# People's Election Pulse: Feb- March, 2025
## A Survey of INNOVISION Consulting

# SUMMARY REPORT

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## Background

INNOVISION is the leading international advisory and management consulting firm in Bangladesh. We have been working to support inclusive economic and social growth in Bangladesh and around the world since 2008. We are the largest in Bangladesh in undertaking research and management consulting services on national economic and social development challenges. INNOVISION is highly regarded in Bangladesh for its leadership in administering research during crisis and post emergency period. We were one of the first organizations to initiate phone call rapid survey during COVID 19 to understand the economic health of low-income population. After the fall of the past regime in August 5, 2024, INNOVISION launched BangladeshSpeaks, a micro polling site to rapidly collect and disseminate people's opinion. We followed up with the first national poll on who people will vote for in September 2024. The current survey is an extended version of our last national poll. We have extended our scope to explain people's opinion on performance of the interim government, expectations from future government, people's voting choice and preferences and voting behaviors. This is the first version of our report which provides the top line findings. The survey was supported by research thinktank BRAIN and policy think tank Voice for Reform.

## Sampling Methodology

The People' Election Pulse -2025 Survey employed a structured and rigorous methodology to ensure a representative and reliable assessment of public opinion. A two-stage stratified cluster sampling design was implemented using census enumeration areas as Primary Sampling Units (PSUs), based on the Bangladesh Bureau of Statistics' Population and Housing Census 2011, as the latest enumeration areas of 'Population and Housing Census 2022 remain unavailable or inaccessible.

The survey aimed to capture the perceptions of adult citizens or potential voters (18+ years of age) across the eight divisions of Bangladesh, with stratification by urban and rural areas. The total initial sample size of 10,000 respondents was proportionally allocated across divisions, with PSUs selected using the Probability Proportional to Size (PPS) method. The sampling frame was further stratified into sub-administrative units, including districts, upazilas, unions (rural), and mohallas/para/wards (urban PSUs) or mouzas/ villages/para (rural PSUs).

The initial PSU selection targeted 500 units, with 129 allocated to urban areas and 371 to rural areas. Each PSU comprised 20 households, yielding an initial total sample size of 10,000 respondents, with an urban-rural ratio of 25:75. Each selected household represented a single respondent, considered a potential voter.

To ensure adequate representation of students from educational institutes, professionals (such as teachers, doctors, engineers, and health workers etc.), and key marginalized groups—including slum dwellers, ethnic minorities, and the Hijra community—an additional 50 PSUs were incorporated. These were all in urban areas, raising the total target to 550 PSUs and expanding the sample size to 11,000 respondents.

However, the final data collection covered 536 PSUs instead of the targeted 550, yielding a total sample of 10,696 respondents/potential voters (97.2% coverage). Due to the exclusive addition of PSUs in urban areas, the urban sample proportion increased from the initially planned 25% to 29%.

This adjustment enhanced the study's inclusivity, ensuring better representation of diverse groups. The revised sampling approach also provided deeper insights into urban populations, particularly among marginalized and underrepresented communities.

Household or respondent selection followed a systematic sampling approach, with individual respondents chosen through randomization grids within selected households, or randomly selected educational institutions, health facilities, or slums.

Data collection was conducted through Computer-Assisted Personal Interviewing (CAPI) using SurveyCTO/Kobo Toolbox to ensure accuracy and efficiency.

To maintain data integrity, a multi-tiered quality assurance process was in place, including real-time entry checks, supervisor accompaniments, spot-checks, and high-frequency data validation. Ethical considerations were strictly followed, ensuring informed consent, confidentiality, and voluntary participation. The survey execution was carried out by a trained team of 78 enumerators and nine supervisors within a 13-day timeframe. Post-collection, data was cleaned and analyzed using SPSS/STATA, with results disaggregated by geographic gender and demographic variables. Findings were disseminated through electronic and social media, as well as newspapers, reports, dashboards, and stakeholder engagements, providing valuable insights into national public opinion trends.

- **Sampling Method:** Stratified simple random sampling based on population distribution and primary sampling units as per population census 2011.
- **Sample Size**: 10,696 voters
- **Sampling Units**: 8 divisions, 64 districts
- **Enumerators**: 67 trained personnel, 9 supervisors
- **Data Collection Method**: Computer Aided Personal Interview (CAPI)
- **Primary Sampling Units**: Wards randomly sampled based on the 2011 census
- **Household Sampling**:
  o 20 households systematically sampled from each ward
  o Starting point defined, sampling every third household

## Sample Distribution

- **Total Households Sampled**: 9,823 through door-to-door surveys
- **Additional Samples**: 873 collected from various universities
- **Total Samples**: 10,696
- **Stratification**:
  o **Rural vs. Urban**: 71% rural, 29% urban
  o **Gender**: 55% male, 45% female
  o **Generational Cohorts**:
    ▪ 36% Gen Z (18-28 years)
    ▪ 34% Millennials (29-44 years)
    ▪ 18% Gen X (45-60 years)
    ▪ 8% Boomers II

- 3% Boomers I
- 1% Post War

## Demographic Breakdown

- **Religious Affiliation**:
  - 89% Muslim
  - 10% Hindu
  - 1% Christian
- **Ethnic Representation**:
  - 2% ethnic households
  - 98% Bangali

## Geographic Distribution of Samples

- **Dhaka Division**: 26%
- **Chattagram Division**: 19%
- **Rajshahi Division**: 13%
- **Khulna Division**: 12%
- **Rangpur Division**: 11%
- **Mymensingh Division**: 7%
- **Sylhet Division**: 6%
- **Barishal**: 6%

# About Interim Government

## Expectations from IG

**Economic and social well-being indicators are prioritized by the voters** as expectations from the Interim Government (IG); **reform agenda scores low in voter's expectation from the IG**

*Table 1: Expectations from the IG- Economic and Social Indicators*

| | |
|---|---|
| Manage price hikes | 69.6% |
| Improved law and order | 45.2% |
| Employment growth | 29.1% |
| Reduced corruption in public services | 21.8% |
| Election friendly environment | 20.2% |
| Investigate corruption charges | 14.5% |
| Justice for murders during the July revolution | 12.3% |
| Better conditions for business | 11.7% |
| Increased access to public services | 11.1% |
| Reform of law enforcement agencies like Police, RAB | 9.3% |
| Political reform | 9.3% |
| Constitutional reform | 5.3% |
| Cannot comment | 2.7% |
| Others | 1.8% |
| n | 10696 |

**Most of the voters think that the IG has not met their expectations; however, the IG performs relatively better in terms of managing price hikes; it performs poorly in terms of employment growth**

*Table 2: % of voters who think their expectations have been met*

| | Managing Price Hikes | Improved Law and Order | Employment Growth | Reduced Corruption | Election friendly environment | Better Conditions for Business |
|---|---|---|---|---|---|---|
| Fully Met | 2.62% | 1.39% | 1.15% | 3.09% | 2.69% | 2.15% |
| Partially Met | 42.33% | 40.33% | 24.64% | 42.56% | 29.05% | 35.57% |
| Not Met | 55.05% | 58.28% | 74.21% | 54.35% | 68.26% | 62.28% |

# About Law and Order

**Most of the voters think the extortion situation has worsened in last 6 months**

*Table 3: Perception about extortion situation*

| | |
|---|---:|
| Increased | 41.0% |
| Decreased | 29.8% |
| Same | 17.8% |
| Cannot comment | 11.4% |
| (n) | 10696 |

**Comparatively higher percentage of urban voters think the extortion situation has increased**

*Table 4: Perception about extortion situation (rural vs urban)*

| | Urban | Rural | Total |
|---|---|---|---|
| Increased | 46.74% | 38.60% | 41.00% |
| Decreased | 23.78% | 32.27% | 29.78% |
| Same | 18.47% | 17.52% | 17.80% |
| Cannot comment | 11.00% | 11.60% | 11.42% |
| (n) | 3145 | 7551 | 10696 |

# Expectations from Future Government

**Economic and social well-being indicators are prioritized by the voters as expectations from the future government**

*Table 5: Expectations from future government*

| | |
|---|---:|
| Manage price hikes | 71.2% |
| Improved law and order | 52.2% |
| Employment growth | 39.7% |
| Reduced corruption in public services | 32.8% |
| Investigate corruption charges | 21.7% |
| Increased access to public services | 20.7% |
| Better conditions for business | 18.8% |
| Justice for murders during the July revolution | 15.7% |
| Reform of law enforcement agencies like Police, RAB | 13.5% |
| Political reform | 13.5% |
| Constitutional reform | 8.6% |
| Cannot comment | 2.5% |
| Others | 2.1% |
| (n) | 10696 |

**Reform agenda are prioritized more by urban voters**

*Table 6: Expectations from future government (urban vs rural)*

|  | Urban | Rural | Total |
|---|---|---|---|
| Manage price hikes | 64.55% | 73.95% | 71.19% |
| Improved law and order | 49.98% | 53.15% | 52.22% |
| Employment growth | 41.05% | 39.17% | 39.73% |
| Reduced corruption in public services | 34.40% | 32.08% | 32.76% |
| Investigate corruption charges | 23.24% | 21.06% | 21.70% |
| Increased access to public services | 18.82% | 21.44% | 20.67% |
| Better conditions for business | 17.81% | 19.19% | 18.78% |
| Justice for murders during the July revolution | 17.49% | 14.90% | 15.66% |
| Reform of law enforcement agencies like Police, RAB | 16.41% | 12.29% | 13.50% |
| Political reform | 18.47% | 11.38% | 13.46% |
| Constitutional reform | 11.03% | 7.64% | 8.64% |
| Cannot comment | 2.51% | 2.50% | 2.51% |
| Others | 1.91% | 2.13% | 2.07% |
| (n) = | 3145 | 7551 | 10696 |

# Voting Preferences

## Expectation about next election date

**58.1% of the voters want the next election by end of 2025**

*Table 7: Month and Year by when the voters want the next general election*

| | |
|---|---|
| June 2025 | 31.6% |
| December 2025 | 26.5% |
| June 2026 | 7.9% |
| December 2026 | 6.6% |
| Later than December 2026 | 10.9% |
| I cannot comment | 16.4% |
| (n) = | 5892 |

31.6 % of the voters want the next general election by June 2025 (95% confidence level, margin of error +/- 1.19%); 26.5% voters want next general election by December 2025 (95% confidence level, margin of error +/- 1.13%)

**Higher percentage of the rural voters (34.41%) want the next general election by June 2025 if compared to urban voters (23.95%)**

*Table 8: Month and Year by when the voters want the next general election*

|  | Urban | Rural | Total |
|---|---|---|---|
| June 2025 | 23.95% | 34.41% | 31.59% |
| December 2025 | 26.46% | 26.58% | 26.54% |
| June 2026 | 10.18% | 7.11% | 7.94% |
| December 2026 | 7.35% | 6.32% | 6.60% |
| Later than December 2026 | 16.03% | 9.04% | 10.93% |
| I cannot comment | 16.03% | 16.53% | 16.40% |
| (n) = | 1591 | 4301 | 5892 |

**50% of the voters did not vote in any of the last three general elections**

*Table 9: % who did not vote in last three general elections*

|  | Total |
|---|---|
| New voter | 11.2% |
| Did not vote in any of the last three general elections | 39.4% |
| Voted once in one of the last three general elections | 49.4% |
| (n) = | 10696 |

# Decision criteria and decision-making processes

**Candidates matter; 38% of the voters assess the candidate's past performance as an MP before making a voting decision**

*Table 10: Voters choice- Party vs candidate*

|  |  |
|---|---|
| I decide based on the performance of the previous candidate | 38.1% |
| I always vote for the same party | 21.6% |
| None of the above | 14.2% |
| I cannot comment | 8.8% |
| Not Applicable (for new voter) | 8.8% |
| I vote for a different party in every election | 8.6% |
| (n) = | 10696 |

**But candidates might be completely new; what other determinants might affect the voters? 22% says grassroot politics will affect their votes; 21% says religion-based politics will affect their votes**

*Table 11: influences on voting decisions (% of respondents)*

| | |
|---|---|
| Social activities of political parties at local level | 21.6% |
| Religion based politics | 20.5% |
| Cannot comment | 19.2% |
| Election manifestos of political parties | 18.8% |
| Alignment with July movement | 16.4% |
| Political parties' stance on the liberation war in 1971 | 9.7% |
| None of the above | 7.7% |
| Awami League's participation in the election | 7.6% |
| Political parties' policy on India | 3.2% |
| Others | 1.2% |
| (n) = | 10220 |

**Political alignment with July movement is more important among the Gen Z voters**

*Table 12: influences on voting decisions (% of respondents)- By age groups*

| | Gen Z (18-28 years) | Millennials (29-44 years) | Gen X (45-60 years) | Boomers II (61-70 years) | Boomers I (71- 79 years) | Post War (80-97 years) | Total |
|---|---|---|---|---|---|---|---|
| Social activities of political parties at local level | 21.6% | 21.1% | 21.7% | 24.1% | 21.2% | 14.3% | 21.6% |
| Religion based politics | 21.7% | 20.2% | 18.8% | 20.4% | 20.0% | 23.4% | 20.5% |
| Cannot comment | 15.9% | 21.1% | 20.9% | 20.9% | 22.1% | 24.7% | 19.2% |
| Election manifestos of political parties | 18.0% | 19.0% | 19.8% | 19.6% | 17.7% | 16.9% | 18.8% |
| **Political alignment with the July movement** | **22.8%** | **12.7%** | **13.3%** | **13.7%** | **7.4%** | **7.8%** | **16.4%** |
| Political parties' stance on the liberation war in 1971 | 11.0% | 8.2% | 9.9% | 8.9% | 9.7% | 13.0% | 9.7% |
| None of the above | 7.1% | 8.3% | 7.8% | 7.7% | 7.9% | 9.1% | 7.7% |
| Awami League's participation in the election | 5.9% | 7.8% | 9.4% | 8.7% | 10.6% | 13.0% | 7.6% |
| (n) = | 3731 | 3461 | 1836 | 775 | 340 | 77 | 10220 |

**Voters vote as a household rather than as individuals; family members will have the most influence on voting decision (47%) followed by neighbours (20%). However, among the media channels, news on social media will have the highest influence on most (18%). Videos of influencers on social media is identified as an influencing channel on voting decision by 5% of the voters**

*Table 13: social vs media influences on voting decisions (% of respondents)- By age groups*

| | |
|---|---|
| Family members | 47.07% |
| Neighbours | 19.88% |
| News on social media (facebook, Whatsapp, youtube, tiktok etc.) | 18.28% |
| I can't comment | 15.19% |
| Television news | 15.18% |
| Friends | 9.03% |
| Local leaders of the political parties | 7.66% |
| Central leaders of the political parties | 7.04% |
| Others | 6.12% |
| Videos of influencers on youtube or facebook or tiktok or other social media | 5.05% |
| Newspaper/ online news paper | 4.25% |
| Colleagues | 3.51% |
| Religious leader | 2.66% |
| Talk show | 2.14% |
| Community leader | 1.29% |
| (n) = | 10696 |

# Decided vs undecided voters

## One-third of the voters remain undecided

*Table 14: % of voters who have made their voting decision*

| | |
|---|---|
| Yes | 62.0% |
| No | 29.4% |
| I cannot comment | 8.6% |
| (n) = | 10696 |

## Higher percentage of urban voters are still undecided

*Table 15: % of voters who have made their voting decision*

| | Urban | Rural | Total |
|---|---|---|---|
| Yes | 52% | 66% | 62% |
| No | 35% | 27% | 29% |
| I cannot comment | 14% | 7% | 9% |
| (n) = | 3145 | 7551 | 10696 |

**Higher percentage of Gen Z voters are undecided (33.64%) if compared to other generation of voters**

*Table 16: % of voters who have made their voting decision (by age groups)*

|  | Gen Z (18-28 years) | Millennials (29-44 years) | Gen X (45-60 years) | Boomers II (61-70 years) | Boomers I* (71-79 years) | Post War (80-97 years) | Total |
|---|---|---|---|---|---|---|---|
| Yes | 55.15% | 64.91% | 67.00% | 66.46% | 67.43% | 73.75% | 62.00% |
| No | 33.64% | 28.06% | 25.53% | 25.99% | 26.00% | 21.25% | 29.37% |
| I cannot comment | 11.21% | 7.02% | 7.47% | 7.55% | 6.57% | 5.00% | 8.64% |
| (n) = | 3900 | 3631 | 1927 | 808 | 350 | 80 | 10696 |

**Higher percentage of female voters are undecided (33.77%) if compared to male voters (25.81%)**

*Table 17: % of voters who have made their voting decision (by gender)*

|  | Male | Female | Total |
|---|---|---|---|
| Yes | 66.02% | 56.98% | 62.00% |
| No | 25.81% | 33.77% | 29.37% |
| I cannot comment | 8.17% | 9.24% | 8.64% |
| (n) = | 5897 | 4782 | 10679 |

**Among the undecided voters, 49% want to know about the candidate to make their voting decision; this is consistent with the finding that the candidate matter**

*Table 18: Reason for being undecided*

| | |
|---|---|
| Not sure who the candidate will be | 49.3% |
| I generally make my decision based on the political situation before the election | 33.9% |
| I am not thinking about the election | 14.9% |
| I do not trust mainstream political parties | 9.7% |
| I cannot comment | 6.5% |
| I don't know if my favorite party will participate in the election. | 6.1% |
| I do not see any alternative political parties | 3.7% |
| Others | 0.6% |
| (n) = | 3141 |

# Revealed vs unrevealed voters

**35% of the voters who have decided to vote did not reveal their voting preference**

*Table 19: % who have revealed voting preference*

| | |
|---|---|
| Revealed | 65.7% |
| Not revealed | 34.3% |
| (n) = | 6631 |

# Choice of Parties

## 41.69% of the revealed voters will vote for BNP

*Table 20: % of Votes for parties if election was held now*

| | |
|---|---|
| BNP | 41.69% |
| Bangladesh Jamaat E Islami | 31.56% |
| Awami League | 13.96% |
| Student led new political party | 5.14% |
| Others (specify) | 3.26% |
| Islami Andolon Bangladesh | 2.55% |
| Jatiya Party | 1.01% |
| Gono Odhikar Parishad | 0.51% |
| Gono Sanghati Andolon | 0.25% |
| AB Party | 0.07% |
| I can't comment | 0.00% |
| (n) = | 4354 |

- BNP 41.7% (95% confidence level, margin of error ± 1.46%)
- Bangladesh Jamaate Islami 31.6% (95% confidence level, margin of error ± 1.38%)
- Awami League: 13.9% (95% confidence level, margin of error ± 1.03%)
- Student led new political party: 5.1% (95% confidence level, margin of error ± 0.65%)

## Almost half of the Gen X voters (47%) and Boomers II (47%) will vote for BNP; Jamaat e Islami trails BNP among all generations but has nearly equal votes from Gen Zs

## Student's party has the highest acceptance among the Gen Zs (10%) but it is almost similar to Awami League's voting share (11%) among the Gen Zs

*Table 21: % of votes for parties if election was held now (by generational groups)*

| | Gen Z | Millennials | Gen X | Boomers II | Boomers I* | Post War | Total |
|---|---|---|---|---|---|---|---|
| BNP | 35.5% | 42.8% | 47.0% | 46.9% | 44.4% | 27.9% | 41.7% |
| Bangladesh Jamaat E Islami | 34.2% | 31.2% | 29.3% | 30.1% | 28.1% | 34.9% | 31.6% |
| Awami League | 11.3% | 14.4% | 15.7% | 13.2% | 18.1% | 32.6% | 14.0% |
| Student led new political party | 10.1% | 3.8% | 2.5% | 1.4% | 1.8% | 2.3% | 5.1% |
| Others (specify) | 3.3% | 3.9% | 2.4% | 2.7% | 4.1% | 0.0% | 3.3% |
| Islami Andolon Bangladesh | 3.7% | 2.3% | 1.1% | 3.3% | 2.3% | 0.0% | 2.6% |
| Jatiya Party | 0.5% | 1.1% | 1.4% | 1.6% | 0.6% | 2.3% | 1.0% |
| Gono Odhikar Parishad | 1.0% | 0.3% | 0.2% | 0.3% | 0.6% | 0.0% | 0.5% |
| Gono Sanghati Andolon | 0.4% | 0.1% | 0.3% | 0.6% | 0.0% | 0.0% | 0.3% |
| AB Party | 0.1% | 0.1% | 0.1% | 0.0% | 0.0% | 0.0% | 0.1% |

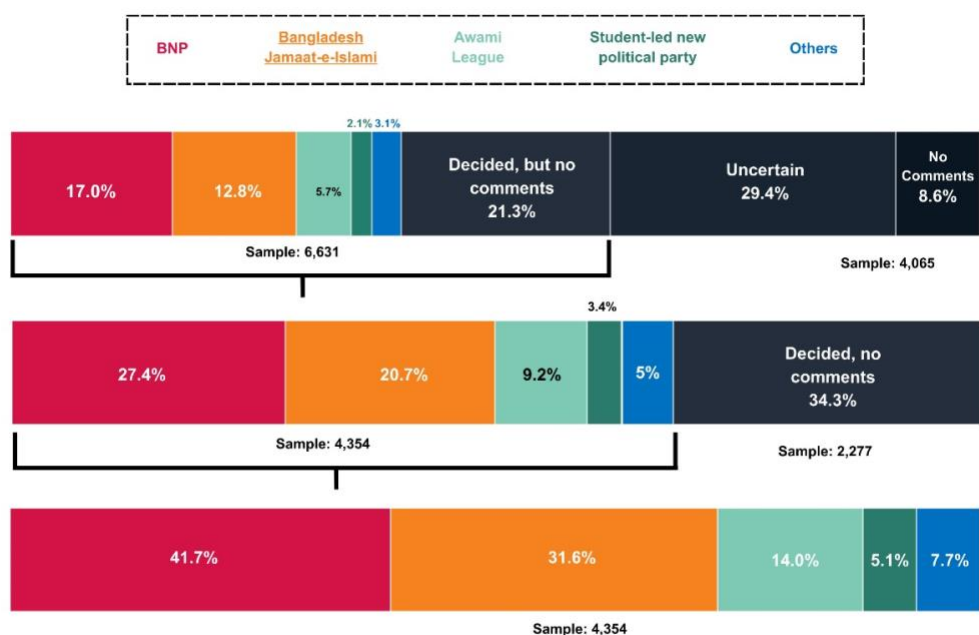| | | | | | | | |
|---|---|---|---|---|---|---|---|
| I can't comment | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| (n) = | 1331 | 1553 | 891 | 365 | 171 | 43 | 4354 |

**Male and female voting preferences follow nearly similar trends for all parties; however, Jamaat e Islami's share of votes decline among female voters if compared to male**

*Table 22: % of votes for parties if election was held now (by gender)*

| | Male | Female | Total |
|---|---|---|---|
| BNP | 42.4% | 40.6% | 41.7% |
| Bangladesh Jamaat E Islami | 32.6% | 29.7% | 31.6% |
| Awami League | 13.1% | 15.4% | 14.0% |
| Student led new political party | 4.9% | 5.6% | 5.1% |
| Others (specify) | 2.2% | 5.1% | 3.3% |
| Islami Andolon Bangladesh | 2.6% | 2.5% | 2.6% |
| Jatiya Party | 1.1% | 0.8% | 1.0% |
| Gono Odhikar Parishad | 0.7% | 0.2% | 0.5% |
| Gono Sanghati Andolon | 0.3% | 0.1% | 0.3% |
| AB Party | 0.1% | 0.0% | 0.1% |
| I can't comment | 0.0% | 0.0% | 0.0% |
| (n) = | 2729 | 1616 | 4345 |

# Distribution of Votes- Revealed, Decided, Undecided



If the election were held now, whom would the voters vote for?

BNP | Bangladesh Jamaat-e-Islami | Awami League | Student-led new political party | Others

17.0% | 12.8% | 5.7% | 2.1% | 3.1% | Decided, but no comments 21.3% | Uncertain 29.4% | No Comments 8.6%
Sample: 6,631 | Sample: 4,065

27.4% | 20.7% | 9.2% | 3.4% | 5% | Decided, no comments 34.3%
Sample: 4,354 | Sample: 2,277

41.7% | 31.6% | 14.0% | 5.1% | 7.7%
Sample: 4,354

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# Urban Vs Rural- Voting Preferences

**Both BNP and Jamaat have comparatively higher acceptance among rural voters if compared to urban; student led party has much less acceptance in rural areas**

*Table 23: % of votes for parties if election was held now (urban vs rural)*

|  | Urban | Rural | Total |
|---|---|---|---|
| BNP | 39.7% | 42.2% | 41.7% |
| Awami League | 12.9% | 14.2% | 14.0% |
| Jatiya Party | 1.3% | 0.9% | 1.0% |
| Bangladesh Jamaat E Islami | 30.4% | 31.9% | 31.6% |
| Islami Andolon Bangladesh | 3.4% | 2.3% | 2.6% |
| Student led new political party | 8.9% | 4.1% | 5.1% |
| AB Party | 0.2% | 0.0% | 0.1% |
| Gono Odhikar Parishad | 0.4% | 0.5% | 0.5% |
| Gono Sanghati Andolon | 0.0% | 0.3% | 0.3% |
| I can't comment | 0.0% | 0.0% | 0.0% |
| Others (specify) | 2.7% | 3.4% | 3.3% |
| (n) = | 921 | 3433 | 4354 |

# Divisional Distribution of Voting Preferences

**BNP is ahead in 6 divisions (Barisal, Chattagram, Dhaka, Mymensingh, Rajshahi, Sylhet) while Jamaat is ahead in 2 divisions (Khulna and Rangpur)**

*Table 24: % of votes for parties if election was held now (divisional distribution)*

|  | Barishal | Chattogram | Dhaka | Khulna | Mymensingh | Rajshahi | Rangpur | Sylhet | Total |
|---|---|---|---|---|---|---|---|---|---|
| **BNP** | 39.66% | 47.82% | 44.71% | 38.29% | 44.60% | 42.68% | 21.69% | 51.02% | 41.69% |
| **Awami League** | 24.58% | 11.08% | 18.46% | 9.06% | 18.28% | 12.86% | 9.21% | 14.87% | 13.96% |
| **Jatiya Party** | 0.00% | 0.75% | 0.40% | 0.17% | 2.49% | 0.54% | 2.30% | 2.62% | 1.01% |
| **Bangladesh Jamaat E Islami** | 22.91% | 27.27% | 25.45% | 46.32% | 18.28% | 35.54% | 44.91% | 25.95% | 31.56% |
| **Islami Andolon Bangladesh** | 6.15% | 2.24% | 3.49% | 1.37% | 2.77% | 1.43% | 3.07% | 1.46% | 2.55% |
| **Student led new political party** | 2.23% | 7.35% | 5.39% | 3.08% | 6.37% | 6.61% | 3.84% | 2.62% | 5.14% |
| **AB Party** | 0.00% | 0.12% | 0.20% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.07% |
| **Gono Odhikar Parishad** | 0.00% | 0.12% | 0.40% | 0.68% | 3.32% | 0.00% | 0.19% | 0.00% | 0.51% |
| **Gono Sanghati Andolon** | 0.00% | 1.00% | 0.00% | 0.17% | 0.28% | 0.00% | 0.19% | 0.00% | 0.25% |
| **I can't comment** | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| **Others (specify)** | 4.47% | 2.24% | 1.50% | 0.85% | 3.60% | 0.36% | 14.59% | 1.46% | 3.26% |
| **(n) =** | 179 | 803 | 1002 | 585 | 361 | 560 | 521 | 343 | 4354 |

# The Shy BNP Effect

During our discussions with the enumerators, the enumerators highlighted when they interviewed Jamaat-e-Islam supporters they were always very enthusiastic about expressing their support. The effect of Shy BNP supporters as opposed to JI supporters is difficult to assess only based on the support revealed. We first had to identify proxies which could be used to unearth the Jamaat vote within the unrevealed respondents.

We found strong correlation between the responses against the question which factors are important in deciding who to vote for. We noticed significant correlation between respondents who have highlighted religion-based politics as an important factor in their voting decisions.

*Table 25: Religion Based Politics as A Factor in Voting Decision: Population Distribution*

|  | BNP | JI | BAL | Student's party* |
|---|---|---|---|---|
| **%** |  |  |  |  |
| Not Important | 49.36% | 20.49% | 17.13% | 5.54% |
| Important | 20.12% | 62.64% | 5.07% | 4.02% |
| **#** |  |  |  |  |
| Not Important | 1,585 | 658 | 550 | 178 |
| Important | 230 | 716 | 58 | 46 |
| **Total %** | 41.69% | 31.56% | 13.96% | 5.14% |
| **Total #** | 1,815 | 1,374 | 608 | 224 |

- NCP was still not announced as a party when the survey was undertaken

As is evident from above, there is a clear advantage for JI, in respondents who expressed religion-based politics is an important factor for them. The support for JI is highly skewed at 62.64% for JI vs. 20.12% for BNP. On the other hand, where it is not important, BNP leads JI 49.36% to 20.49%. This led us to use religion-based politics as a proxy to segregate BNP and JI support. As a next step, we had to analyze, whether there is a difference in the responsiveness of individuals who expressed Religion Based Politics as an important factor. Again, as the table below shows, there is significant uptick in the willingness to express political support for respondents who suggest Religion based politics is an important factor in voting decision.

*Table 26 Difference in Exposing Voting Preference for Respondents Who Feel Religion Based Politics as An Important Factor in Voting Decision*

|  | Revealed | Not Revealed/ Undecided | Total |
|---|---|---|---|
| **%** |  |  |  |
| Not Important | 37.34% | 62.66% | 100.00% |
| Important | 54.53% | 45.47% | 100.00% |
| **#** |  |  |  |
| Not Important | 3,211 | 5,389 | 8,600 |
| Important | 1,143 | 953 | 2,096 |
| **Total %** | 40.71% | 59.29% | 100.00% |
| **Total #** | 4,354 | 6,342 | 10,696 |

Combining the observations from Table 25, and Table 26, given the difference in voting preference for the population who suggest Religion Based Politics is an important factor, and

their noticeable preference for JI, we conclude that the survey will show a tilt towards JI unless the entire population response is revealed.

To establish this, for the "Not Revealed/ Undecided Population", we have distributed their votes in the same proportion of revealed voters, segregated between individuals where Religion Based Politics was identified as important vs. not important.

Our Total Unrevealed Vote was 6,342. Out of this population, for 5,389 individuals this factor is not important, but for 953 this factor is important. If we distribute this in the same proportion as the revealed vote, they will breakdown as follows:

*Table 27: Redistributing Unrevealed Vote Based on Revealed - Segregated Between "Religion Based Politics" Being an Important Factor vs. Not.*

|  | BNP | JI | BAL | Student's party |
|---|---|---|---|---|
| **%** |  |  |  |  |
| Not Important (A) | 2,660 | 1,104 | 923 | 299 |
| Important (B) | 192 | 597 | 48 | 38 |
| Unrevealed (Distributed) (A+B) | 2,852 | 1,701 | 971 | 337 |
| Revealed (Actual) C | 1,815 | 1,374 | 608 | 224 |
| **Total (A + B + C)** | **4,667** | **3,075** | **1,579** | **561** |
| **Total % (Fully Distributed)** | **43.63% (G)** | **28.75% (H)** | **14.76%** | **5.24%** |
| **Total % (Revealed), from Table 1** | **41.69% (I)** | **31.56% (J)** | **13.96%** | **5.14%** |

Based on the above table, the swing in favor of BNP if their supporters were as enthusiastic about expressing their opinion would be, G-H-I+J= 4.75%

Assumptions/ Comments

a. We expected the characteristics of the unrevealed and undecided population will maintain the characteristics of the revealed population – in terms of their voting preferences.
b. We have checked other factors for correlation with JI support. There were no other clear indicators.

# Other Findings

- BNP has a higher vote share in rural areas (42.2%) than in urban areas (39.7%)
- Jamaat has a higher vote share in rural areas (31.9%) than in urban areas (30.4%)
- The new student-backed political party has a higher vote share in urban areas (8.9%) than in rural areas (4.1%)
- Compared to other generations of voters, a higher percentage of Gen Z (18-28) voters (33.64%) are undecided about their voting decision
- A higher percentage of female voters (33.77%) than male voters (25.81%) are undecided about their voting decision
- A higher percentage of female voters (40.70%) than male voters (29.90%) have not expressed an opinion on who they will vote for.

# How do our previous results compare to the current results?

- The percentage of undecided voters has decreased (previously 34%, now 29%)
- BNP's vote has increased from 33.87% to 41.69%
- Jamaat-e-Islam's vote has increased from 22.58% to 31.56%
- Awami League's vote has increased from 8.06% to 13.96%
- The vote of the new student-backed party has decreased from 16.13% to 5.14%.

***Please note:*** *We have changed our methodology for measurement. Voters who have not made up their minds and those who have not commented are now reported separately and excluded from the voting share. The published results only represent the survey period from February 19, 2025 - March 3, 2025.*

## About INNOVISION Consulting

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