VOTING DECISION | PARTY PREFERENCE

PEOPLE'S ELECTION PULSE SURVEY ROUND 2- PART 2

September 24, 2025

A Social Research Initiative of Innovision Consulting

In Association With

People's Election Pulse Survey: Round 2- Part 2

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.'

The People's Election Pulse Survey is a flagship social research initiative of INNOVISION. Round 2 was conducted from September 2-15, 2025. Round 2 has two parts- Part 2 focuses on people's voting preference.

Round 2 is a follow up of round 1 which was conducted from February 19 to March 3, 2025.

The results from round 1 were published on March 8, 2025.

The survey if funded by Innovision with technical support from BRAIN and Voice for Reform.

Round 2: Part 2: Pulse Points

Expectation from Future Government

Relationship with India and Pakistan

Decision to Vote

Party Preference

Party Approval

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Sample Size: 10,413 Voting Age Population (Household: 9398; University 1015)

Survey Period: September 2, 2025 – September 15, 2025

Sample Distribution		Division-wise Sample	
Geographical Scope of Sample : **8** Divisions, **64** Districts		Dhaka Division	**25.6%**
Area-wise Sample: **69.5%** Rural, **30.5%** Urban		Chattogram Division	**20.5%**
		Rajshahi Division	**13.0%**
Gender-wise Sample: **54.2%** Male, **45.4%** Female, 0.4% Transgender		Khulna Division	**11.2%**
Age-wise Sample Representation		Rangpur Division	**11.0%**
Gen Z (18-28 years): **37.6%**		Mymensingh Division	**7.1%**
Millennials (29-44 years): **33.4%**		Barisal Division	**6.2%**
Gen X (45-60 years): **19.8%**		Sylhet Division	**5.3%**
60+ years: **9.3%**			

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Expectation from the Future Government

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Expectation from Future Government
All Respondents

Expectations from future government shifted between the two rounds.
Improving the law-and-order system is now the top emphasis.

- 🟢 Improving the law-and-order system
- 🟠 Commodity price controls
- 🔴 Increasing employment
- 🔵 Reducing corruption in government work
- 🟦 Reformation of law enforcement agencies (Police, RAB)
- ⬛ Increasing access to government services
- 🔵 Improving the business-friendly environment
- 🟠 Cannot comment

Round-1 (March)	52.2%	71.2%	39.7%	21.7%	13.5%	20.7%	18.8%
Round-2 (September)	57.5%	54.6%	42.4%	36.9%	20.3%	18.8%	13.8%

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Relationship with India and Pakistan

Relationship with India and Pakistan

All Respondents

People want good relationship with both India (72.2%) and Pakistan (69.0%).

Good relationship should be created ● Distance should be created

The relationship should be kept as it is ● I have no opinion

India
- 72.2%
- 13.9%
- 8.6%

Pakistan
- 69.0%
- 11.2%
- 11.4%
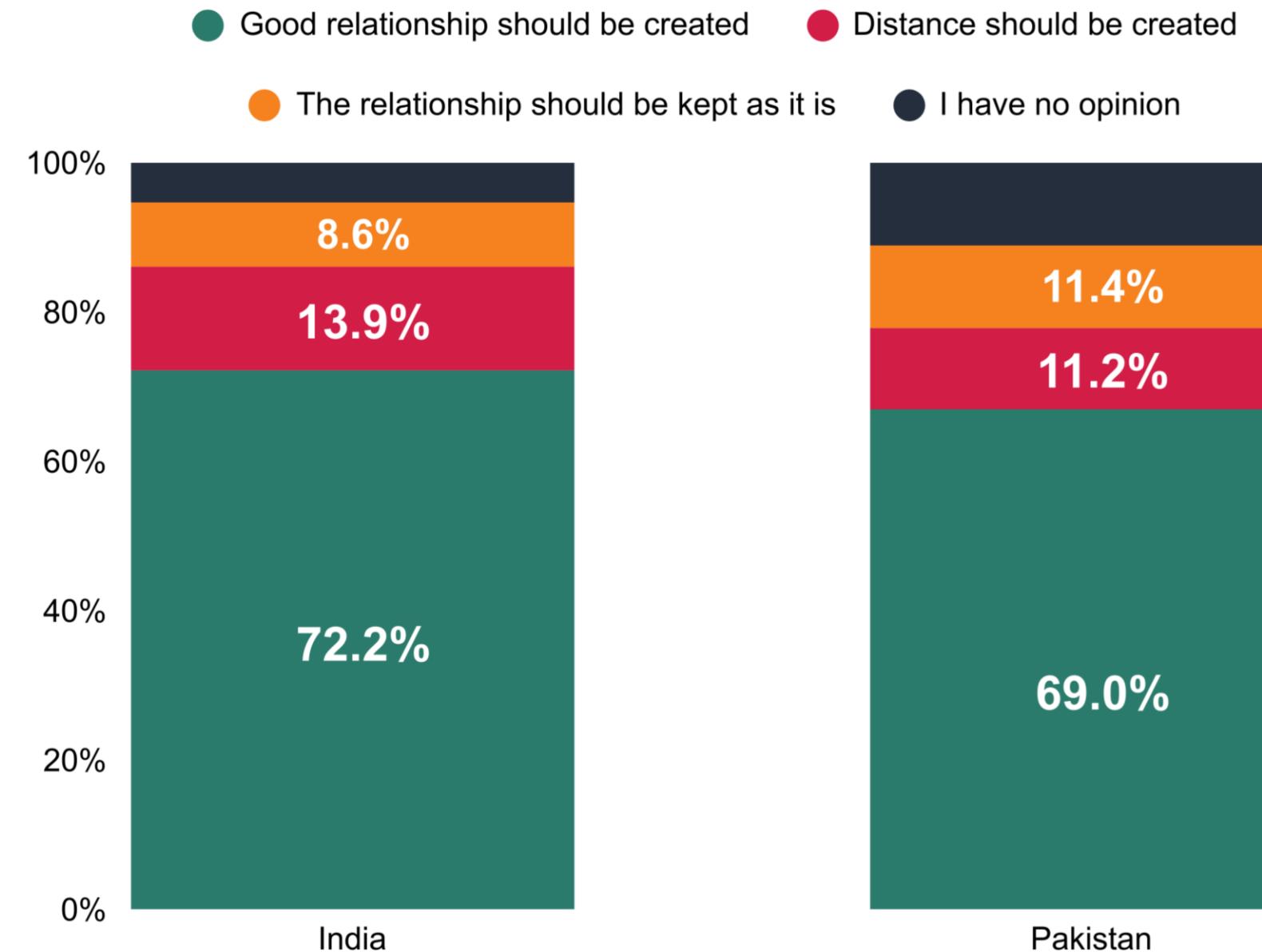
Relationship with India and Pakistan

University Samples vs Household Samples

Lesser proportion of students sampled from universities want distance with Pakistan (8.0%) if compared with India (15.10%).
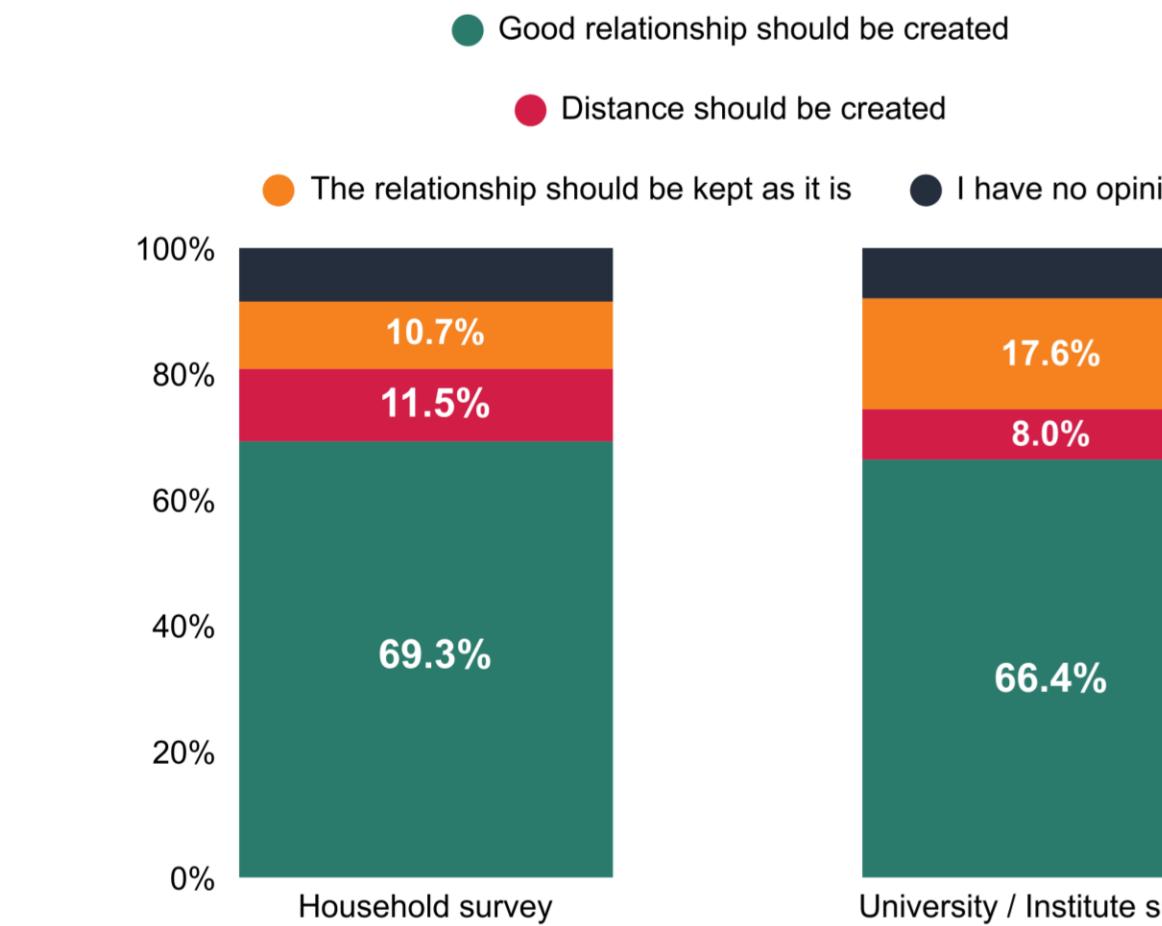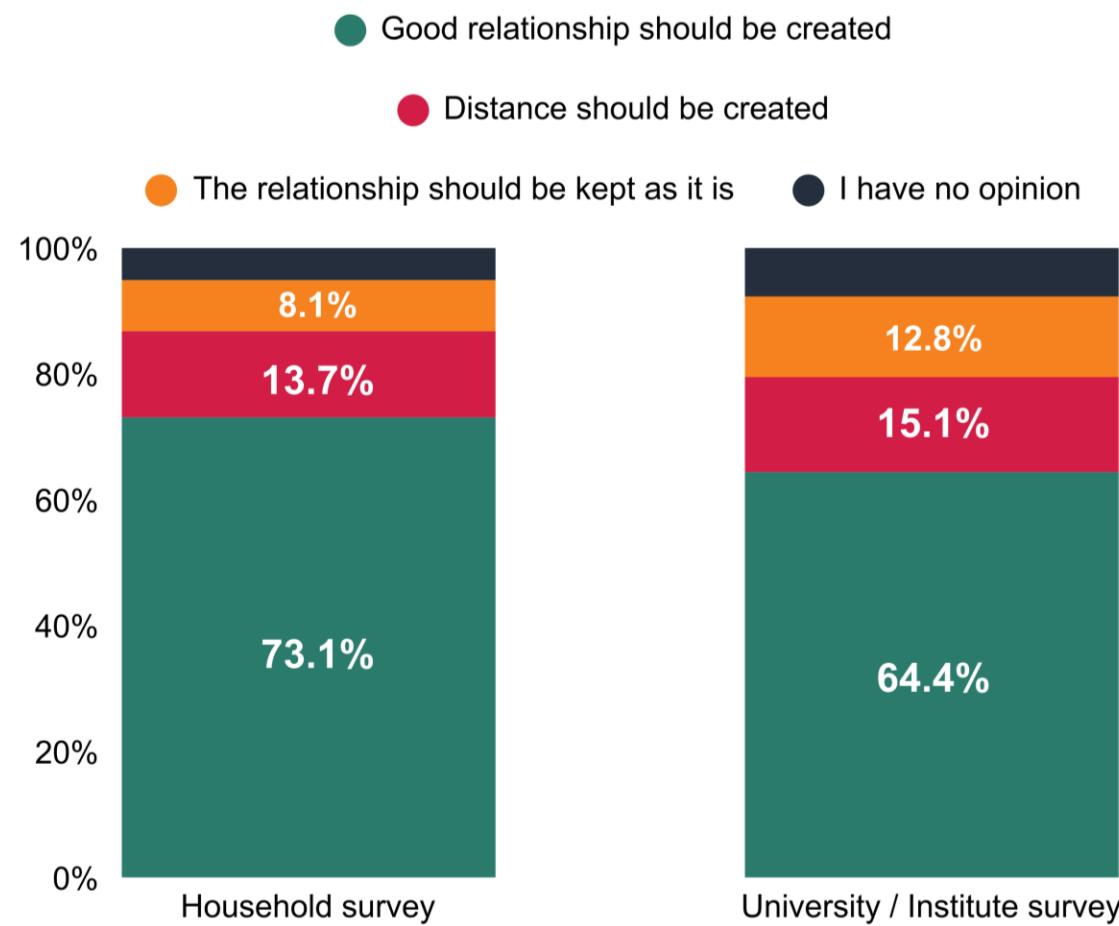

India

Pakistan

Relationship with India and Pakistan

By gender

Higher proportion of female respondents would prefer a better relationship with India (75.8%) if compared to men (69.3%)
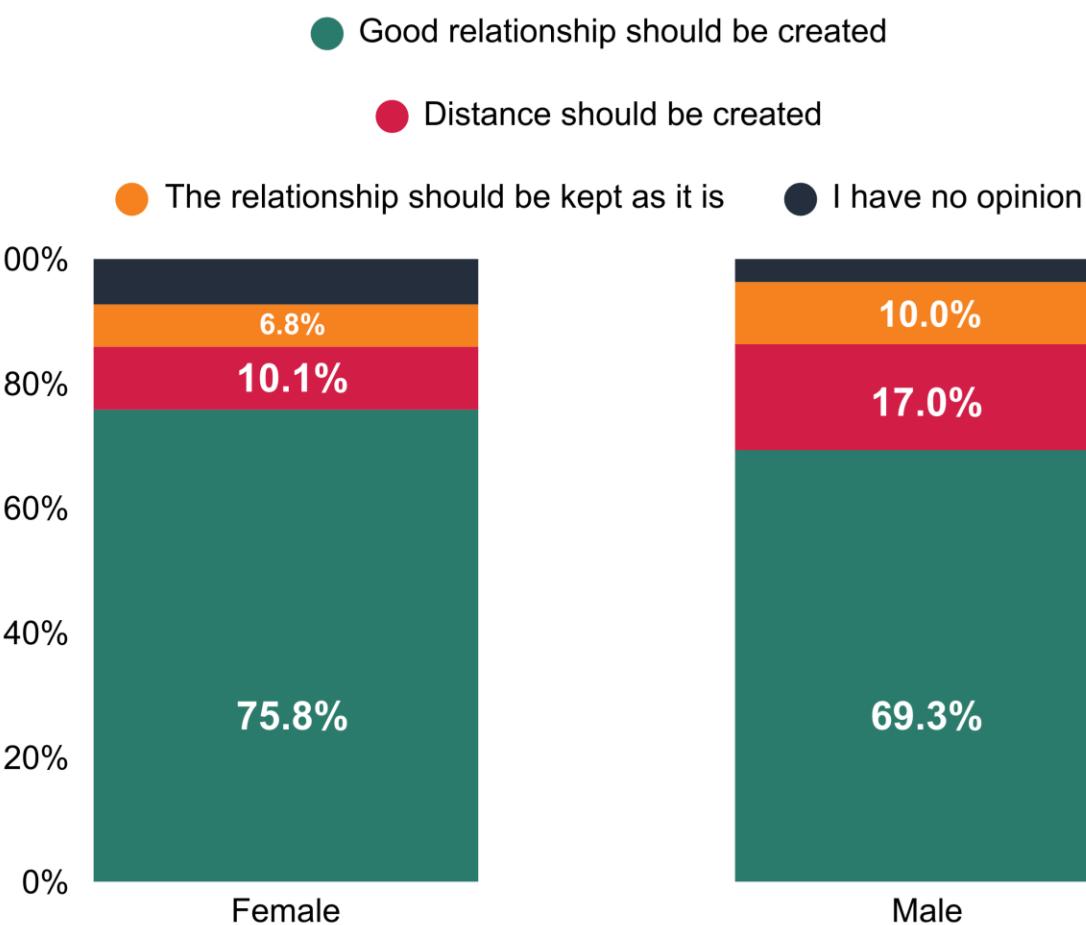
India
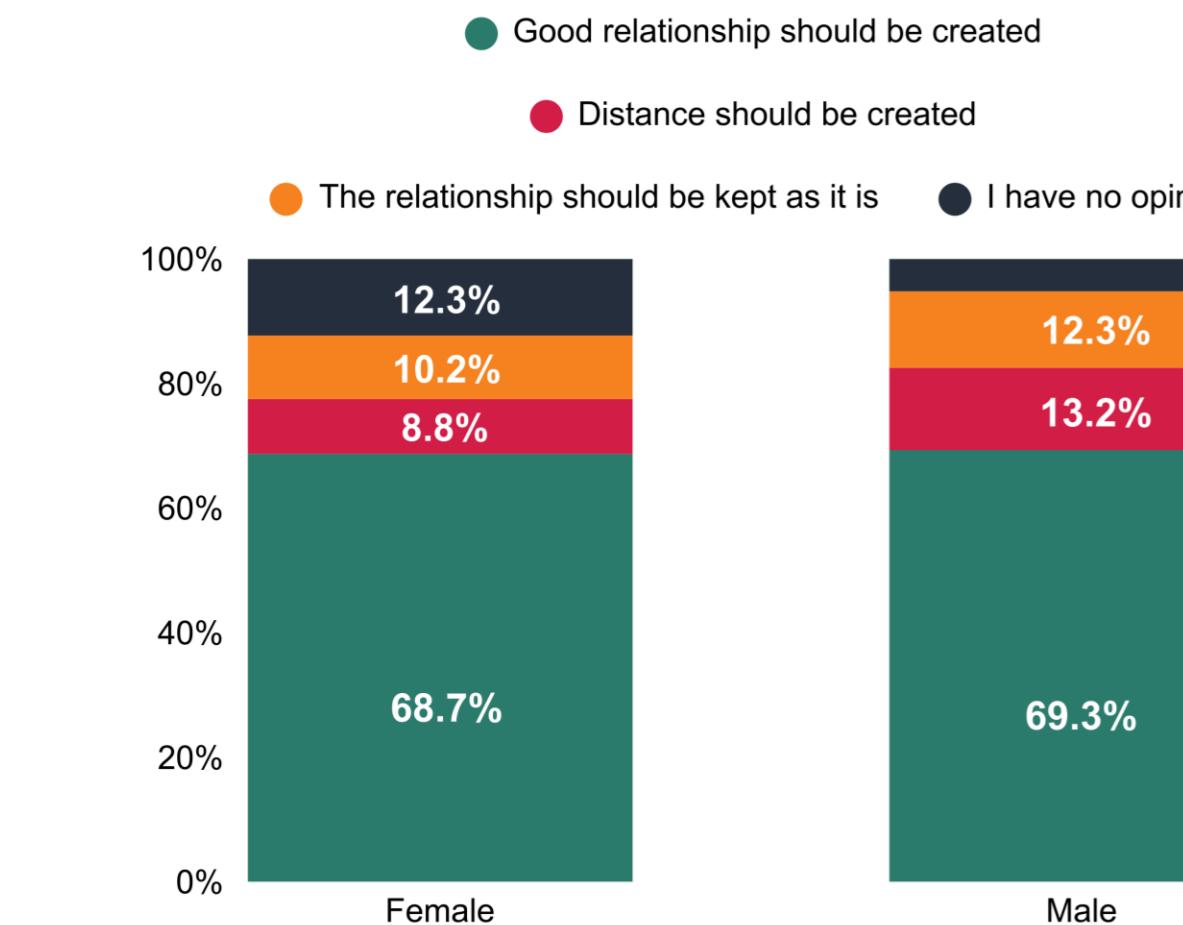
**Pakistan**

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What do voters consider to decide who to vote?

What do voters consider to decide who to vote?

All Respondents

Candidate's qualification (65.5%) rather than the party symbol
(14.7%) is more important for the general voters.

● Party's electoral symbol   ● Party's manifesto   ● Candidate's qualifications

● Candidate's previous work

14.7%	65.5% 14.8%

0%   20%   40%   60%   80%   100%
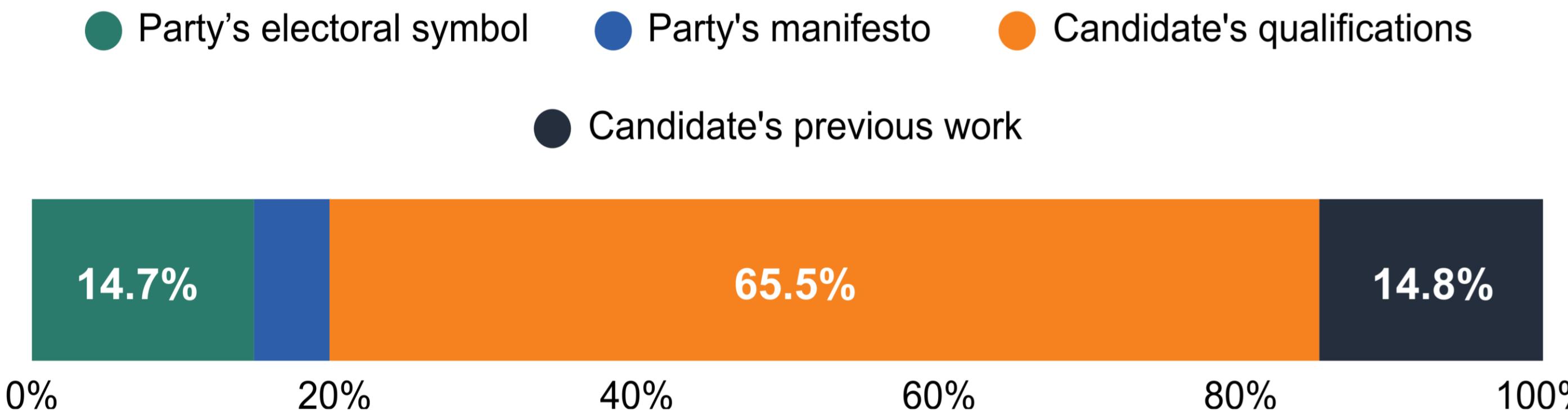
What do voters consider to decide who to vote?
By Age Group

However, higher proportion of older generation voters are inclined towards the party symbol

- ● Party's electoral symbol
- ● Party's manifesto
- ● Candidate's qualifications
- ● Candidate's previous work

| Age Group	Party's electoral symbol	Candidate's qualifications	Candidate's previous work
Gen Z (18-28)	12.1%	65.9%	17.0%
Millennials (29-44)	16.1%	64.9%	14.2%
Gen X (45-60)	14.6%	66.1%	13.4%
Boomers+ (61+)	18.0%	65.2%	12.4%

0% 20% 40% 60% 80% 100%
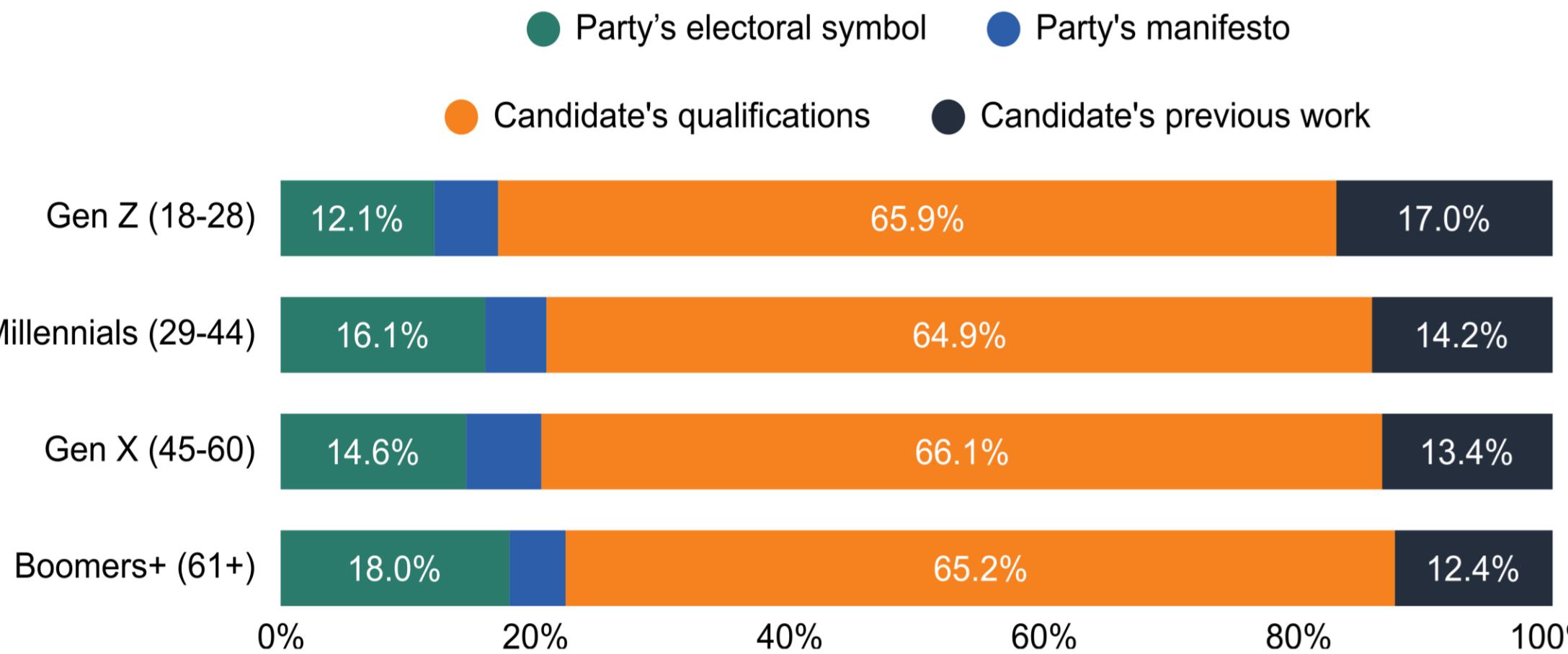
Are the voters satisfied with local party politics?

Satisfaction with local party politics

All Respondents

Generally, voters are more satisfied with local party politics of Jamaat e Islami Bangladesh if compared to other parties

Legend: ● Hundred percent ● A lot ● Roughly ● A little ● Not at all ● I can't say
● I have not seen the activities of this party in my area

Party	Hundred percent	A lot	Roughly	A little	Not at all	I can't say	I have not seen the activities
BNP	8.2%	12.8%	18.4%	13.6%	27.6%	14.5%	4.9%
Awami League	6.3%	9.2%	10.6%	10.3%	33.4%	20.2%	10.0%
NCP	9.1%	13.8%	17.4%	9.5%	17.0%	21.5%	11.7%
Jamaat-e-Islami	13.7%	16.7%	17.0%	11.1%	19.7%	14.1%	7.6%

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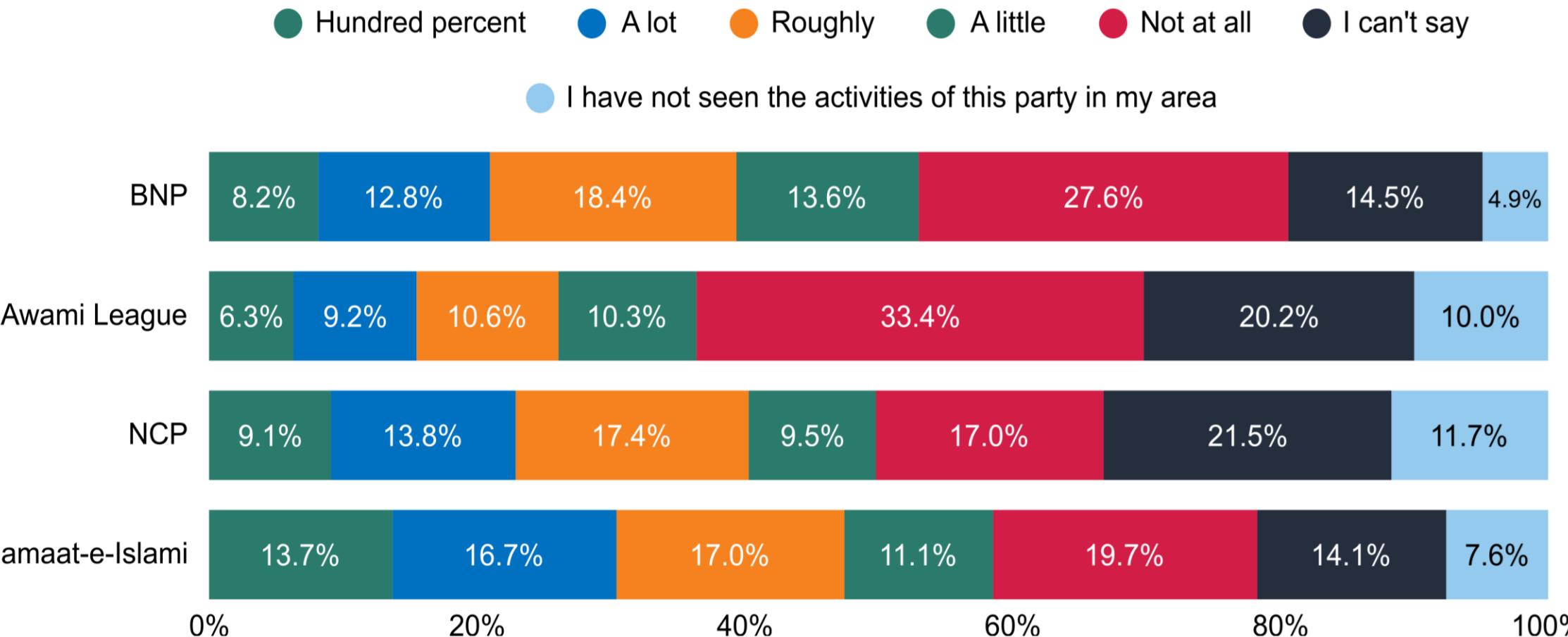
Satisfaction with local party politics
By Gender

Comparatively higher proportion of female respondents are satisfied with Jamaat – e –Islami and then NCP if compared to BNP and Awami League

| Party	Gender	Hundred percent	A lot	Roughly	A little	Not at all	I can't say	I have not seen the activities of this party in my area
BNP	Female	8.2%	12.3%	18.7%	14.3%	25.5%	15.4%	5.6%
BNP	Male	8.2%	13.3%	18.1%	13.0%	29.3%	13.8%	4.4%
Awami League	Female	6.7%	9.2%	11.6%	11.2%	31.7%	19.9%	9.7%
Awami League	Male	6.0%	9.3%	9.8%	9.4%	34.8%	20.4%	10.4%
NCP	Female	9.2%	13.0%	16.9%	9.2%	15.4%	24.4%	11.9%
NCP	Male	9.0%	14.6%	17.9%	9.9%	18.1%	19.0%	11.4%
Jamaat-e-Islami	Female	13.3%	15.2%	16.8%	11.0%	18.5%	16.5%	8.7%
Jamaat-e-Islami	Male	14.1%	17.9%	17.3%	11.2%	20.6%	12.1%	6.7%

Voter's Expectation about Awami League's Participation in Next General Election

# Voter's Expectation about Awami League's Participation in Next General Election

All Respondents

45.79% respondents reported that all parties should be allowed to participate in the next general election

I have no opinion

8.63%

45.79%

All parties should be given the opportunity to participate

45.58%

Awami League should not be allowed to participate in elections before trial
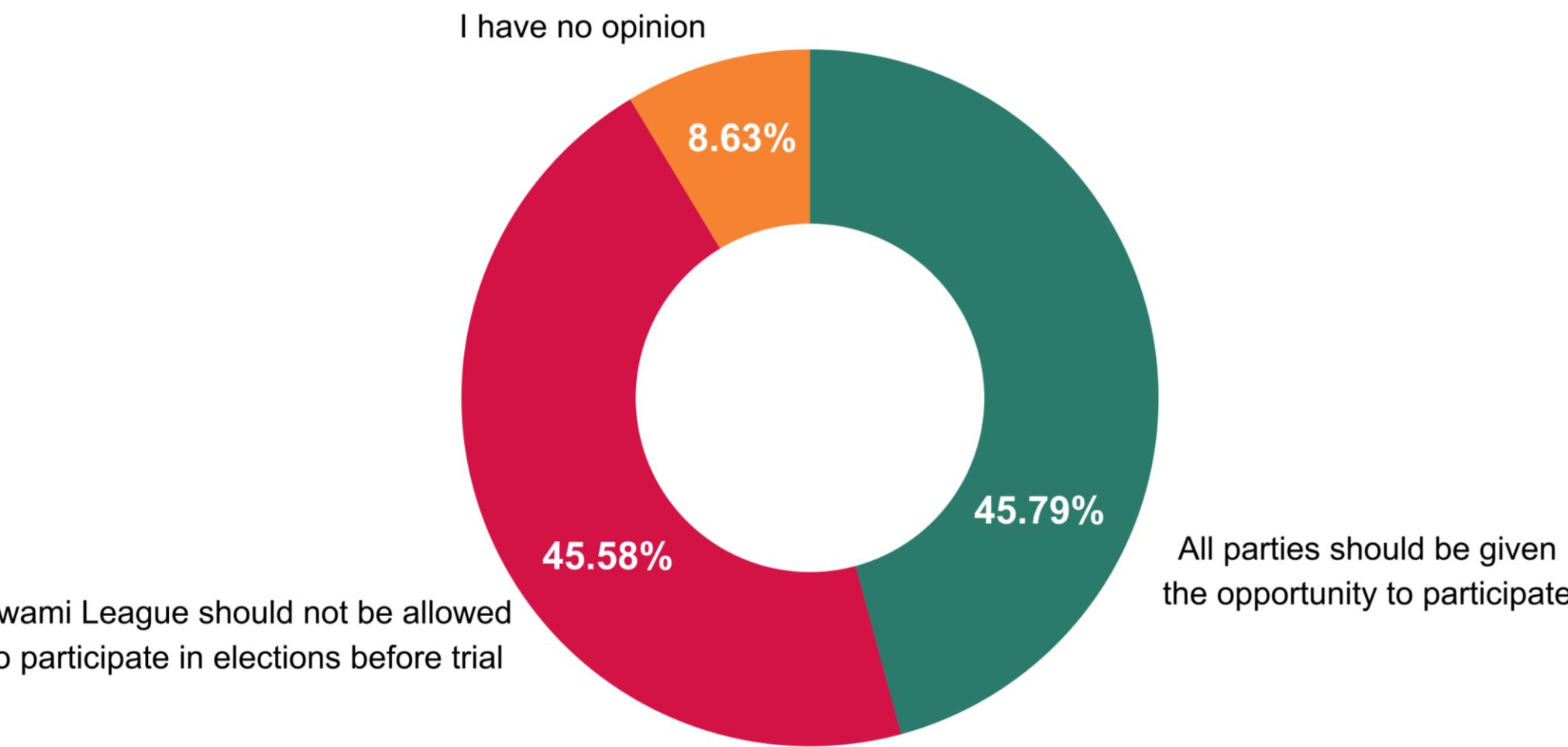
Voter's Expectation about Awami League's Participation in Next General Election

Student vs Household Samples

Students sampled from universities (63.05%) are more in disfavor of Awami League's Participation in next general election if compared to samples from households (43.69%)

● **All parties should be given the opportunity to participate**

● **Awami League should not be allowed to participate in elections before trial**   ● **I have no opinion**

| Survey			
Household survey	47.7%	43.69%	8.61%
University / Institute survey	28.08%	63.05%	8.87%

0%   20%   40%   60%   80%   100%
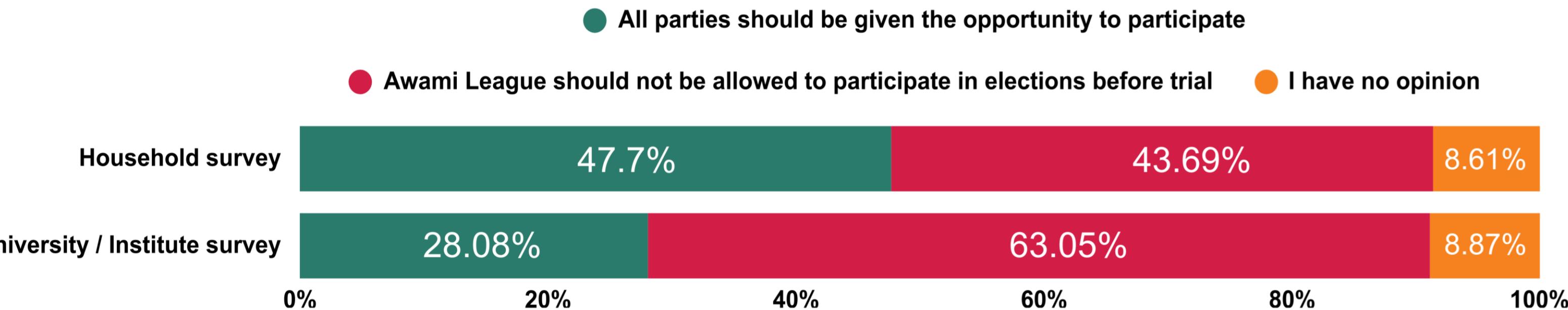
Have the Voters Decided Which Party to Vote?

Decision to Vote for Party
All Respondents

Higher proportion (32.6%) of voters are now undecided if compared to March (29.4%)

Legend: ● Yes ● No ● I don't want to say

Round 1 (March)
- Yes: 62.0%
- No: 29.4%
- I don't want to say: 8.6%

Round 2 (September)
- Yes: 57.8%
- No: 32.6%
- I don't want to say: 9.6%
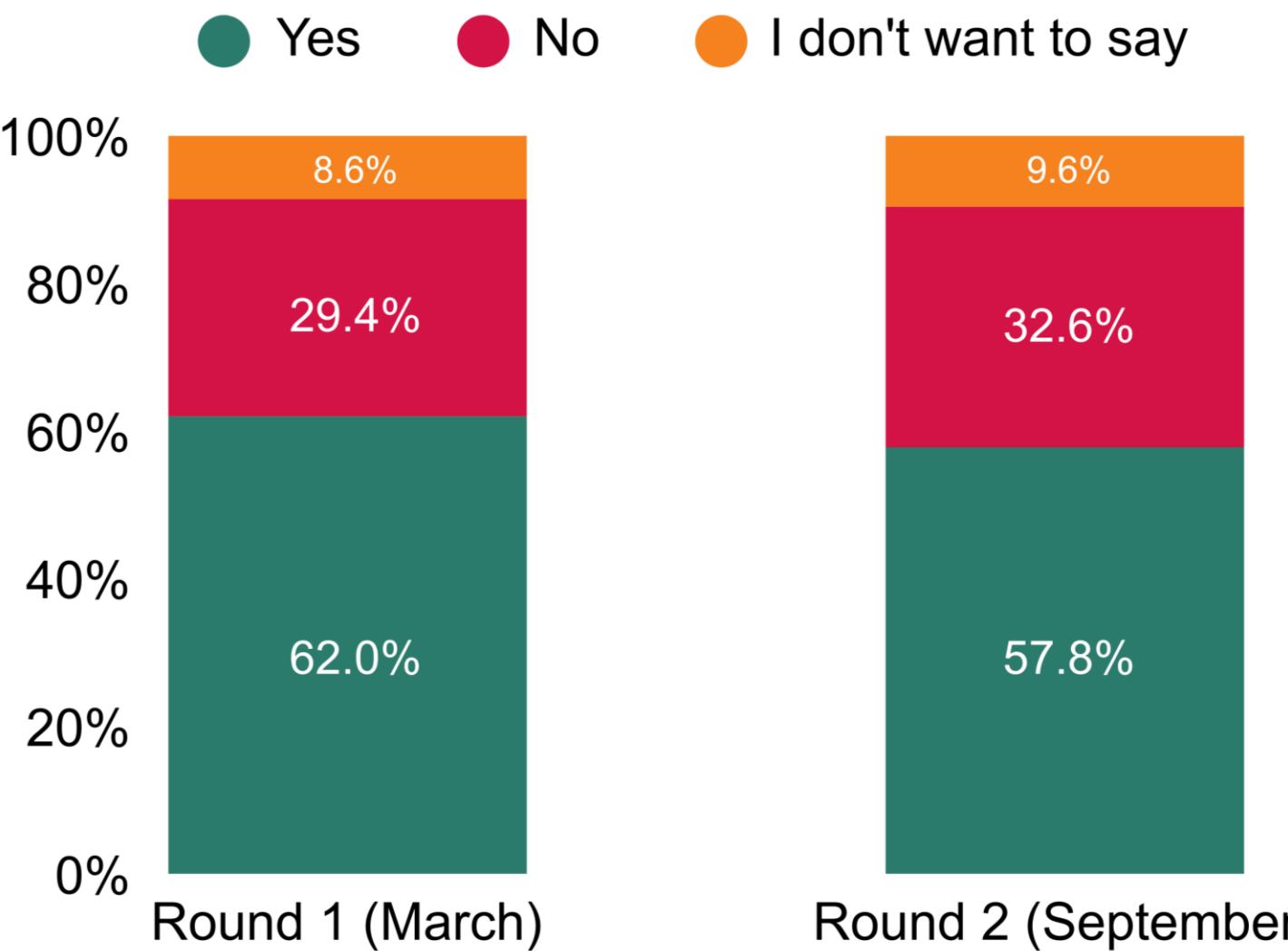
Decision to Vote for Party

By Gender

Higher proportion of female voters are undecided (37.88%) if compared to male (28.15%)

● Yes ● No ● I don't want to say

	Female	Male
I don't want to say	10.55%	8.79%
No	37.88%	28.15%
Yes	51.57%	63.06%

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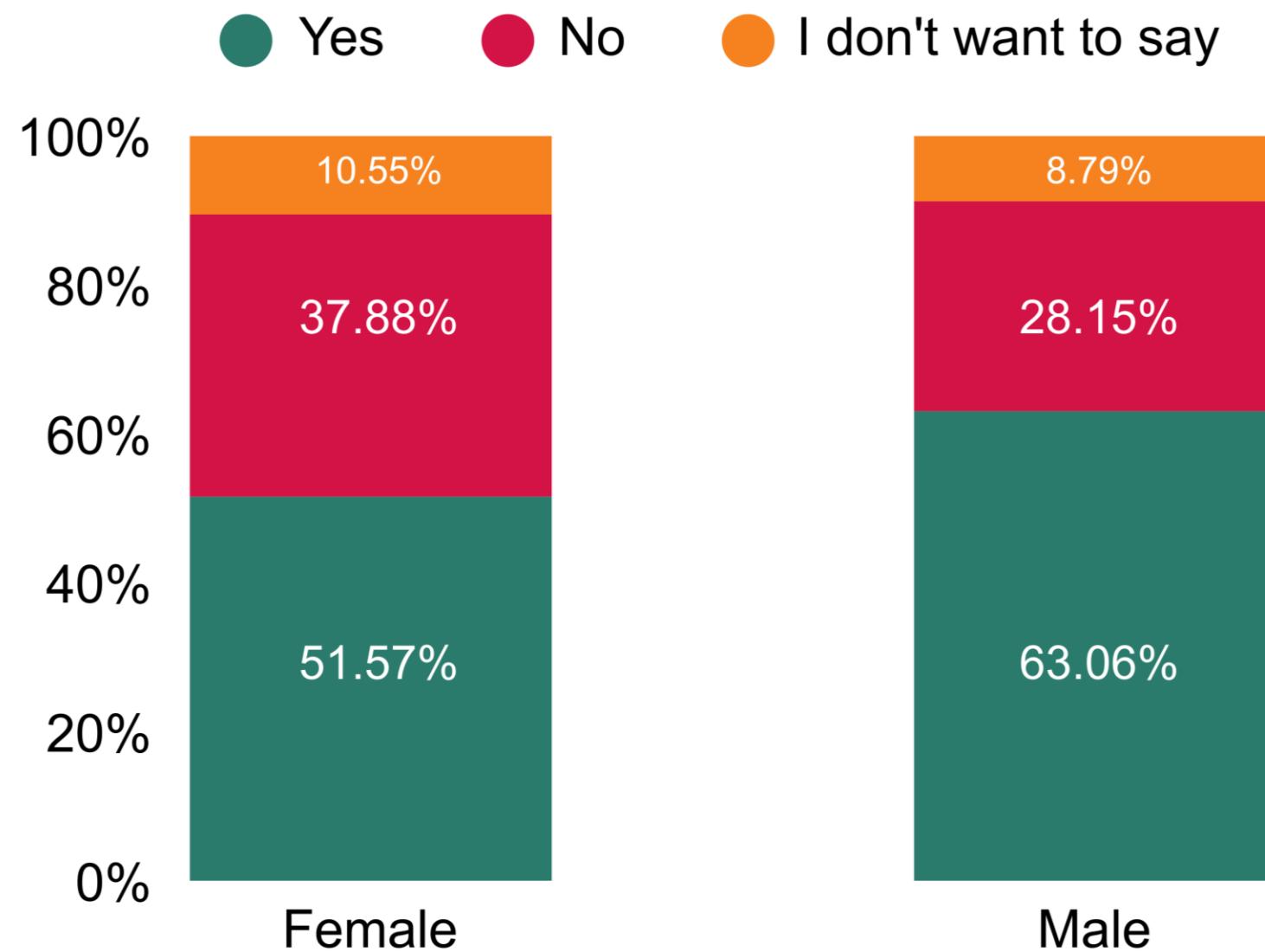
Decision to Vote for Party
By Age Group

Higher proportion of Gen Z voters are undecided (36.34%) if compared to other age groups

● Yes   ● No   ● I don't want to say

Age Group	Yes	No	I don't want to say
Gen Z (18-28)	54.19%	36.34%	9.47%
Millennials (29-44)	59.02%	31.14%	9.84%
Gen X (45-60)	61.12%	29.13%	9.75%
Boomers+ (61+)	60.07%	30.54%	9.39%

0%   20%   40%   60%   80%   100%

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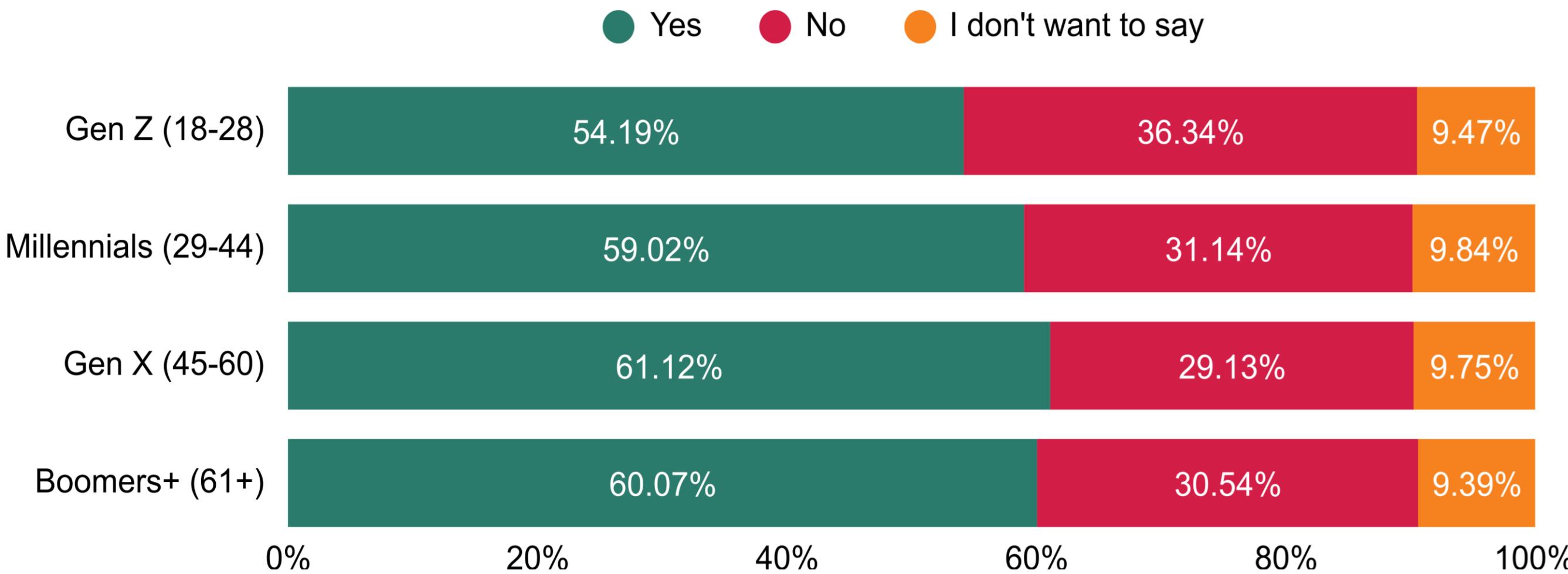
Decision to Vote for Party

Revealed vs Non-Revealed

Higher proportion of decided voters have revealed their preference in September (83.2%) if compared to March (65.7%)

● Revealed   ● Not Revealed

Round 1: 65.7% / 34.3%
Round 2: 83.2% / 16.8%
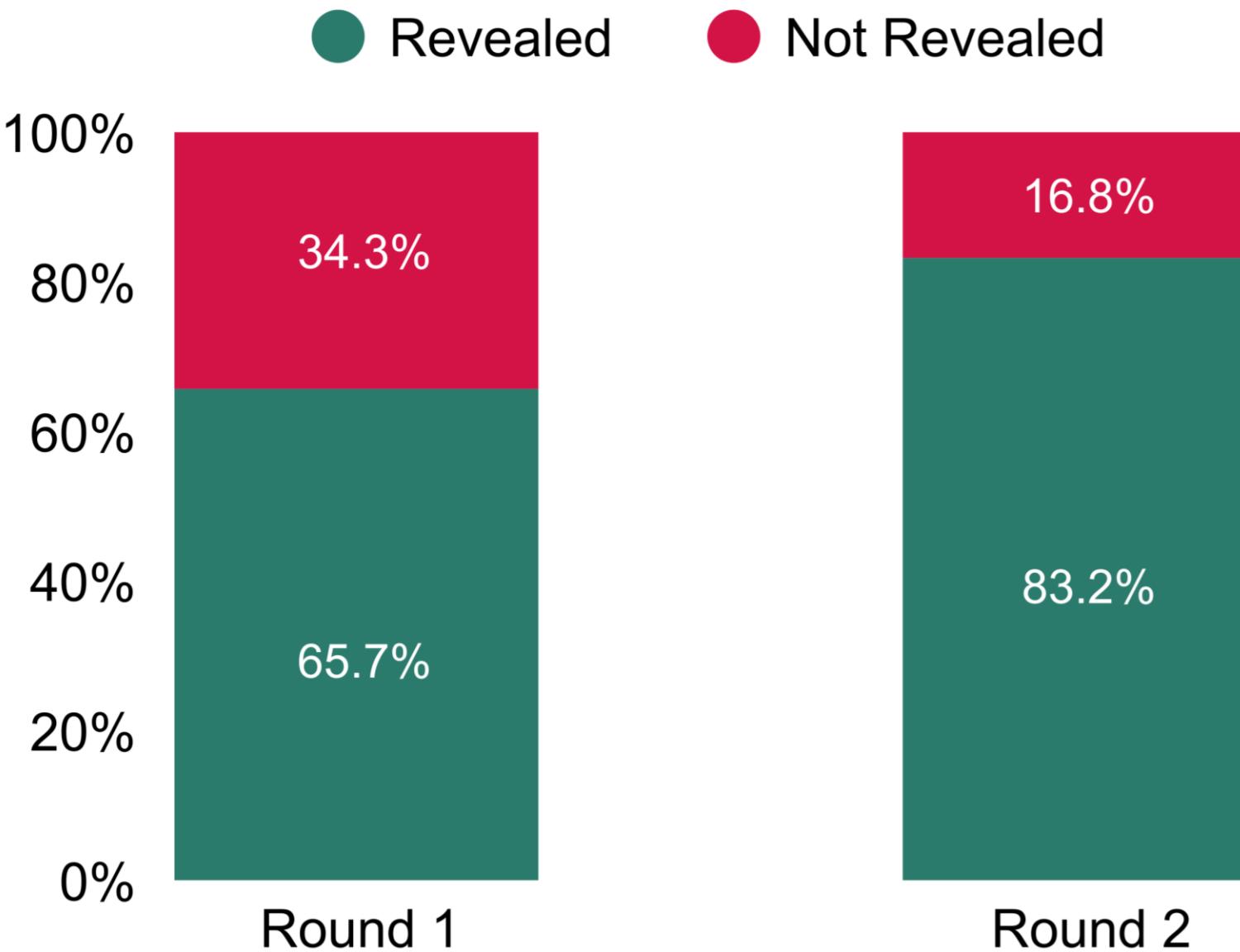
Who the voters will vote for?

Who the voters will vote for?

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	Round-1 (March 2025)		Round-2 (September 2025)	
	Sample includes all respondents	Sample Includes only decided and revealed respondents	Sample includes all respondents	Sample Includes only decided and revealed respondents
BNP	17.00%	41.70%	18.70%	41.30%
Bangladesh Jamaat-e-Islami	12.80%	31.60%	13.80%	30.30%
Awami League	5.70%	14.00%	8.50%	18.80%
NCP	2.10%	5.10%	1.90%	4.10%
Islami Andolon Bangladesh	1.00%	2.50%	1.40%	3.10%
Jatiya Party	0.40%	1.00%	0.40%	0.90%
Gono Odhikar Parishad	0.20%	0.50%	0.20%	0.50%
Others	1.40%	3.60%	0.40%	1.00%
I don't want to comment	0.00%	0.00%	0.00%	0.00%
Decided but did not reveal party preference	21.40%	0.00%	9.10%	0.00%
Not decided	29.40%	0.00%	30.70%	0.00%
Did not comment whether they have decided	8.60%	0.00%	9.10%	0.00%
Will not vote	0.00%	0.00%	3.80%	0.00%
Did not answer whether to they will vote	0.00%	0.00%	2.00%	0.00%
Total	10696	4354	10413	4721

Who the voters will vote for?

● Round 1 (March 2025)   ● Round 2 (September 2025)

Party	Round 1	Round 2
BNP	17.00%	18.70%
Bangladesh Jamaat-e-Islami	12.80%	13.80%
Awami League	5.70%	8.50%
NCP	2.1%	1.9%
Islami Andolon Bangladesh	1%	1.4%
Jatiya Party	0.4%	0.4%
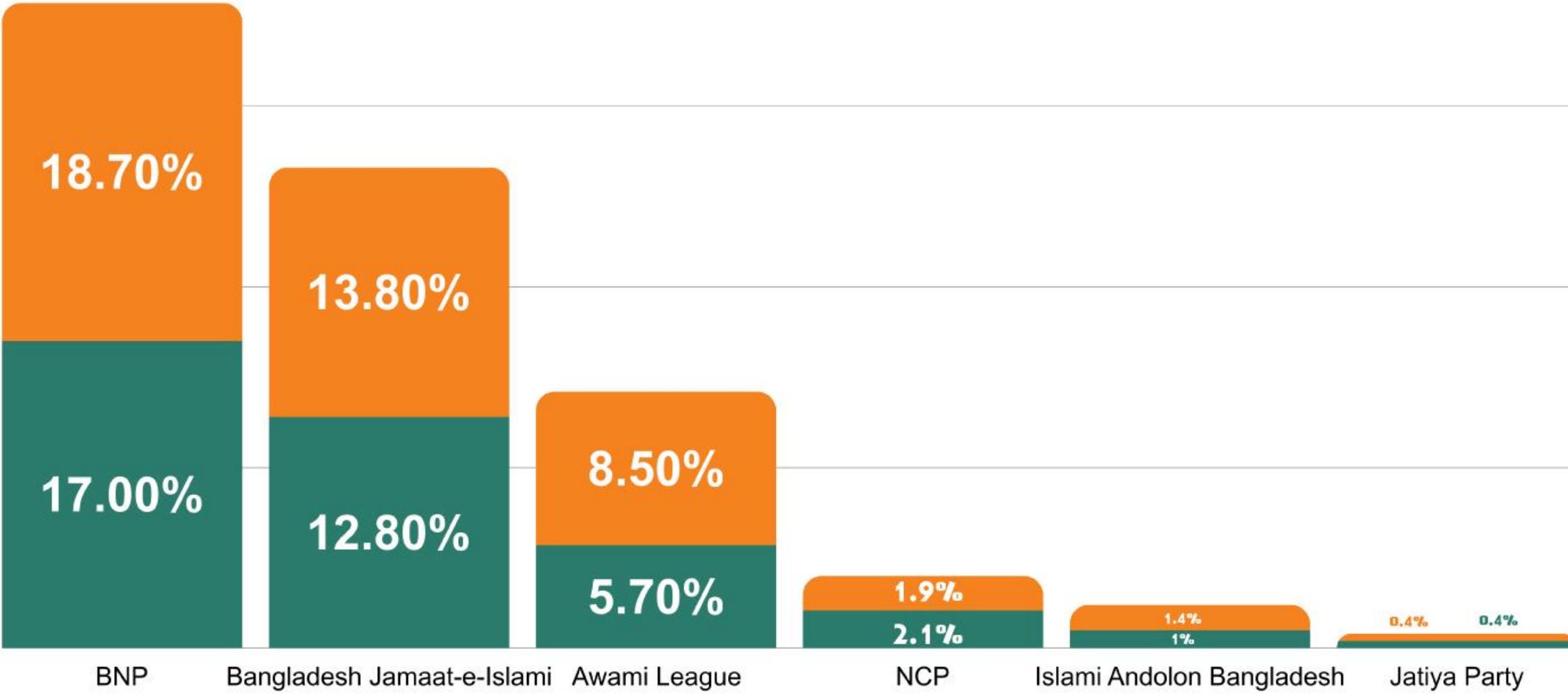
In all samples, BNP share increased by 1.70 points, Jamaat by 1.0 point and Awami League by 2.8 points

Who the voters will vote for?

● Round 1 (March 2025)   ● Round 2 (September 2025)

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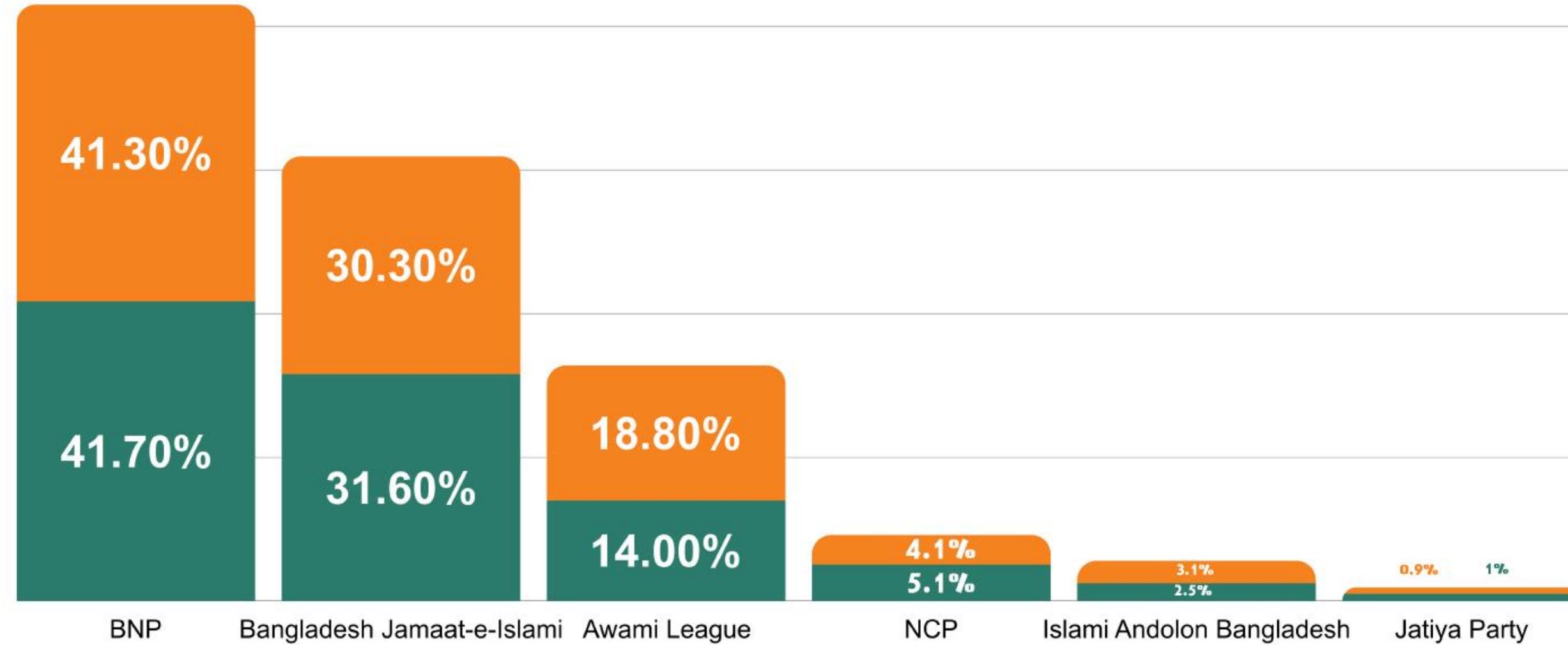
Who the voters will vote for?

Among revealed voters, BNP reduced by 0.40 points, Jamaat
reduced by 1.3 points ; Awami League increased by 4.80 points

Party	March 2025	September 2025
BNP	41.7%	41.3%
Jamaat-e-Islami	31.60%	30.30%
Awami League	14.00%	18.80%
NCP	5.10%	4.10%
IAB	2.50%	3.10%
Jatiya Party	1.00%	0.90%

Who the voters will vote for?
(with margin of errors)

| Party	March 2025	September 2025
BNP	41.7% ($\pm$1.46)	41.3% ($\pm$1.40)
Jamaat-e-Islami	31.60% ($\pm$1.38)	30.30% ($\pm$1.31)
Awami League	14.00% ($\pm$1.03)	18.80% ($\pm$1.11)
NCP	5.10% ($\pm$0.65)	4.10% ($\pm$0.57)

Who the voters will vote for?

BNP's vote bank comprises more of the older generation voters, Jamaat's vote bank comprises more of the younger generation voters; Awami League has a mixed bag

Legend: ● BNP ● Awami League ● Jamaat-e-Islami ● NCP ● Others (%)

Generation	BNP	Awami League	Jamaat-e-Islami	NCP	Others
Gen Z (18-28)	34.3%	18.8%	32.8%	6.8%	7.3%
Millennials (29-44)	41.6%	18.5%	31.4%		
Gen X (45-60)	46.4%	18.8%	28.0%		
Boomers+ (61+)	48.6%	19.0%	26.5%		

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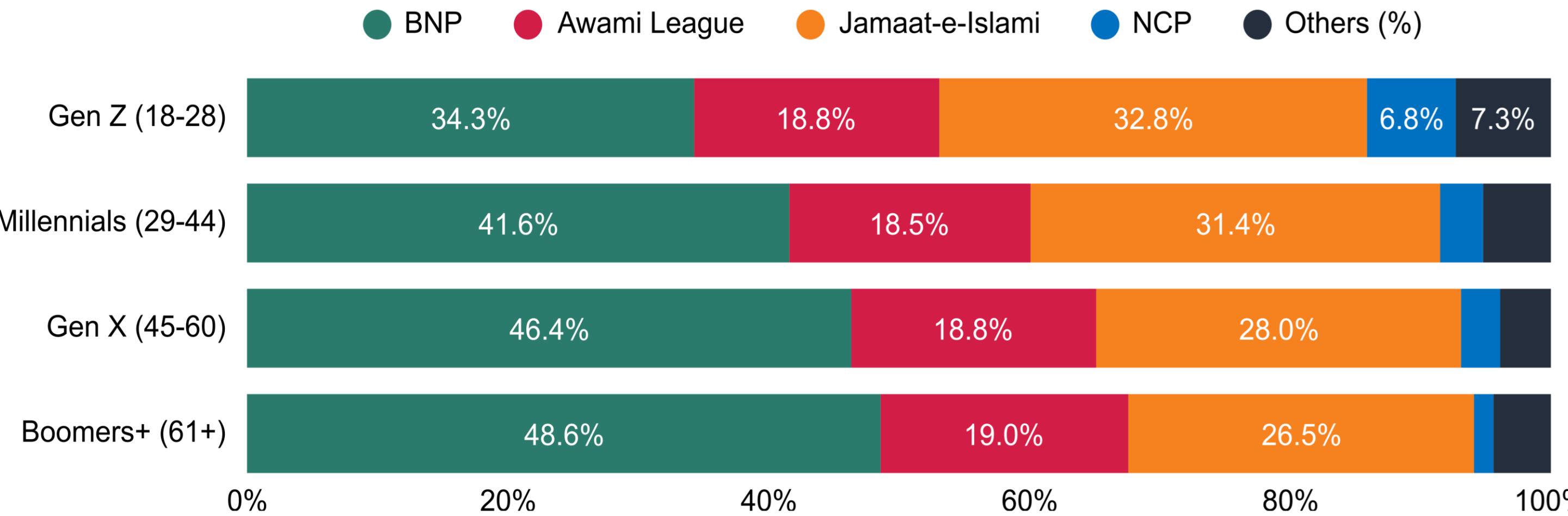
Who the voters will vote for?

BNP is leading in 6 divisions
Jamaat is leading in Rangpur, Awami League is leading in Barishal

Legend: ● BNP ● Awami League ● Jamaat-e-Islami ● NCP ● Others (%)

Division	BNP	Awami League	Jamaat-e-Islami	NCP	Others (%)
Barishal	28.7%	31.9%	29.1%		6.4%
Chattogram	41.9%	17.1%	27.6%	7.7%	
Dhaka	40.8%	25.8%	24.3%		5.9%
Khulna	43.3%	18.3%	30.1%		
Mymensingh	45.7%	17.3%	25.8%		6.5%
Rajshahi	44.4%	9.2%	40.9%		
Rangpur	36.7%	12.5%	43.4%		6.2%
Sylhet	44.7%	14.0%	29.6%		8.4%

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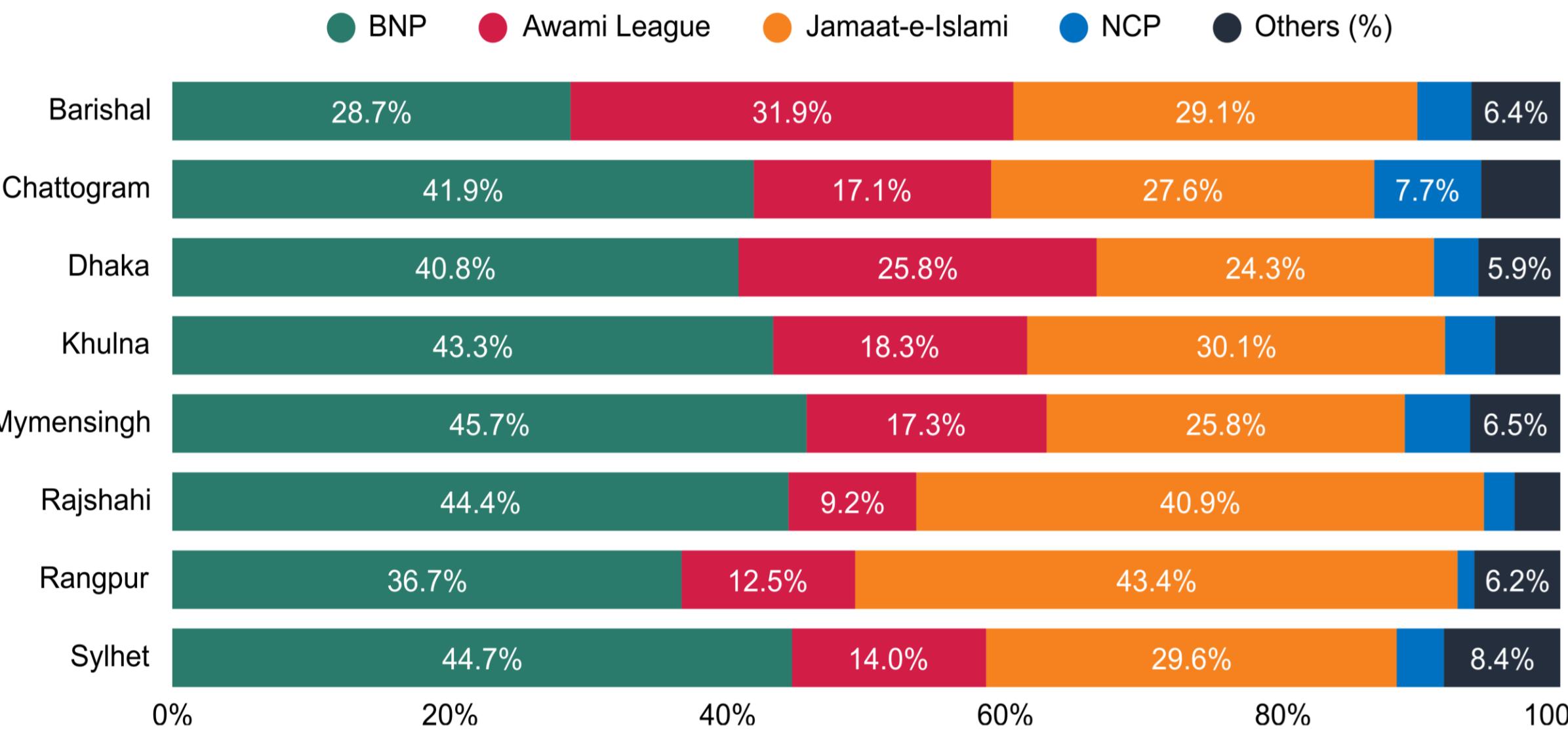
Who the voters will vote for?

BNP is leading with voters with lesser educational qualification, Jamaat is leading with voters with higher educational qualifications

Legend: ● BNP ● Awami League ● Jamaat-e-Islami ● NCP ● Others (%)

Education Level	BNP	Awami League	Jamaat-e-Islami	NCP	Others
No education or Pre-School	48.4%	19.6%	27.2%		
Some schooling but did not complete Primary	45.2%	23.7%	24.3%		5.2%
Completed Primary but did not complete Secondary	45.4%	17.8%	30.6%		
Secondary	37.4%	18.6%	33.3%		6.2%
Higher Secondary	34.9%	18.8%	31.7%	7.9%	6.8%
Vocational	29.0%	9.7%	35.5%	16.1%	9.7%
Bachelor's	32.2%	17.2%	31.3%	11.4%	7.8%
Master's	23.4%	15.6%	38.3%	15.0%	7.8%

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If the voters are not voting, then why?

Reasons for not opting to vote

Most cited security concerns (32.65%) followed by lack of trust in mainstream political parties (20.41%) (3.8% of the total samples responded that they will note vote)

● Security concerns   ● Lack of trust in mainstream political parties

● Not sure if my favorite party will participate in the elections   ● I don't think my vote has any value

● Concerns about fake votes   ● I do not see alternative political parties

| 32.65% | 20.41% | 20.15% | 13.78% | 10.97% | 10.2% |
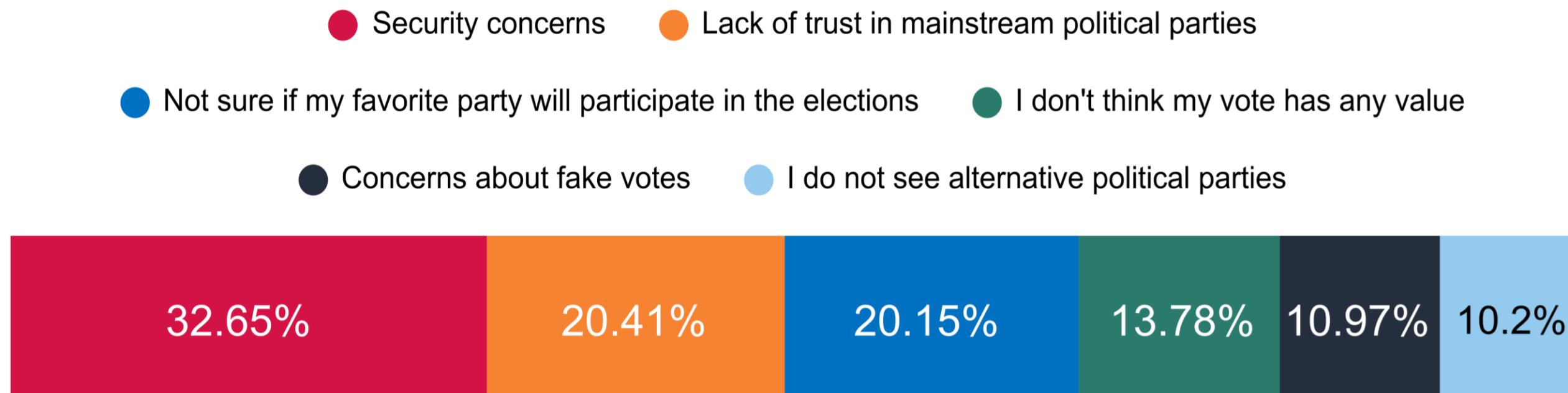
Reasons for not opting to vote

Higher proportion of women who said they will note vote, cited having no alternative political parties (12.90%) if compared to men (8.50%)

- 🔴 Security concerns
- 🟠 Lack of trust in mainstream political parties
- 🔵 Not sure if my favorite party will participate in the elections
- 🟢 I don't think my vote has any value
- ⚫ Concerns about fake votes
- 🔵 I do not see alternative political parties

	Security concerns	Lack of trust	Not sure favorite party	Vote no value	Fake votes	No alternative
Female	33.50%	19.40%	13.50%	15.50%	11.60%	12.90%
Male	31.90%	21.30%	24.70%	12.80%	10.60%	8.50%

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In your view, which party is most suitable to form the next government?

In your view, which party is most suitable to form the next government?

39.1% think BNP is most eligible, followed by Jamaat (28.1%).
This result is on full sample and it closely follows the revealed distribution of votes.
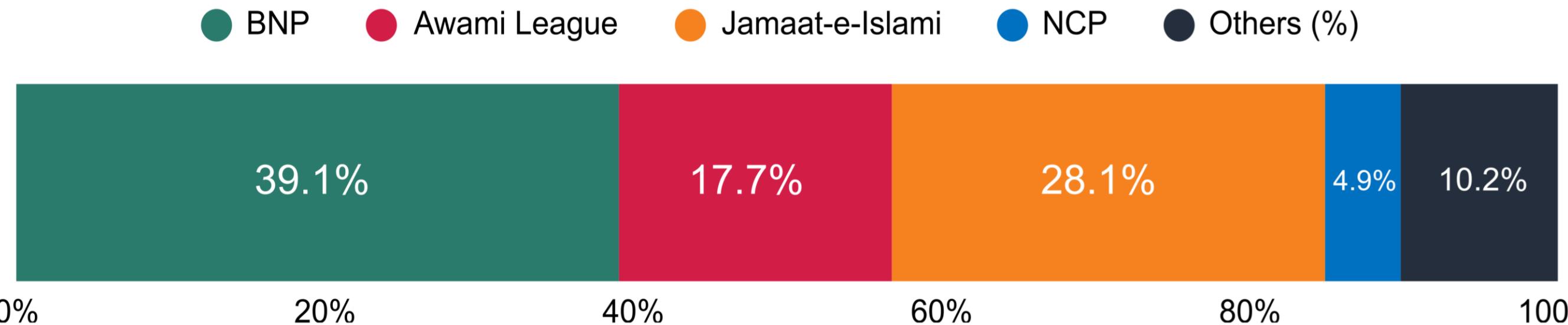
● BNP   ● Awami League   ● Jamaat-e-Islami   ● NCP   ● Others (%)

| 39.1% | 17.7% | 28.1% | 4.9% | 10.2% |

0%   20%   40%   60%   80%   100%
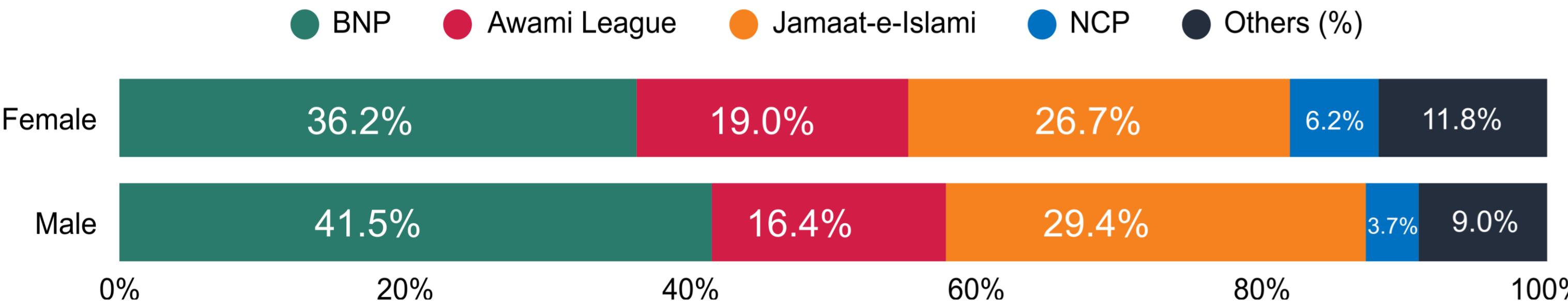
Which party is most likely to form the next government?

Voter's perception on which party is most likely to form the next government?

Higher proportion of respondents think BNP is most likely to form the next government (40.0%) if compared to March (29.3%). The rate has increased for both Jamaat (March: 17.5%, September 23.3%) and Awami League (March 6.3%, September 12.1%).

● BNP ● Jamaat-e-Islami ● Awami League ● NCP ● Others (%)

● I don't want to say

	BNP	Jamaat-e-Islami	Awami League	NCP	Others	I don't want to say
Round-1 (March)	29.3%	17.5%	6.3%	3.9	3.2	39.7%
Round-2 (September)	40.0%	23.3%	12.1%	3.8	5.0	15.8%

0%   20%   40%   60%   80%   100%
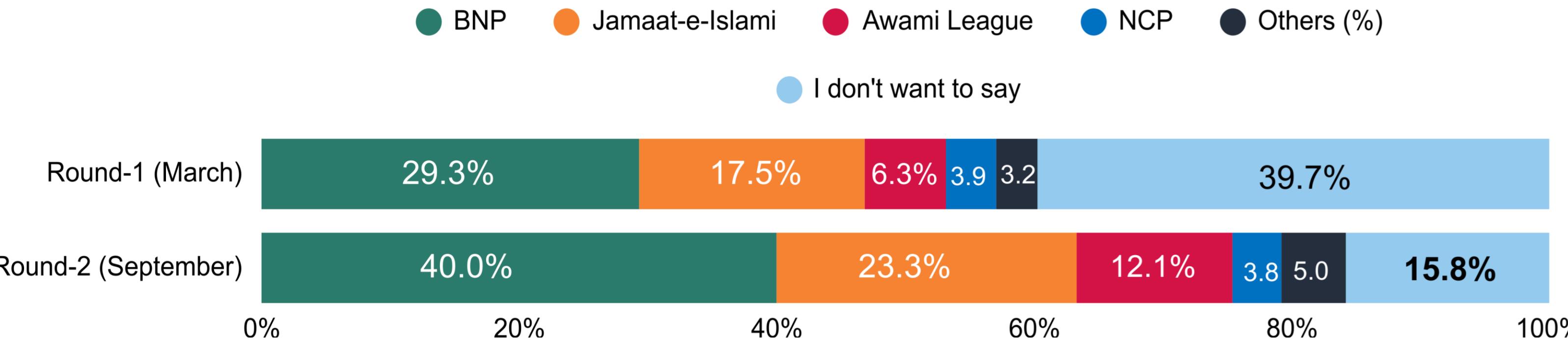
Who the voters will vote for if Awami League Does not Participate in Next Election?

If Awami League does not participate in election…

	All respondent	Decided revealed
BNP	20.2%	45.6%
Bangladesh Jamaat-e-Islami	14.8%	33.5%
NCP	2.1%	4.7%
Islami Andolon Bangladesh	1.7%	3.8%
Jatiya Party	0.9%	2.1%
Independent candidate	0.6%	1.3%
Gono Odhikar Parishad	0.3%	0.6%
AB Party	0.0%	0.1%
Ganosamhati Andolon	0.0%	0.0%
I will not go to vote.	3.7%	8.3%
Decided but did not reveal	10.2%	0.0%
Not decided	30.7%	0.0%
Party decision not revealed	9.1%	0.0%
Will not vote	3.8%	0.0%
Voting decision not revealed	2.0%	0.0%
Total	10413	4608

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If Awami League does not participate in election…

If Awami League does not participate in next election then among the revealed voters, BNP's vote increases to 45.6%, Jamaat's vote increases to 33.5%

	Decided revealed
BNP	45.6%
Bangladesh Jamaat-e-Islami	33.5%
NCP	4.7%
Islami Andolon Bangladesh	3.8%
Jatiya Party	2.1%

Voters who think Awami League is the most suitable party who do they think the second most suitable party is

	n	Percent (%)
BNP	911	49.5
JIB	330	17.9
No second preference found	327	17.8
JP	160	8.7
NCP	63	3.4
IAB	23	1.2
AL Supported Alliance	12	0.7
Islamic Party Alliance	4	0.2
Left Parties Alliance	4	0.2
Unnamed	3	0.2
BNP led alliance	2	0.1
BNP and Islamic Party Alliance	1	0.1
Respondent	1840	100

Contact

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