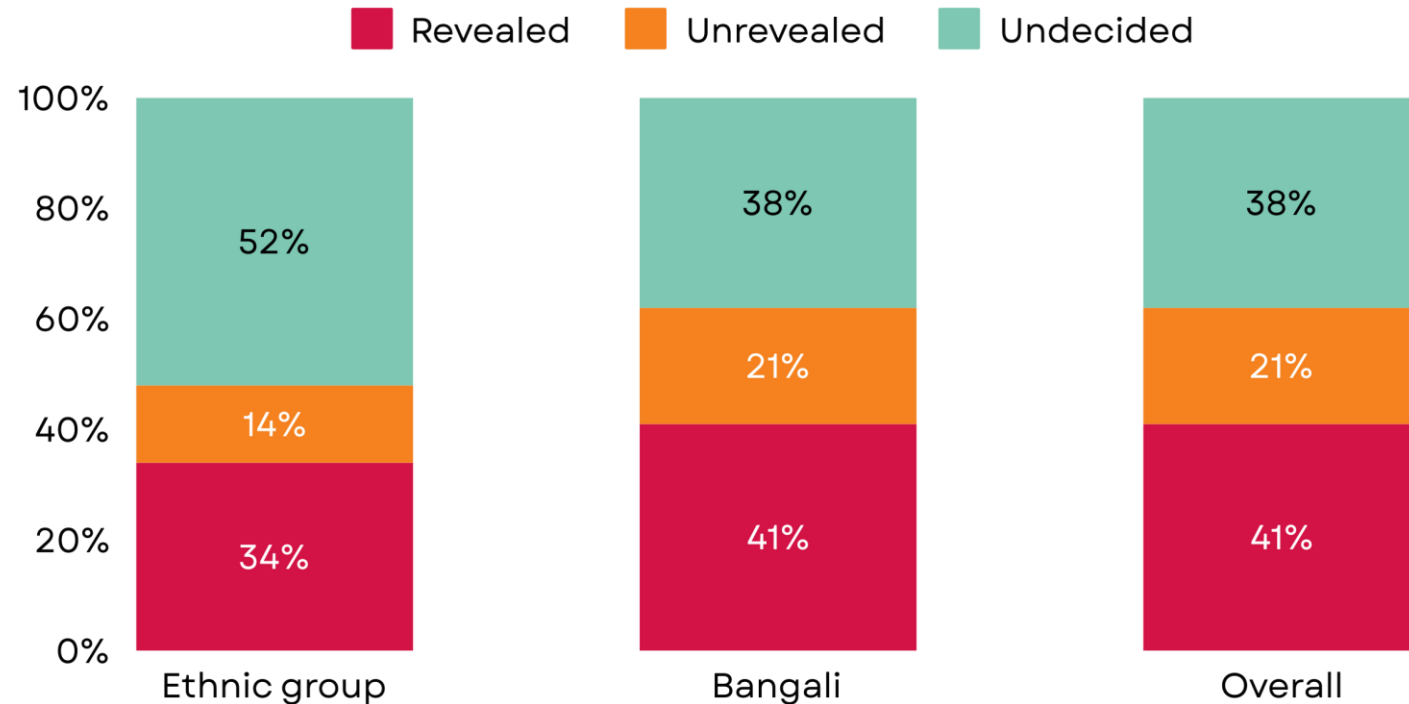
# Who are the undecided and unrevealed voters? Analysis by dwelling



Higher proportion of affluent households are undecided (45%)  
Higher proportion of poorer households are unrevealed (25%)

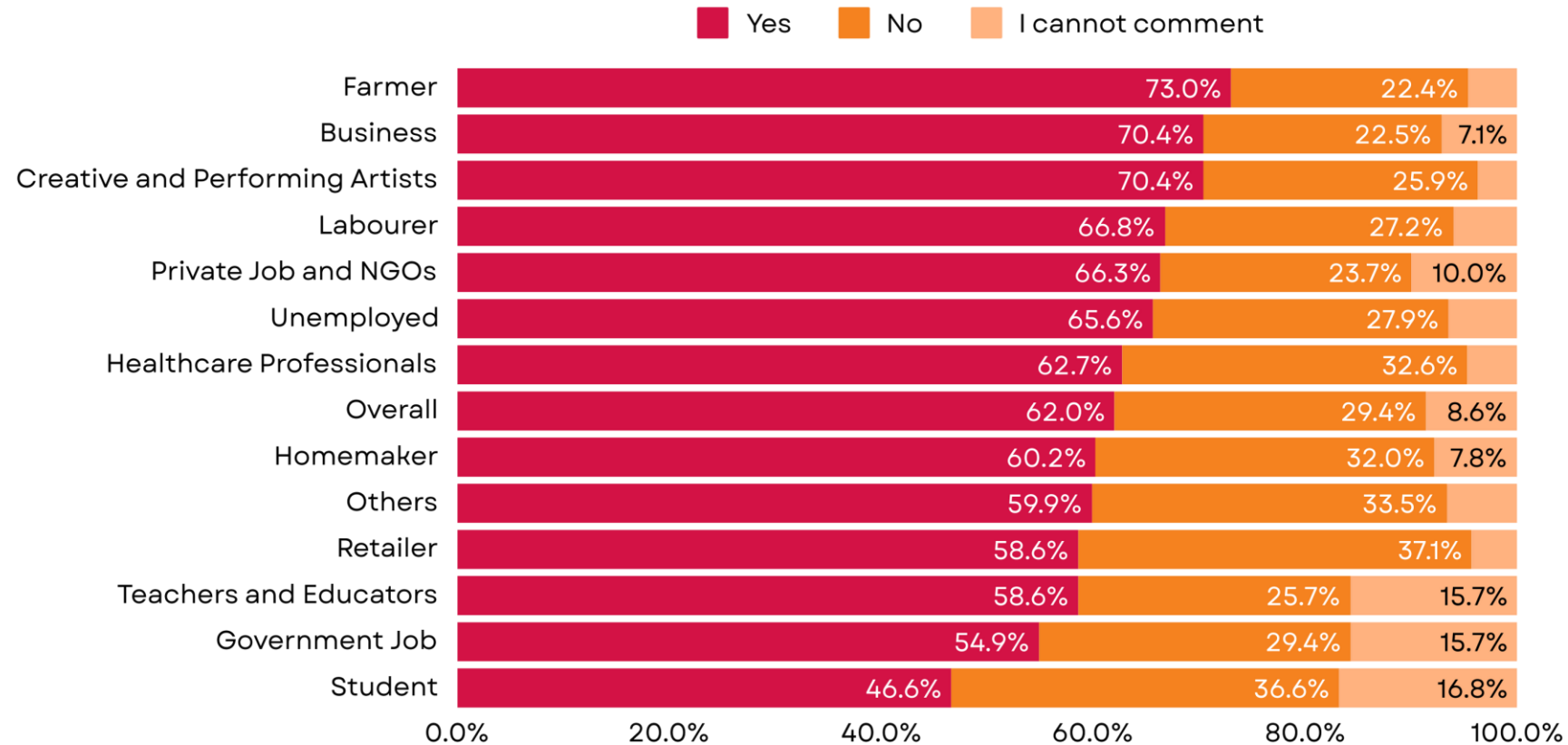


# Who are the undecided and unrevealed voters? By Ethnicity



Higher proportion of ethnic minority groups are undecided (52%)  
but most of them have revealed their voting preference

# Who are the undecided voters? By Occupational Groups



Higher proportion of students are undecided (36.6%). Other major undecided occupation groups include retailers (37.7%), Health care professionals (32.6%), Homemakers (32.0%), Government Job holders (29.4%) The data provides a directional message as statistical power is weak by occupation.

**Why are the voters  
undecided?**

# Why are the voters undecided?

## Analysis by age groups

	Age group					
	Gen Z (18-28 years)	Millennials (29-44 years)	Gen X (45-60 years)	Boomers II (61-70 years)	Boomers I* (70-79 years)	Post War (80-97 years)
Not sure who the candidate will be	36.5%	41.6%	42.7%	41.9%	39.3%	31.6%
I generally make my decision based on the political situation before the election	26.3%	27.7%	27.4%	26.1%	35.9%	26.3%
I am not thinking about the election	13.0%	12.1%	10.3%	9.6%	7.7%	21.1%
I do not trust mainstream political parties	10.3%	6.9%	3.9%	5.9%	6.8%	0.0%
I cannot comment	6.3%	3.5%	5.9%	5.5%	2.6%	10.5%
I do not see any alternative political parties	4.2%	1.8%	2.4%	2.6%	1.7%	5.3%
I don't know if my favorite party will participate in the election	2.8%	5.8%	7.2%	8.1%	5.1%	5.3%
Others	0.6%	0.6%	0.2%	0.4%	0.9%	0.0%

Lack of knowledge on the candidate appears to be the major reason across all groups. However, a larger proportion of Gen Z voters, if compared to other age group voters are apathetic towards next election (13.0%). A higher proportion of Gen Z also have lost trust on mainstream political parties (10.3%) and they do not see any alternative political parties (4.2%). Awami League's participation (taken with proxy of favorite party) is more important with Gen X and Boomers II.

# Why are the voters undecided?

## Analysis by Urban and Rural

	Urban	Rural
Not sure who the candidate will be	37.4%	40.8%
I generally make my decision based on the political situation before the election	25.8%	25.8%
I do not trust mainstream political parties	12.1%	5.3%
I am not thinking about the election	11.6%	12.1%
I do not see any alternative political parties	4.0%	2.4%
I don't know if my favorite party will participate in the election	2.6%	6.2%
I cannot comment	6.1%	4.7%
Others	0%	1%

There is higher mistrust of mainstream political parties among voters in urban areas (12.1%) if compared to rural (5.3%); potentially higher percentage of rural population are undecided because they are not sure whether Awami League will participate in the next election

# Why are the voters undecided?

## Analysis by occupational groups

	Occupation												
	Government Job	Private Job and NGOs	Homemaker	Student	Unemployed	Retailer	Farmer	Labourer	Creative and Performing Artists	Others	Teachers and Educators	Healthcare Professionals	Businesses
Not sure who the candidate will be	37.1%	40.9%	41.3%	31.6%	50.3%	31.3%	40.7%	46.3%	50.0%	42.8%	27.8%	22.7%	39.7%
I generally make my decision based on the political situation before the election	22.9%	25.0%	26.3%	26.0%	22.4%	31.3%	27.6%	28.2%	37.5%	28.9%	33.3%	40.9%	31.3%
I am not thinking about the election	14.3%	9.8%	15.2%	11.9%	6.8%	10.8%	9.0%	8.7%	12.5%	15.1%	5.6%	4.5%	7.6%
I cannot comment	8.6%	6.7%	5.7%	5.8%	8.2%	3.6%	2.2%	2.7%	0.0%	2.6%	5.6%	0.0%	6.3%
I do not trust mainstream political parties	5.7%	7.9%	4.4%	16.0%	4.8%	10.8%	7.8%	5.4%	0.0%	6.6%	22.2%	13.6%	6.3%
I don't know if my favorite party will participate in the election	5.7%	5.5%	4.8%	2.0%	4.8%	9.6%	8.4%	7.0%	0.0%	1.3%	5.6%	9.1%	6.3%
I do not see any alternative political parties	2.9%	3.7%	1.6%	6.2%	2.7%	2.4%	3.7%	1.3%	0.0%	2.0%	0.0%	9.1%	2.5%
Others	2.9%	0.6%	0.6%	0.5%	0.0%	0.0%	0.6%	0.3%	0.0%	0.7%	0.0%	0.0%	0.2%

High proportion of teachers and educators (22.2%), health care professionals (13.6%), students (16.0%) mistrust mainstream political parties; higher proportion of government employees (14.3%) are potentially apathetic about next election; Awami League's participation might be a key reason for undecided retailers (9.6%), farmers (8.4%)

# Why are the voters undecided?

## Analysis by religion

	Muslim	Hindu	Christian	Buddhism	Others
Not sure who the candidate will be	39.2%	42.1%	44.4%	39.1%	14.3%
I generally make my decision based on the political situation before the election	27.1%	27.3%	11.1%	34.8%	42.9%
I am not thinking about the election	12.6%	8.6%	0.0%	0.0%	0.0%
I do not trust mainstream political parties	8.0%	5.8%	11.1%	8.7%	0.0%
I don't know if my favorite party will participate in the election	4.3%	8.6%	0.0%	0.0%	28.6%
I cannot comment	5.3%	4.5%	22.2%	8.7%	0.0%
I do not see any alternative political parties	2.9%	2.6%	11.1%	8.7%	14.3%
Others	0.5%	0.4%	0.0%	0.0%	0.0%

Higher proportion of Muslim voters are apathetic towards the next election (12.6%). Potentially, uncertainty about Awami League's participation is affecting the Hindu voters (8.6%) to make their decisions to vote.

**How are voters  
gathering information?**



# How are voters gathering information?- Overall

	Politics	Economics	Government's Performance	Law and Order	Who to Vote
Family members	35.0%	40.60%	32.60%	32.20%	47.20%
Television news	29.4%	28.50%	28.70%	30.10%	15.20%
Social Media*	28.1%	27.10%	28.10%	30.00%	18.30%
Neighbours	24.9%	24.50%	24.00%	24.70%	19.90%
I can't comment	12.8%	11.70%	14.50%	13.20%	15.20%
Friends	11.8%	10.60%	10.90%	10.40%	9.10%
Newspaper/ online news paper	7.5%	8.00%	7.90%	8.30%	4.30%
Central leaders of the political parties	6.2%	3.70%	4.30%	3.80%	7.10%
Colleagues	4.1%	4.80%	4.40%	4.30%	3.50%
Local leaders of the political parties	4.8%	3.20%	3.90%	3.70%	7.70%
Talk show	4.5%	4.50%	4.30%	3.90%	2.10%
Religious leader	2.4%	1.70%	1.80%	1.60%	2.70%
Community leader	1.1%	0.70%	1.00%	1.10%	1.30%
Others	1.7%	1.60%	1.60%	1.40%	6.10%

\*News on social media (Facebook, WhatsApp, YouTube, TikTok etc.) and Videos of influencers on YouTube or Facebook or TikTok or other social media

Social media is one of the lead channels for gathering information on politics, economics, government's performance and law and order situation; but much lesser proportion of voters identified social media as a channel to collect information on whom to vote.

# How are voters gathering information?

## By age group on whom to vote

	Gen Z	Millennials	Gen X	Boomers II	Boomers I*	Post War
Friends	12.1%	7.5%	7.5%	6.6%	5.7%	11.2%
Neighbours	13.9%	20.9%	24.9%	28.3%	27.4%	31.2%
Colleagues	2.8%	3.8%	4.1%	4.3%	2.3%	6.2%
Family members	47.9%	48.2%	46.1%	44.4%	41.4%	52.5%
Social Media	24.4%	18.1%	13.6%	8.2%	6.6%	1.2%
Newspaper/ online news paper	5.7%	3.1%	4.3%	3.0%	3.7%	3.8%
Television news	12.2%	15.4%	19.3%	17.3%	20.0%	15.0%
Central leaders of the political parties	6.3%	7.0%	8.3%	7.3%	9.1%	6.2%
Local leaders of the political parties	5.0%	8.6%	9.7%	10.8%	8.9%	6.2%
Talk show	2.3%	1.9%	1.9%	2.7%	3.4%	2.5%
Religious leader	2.5%	2.6%	3.0%	2.7%	2.9%	3.8%
Community leader	0.8%	1.4%	1.9%	1.7%	1.1%	1.2%
I can't comment	16.6%	13.6%	14.3%	16.7%	18.6%	17.5%
Others	5.7%	6.5%	6.4%	6.2%	6.9%	5.0%

\* News on social media (Facebook, WhatsApp, YouTube, TikTok etc.) and Videos of influencers on YouTube or Facebook or TikTok or other social media

Gen Z's and Millennials are predominantly consuming information from social media on whom to vote. Family members are the most important channel for gathering information on whom to vote. This shows that voters probably make decisions as a family rather than as individuals.

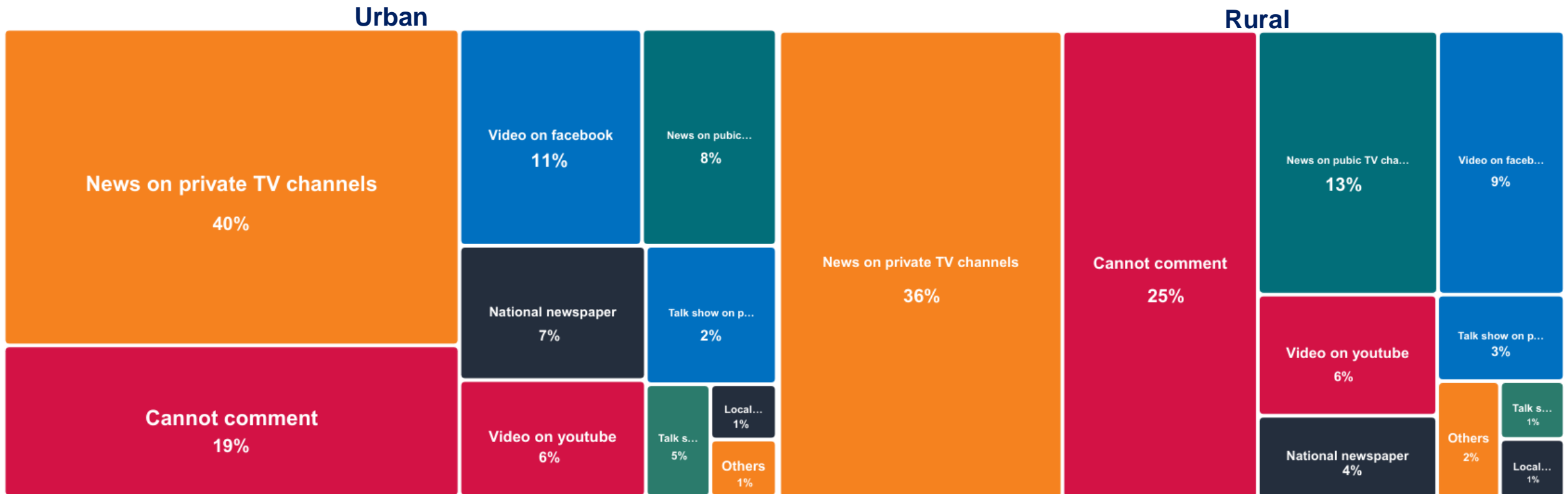
# How are voters gathering information?

## Urban vs rural on whom to vote

	Politics		Economics		Government's Performance		Law and Order Situation		Whom to Vote	
	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural
Friends	18.4%	9.0%	16.0%	8.4%	16.4%	8.6%	16.0%	8.1%	12.9%	7.5%
Neighbours	17.3%	28.0%	18.3%	27.1%	16.8%	27.0%	18.1%	27.5%	14.1%	22.4%
Colleagues	5.6%	3.5%	5.8%	4.3%	5.2%	4.1%	5.5%	3.8%	4.5%	3.1%
Family members	30.3%	37.0%	36.0%	42.5%	28.9%	34.2%	28.2%	33.8%	40.6%	50.0%
Social Media	34.6%	25.3%	33.5%	24.4%	33.8%	25.7%	36.9%	27.1%	22.0%	16.8%
Newspaper/ online news paper	13.5%	5.1%	14.3%	5.3%	13.4%	5.5%	14.4%	5.8%	7.0%	3.1%
Television news	30.1%	29.2%	29.6%	28.1%	28.0%	29.0%	30.9%	29.8%	16.2%	14.8%
Central leaders of the political parties	6.5%	6.1%	3.9%	3.7%	4.1%	4.4%	3.8%	3.8%	7.6%	6.8%
Local leaders of the political parties	3.4%	5.4%	2.3%	3.6%	2.9%	4.3%	2.5%	4.2%	7.6%	7.7%
Talk show	6.9%	3.5%	6.7%	3.6%	6.9%	3.2%	6.0%	3.0%	3.7%	1.5%
Religious leader	1.9%	2.6%	1.3%	1.9%	1.3%	2.0%	1.2%	1.8%	1.9%	3.0%
Community leader	0.9%	1.2%	0.8%	0.7%	0.8%	1.0%	1.0%	1.2%	0.9%	1.5%
I can't comment	12.6%	12.8%	11.2%	11.9%	14.2%	14.6%	12.4%	13.6%	20.3%	13.1%
Others	1.1%	1.9%	1.1%	1.8%	1.2%	1.8%	0.7%	1.7%	4.6%	6.8%

Social media has a more dominating role in urban areas (22.0%) if compared to rural (16.8%) in terms of source of information on whom to vote.

# Trusted channels - Urban vs Rural



Even though social media is identified as strong channel for gathering information, it is not regarded as trustworthy as news on private TV channels (40%).

## Trusted channels – By Age Group

	Millennial	Gen X	Boomers II	Boomers I*	Post War
News on private TV channels	38%	40%	40%	33%	24%
News on public TV channels	12%	12%	13%	15%	9%
Video on Facebook	8%	4%	2%	1%	0%
Video on YouTube	7%	4%	2%	2%	1%
Talk show on private TV channels	4%	4%	4%	4%	0%
Talk show on public TV channels	1%	2%	1%	1%	1%
Video on WhatsApp	0%	0%	0%	0%	0%
National newspaper	4%	5%	3%	1%	11%
Local newspaper	1%	1%	1%	1%	1%
Cannot comment	24%	28%	32%	38%	49%
Others	2%	2%	2%	3%	4%

Social media is more trusted by Gen Z's; but generally even for the age groups, news on private TV channels is identified as most trustworthy. Traditional newspapers have lost their appeal.

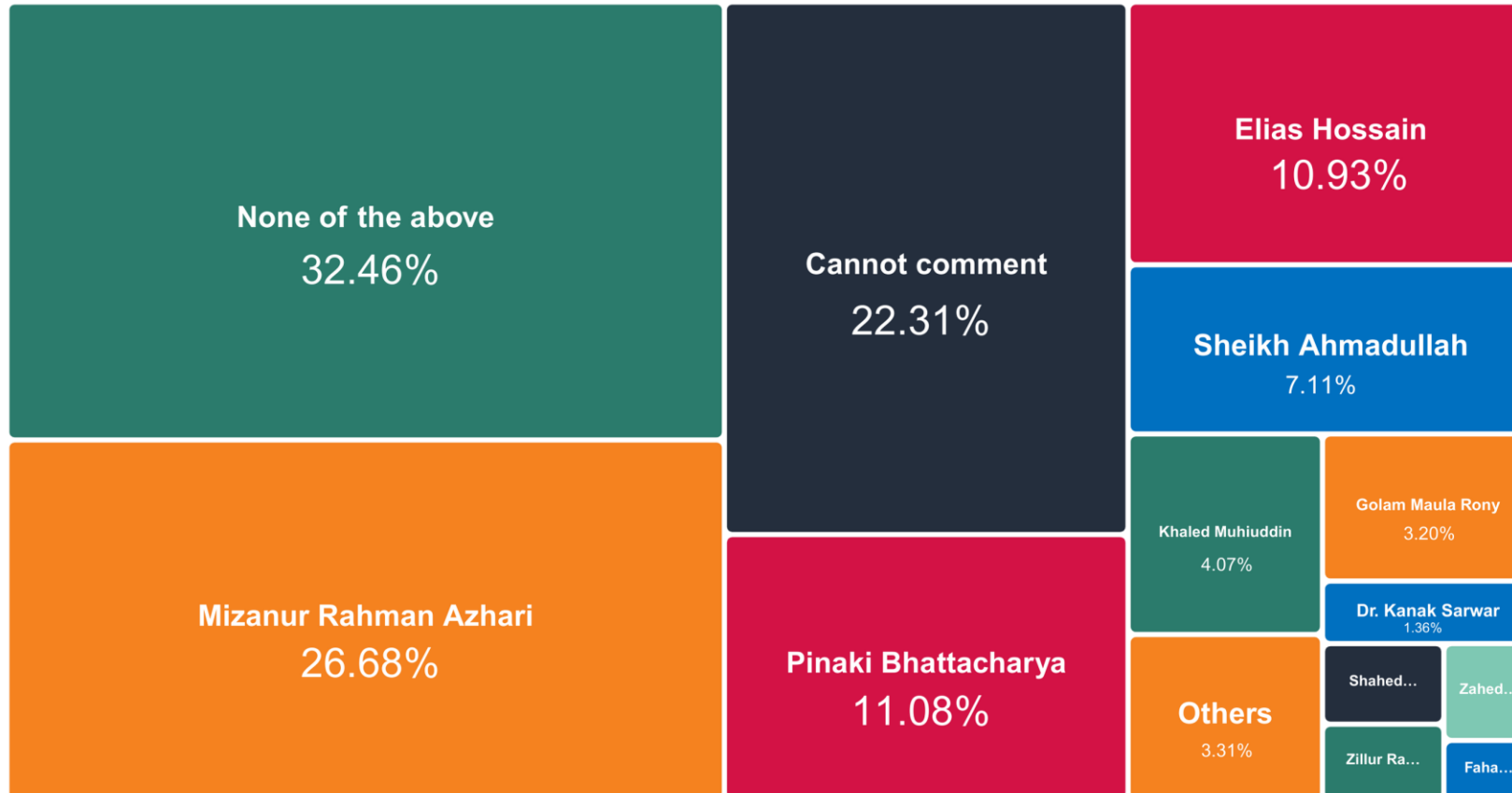
## Trusted channels - By Occupational Groups

	Private Job and NGOs	Homemaker	Student	Unemployed	Retailer	Farmer	Labour	Creative and Performing Artists	Others	Teachers and Educators	Healthcare Professionals	Business
News on private TV channel's	40%	33%	35%	33%	40%	42%	39%	44%	39%	41%	40%	44%
Talk show on private TV channels	7%	2%	6%	4%	4%	5%	3%	0%	3%	6%	7%	4%
News on pubic TV channels	9%	13%	7%	12%	14%	14%	13%	7%	10%	9%	7%	10%
Talk show on public TV channels	2%	1%	2%	0%	2%	2%	2%	4%	1%	1%	5%	1%
Video on Facebook	14%	8%	17%	12%	5%	5%	9%	15%	10%	6%	12%	8%
Video on YouTube	7%	6%	9%	7%	5%	4%	5%	7%	7%	6%	16%	6%
Video on Whatsapp	0%	0%	0%	0%	1%	0%	0%	0%	0%	3%	0%	0%
National newspaper	8%	2%	10%	4%	6%	3%	3%	11%	6%	9%	7%	6%
Local newspaper	1%	0%	1%	1%	1%	1%	1%	4%	1%	3%	2%	1%
Cannot comment	11%	32%	11%	25%	22%	23%	26%	7%	21%	17%	5%	19%
Others	0%	3%	1%	2%	0%	2%	1%	0%	3%	0%	0%	1%

Higher proportion of students trust Facebook (12%) and Youtube (5%) videos. Private TV channels is more trusted across all age groups. (results show direction; results are not statistically significant)

**Which social media  
influencers people are  
discussing about?**

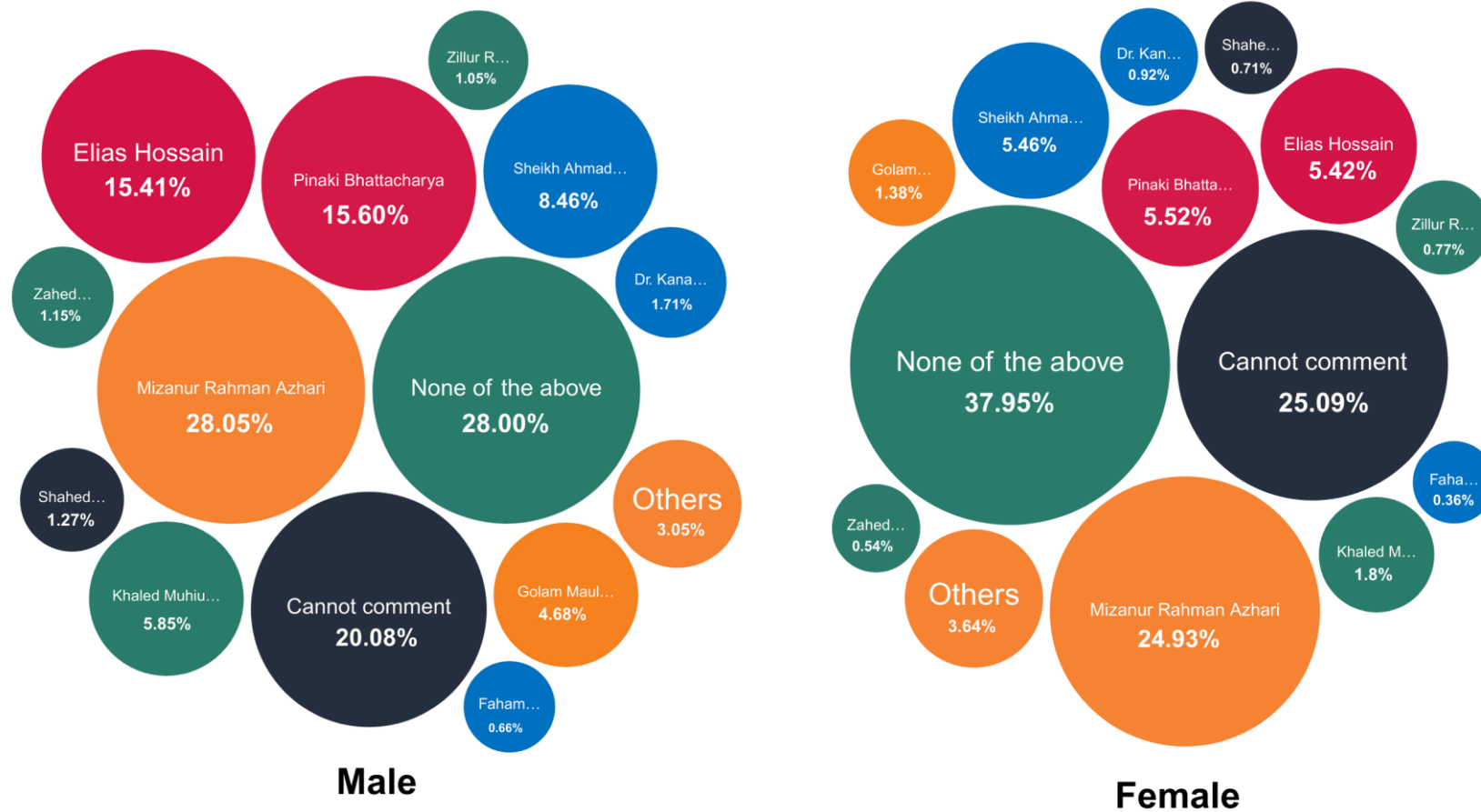
# Which influencers people are discussing about?



One third of the voters are not following the major social media influencers; among the rest, Mizanur Rahman Azhari has a strong lead with 22.31%. Pinaki Bhattacharya (11.08%) and Elias Hossain (10.93%) are the two other social media influencers that the voters are discussing about.

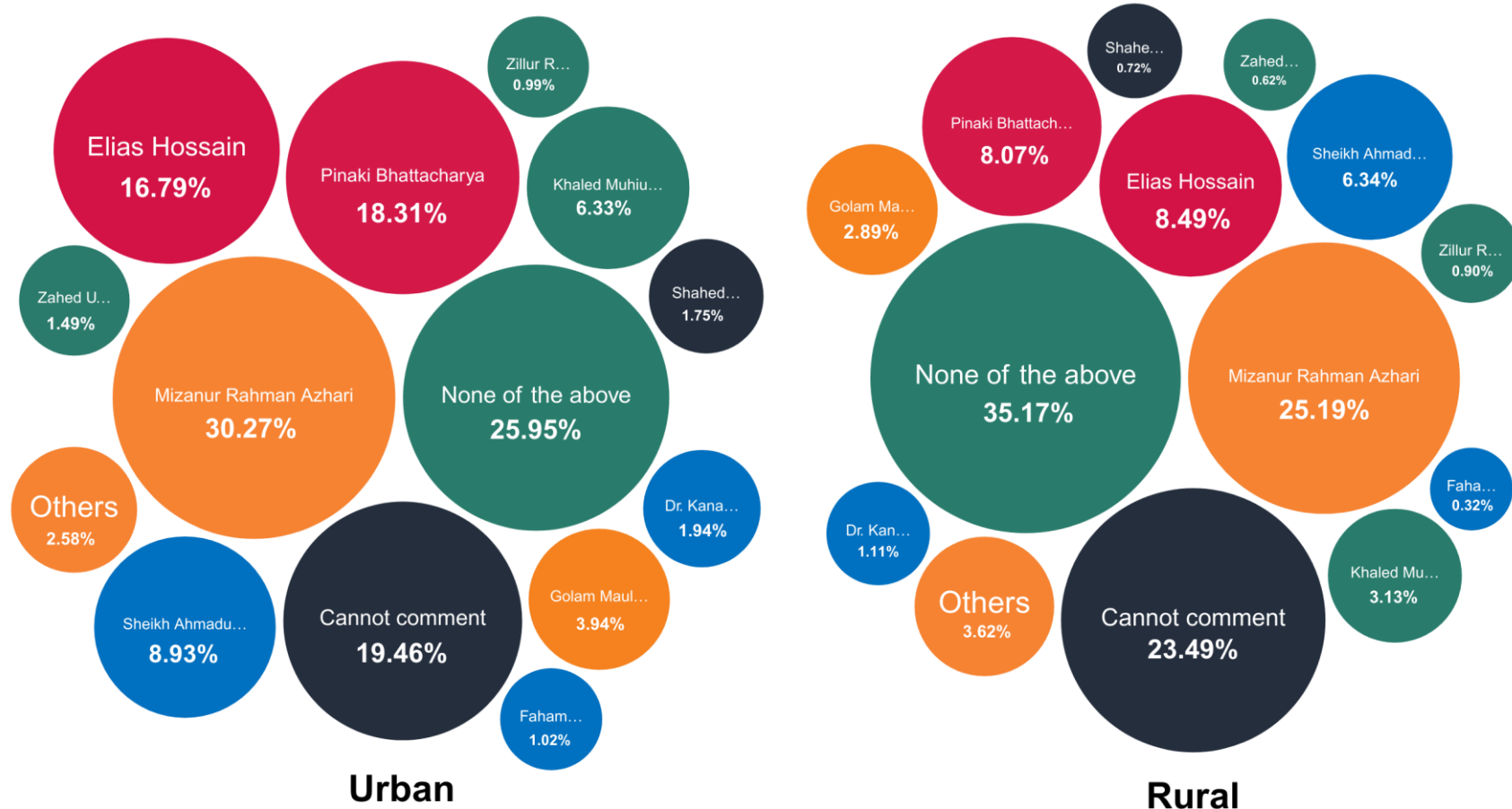


# Which influencers people are discussing about?



Social media influencers have higher outreach among the male if compared to female voters; Pinaki Bhattacharya and Elias Hossain have much higher engagement among male voters if compared to female voters; in contrast Mizanur Rahman Azhari have comparatively smaller difference in engagement among male and female voters

# Which influencers people are discussing about?



Mizanur Rahman Azhari has high engagement in both urban and rural areas; Pinaki Bhattacharya and Elias Hossain have predominantly urban engagement

# Which influencers people are discussing about?

## By Age Groups

	Gen Z	Millennials	Gen X	Boomers II	Boomers I*	Post War	Total
None of the above	27.92%	32.97%	35.55%	38.99%	44.00%	40.00%	32.46%
Mizanur Rahman Azhari	33.41%	26.52%	20.13%	17.20%	12.86%	20.00%	26.68%
Cannot comment	16.15%	23.11%	26.47%	32.05%	35.14%	31.25%	22.31%
Pinaki Bhattacharya	15.79%	9.61%	8.72%	5.07%	2.86%	1.25%	11.08%
Elias Hossain	15.90%	10.00%	6.95%	4.95%	3.14%	1.25%	10.93%
Sheikh Ahmadullah	9.67%	6.89%	4.26%	5.07%	2.29%	2.50%	7.11%
Khaled Muhiuddin	5.49%	3.66%	3.11%	2.35%	2.00%	2.50%	4.07%
Others	2.95%	3.44%	4.10%	2.85%	2.29%	5.00%	3.31%
Golam Maula Rony	3.33%	3.14%	3.58%	2.60%	1.71%	2.50%	3.20%
Dr. Kanak Sarwar	1.92%	1.05%	1.04%	0.99%	0.57%	2.50%	1.36%
Shahed Alam	1.56%	0.91%	0.57%	0.50%	0.00%	0.00%	1.02%
Zillur Rahman	1.00%	0.77%	1.45%	0.50%	0.00%	0.00%	0.93%
Zahed Ur Rahman	1.18%	0.85%	0.78%	0.25%	0.00%	0.00%	0.88%
Faham Abdus Salam	0.87%	0.44%	0.21%	0.25%	0.00%	0.00%	0.52%

# Recommendations

The survey shows that younger generation voters, religious and ethnic minority voters, female voters, government officials, students make the majority of the undecided voters.

Nearly one third of the undecided voters among the younger generations have reported that they do not have interest on election or on the mainstream political parties. Nearly one out of five urban voters have reported the same. **The political parties will have to find deeper connections to the younger generation voters and the urban voters to win their confidence.**

**Awami League's fall may have left a large number of voters as floating.** These voters are more concentrated in rural areas and among the older generation voters. **It will be imperative to assess the needs and concerns of these voters** to make them interested to vote.

In the current political scenario, a good percentage of voters may not eventually vote.

Findings suggest that the voters vote as families. As such, the female voters revealed preference may mirror the male members revealed preference and vice versa. Nevertheless, female voters appear to be more apathetic towards politics and election and may not vote. **Winning the confidence of the female voters may make a strong difference in the outcome of the election results.**

Social media has emerged as a major source of information. However, private TV channels are more trusted. The election campaign and news on social media and the TV channels might play a critical role in the next general election. Specially, **social media engagement will be more important to get closer to the younger generation voters. The news mix in social media and private TV channels might swing the party preference specially among young voters.**

At least half of the voters are actively talking about the social media influencers. **Social media influencers might play a decisive role in the next general election ESPECIALLY AMONG young and new voters.**

## Contact

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