Media Release

PULSE FROM THE GROUND
EMIR RESEARCH QUARTERLY POLL
THIRD QUARTER 2020 (3Q20) – PART 2

Introduction

We have released Part 1 of the EMIR Research Quarterly Poll (QP) for the third quarter of this year (3Q20) on November 2. This covers the well-being of the nation, living conditions of the *rakyat,* and socio-economic and political issues.

EMIR Research is pleased to announce Part 2 of the findings of our poll for Q320 which covers the National Worry Index (NWI), the Government Satisfaction Index (GSI), respondents' political choice and the Voters' Worry-Satisfaction Valence Model. The latter gives a good indication of the voters' intention to vote.

Objectives of the EMIR Research Quarterly Poll

The poll which was conducted to gauge the pulse from the ground has the following objectives:

- Assess the perceived direction of the country and living condition among the people;

- Profile the *rakyat's* worries and track changes in the national worry index (NWI);

- Assess the *rakyat's* hopes and expectations towards the government;

- Track changes in the government satisfaction index (GSI) among people of different communities and socio-economic statuses; and

- Test Voters' Worry-Satisfaction Valence model.

The state-wide survey was conducted in August involving 2,096 respondents comprising the *rakyats* from all the states in Malaysia including Sabah, Sarawak and the Federal Territory.

For the methodology adopted in conducting the poll, please refer to Annex 1.

DISCLAIMER

Since the FGD was conducted in July, and the survey was in August, the poll does not take into account the latest happenings in the country which include the surge in Covid-19 new infections – the third wave that began in late September – and the intense politicking among politicians that has led to attempts at power grab culminating in the Sabah state election on Sep 26, and Datuk Sri Anwar Ibrahim's bombshell that he has the majority to carry him to Putrajaya, and finally the call for a state of emergency to be declared which was denied by the Yang di-Pertuan Agong.

FINDINGS

1. Covid-19 pandemic worries

Both the findings of the FGD and the nation-wide survey from the EMIR Research QP 3Q20 have shown the unprecedented Covid-19 pandemic leading to an economic crisis had taken a toll on everyone across the nation.
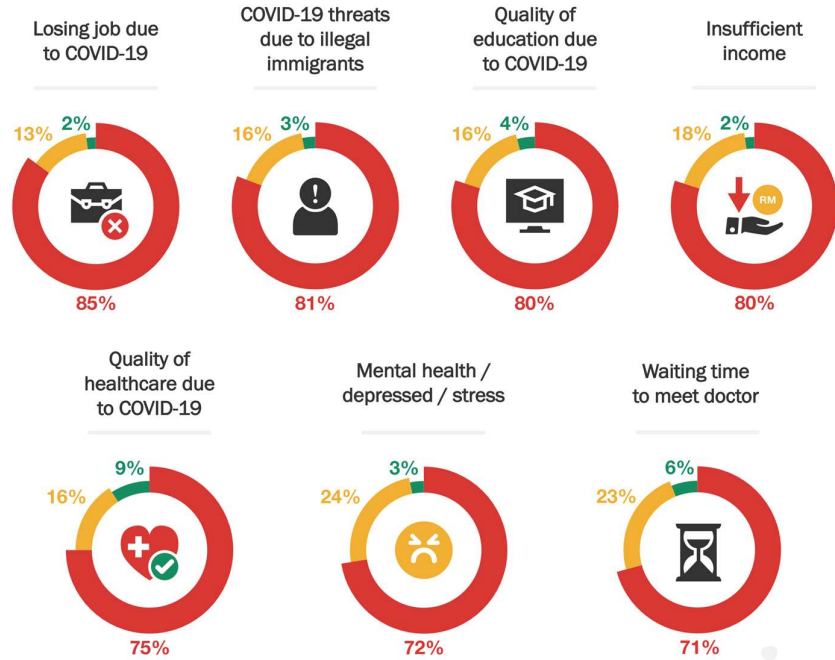
The current political instability which has a direct impact on lives and livelihoods also plays a major part in contributing to the worries amongst the *rakyat* – all these leading to what we call the seven "pandemic-related" worries (See Figure 1 below).

These worries have emerged as major reoccurring narrations by our FGD respondents in the qualitative research stage. Therefore, we have decided to test how wide these worries are spread in the population by including corresponding questions in our EMIR Research QP 3Q20.

This is also in line with another discovery from the FGD whereby some discussants shared that aside from the economic uncertainty they are facing, one of the elements of uncertainty is contributed by political instability.

One discussant put it this way: "For me there's a lot of element of uncertainty. Uncertainty. We don't know whether the government will be there tomorrow or not. Job-wise many wouldn't know whether they can keep a job tomorrow or not …"

Figure 1 shows the seven pandemic-related worries of the *rakyat*. The top worry is losing job (85%). About eight out of every 10 respondents worried about the threat of infection through illegal immigrants (81%), quality of education (80%) due to the new norm of relying on online education, which has created a worry of depriving the *rakyat* and their children of quality education because of the lack of access to internet and broadband facility at their home, insufficient income (80%), and the quality of healthcare due to Covid-19 (75%). Meanwhile seven out of every 10 respondents worried about mental health (72%) and the waiting time to meet doctor (71%).

Losing job due to COVID-19

2%
13%
85%

COVID-19 threats due to illegal immigrants

3%
16%
81%

Quality of education due to COVID-19

4%
16%
80%

Insufficient income

2%
18%
80%

Quality of healthcare due to COVID-19

9%
16%
75%

Mental health / depressed / stress

3%
24%
72%

Waiting time to meet doctor

6%
23%
71%

* The percentage figures may not add up to 100% due to rounding.

Est. ME : ±3%

● Worried   ● Not sure   ● Not Worried

Figure 1: The seven pandemic-related worries

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Ethnic Perspective

More than 90% of the Bumiputera Sabah and Sarawak exhibit the highest level of worry in the top four pandemic-related worries with 95% fearing losing jobs, followed by the threat of infection from illegal immigrants (94%), insufficient income (93%) and the quality of their education (91%).

This is followed by the Malays whose worry level in these four areas are in the 80s percentages. The Chinese and Indians have a relatively lower level of worry compared to the Bumiputera Sabah and Sarawak, and the Malays (see Figure 2 below). Still, about 7 out of every 10 respondents in these groups are greatly concerned with these pandemic-related issues.
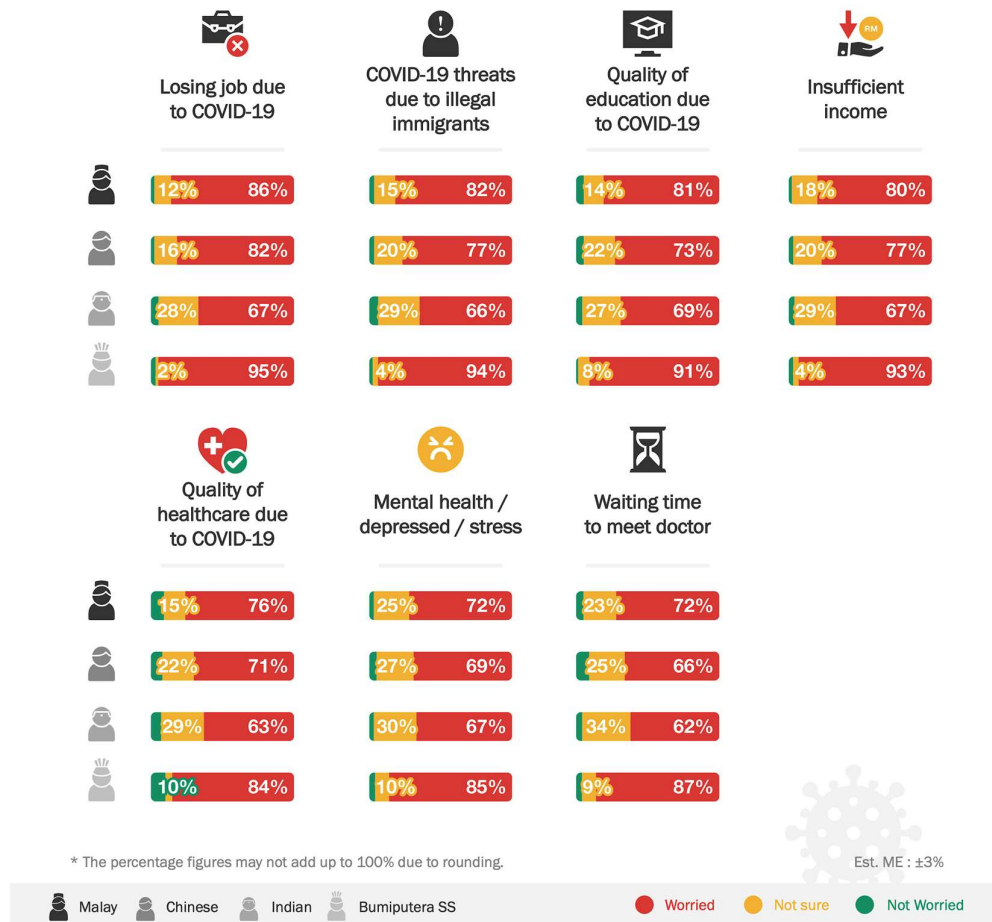
	Losing job due to COVID-19	COVID-19 threats due to illegal immigrants	Quality of education due to COVID-19	Insufficient income
Malay	12% / 86%	15% / 82%	14% / 81%	18% / 80%
Chinese	16% / 82%	20% / 77%	22% / 73%	20% / 77%
Indian	28% / 67%	29% / 66%	27% / 69%	29% / 67%
Bumiputera SS	2% / 95%	4% / 94%	8% / 91%	4% / 93%

	Quality of healthcare due to COVID-19	Mental health / depressed / stress	Waiting time to meet doctor
Malay	15% / 76%	25% / 72%	23% / 72%
Chinese	22% / 71%	27% / 69%	25% / 66%
Indian	29% / 63%	30% / 67%	34% / 62%
Bumiputera SS	10% / 84%	10% / 85%	9% / 87%

* The percentage figures may not add up to 100% due to rounding.   Est. ME : ±3%

Malay   Chinese   Indian   Bumiputera SS   ● Worried   ● Not sure   ● Not Worried

Figure 2: The ethnic dimension of pandemic-related worries

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Urban-rural divide and educational level perspectives

The urbanites worry more than their rural counterpart over mental health caused by the pandemic – 75% versus 64%, a significant difference of 11% (refer to Figure 3). So too are the higher educated, with 78% worrying about mental health as compared to the holders of school certificate (66%) – a significant 12% difference, as shown in Figure 4.
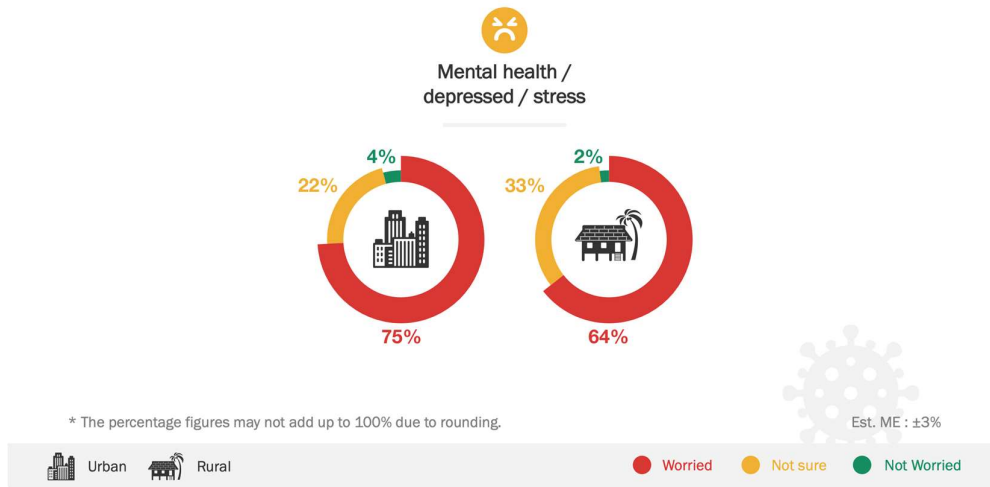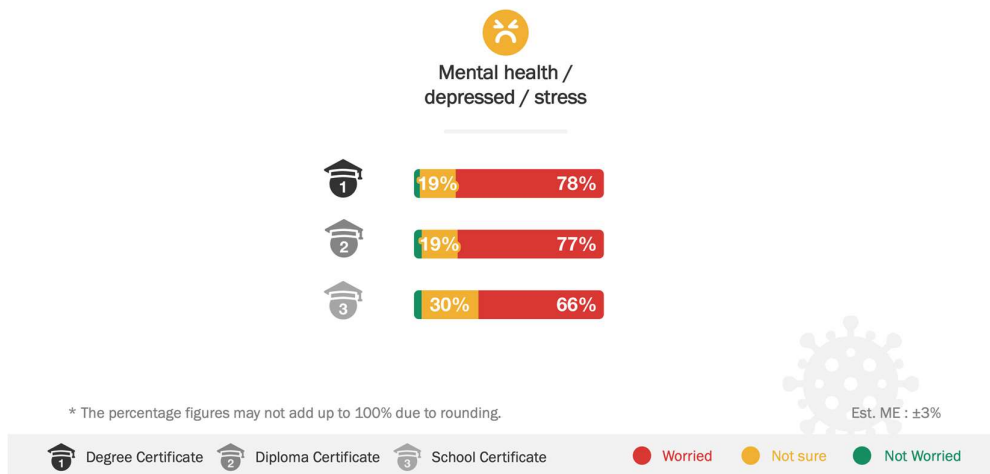

Figure 3: Pandemic-related worries: Location dimension

Figure 4: Pandemic-related worries: Qualification dimensions

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2. The National Worry Index (NWI)

The questionnaire in the EMIR Research QP 3Q20 maintained 12 questions developed during of EMIR Research Inaugural Poll based on themes, or recurring descriptions and statements, that emerged as the outcome of the focus group discussions (FGDs). These 12 questions represent worrying issues, and respondents were asked to indicate their level of worry for each of these issues.

Based on these 12 questions-indicators, the National Worry Index (NWI) was conceptualized and developed. The theoretical construct of the NWI is based on the identification of four common underlying or latent factors that influenced the variability of the responses – cost of living, job security, economic, and security issues.

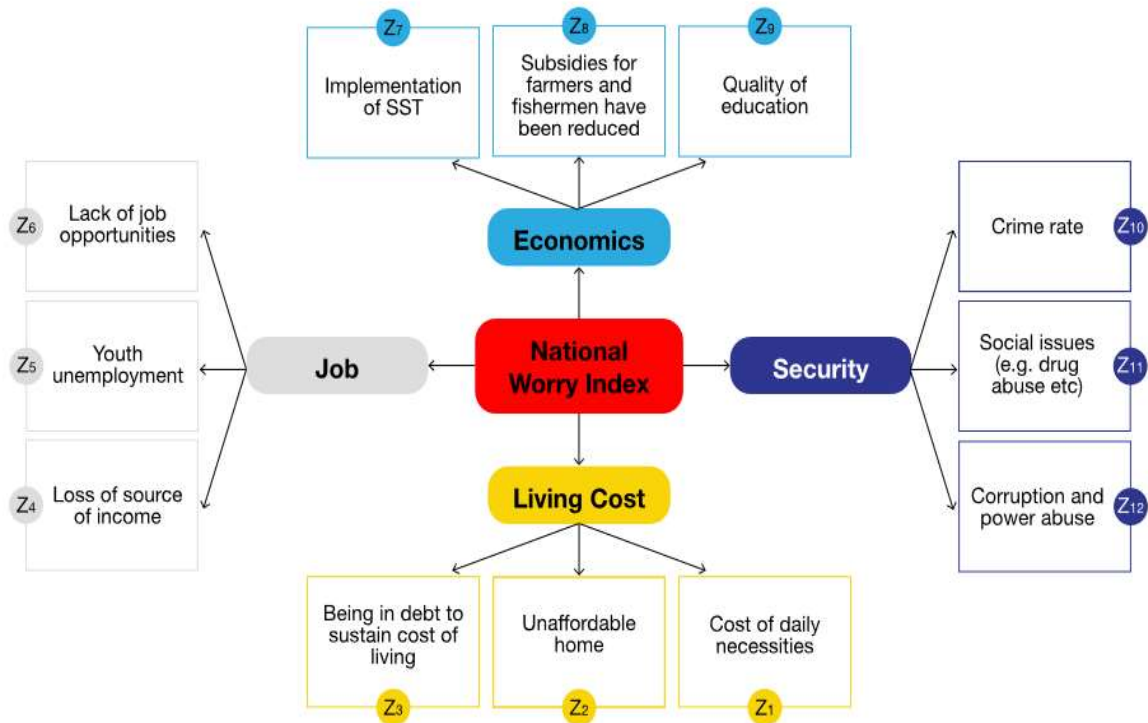The construct of NWI can also be seen in detail in Figure 5 below.

Figure 5: Theoretical construct of the National Worry Index

When calculated according to the method delineated in detail in Annex 1 on our research methodology, overall Malaysia's NWI score for 3Q20 stands at 0.79 level when measured on the sliding scale from 0 to 1, with the higher number indicating a greater amount of worry (see Figure 6).

According to the NWI scale bands, this number steps into the area of maximum worry, just one notch below the unhealthy level of 0.80 of maximum worry. We can therefore conclude the feeling of worry over socio-economic issues brought about by the Covid-19 pandemic-related worries for an average Malaysian has intensified over the period from the first quarter to third quarter of 2020.

Also, the current NWI reading of 0.79 has worsened compared to the NWI in the last quarter of 2019 (4Q19) at 0.77.
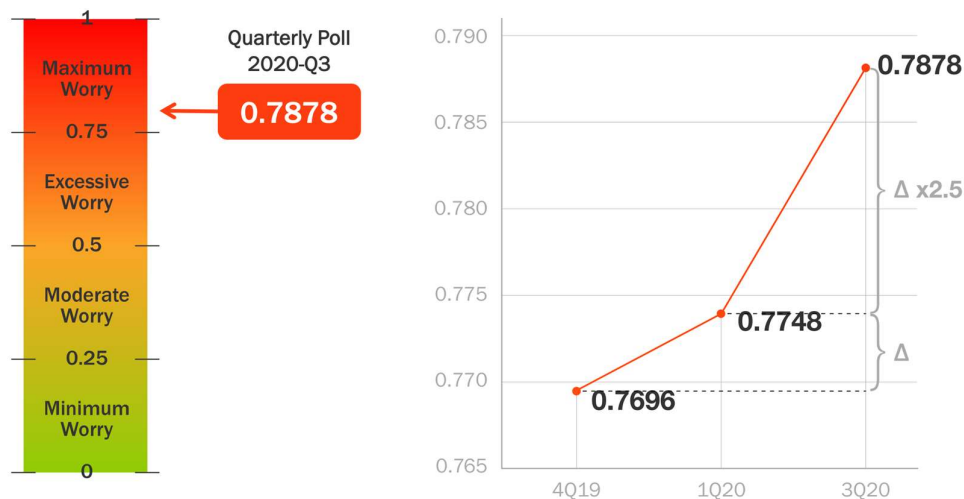

Figure 6: A worsening of the National Worry Index at 0.79.

3. Main expectations of the *rakyat*

The sudden change in government which took place in March has abrupted many important national policies that are expected to impact the *rakyats* positively.

Despite the change in government, EMIR Research poll aims to assess whether there remain policies which the *rakyat* hope and expect the government of PN to implement, particularly those that could help and support them in sailing through the storms or otherwise.

From the findings of the FGD, the worsening economic conditions brought about by the Covid-19 pandemic are described first of all in terms of ever rising costs of living – prices of basic necessities, utilities costs, home rentals, and unaffordable house prices.

Various groups highlighted despite this continued increase in general costs of living, there is very little or almost no corresponding increase in wages. The latter to a large extent remain stagnant.
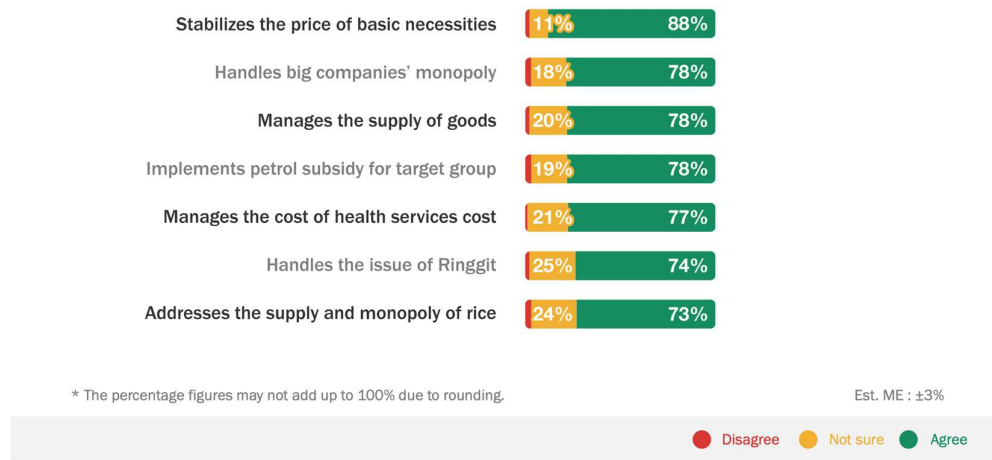
Even in the rural areas where the rural folks are not subjected to constant financial pressures nor face threats of losing job and source of earning amidst the pandemic, they are still very concerned with the high cost of living, increasing price of basic needs, inadequate housing, prices of agricultural commodities and water supply.

Addressing all these issues would definitely result in the *rakyats'* satisfaction towards the government for being sensitive and empathetic to their plights, as strongly supported by the results of the Worry-Satisfaction Valence Model fitting in the previous quarterly poll releases.

The economic dimension

Figure 7 highlights the main issues which mainly contribute to the rising cost of living in Malaysia.

Issue	Not sure	Agree
Stabilizes the price of basic necessities	11%	88%
Handles big companies' monopoly	18%	78%
Manages the supply of goods	20%	78%
Implements petrol subsidy for target group	19%	78%
Manages the cost of health services cost	21%	77%
Handles the issue of Ringgit	25%	74%
Addresses the supply and monopoly of rice	24%	73%

* The percentage figures may not add up to 100% due to rounding.   Est. ME : ±3%

● Disagree   ● Not sure   ● Agree

Figure 7: The economic dimension of rakyats' expectations

In general, majority of Malaysians agree that all of the issues listed need to be addressed by the government, with the highest frequency of expectation placed on stabilising the price of basic necessities (88%) and over 70% of the total respondents are hoping that the issue of supply and monopoly of rice will be looked into.

Of the four ethnic groups, the Bumiputeras of Sabah and Sarawak recorded higher incidences of expectations towards the government's initiative to address the listed issues (refer Figure 8). More of the Malays and Bumiputeras hope the government will initiate policies and actions related to the economic and living conditions concerns than the other ethnic groups.

The expectations that the government will handle issues related to big companies' monopoly are more prevalence among the Malays and Bumiputeras as compared to the Chinese and Indians. The Indians express least incidence of hope to all of the listed issues.

Figure 8: Economic Dimension – Ethnicity perspectives

In terms of household income, interestingly, higher income group show higher hopes towards governments' initiatives to manage cost of health services, issue of Malaysian Ringgit, and the supply and monopoly of rice (refer Figure 9).
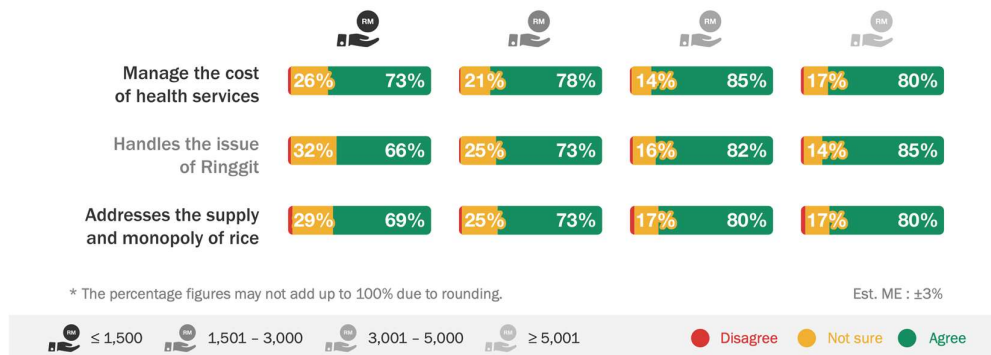
Figure 9: Economic Dimension – income perspectives

The dimension of affordable home

The issue of housing affordability should be prioritised by the government, as 85.3% hope for the government to manage the supply of affordable home and concurrently, 82% hope the housing rental scheme would be expanded as an alternative to purchasing a house. A simpler and less-hassle housing loan procedure is preferred with 85% of Malaysians agreeing to it.
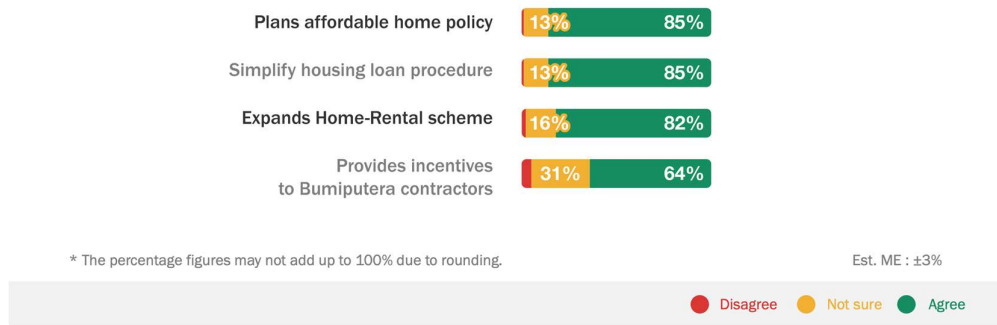

Figure 10: Affordable home dimension

Under this dimension, 64% Malaysians are looking forward for the government to provide incentives to the Bumiputera contractors, with the Malays and other Bumiputeras supporting the idea – 69% and 73% respectively.
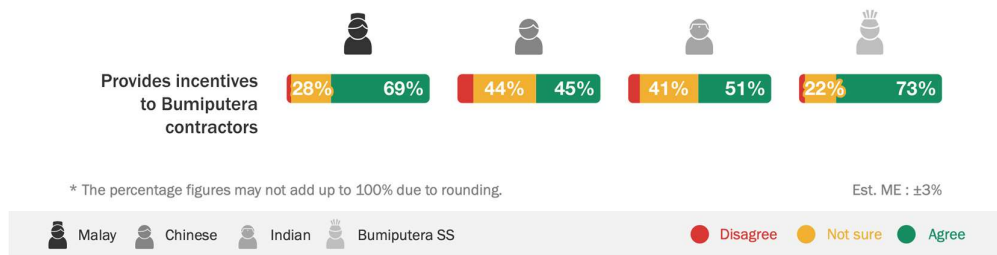

Figure 11: Affordable home dimension – ethnicity perspective

The Agricultural Policy Dimension

Given the struck of pandemic which has affected global supply chains, measures to improve food security has been mooted by the public to ensure adequate domestic supply and more employment opportunities for the locals.

In our poll and as per the figure below, 77% think the government needs to strengthen Food Safety Policy, and 74% agreed agricultural policy should be used to manage rising unemployment and reliance on food imports.

A notable share of 74% also believe that the minimum wage policy implementation is a positive move.

	Disagree	Not sure	Agree
Strengthens food safety policy		22%	77%
Implements minimum wage policy		24%	74%
Uses agricultural policy to manage high unemployment & food imports		23%	74%

* The percentage figures may not add up to 100% due to rounding.

Est. ME : ±3%

● Disagree ● Not sure ● Agree

Figure 12: The dimension of agriculture policy

Malaysians across all races agreed the government need to implement and pursue these policies. However, Malay and Bumiputera groups are placing higher hopes that government would prioritise these issues.
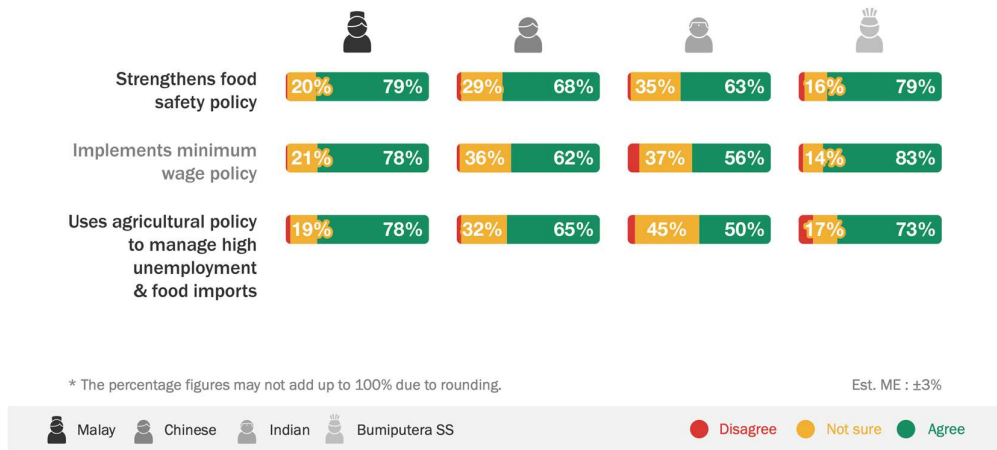
	Malay		Chinese		Indian		Bumiputera SS	
Strengthens food safety policy	20%	79%	29%	68%	35%	63%	16%	79%
Implements minimum wage policy	21%	78%	36%	62%	37%	56%	14%	83%
Uses agricultural policy to manage high unemployment & food imports	19%	78%	32%	65%	45%	50%	17%	73%

* The percentage figures may not add up to 100% due to rounding.

Est. ME : ±3%

Malay Chinese Indian Bumiputera SS   ● Disagree ● Not sure ● Agree

Figure 13: The dimension of agriculture policy – ethnicity perspective

4. The Government Satisfaction Index (GSI)

In our research, we have consistently been finding rakyat's satisfaction towards the incumbent government, as manifested by Government Satisfaction Index (GSI), to be a strong predictor of their intention to support the incumbent government. Once the level of satisfaction of the rakyats towards the government changes by going south, it means regime change is in the offing.

The GSI for the current poll stands at 0.67. Our poll shows the GSI has increased substantially from 0.45 in the first quarter of 2020 (1Q20) to 0.67 in the third quarter (3Q20) – a 49% increase. This compares very favourably against the decrease in GSI from 0.53 in fourth quarter of 2019 (4Q19) to 0.45 in 1Q20 – a 15% decline.

This brings the satisfaction level of *rakyat* towards the government, which GSI measures, from being at the average band to the above average band as can be seen in Figure 14 below.

As we discover in the FGDs, the respondents' sense of confidence and optimism for the future, and hence a higher satisfaction towards the government, are likely due to their endorsement of the government's effort to balance lives and livelihoods by reopening the economy and announcing stimulus packages, while at the same time, balancing the measures to mitigate Covid-19 infections and searching for vaccines.
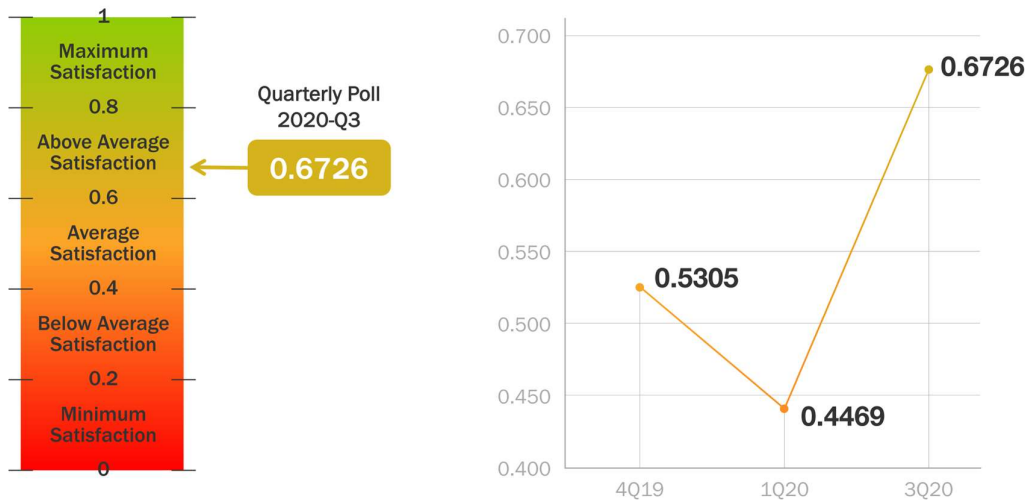

Figure 14: The Government Satisfaction Index (GSI) jumps into a new, higher band of above average satisfaction
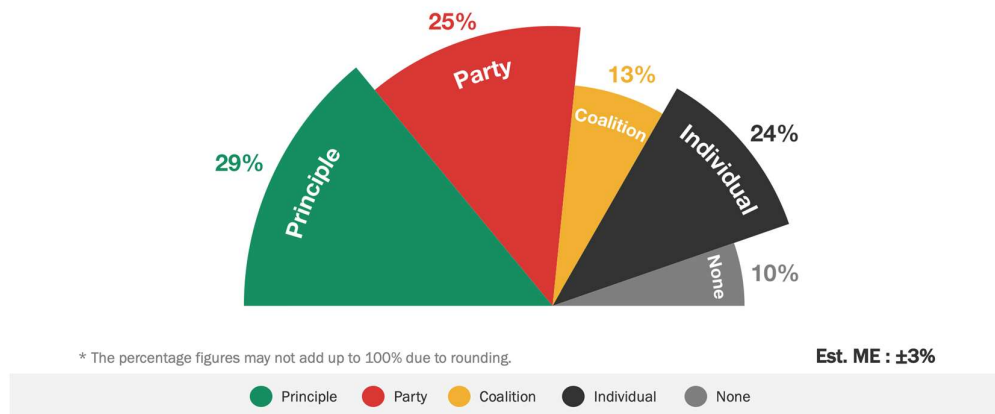
5. Political choice

Basis of political choice

In our earlier qualitative research findings, we observed a strong emergence of a group of discussants who expressed their intention to support in their own words "principle-based politics" as opposed to "individual-based" or "party-based".

This sentiment appeared to be not as prevalent among the rural Malay discussants as opposed to other groups. This pattern was so apparent in FGD discussants' narrations that in this quarterly poll, we decided to test how widely this sentiment is spread among the population.

The respondents were requested to indicate what would be the basis of their political choice. The distribution of responses is presented in Figure 15. Although we indeed observe the highest percentage of principle-oriented respondents (29%), it is still a very marginal difference from the proportions of those who are oriented towards party (25%) or individual (24%). However, we can conclude coalition criteria played significantly less important role as a basis of political choice among the respondents.

The emergence of this "principle-based" sentiment is still an interesting trend to monitor how it would unfold in the future.

Figure 15: Basis of political choice

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Demographic profiles

Stratification of respondents by demographics revealed this "principle-based"-oriented respondents are mainly urbanites with higher level of education and in the higher income bracket (See Figure 16).
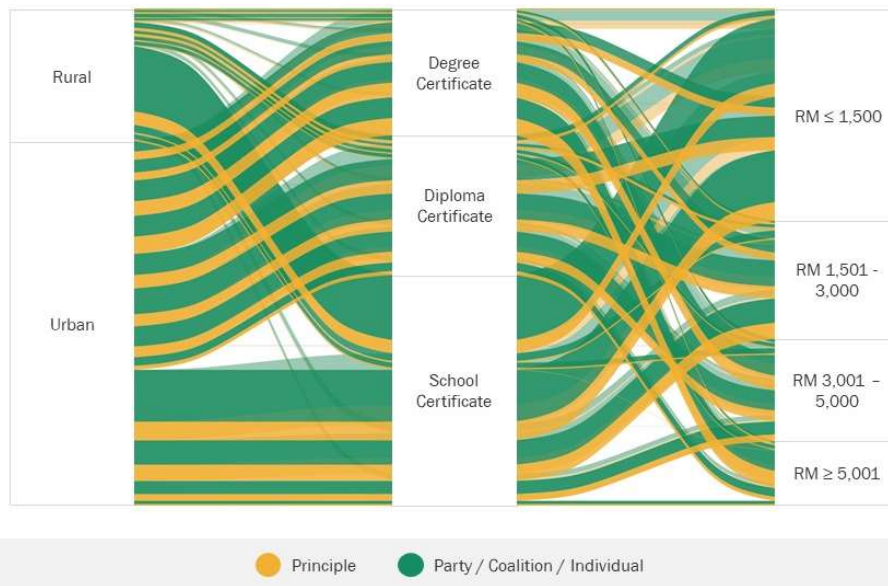

Figure 16: Respondents stratified by demographics and basis of their political choice

Party of choice

According to Figure 17, the majority of Malaysians (42.8%) reveal their support for Umno which is part of the current government, leaving far behind even the second highest choice which is PAS (15.5%). PPBM comes in third with only 8.3%. See Figure 17.

A surprise showing is Pejuang, a party spearheaded by former prime minister Tun Mahathir Mohamad, which comes in fourth (6.2%) because it is not even registered as a party yet.
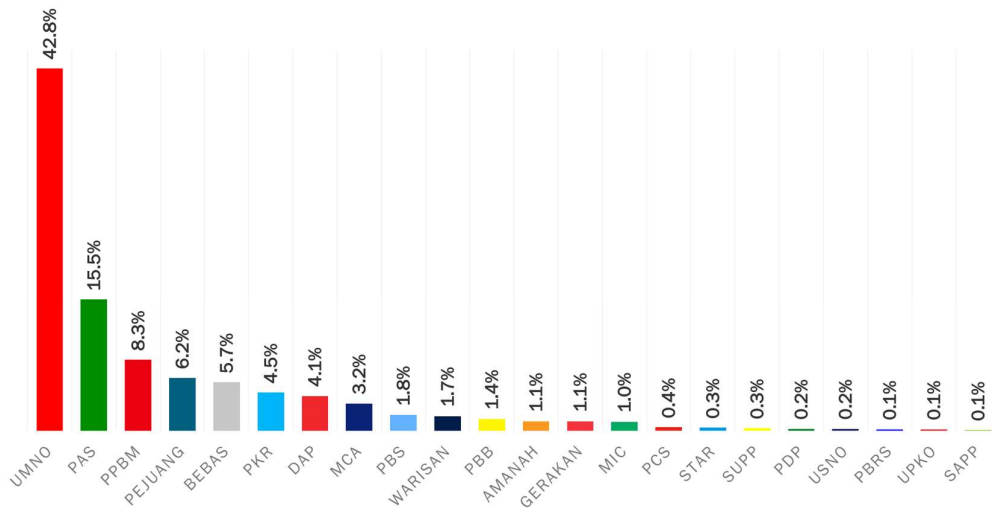
Figure 17: Party of choice

Independent comes fifth (5.7%), keeping alive the desire for the emergence of the Third Force in Malaysian politics. Based on our FGD findings and previous polls, Malaysians who yearn for the Third Force have difficulty naming the leader/leaders of the Third Force.

Very often, the discussants in the FGD who favoured the Third Force would resort to saying they do not see currently there is a suitable candidate on the political arena or they would say that we need fresh blood in politics.

Otherwise, they would name individuals whom they know would perhaps never become the PM but they still name these individuals to illustrate the point that they want to see leaders with personal qualities of having the passion and the sincerest desire to do things for the *rakyat* and being above identity politics (ethnic-based or religion-based). In discussants own words, only having people who can do the job could bring in both the political and economic stability.

As proven in many by-elections since a year ago, independent candidates have always been trounced by party or coalition candidates which means the time for independent candidates of the Third Force has yet to come.
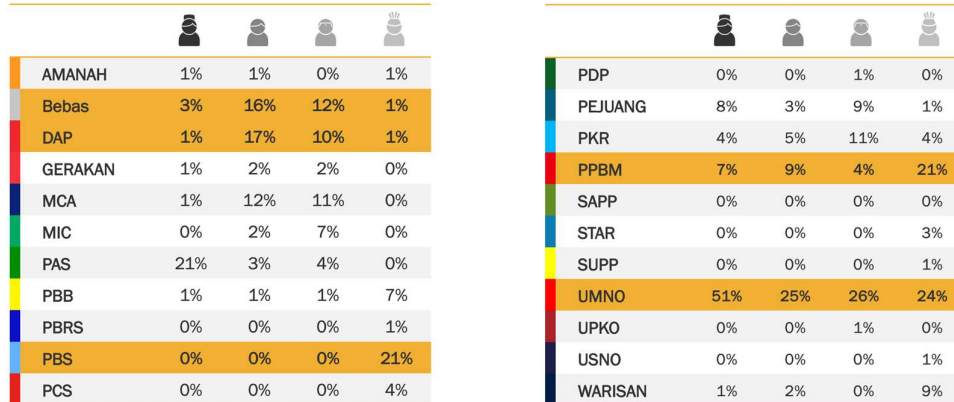
Demographic profiles of party of choice

Within ethnic group, comparison reveals the Malays is in the highest favour for Umno, with 51% votes compared to the other ethnic groups – Indians (26%), Chinese (25%) and Bumiputera of Sabah and Sarawak (24%).

DAP received greater support within Chinese and Indian groups. These two ethnic groups also gave greater support to independent as compared to Malay and Bumiputera.

PPBM had greater support among the Bumiputera Sabah and Sarawak (21%) compared to other ethnic groups – Chinese (9%), Malays (7%) and Indians (4%).
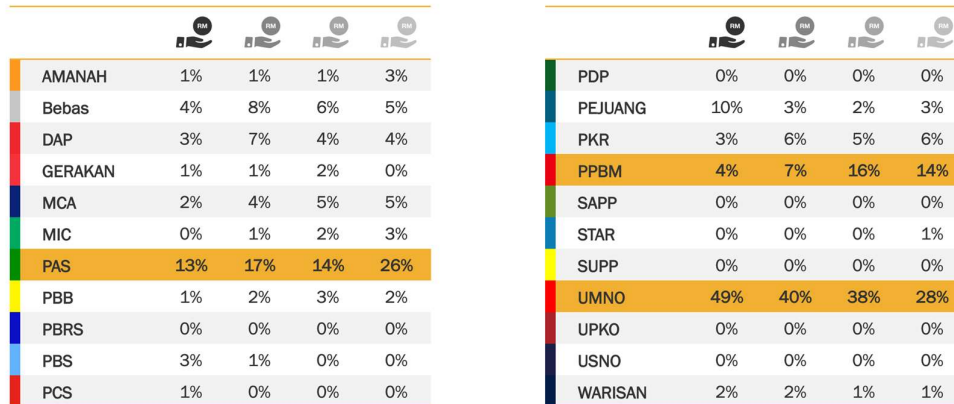
	Malay	Chinese	Indian	Bumiputera SS			Malay	Chinese	Indian	Bumiputera SS
AMANAH	1%	1%	0%	1%		PDP	0%	0%	1%	0%
Bebas	3%	16%	12%	1%		PEJUANG	8%	3%	9%	1%
DAP	1%	17%	10%	1%		PKR	4%	5%	11%	4%
GERAKAN	1%	2%	2%	0%		PPBM	7%	9%	4%	21%
MCA	1%	12%	11%	0%		SAPP	0%	0%	0%	0%
MIC	0%	2%	7%	0%		STAR	0%	0%	0%	3%
PAS	21%	3%	4%	0%		SUPP	0%	0%	0%	1%
PBB	1%	1%	1%	7%		UMNO	51%	25%	26%	24%
PBRS	0%	0%	0%	1%		UPKO	0%	0%	1%	0%
PBS	0%	0%	0%	21%		USNO	0%	0%	0%	1%
PCS	0%	0%	0%	4%		WARISAN	1%	2%	0%	9%

* The percentage figures may not add up to 100% due to rounding.   **Est. ME : ±3%**

Malay   Chinese   Indian   Bumiputera SS

Figure 18: Party of choice – Ethnicity

Income-wise, Umno was more supported within the poorest group with income of RM1,500 and below (49%), while PPBM on the contrary found more support among the more affluent, with 16% within the RM3,001 – 5,000 income level group, and 14% within the RM5,001 and more income level group. PAS also enjoyed greater support of the more affluent vis-à-vis the poorest. See Figure 19 below.
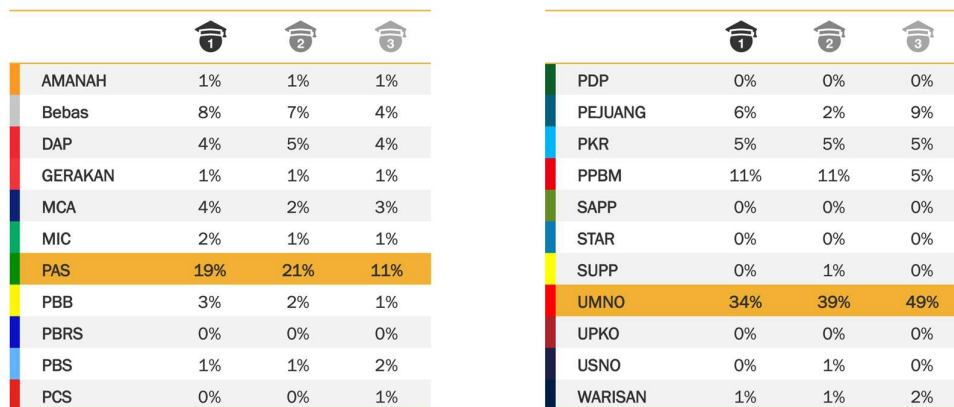
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	≤ 1,500	1,501 – 3,000	3,001 – 5,000	≥ 5,001
AMANAH	1%	1%	1%	3%
Bebas	4%	8%	6%	5%
DAP	3%	7%	4%	4%
GERAKAN	1%	1%	2%	0%
MCA	2%	4%	5%	5%
MIC	0%	1%	2%	3%
PAS	13%	17%	14%	26%
PBB	1%	2%	3%	2%
PBRS	0%	0%	0%	0%
PBS	3%	1%	0%	0%
PCS	1%	0%	0%	0%

	≤ 1,500	1,501 – 3,000	3,001 – 5,000	≥ 5,001
PDP	0%	0%	0%	0%
PEJUANG	10%	3%	2%	3%
PKR	3%	6%	5%	6%
PPBM	4%	7%	16%	14%
SAPP	0%	0%	0%	0%
STAR	0%	0%	0%	1%
SUPP	0%	0%	0%	0%
UMNO	49%	40%	38%	28%
UPKO	0%	0%	0%	0%
USNO	0%	0%	0%	0%
WARISAN	2%	2%	1%	1%

* The percentage figures may not add up to 100% due to rounding.   **Est. ME : ±3%**

RM ≤ 1,500   RM 1,501 – 3,000   RM 3,001 – 5,000   RM ≥ 5,001

Figure 19: Party of choice: Gender & household income

Qualification-wise, Umno enjoyed greater support within the lower educational qualification rather than among the degree holders. PAS, on the other hand secured less support among those with lower educational qualification.

	Degree Certificate	Diploma Certificate	School Certificate
AMANAH	1%	1%	1%
Bebas	8%	7%	4%
DAP	4%	5%	4%
GERAKAN	1%	1%	1%
MCA	4%	2%	3%
MIC	2%	1%	1%
PAS	19%	21%	11%
PBB	3%	2%	1%
PBRS	0%	0%	0%
PBS	1%	1%	2%
PCS	0%	0%	1%

	Degree Certificate	Diploma Certificate	School Certificate
PDP	0%	0%	0%
PEJUANG	6%	2%	9%
PKR	5%	5%	5%
PPBM	11%	11%	5%
SAPP	0%	0%	0%
STAR	0%	0%	0%
SUPP	0%	1%	0%
UMNO	34%	39%	49%
UPKO	0%	0%	0%
USNO	0%	1%	0%
WARISAN	1%	1%	2%

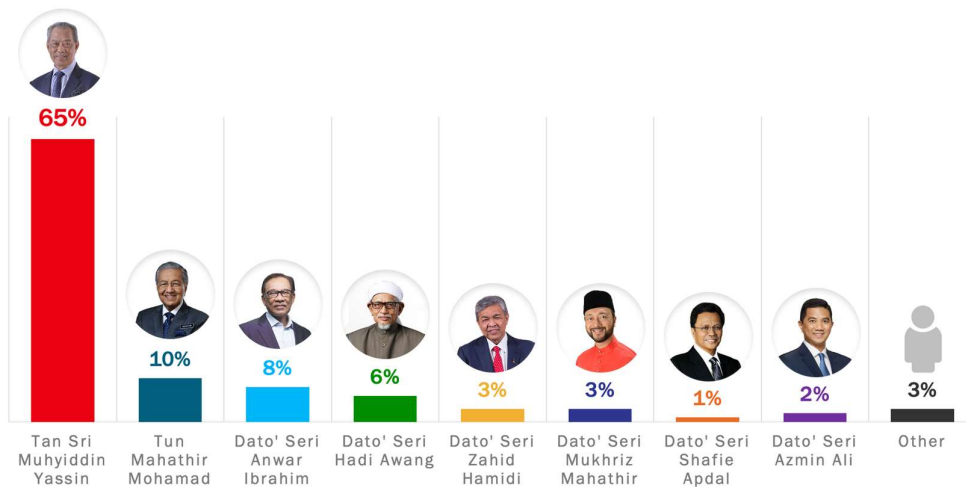* The percentage figures may not add up to 100% due to rounding.   **Est. ME : ±3%**

1 Degree Certificate   2 Diploma Certificate   3 School Certificate

Figure 20: Party of choice: Educational qualification

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Prime Minister of Choice

As PM of their choice, an overwhelming majority (65%) indicated Tan Sri Muhyiddin Yasin. Tun Dr Mahathir Mohamad came second with a 10% of support, followed by Dato Seri Anwar Ibrahim with an 8% support.

Figure 21: Prime Minister of choice

Similar patterns of support were recorded within various demographic groups. However, Muhyiddin had greater support among the urban respondents (68%).
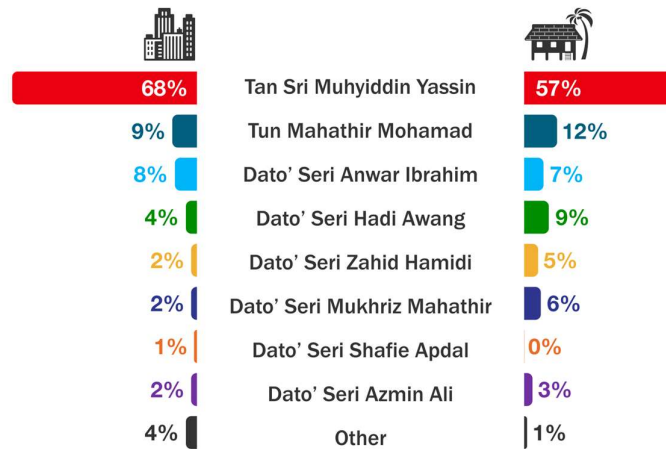
The distribution of votes within states is visualised in Figure 23. Tan Sri Muhyiddin Yassin's was the preferred vote across the states except in Penang, where Tun Dr Mahathir received the greatest support. In Figure 23, also note the distribution of vote for independent candidate with the largest percentage was concentrated in Wilayah Persekutuan.

Gender-wise, the female group of respondents (73%) has also shown stronger support for Tan Sri Muhyiddin Yassin. In terms of age, he gained more support among the younger groups. He also enjoyed greater support among the Malays and Bumiputeras of Sabah and Sarawak.

Unexpectedly, support for Muhyiddin from the Chinese and Indians are quite strong – 50% and 49% within the ethnic group respectively. Second highest support within these two ethnic groups was given to Dato Seri Anwar Ibrahim.

The higher educated are reliably associated with positive support for Tan Sri Muhyiddin.

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The following series of graphics report the distributions within the various demographic groups with significant differences highlighted.

Urban		Rural
68%	Tan Sri Muhyiddin Yassin	57%
9%	Tun Mahathir Mohamad	12%
8%	Dato' Seri Anwar Ibrahim	7%
4%	Dato' Seri Hadi Awang	9%
2%	Dato' Seri Zahid Hamidi	5%
2%	Dato' Seri Mukhriz Mahathir	6%
1%	Dato' Seri Shafie Apdal	0%
2%	Dato' Seri Azmin Ali	3%
4%	Other	1%

* The percentage figures may not add up to 100% due to rounding.

Est. ME : ±3%

🏢 Urban 🏚 Rural

Figure 22: Prime Minister of choice: Domicile
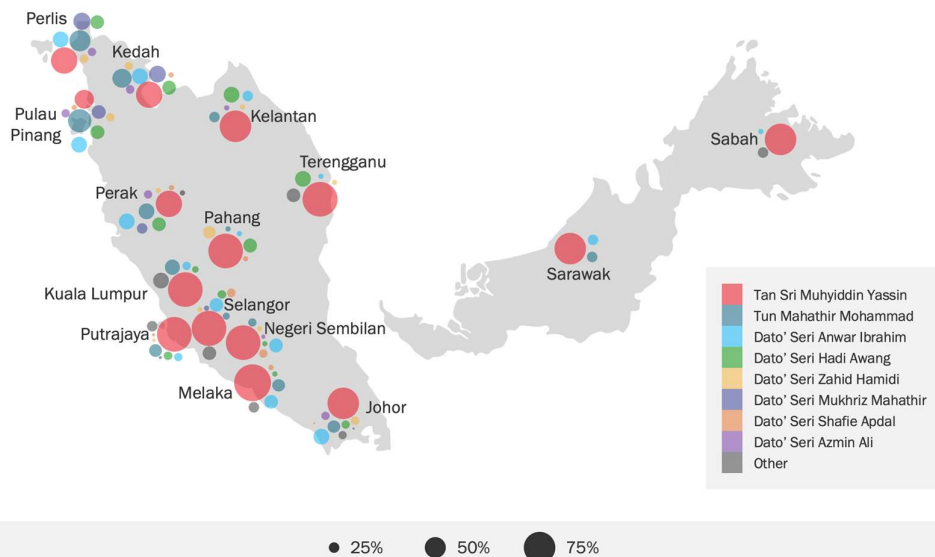
Figure 23: Prime Minister of choice – State

	Male	Female
Tan Sri Muhyiddin Yassin	58%	73%
Tun Mahathir Mohamad	11%	8%
Dato' Seri Anwar Ibrahim	10%	6%
Dato' Seri Hadi Awang	7%	4%
Dato' Seri Zahid Hamidi	2%	2%
Dato' Seri Mukhriz Mahathir	5%	2%
Dato' Seri Shafie Apdal	1%	1%
Dato' Seri Azmin Ali	2%	1%
Other	4%	2%
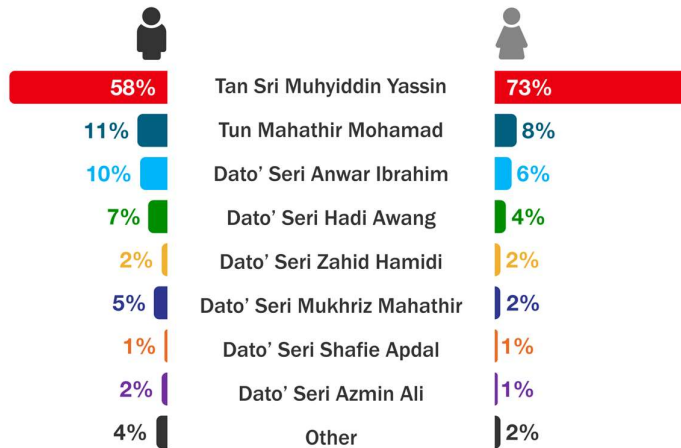
* The percentage figures may not add up to 100% due to rounding.

Est. ME : ±3%

👤 Male   👤 Female

Figure 24: Prime Minister of choice by gender

	AGE ≤ 30	AGE 31 - 40	AGE 41 - 50	AGE ≥ 51
Tan Sri Muhyiddin Yassin	71%	63%	60%	55%
Tun Mahathir Mohammad	7%	9%	10%	17%
Dato' Seri Anwar Ibrahim	8%	6%	8%	10%
Dato' Seri Hadi Awang	4%	7%	7%	7%
Dato' Seri Zahid Hamidi	1%	3%	4%	3%
Dato' Seri Mukhriz Mahathir	2%	5%	4%	4%
Dato' Seri Shafie Apdal	1%	1%	2%	1%
Dato' Seri Azmin Ali	1%	3%	1%	2%
Other	4%	2%	3%	1%

* The percentage figures may not add up to 100% due to rounding.

Est. ME : ±3%

AGE ≤ 30   AGE 31 - 40   AGE 41 - 50   AGE ≥ 51

Figure 25: Prime Minister of choice by age

	Malay	Chinese	Indian	Bumiputera SS
Tan Sri Muhyiddin Yassin	67%	50%	49%	94%
Tun Mahathir Mohammad	9%	14%	11%	0%
Dato' Seri Anwar Ibrahim	5%	20%	18%	2%
Dato' Seri Hadi Awang	8%	1%	1%	0%
Dato' Seri Zahid Hamidi	3%	2%	6%	0%
Dato' Seri Mukhriz Mahathir	4%	3%	6%	0%
Dato' Seri Shafie Apdal	1%	2%	2%	2%
Dato' Seri Azmin Ali	1%	5%	4%	0%
Other	3%	1%	2%	2%

* The percentage figures may not add up to 100% due to rounding.   **Est. ME : ±3%**

Malay   Chinese   Indian   Bumiputera SS

Figure 26: Prime Minister of choice by ethnicity

	Degree Certificate	Diploma Certificate	School Certificate
Tan Sri Muhyiddin Yassin	70%	73%	56%
Tun Mahathir Mohammad	5%	6%	14%
Dato' Seri Anwar Ibrahim	8%	6%	9%
Dato' Seri Hadi Awang	5%	5%	6%
Dato' Seri Zahid Hamidi	1%	1%	4%
Dato' Seri Mukhriz Mahathir	2%	2%	5%
Dato' Seri Shafie Apdal	1%	2%	1%
Dato' Seri Azmin Ali	1%	2%	3%
Other	6%	3%	1%

* The percentage figures may not add up to 100% due to rounding.   **Est. ME : ±3%**

1 Degree Certificate   2 Diploma Certificate   3 School Certificate

Figure 27: Prime Minister of choice by qualification

The fact that even Chinese and Indian groups of respondents indicated their strongest support for Tan Sri Muhyiddin Yassin as PM of their choice inspired more data exploration.

Figure 28 reveals for Chinese and Indian groups, government satisfaction was not a driver for their choice of political leader. In contrast, Malay and Bumiputera respondents, who supported Tan Sri, registered significantly higher level of satisfaction with the government, in agreement with what Voters' Worry-Satisfaction Valence model postulates – greater satisfaction with the incumbent government leads to its greater support by the *rakyat*.

One possible explanation to these perplexing results could be the **unanimous yearning for government stability** which was one of the most pronounced themes in our qualitative research study.

The discussants across all the FGDs reiterated on numerous occasions that government stability is the most crucial at these trying times. As one of the discussants sums it up: "Many people said that this current government is the government that we need, not the government that you want, not the government that we have chosen".
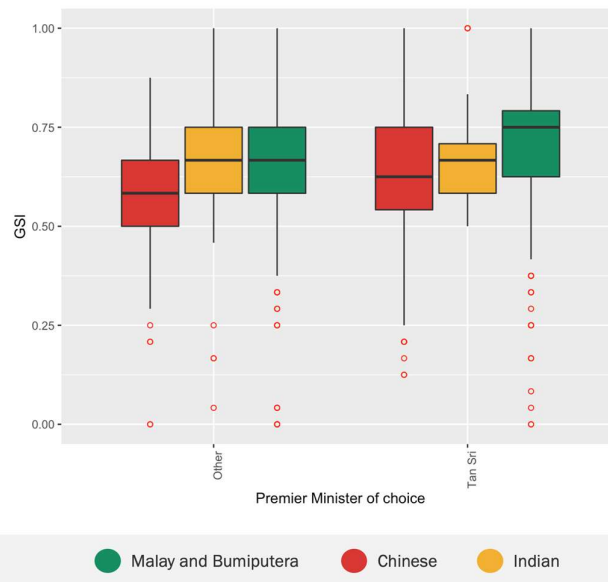

Figure 28: GSI, Prime Minister of choice and ethnicity

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6. Explaining Voting intention

The current government took over the country not through the device of a general election but through a political crisis that was settled through the dignified office of the Yang di-Pertuan Agong, the constitutional monarch of the country.

This has led to a reformulation of questionnaire with regard to the fulfillment of manifesto promises made by the government during election campaigning prior to taking office, as manifesto appears only during a general election.

An attempt to fit the model without the manifesto fulfilment construct (refer to Figure 27) resulted with a poor fitting causal model. This indicates fulfilment of manifesto is an indispensable construct to adequately explain the formation of respondents' voting intention and, as it was found in the previous EMIR Research quarterly polls, is strong positive predictor of people's intention to support the incumbent government.
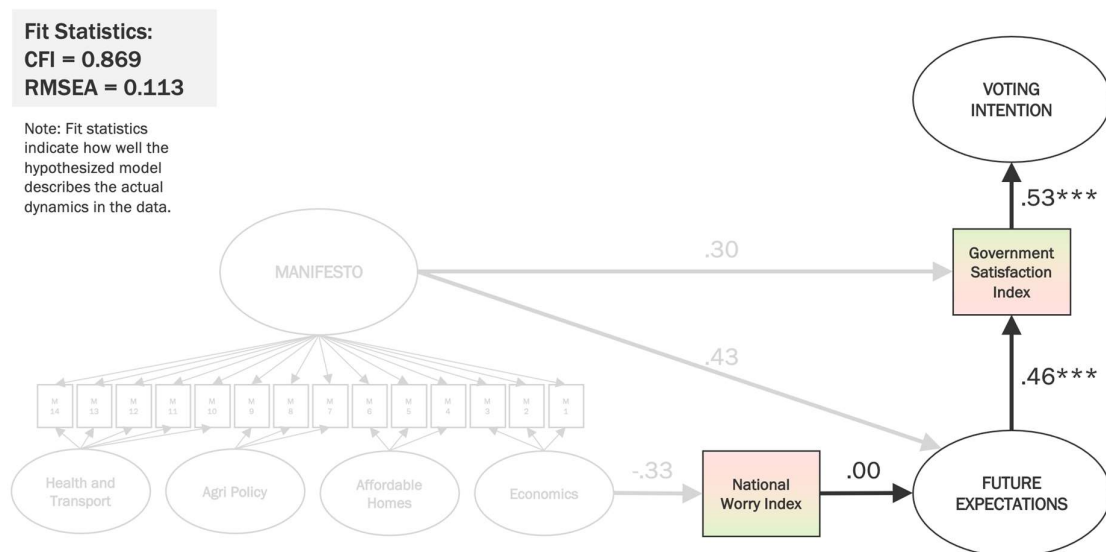
Figure 29: Results of Worry-Satisfaction Valence Modeling fitting

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ANNEX 1

Research Methodology

For an opinion poll that aspires to be reflective of the current pulse of the nation, and at the same time rigorous and scientific, it must adopt an **evidence-based methodology** which features two important components – the **qualitative** and **quantitative** state-of-the-art analysis.

Qualitative Component

Quantitative Component

Qualitative Component

The qualitative component of a survey or poll represents the **first crucial step in identifying emerging issues** that are relevant to the objectives of the polls.

The EMIR Research Quarterly Poll (QP) has the following as its objectives:

- Assess the perceived direction of the country and living condition among the people;

- Profile *rakyat's* worries and track changes in national worry index;

- Assess the *rakyat's* hopes and expectations towards the government;

- Profile and track changes in the ***rakyat*'s level of satisfaction** towards the government performance among different communities and socio-economic statuses.

One way to identify these emerging issues is through analysis of the relevant literature and variety of media outlets. In this case it is the pollsters or think tanks' researchers who identify the issues of importance through the lenses of their own logic and experience in the subject matter.

However, the more scientific approach is by conducting qualitative elicitation study – **a series of face-to-face, in-depth focus group discussions** (FGD) with those who experience the issues first hand i.e. the *rakyat* in the case of our EMIR Research QP.

This approach ensures that **overall findings are grounded in the actual experience of the *rakyat*** and this is the approach that was adopted in our EMIR Research QP.

This approach differentiates us from such polls where the qualitative component is sorely missing.

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Focus Group Discussion (FGD)

The first phase (qualitative component) of our EMIR Research QP Q320, which essentially was a **naturalistic-interpretive inquiry, comprised 11 FGDs**. For this type of scientific inquiry, population-wide representativeness is not a major consideration. Rather, the discussants' knowledge and ability to express and articulate the phenomenon of interest in light of his personal experience are the most important criteria of choice.

Another criterion that is deemed **critical for this type of inquiry** is versatility of responses to gauge as many nuances of the ground reality as possible. As such, FGD groups in our research covered **multiple categories and layers of Malaysian society**. The discussants represented major characteristics of the population in terms of:

Gender	Age group	Socio-economic status	Education level	Occupation

Overall, the majority belong to **middle- and lower- income groups** who make up large segments of the population. It is, therefore, reasonable to argue that the opinions they provided would constitute **the voice of *rakyat***.

The Table below shows some details of the FGD participants.

	Group	Venue	n
1	Paddy Planter & Fisherman	Kuala Kedah, Kedah	6
2	Felda Settler	Felda Sg Retang, Pahang	6
3	Chinese Business Community	EMIR Research Office, KL	7
4	Gig Worker	EMIR Research Office, KL	5
5	Malay Professional	Ipoh, Perak	6
6	Civil Servant, Teacher & Frontliner	EMIR Research Office, KL	4
7	Malay Youth	UIAM, Selangor	6
8	Student of IHE & Youth (Chinese & Indian)	EMIR Research Office, KL	5
9	Bumiputera Sabah	Putatan, Sabah	6
10	Bumiputera Sarawak	Kuching, Sarawak	6
11	Indian Muslim Community	EMIR Research Office, KL	6
	TOTAL		**63**

Quantitative Component

The themes, or recurring descriptions and statements, that emerged as **results of this qualitative elicitation phase were formulated into the close-ended questionnaire items** and were tested in a state-wide survey conducted in the month of August 2020. This state-wide survey represented the second, quantitative phase of the EMIR Research QP 3Q20.

The quantitative exercise serves to validate, verify and confirm the findings of the FGDs in a measurable and statistically accurate manner. This is done to ensure that **the survey questions are empirically reflective or representative of the perspectives and concerns of the** *rakyat*.

In addition, the survey was used as a means to gauge the depth and spread of the *rakyat's* worry and perceptions towards the government's socio-economic plan and actions on the nation-wide scale. **To ensure data reliability and integrity, well-trained and seasoned enumerators were employed** to administer the questionnaires on a face-to-face basis.

Multi-stage Sampling

In order to capture credible and reliable data that represents the population, a multi-stage sampling technique was adopted for the survey. The **222 parliamentary constituencies** comprised clusters that are considered for random selection.

Once **19 clusters were identified at random**, within each selected cluster, quota sampling was applied. Quota sampling ensured the selection of a sample of respondents with the salient politically related demographic characteristics, such as **race, gender, age, urban-rural domicile** etc., is in proportion that is reflective of the actual population within that constituency.

The Table below shows the frequency and percentage distribution of the major characteristics of the sample. The targeted population comprised all **adults (17 years and above)**, while 100 respondents were selected within each randomly selected constituency using quota sampling.

A total of **2,096 respondents** completed the questionnaire. Given the representativeness of the sample, the **margin of error is estimated to be about ± 3%.**
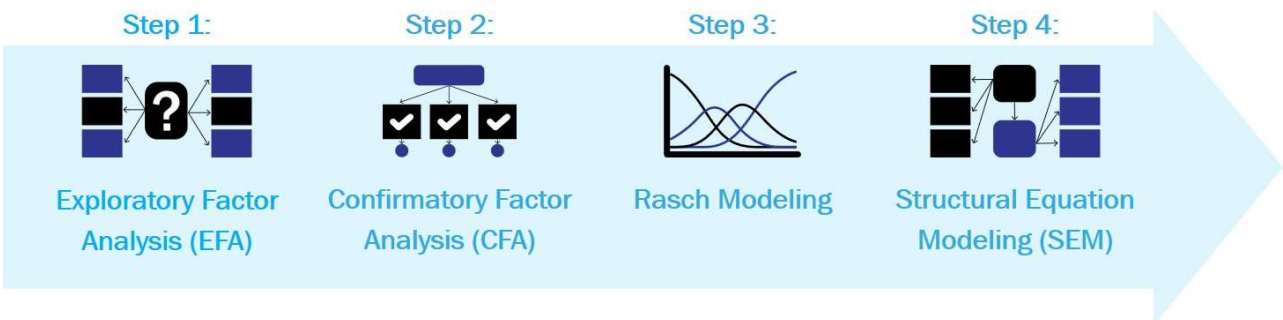
Demographic Characteristic		n	%
Gender	Male	1078	52.2
	Female	986	47.8
Living Area / Domicile	Urban	1,500	74.3
	Rural	519	25.7
Ethnicity	Malay & Bumiputera	1,565	76.9
	Chinese	353	17.3
	Indian	112	5.5
Highest qualification	Degree Holder	504	25.2
	Diploma / Certificate	584	29.2
	School Certificate	912	45.6
Household Income	Less than RM 1,500	795	41.0
	RM1,500 - 3,000	478	24.6
	RM3,001 - 5,000	401	20.7
	RM5,001 - 10,000	205	10.6
	RM10,001 - 20,000	41	2.1
	RM20,001 and more	20	1.0
Age Group	30 and less	760	39.5
	31 - 40 years old	531	27.6
	41 - 50 years old	361	18.8
	51 and more	270	14.0

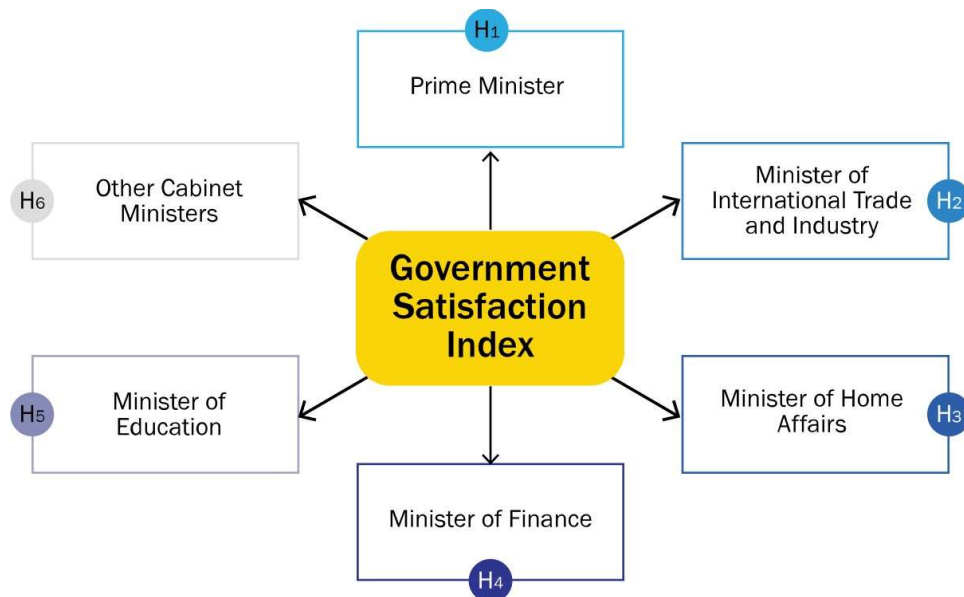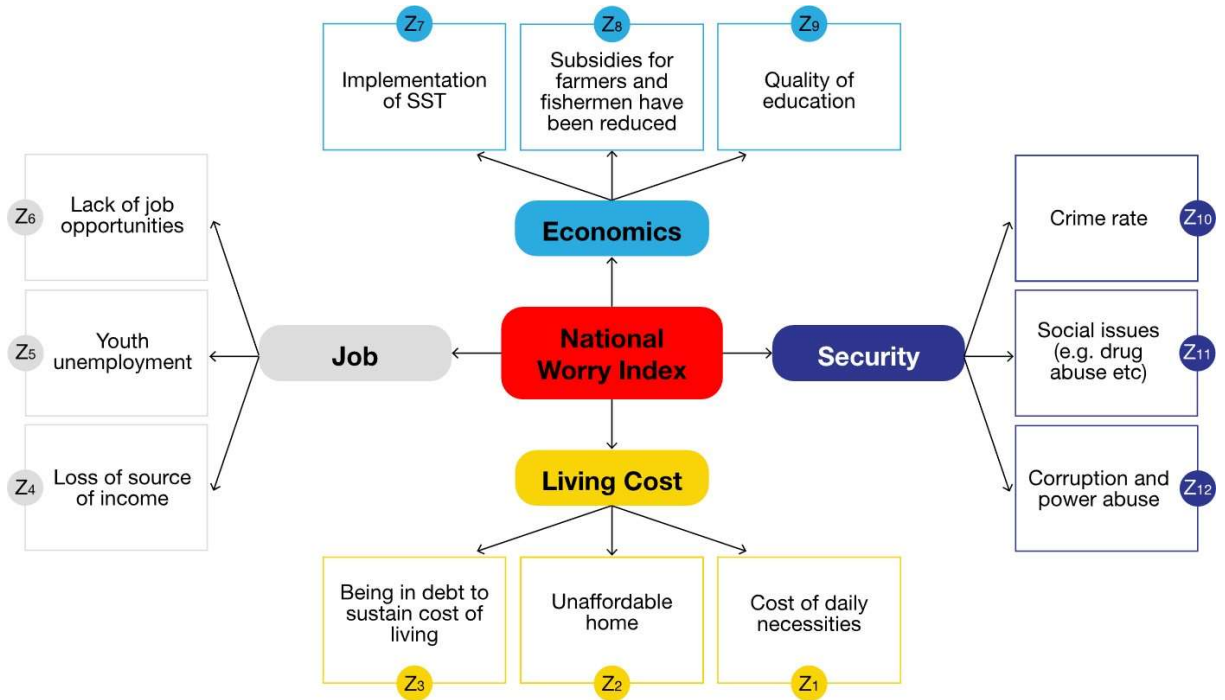### *State-of-the-art Analysis*

The questionnaire in the EMIR Research QP 3Q20 maintained **12 questions which represent worrying issues, and respondents** were asked to indicate their level of worry for each of these issues. Based on these 12 questions-indicators, the **National Worry Index** was conceptualized and developed.

The questionnaire also maintained 6 questions representing respondents' level of satisfaction with the performance of the members of the Cabinet. These 6 questions-indicators became the base for conceptualisation and development of the Government Satisfaction Index.

In doing so, a cutting-edge analytical procedure was used:

Step 1: Exploratory Factor Analysis (EFA)

Step 2: Confirmatory Factor Analysis (CFA)

Step 3: Rasch Modeling

Step 4: Structural Equation Modeling (SEM)

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National Worry Index diagram:

- Economics (Z7: Implementation of SST; Z8: Subsidies for farmers and fishermen have been reduced; Z9: Quality of education)
- Job (Z6: Lack of job opportunities; Z5: Youth unemployment; Z4: Loss of source of income)
- Security (Z10: Crime rate; Z11: Social issues (e.g. drug abuse etc); Z12: Corruption and power abuse)
- Living Cost (Z3: Being in debt to sustain cost of living; Z2: Unaffordable home; Z1: Cost of daily necessities)

Government Satisfaction Index diagram:

- H1: Prime Minister
- H2: Minister of International Trade and Industry
- H3: Minister of Home Affairs
- H4: Minister of Finance
- H5: Minister of Education
- H6: Other Cabinet Ministers

Rasch Modeling

When NWI and GSI were developed during EMIR Research Inaugural Poll, Rasch Modeling was used in the third step to convert categorical questionnaire responses into a single useful "interval" measure or score that could be used for meaningful comparisons across groups and time.

Rasch modeling **rigorously tests** whether this score is indeed able to differentiate among various groups of the respondents — in the context of the government satisfaction index **whether this index can effectively differentiate between various satisfaction levels**, while in the context of the national worry index **whether this index can effectively differentiate between various levels of worry**.

Rasch analysis allows the researchers to use respondents' raw test or scale scores and convey the respondents' performance on a linear scale, **taking into account the unequal difficulty (to be endorsed) of the indicators**.

Rasch modeling arrives at its results using logit score. However, the further analysis indicated that the ranking of both the Worry Index, and the Satisfaction Index on the basis of the logit scores is similar to the ranking that uses simple summated score. The decision was, therefore, to use simple summated score for the ease of comprehension.
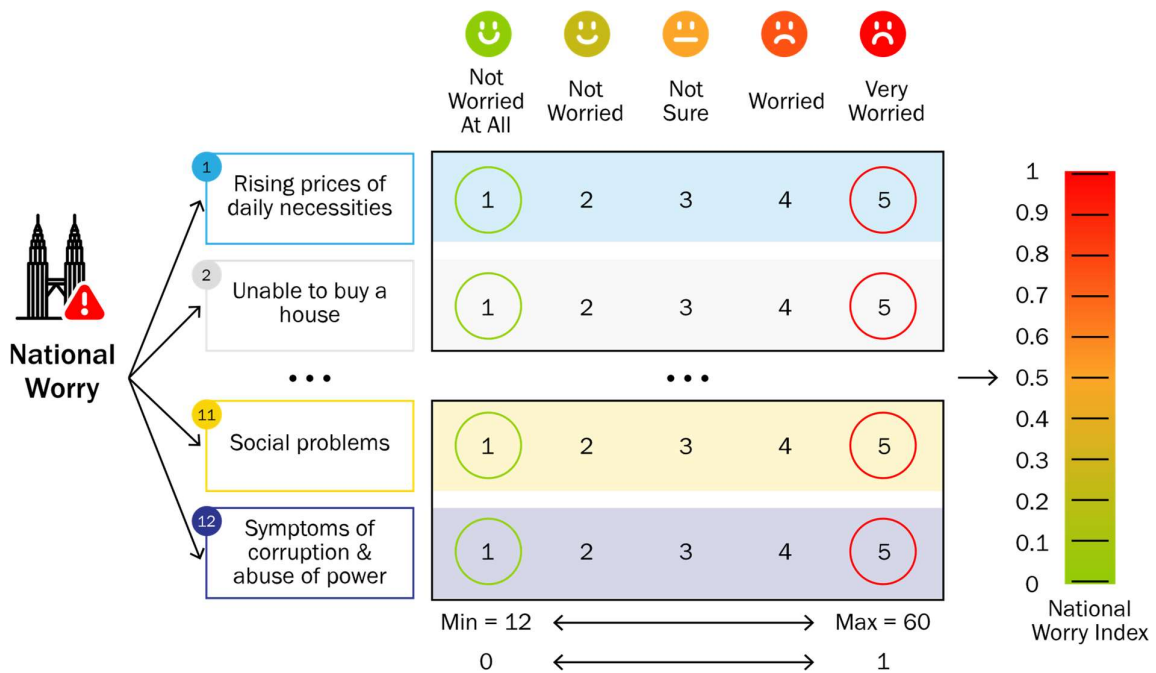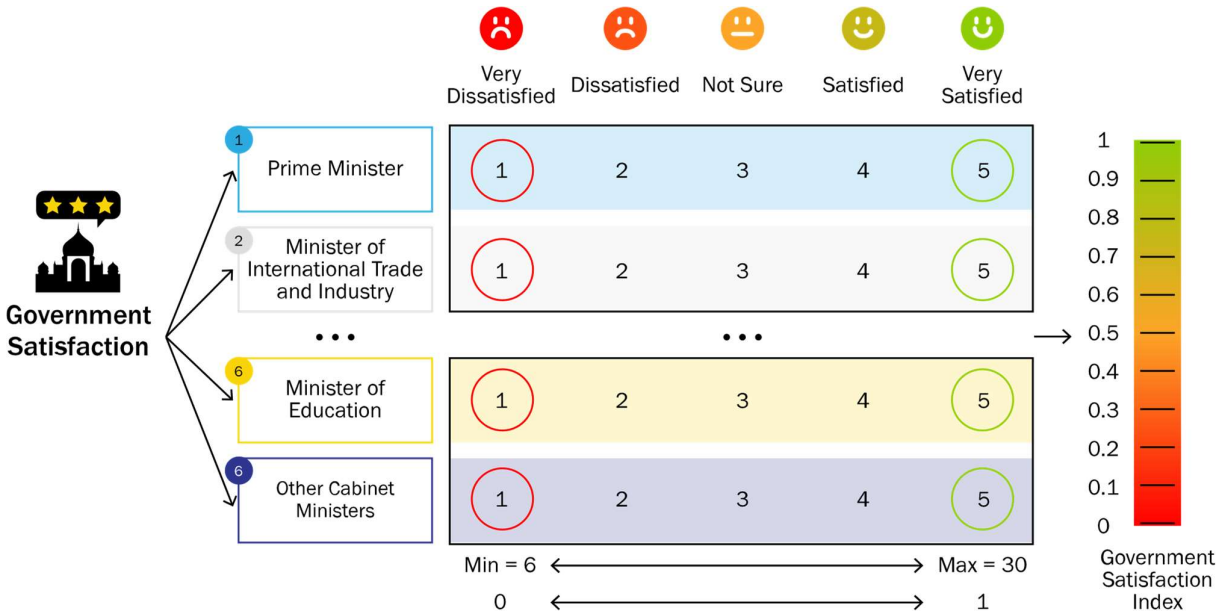
The Hypothesized Model Explaining the Dynamics of Voting Intention Formation

Once the meaningful measures of the **constructs of interest** were extensively evaluated with the help of Exploratory Factor Analysis, Confirmatory Factor Analysis and Rasch modelling, they were **assembled into a model that explains important dynamics of the relationships among these constructs**.

This model was subject to **Structural Equation Modeling** (**Step 4** in our methodology).
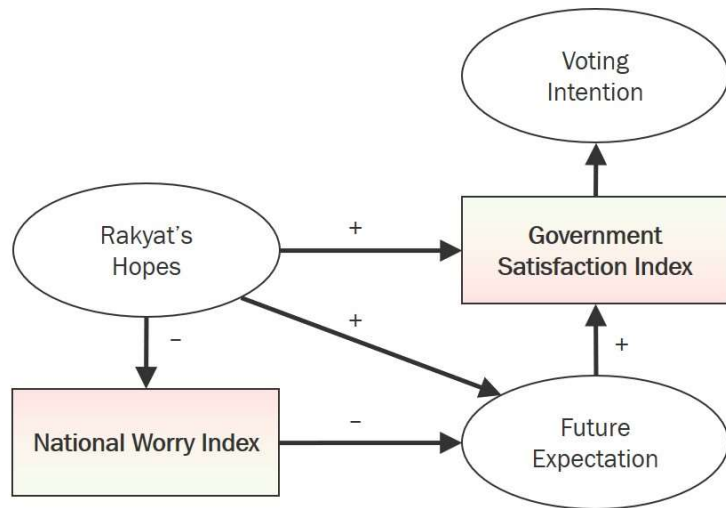

Note: '+' represents positive relationship while '−' signifies negative relationship

Structural Equation Modeling (SEM)

Structural Equation Modeling (SEM) allows a researcher to test the hypothesized structure linking the observed (measurable) variables to the latent (unobserved) variables and, in some models, linking particular latent variables to one another. With the help of SEM, the researcher can evaluate the impact of one construct of interest on another in a very robust fashion.

For example:
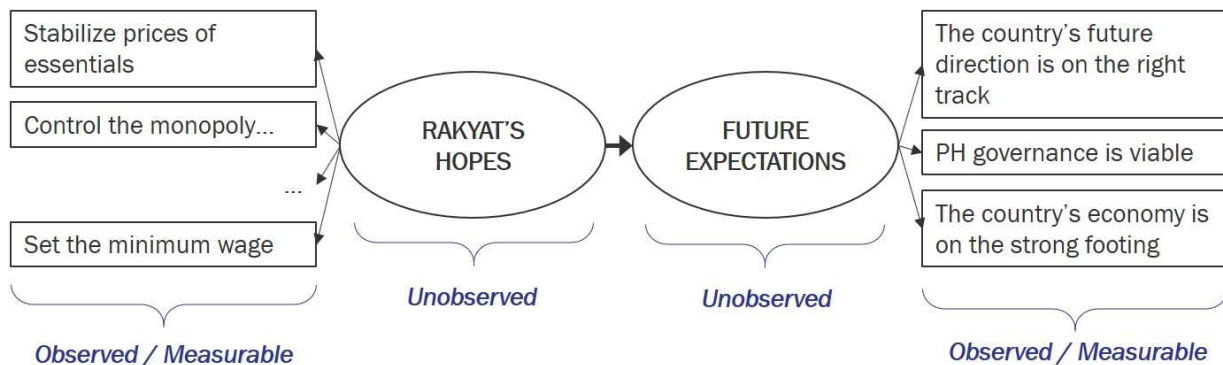
Conclusion

In ensuring that the **understanding of what ordinary Malaysians** (in particular the B40 and M40) **want, need, aspire** and **expect** in the context of change is evidence-based and thus data-driven, the research process we undertook was scientific and empirical, not to mention rigorous, objective, verifiable, unbiased, reliable, non-partisan and realistic.

For it is only by identifying the actual causes of the *rakyat's* difficulties and worries that we will be able to detect the pulse of the nation, grounded in the experience of the *rakyat.* It is hoped that the findings of our poll, in turn will provide the government with an important tool to formulate impactful, meaningful and sustainable policies.

This is precisely why we describe all researches that we undertake as

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