



Nigerian Presidential Elections  
**Insights Report**

January 25th 2023

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## Overview

This report is the culmination of a year's worth of data collection, polling and analysis around Nigeria's elections. It aims to make sense of the prevailing political landscape and provide summary insights into how Nigerians are thinking (as of January 25th 2023) going into the all-important presidential elections.

### Methodology

The study was designed to understand the sentiments of Nigerians with PVC's (voting population) towards the 2023 Presidential elections in Nigeria. Data was collected from 16,335 respondents drawn from all 36 states and the FCT.

#### Sample Size and Selection

The sample for this study was selected using a multi-stage sampling method. The population was divided into strata based on location (state and LGA), age, gender and people with PVC's. Subsequently, a random sample of individuals from the 36 states of Nigeria (and the FCT) was randomly selected from each stratum to ensure representation of the voting population of Nigeria.

#### Data Collection & Questionnaires

Data was collected through fieldwork using Computer-Assisted Personal Interviewing (CAPI) devices. The survey was conducted by 234Intels network of trained interviewers who administered the questionnaire in person. Surveys were conducted in English, Pidgin English, Yoruba, Hausa and Igbo languages using questionnaires. The data collection process was supervised by a team of supervisors (one for each state) and data verification officers to ensure the quality of the data.

### Data Analysis

The data was analysed using descriptive statistics while open-ended responses were coded and analysed thematically to identify patterns and themes in the data.

### Weighting

In order to ensure that the sample is representative of the voting population, the data was weighted based on known characteristics. Weighting factors were derived using known voter population data and the number of registered voters in particular locations to adjust for sampling bias. Weights were calculated such that the weighted sample matched the known population characteristics in terms of age, gender, state, LGA and voting history. This technique helped to correct for any oversampling or under-sampling of certain subgroups within the sample. The weighting was done using the statistical software package R and the Raking package.

### Limitations

The limitations of this study include the potential for non-response bias, as only those who choose to participate in the survey are included in the sample.

## KEY FINDINGS

## Unprecedented Times

With 30 days until the 2023 Presidential elections, Nigerians face uncertain times as they embark upon the all-important task of choosing a new leader.

## The 2023 elections are foregrounded by:

## 1. Heightened Insecurity

In recent polls (*December 20th, 2022*), Nigerian voters ranked “insecurity” as the country's most pressing issue. Although incidents of kidnappings have miraculously declined, there is a prevailing sense of fragility around the nation's security situation. Experts also worry about whether the situation has indeed subsided or whether security incidents are being underreported.

## 2. Declining Macroeconomic Conditions

In 2022, Nigeria's economy was characterised by a number of negative indicators, including high inflation, low GDP growth, foreign exchange shortages, non-performing government debts and record-level unemployment levels. The current spat between the CBN leadership and security agencies is not helping to improve confidence in the nation's financial systems.

## 3. Increased Poverty Levels

The Nigerian Bureau of Statistics' Multidimensional poverty report of November 2022 showed record-breaking multidimensional poverty levels. According to the report, 63% of Nigerians are multidimensionally poor. In addition, around 136 million Nigerians survive on less than 450 Naira a day<sup>1</sup>.

## 4. Rising Food Prices

The past Christmas was one of the most miserable for Nigerians. Two in three Nigerians could not afford a full meal on Christmas Day<sup>2</sup>. For many, staple food items such as garri, rice and bread have tripled in price since December 2021. In that time, wages have remained static, so there are few buffers to support families in these difficult climes.

## 5. A Pervading Sense of Hopelessness

Nigerians are more pessimistic about their future today than they were only 12 months ago. On the 234Intel Optimism Index, less than 15% of the 4,509 Nigerians surveyed expressed hope for a better life in 2023<sup>3</sup>.

## KEY TAKEAWAY

**It is difficult to conclude that the majority will suspend their living realities in this cycle of elections. Many households continue to face difficulty in meeting their basic needs. Incomes have shrunk in the new school fees season. Meanwhile, fuel shortages and rising transport costs serve as a constant reminder of the harsh realities that Nigerians are forced to endure in order to survive.**

KEY FINDINGS

## 2023 Elections: Navigating the Unknown

Again, these are unprecedented times. For the first time in this 4th Republic...

# 1

**There will be three candidates representing the three major Ethnic Groups.**

There will be at least three major candidates representing each of Nigeria's three major ethnic groups- the Igbo, Hausa & Yoruba. Elections since 1999 have traditionally been contested between two major parties and smaller political contenders on the platform of smaller (often regional) political parties.

# 2

**Buhari is not on the ballot (for the first time in 20 Years).**

For the first time since 2003, President Buhari will not be on the ballot. Having completed two terms of four years, his ubiquity as the candidate of choice amongst voters in Northern Nigeria has effectively ended. Additionally, **the CPC/ANPP "Buhari Wall" that he cultivated** has collapsed. There is currently no candidate who enjoys the broad support that he did in Northwest and Northeast Nigeria. Votes in those two regions will be split.

# 3

**INEC has vastly improved its voter database, technology and systems.**

INEC's adoption of technology to accredit voters and report results to a central, public repository is a **game changer**. This potentially eliminates the "magic" that happens at voting collation centres. It also means that for the first time in Nigeria, we will probably have *a true reflection of voter turnout and the number of actual human beings on our electoral database*. In other words, a new (and more credible) baseline for voter turnouts will be established.

# 4

**There is a youth & civic re-awakening.**

The number of young people interested in participating in the 2023 elections is unprecedented. In January 2023, INEC reported that 51% of registered voters are young people. More importantly, 76% (7.2 million) of the newly registered voters are aged 18-34 years old. The irony of the ASUU strike coinciding with the surge of young voters is interesting to note.

## KEY FINDINGS

## Factors

Survey findings indicate that the key factors that will influence the elections next month include:

### 1. Ethnicity

When faced with important decisions of national interest, Nigerians tend to ignore reason, succumb to their primordial tendencies and relate more comfortably with their “*kin connections*”. This fact is evident from survey findings that show a clear ethnic colouring in the outcome of the survey: “*I will be a bastard to sell out my brother and vote for another tribe*” P11.

### 2. Religion

Nigerians are hyper-religious people. Two of the three major candidates are Muslims, with only one Christian at the top of the ballot. When the candidate of the NNPP is included in this equation, it would mean that 3 Muslim candidates will contest against one Christian candidate.

### 3. (In)Security

The pervasive sense of insecurity looms heavy on the minds of Nigerians as we approach the elections. Voter turnout, especially in the far North and Eastern Nigeria will be affected by the perceptions and realities of insecurity, kidnappings and banditry prevalent across the country.

### 4. INEC's Technology

INEC has progressively improved its technology systems and reporting frameworks. Its BVAS (fingerprint and facial recognition) biometric accreditation systems and the results viewing portal are potential game changers.

### 5. Illiteracy, Money & Gratification

High levels of poverty and illiteracy mean that politicians will seek to weaponise hunger and provide gratification in exchange for votes. Almost half of the respondents will vote for anyone who provides them with financial incentives. This means that vote buying will largely influence outcomes, especially in rural communities.

### 6. Youth

Young people are more interested in voting in the 2023 elections than at any other point in this fourth republic. The high levels of motivation is driven by the need to “*improve my destiny* and “*participate in building the future that I want to see*” P5.

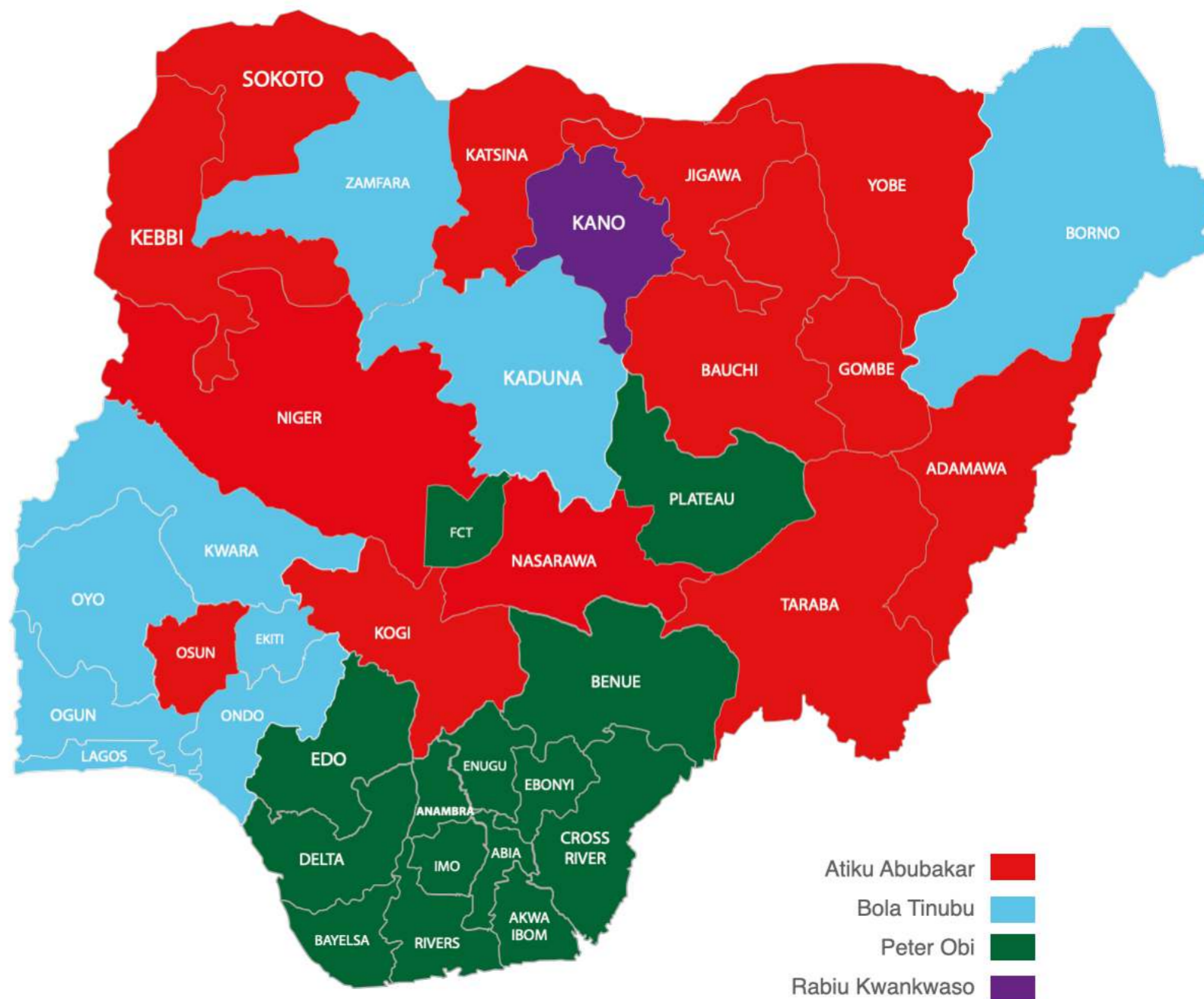
## IN SUMMARY...

In 2023, previous election data will not matter much. New benchmarks will be established and unprecedented outcomes are likely. **The following pages provide a state of the race and forecast based on our analysis of historical data and the most recent polls (January 2023).**

**KEY FINDINGS**

# State of the Race: Overview

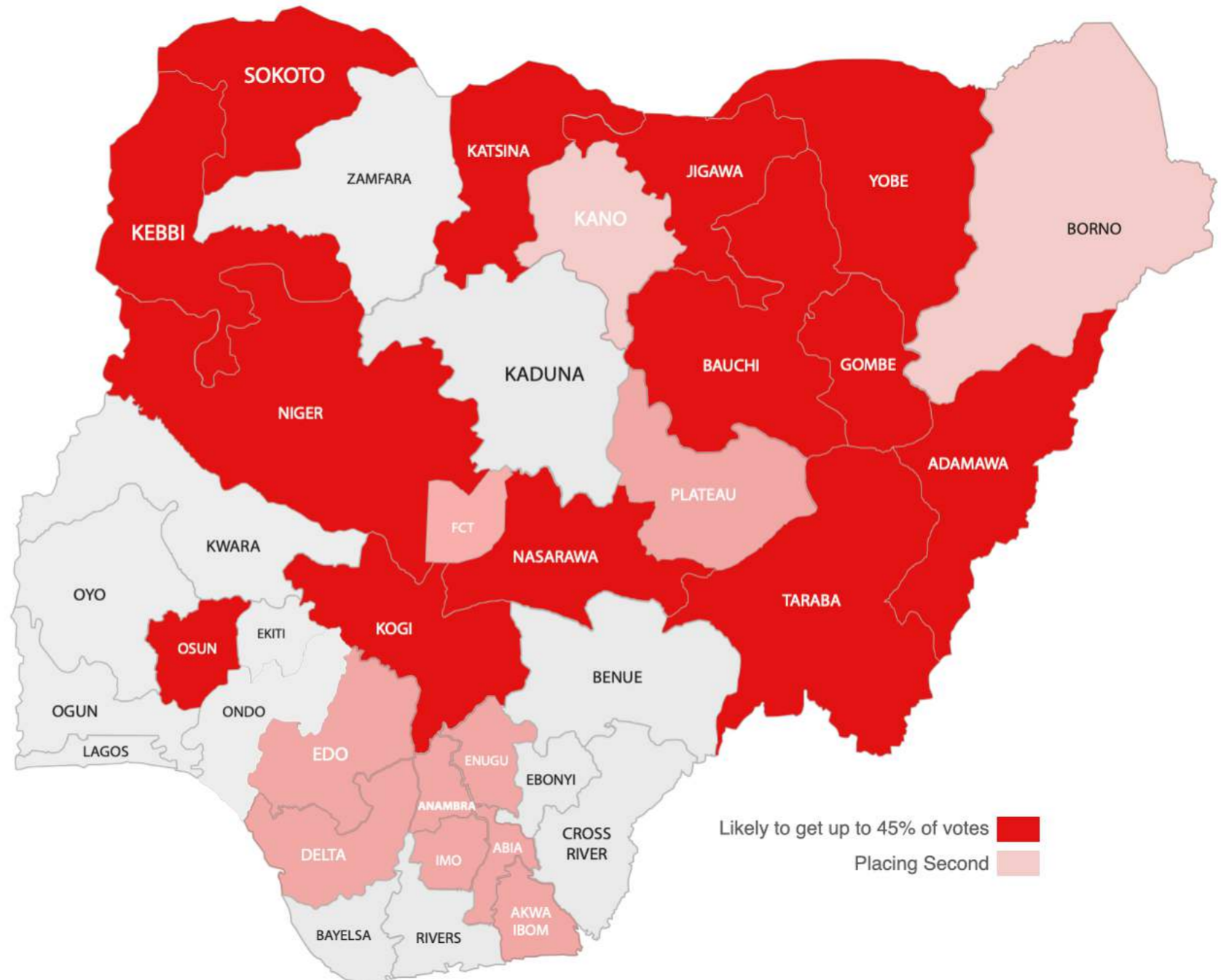
1. The Presidential race is too close to call at this point (*January 24th 2023*). Peter Obi leads by 4% (down from 11% in November 2022), a lead that is statistically too small to predict a clear outcome. Atiku Abubakar (PDP) is running closely in second place, and Bola Tinubu (APC) is not too far behind, either\*. This race will be much tighter than the past three Presidential elections.
2. In these elections, the margins would be **critical**: winning in strongholds will be insufficient to guarantee victory on the first ballot. Candidates would need to *win well* across multiple states and avoid wholesale defeats in their blind spots.
3. One of the three candidates is currently struggling to meet the constitutional criteria to win the elections outrightly (simple majority plus a minimum of 25% of votes in at least 24 states). Two of them currently meet this criterion.
4. Factors influencing voters' choice include ethnicity, religion, the "experience of the candidate", and "change from the ruling party".
5. In some states (Katsina, Kano, Benue, Delta) where the performance of the incumbent governor is regarded as "*strongly unfavourable*", voters appear to be reacting (protesting) by supporting the presidential candidate of a different party.
6. This phenomenon is also evident in states where the incumbent governor is perceived "*somewhat favourably*" (Lagos, Kaduna, Osun, Zamfara), and the goodwill of the governor appears to be rubbing off on their presidential candidate.



**ROUTE TO VICTORY**

# Atiku Abubakar

1. Atiku Abubakar is winning a slight majority (~51%) of voters in Hausa-speaking states with an overwhelmingly Muslim population.
2. He currently leads in Sokoto, Katsina, Jigawa, Yobe, Niger, Kebbi, Gombe, Bauchi and Adamawa.
3. He also holds a slight advantage in Kogi, Osun and Taraba, but his leads in these states are within the margin of error.
4. The biggest disadvantage for Atiku at the moment is the presence of the NNPP candidate, Rabiu Kwankwaso, who is competing favourably, especially in the Northwest and maintains a slight lead in Kano.
5. In the Northeast, Abubakar's votes are being split by the APC's Vice Presidential candidate, who leads in his home state of Borno.
6. Two in three Hausa-speaking men in the Northwest currently favour Atiku Abubakar for President, a significant voting bloc in Nigeria.
7. Voter attitudes in the Southeast and South-south appear to have changed. These traditional PDP strongholds are currently leaning towards the candidate of the Labour Party.

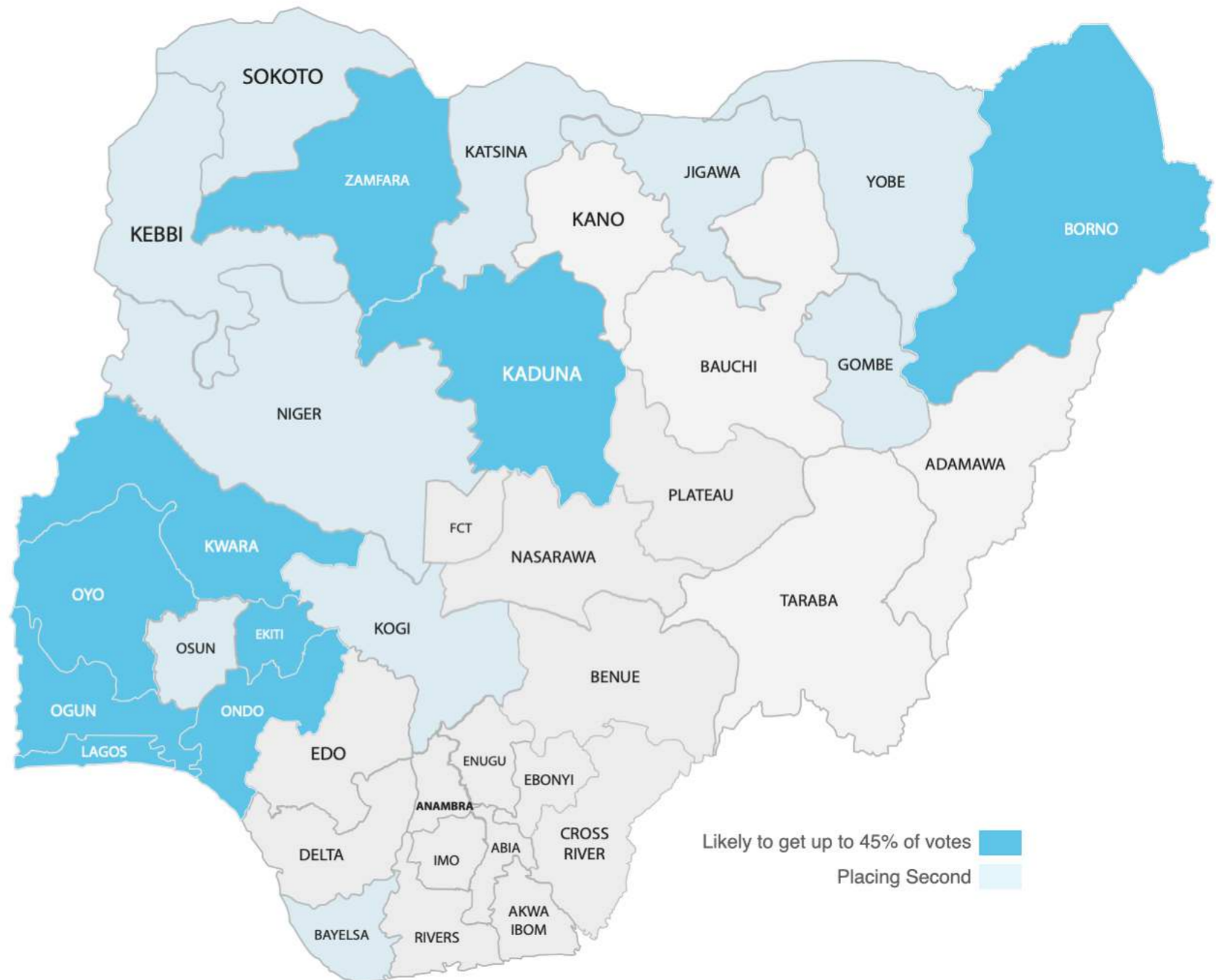




**ROUTE TO VICTORY**

# Bola Tinubu

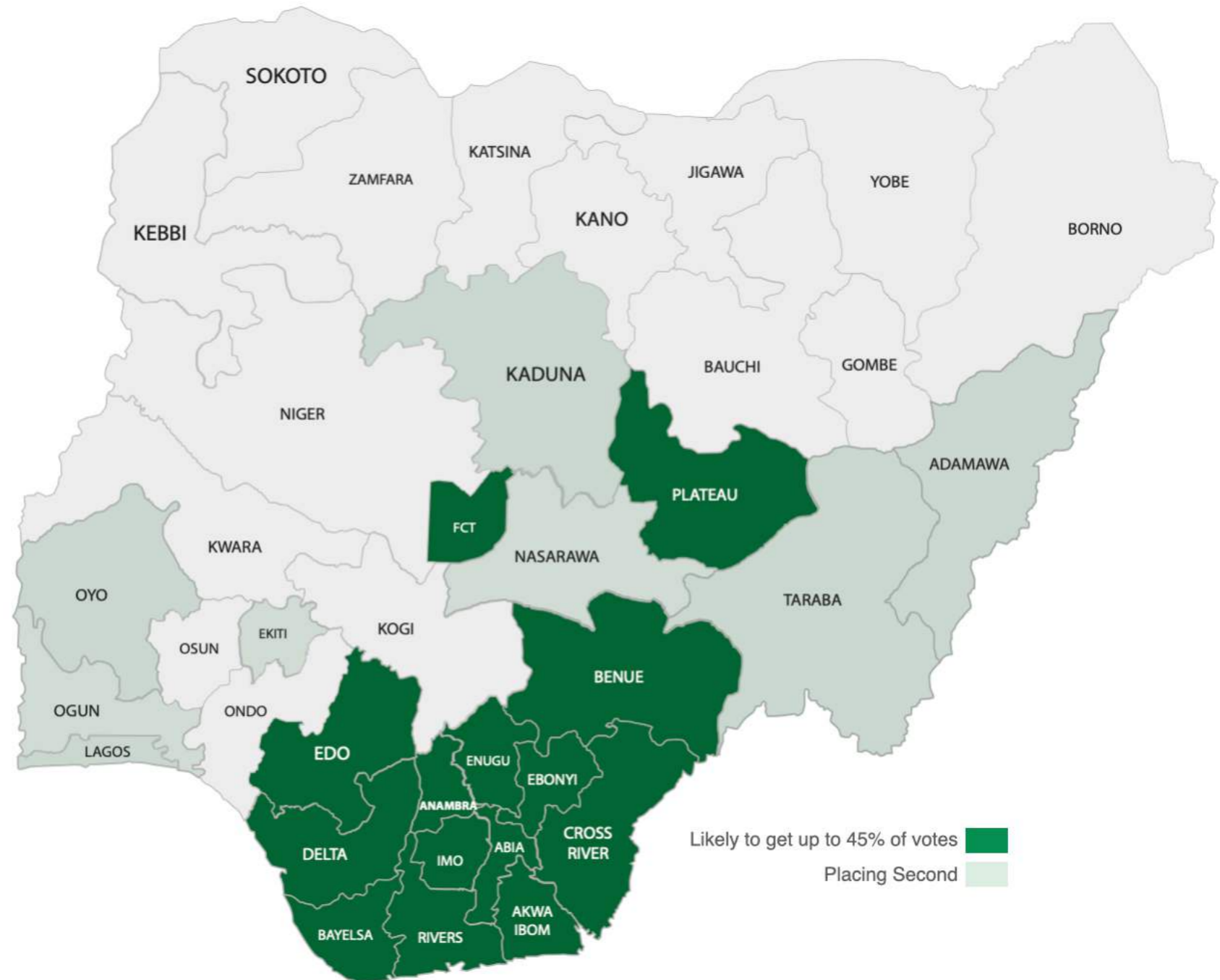
1. Bola Tinubu holds comfortable leads in Ekiti, Ondo, Oyo, Ogun, Kwara, and Borno.
2. Surprisingly, he holds only a marginal lead in Lagos, with Peter Obi currently running a close second. He is running strongly in second place in Niger, Kebbi, Yobe and Kogi.
3. Men and women who are Yoruba-speaking Muslims and reside in Southwest and North-central Nigeria currently favour his candidacy by more than 78%.
4. He also leads overwhelmingly (81%) amongst civil servants/ government workers and members of the APC political party in states where the incumbent governor is a member of the APC.
5. However, the presence of APC Governors is not translating to broad-based voter support, especially in the Northwest.
6. Unlike the other two candidates, he holds a strong lead in the state of origin of his Vice Presidential candidate (Borno)
7. He also holds a slight advantage in Kaduna, where Peter Obi and Atiku Abubakar are running a close second and third, respectively.
8. His biggest weakness is among women aged 19-45, Christians, young people (18-40), students, professionals & traders.



**ROUTE TO VICTORY**

**Peter Obi**

1. At this point, It's essential to dispel the notion that Peter Obi has no chance of winning the 2023 elections. A few years ago, that may have been the case. Today, however, the data suggests otherwise- he definitely has a path.
2. He currently holds healthy leads in all the states in the Southeast as well as Edo, FCT, Plateau, Akwa Ibom, Benue, Cross River and Rivers. However, we must account for comparatively lower registered voters and historically low voter turnout in his stronghold (Southeast).
3. He also holds a slight advantage in Delta (surprisingly) and Bayelsa.
4. He is currently in second place in Lagos, Oyo, Kaduna, Adamawa and Taraba.
5. Of the three major candidates, Peter Obi is the only candidate who holds commanding leads (to the exclusion of other candidates) in his base- the Southeast and large parts of the South-south.
6. He is currently leading among young people aged 18-35 (71%), newly registered voters (69%) and Christians (85%)- especially in the North (North Central, Kaduna and parts of North East).
7. The Northeast and Northwest are his current blindspots, and he is losing amongst Northern and Southern Muslims by as much as 89 percentage points.



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