KONDA

NOVEMBER'22 BAROMETER

136

Political and Social Survey Series

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Political and Social Survey Series

Political Preferences
Perception of Economic Situation and Livelihood Plans
Perception of Inflation
Income Distribution, Poverty and Material Deprivation
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Dear Subscriber,

I present the November'22 Report, the 136th of the KONDA BAROMETER.

In our report, which is based on the survey we conducted face-to-face with 3641 people in their households on 5-6 November 2022, it is possible to list the highlights of our findings regarding political preferences as follows:

- ✓ It is understood that the voter turnout rate in the elections will be around 85 percent.

- ✓ Even though one-third of the voters are still undecided or say that they will not vote verbally, when we look at the marked answers, it is observed that 15 percent of the voters are really undecided.

- ✓ Considering the preferences marked by the voters who concealed themselves and said that they were undecided in verbal answers, it is not observed that the incumbent or opposition bloc has a special weight or that they were trying to hide their preferences.

- ✓ It is not seen that the incumbent or the Six-Party Table blocks are differentiating from each other, and one side is gradually breaking away from the other. Although the opposition bloc is in the lead by a very small margin, it does not seem possible to say that the course of the election has been shaped irreversibly yet.

- ✓ Since the two big blocs could not produce a break in the electorate, it seems that some parties outside the alliances attracted the attention of the voters, and if there is no change, it is possible for these parties to reach a vote in the range of 5-8 percent.

- ✓ It is seen that the alliance led by the HDP is still in a key position for the election and beyond.

- ✓ The situation in which the voters are disturbed by the state of affairs, but where the movement is within the blocks rather than a major shift between the blocks, continues as it has been observed for a while.

On the other hand, while 62 percent of the voters remain of the opinion that if Erdoğan wins; it will be negative for the country, only 31 percent of the voters seem confident that Erdoğan will win. Eighty percent of the voters consider the policies of the government responsible for the course of the economy and the reason for the economic difficulties in their own life. Twenty percent define themselves as poor, 38 percent try to maintain their lives by reducing their normal expenses, 7 out of 10 people are hesitant to meet an unexpected expense, 8 out of 10 people say they cannot take a week's vacation away from home.

According to the data and findings of "income distribution and poverty", which we have considered as the theme of this month, when we accept 50 percent of the median income per capita as the threshold, we calculate the relative poverty rate in Turkey as 16.7 percent as of 2022. This rate seems to have increased in the last 2 years. As of November'22, we measure the current rate of material deprivation at 55 percent.

All the data show that the electorate is getting poorer, they see the government as responsible for the situation, but there is still no significant shift towards the opposition. In a way, the voters open a psychological space for the opposition to win their minds, hearts and votes, but the opposition does not seem to be able to produce a policy in which it will gain weight.

As a matter of fact, when we look at the numerical data, the sum of the Ak Parti and MHP votes is 41.9 percent when verbally stated, while it is 40.4 percent considering the marked preferences. The sum of the CHP and İyi Parti votes is 41 percent in the verbal and 40.8 percent in the marked preferences. The main difference is that the vote of other parties increases considering the marked preferences. On the other hand, HDP votes are 11.6 percent in verbal and 10.3 percent in marked preferences. The votes of the other parties, which are 5.4 percent in the verbal preference, increase to 8.5 percent in the marked preferences.

When we ask the question "Who would you vote for in a presidential election to be held between Kemal Kılıçdaroğlu and Recep Tayyip Erdoğan?", 37 percent of the interviewees say Erdoğan and 35 percent say Kılıçdaroğlu, but when we ask them to mark, 37 percent of the voters mark Erdoğan and 38 percent of Kılıçdaroğlu. For the presidency, a break in favor of a candidate in the preferences is not yet seen.

It seems that both the voters and we will be watching the progress for a while and we will wait with excitement.

We will hold the November Barometer webinar on Monday, December 5, 2022 at 15.00.

I should proudly remind you that the KONDA Barometer will enter its 14th year as of January, as we are approaching the end of another year. We will be happy to accompany you with our data and findings on how the society will live the coming year, which seems to be an exciting year with its global, local, economic and political dynamics, uncertainty and complexity. I would like to inform you that we will deliver our New Year contract proposal files to you next week.

I hope that our report will be useful for your business and decision processes and wish you successful and healthy days.

Best Regards,

Bekir Ağırdır

CONTENTS

1. EXECUTIVE SUMMARY

We present the findings of the 136th survey of the KONDA Barometer, which we conducted face-to-face with 3641 people in their households on 5-6 November 2022.

The theme of our research this month: Income Distribution, Poverty and Material Deprivation.

In the theme part of this month's research, we measured income distribution, poverty and material deprivation in Turkey. For the measurement of material deprivation, we asked the questions of the universally accepted measurement of material deprivation. For the measurements of income distribution and relative poverty, we worked on the KONDA Barometer data between 2014 and 2022 with the data mining method.

Political Preferences

There have been no major changes in political preferences for the last 3 months, 22.7 percent are still swing voters.

For the last 3 months, political preferences have not changed except for minor differences. In direct preferences, the Ak Parti is at 23.9 percent and the MHP is at 5.8 percent. 17.2 percent prefer the CHP, 8.2 percent prefer the HDP, and 11.8 percent the İyi Parti. When the swing voters are distributed, the Ak Parti receives 33.7 percent and the MHP 8.2 percent of the total votes. The CHP receives 24.3 percent, the HDP 11.6 percent, and the İyi Parti 16.7 percent of the total votes.

The rate of swing voters on the ballot is reduced by half.

When we hand out ballots to the interviewees and ask them to mark their voting preferences, the rate of swing voters decreases by half. The trend of change in the ballot in the last 3 months is taking place within alliances. The vote rate of the Cumhur Alliance is at the range of 37-40 percent; the total of CHP and İyi Parti, on the other hand, moves in the range of 39-42 percent.

The difference in verbal and marked vote preferences...

The difference between the vote preference marked on the ballot and the vote preference told to the person who conducts the survey points to the rise in other parties again. The vote rate of the other parties, which is 5.4 percent verbally, increase to 8.5 percent on the ballot. While the votes of the Ak Parti and CHP decrease on the ballot, the votes of the MHP and İyi Parti increase. However, the balance between alliances does not change.

Erdoğan's scorecard grade is stable: 2.6 out of 5.

We measured Erdoğan's grade at the level of 2.6 this month. This score has remained at the same level for the last 3 months. This also shows that a negative change in Erdoğan's assessment has not been observed in the last 3 months.

Sixty-two percent continue to say that if Erdoğan wins, it will be negative.

Since February'21, we have been asking whether it will be positive or negative if Recep Tayyip Erdoğan wins the next Presidential election. This question has been answered at similar

rates for the last three months. Sixty-two percent of the society thinks that Erdoğan's victory will be negative.

The rate of those who say, "Whoever will be a candidate against Erdoğan, cannot win," is 31 percent.

This month, we also asked the interviewees, "Who do you think can win the Presidential election as a candidate against Tayyip Erdoğan?" Thirty-one percent of the interviewees said that no one can win against Erdoğan. Mansur Yavaş is seen as the favorite candidate against Erdoğan; Kemal Kılıçdaroğlu has the highest increase in terms of probability of winning in the eyes of the public since July'22.

The Wisdom of the Crowds: Presidential Vote Predictions

In our survey this month, we asked our interviewees how many votes they would receive if Recep Tayyip Erdoğan and Kemal Kılıçdaroğlu were candidates. It is estimated that Erdoğan will receive 47 percent of the votes and that Kılıçdaroğlu will receive 36 percent. Repeating this measurement, which we made with the wisdom of the crowds method, would produce more accurate results when the candidate of the Millet İttifakı is determined.

Perception of the Economic Situation

Four out of 5 people think that the government's policies negatively affect the country's economy.

When we ask the question, "How have the government's policies affected the country's economy in the last year?" 4 out of 5 people give the answer "negative." That's the highest we've measured since 2015. It seems that the voters of the incumbent bloc also tended to give a "negative" answer to this question.

The tendency to define oneself as poor has increased.

This month, we once again discussed the perception of class position. We observed that the rate of those who define themselves as poor, which was in the 9-12 percent between 2015-2018, reached 20 percent this month.

Two out of 5 people think of doing additional work for a living.

When asked about their plans to make a living, 38 percent of the society answers "cutting expenses." In the second place, there is "doing additional work" with a rate of 19 percent, and it has also shown an upward trend in the last 2 years. In the working cluster, this rate is 29 percent.

Perception of Inflation

In general, the perception of inflation for the next year rather than the past year is certain.

When we ask how much was paid this year for something that was paid 100 lira a year ago, and how much will be paid next year for something paid 100 lira this year, a trend across society emerges. Society's inflation expectation for the next year is more specific and at a higher level.

The theme of the Month: Income Distribution, Poverty and Material Deprivation in Turkey

Income distribution, poverty and material deprivation measurement...

In the theme part of our research this month, we performed percentage share analysis, income distribution calculations, and relative poverty and material deprivation measurements in order to evaluate the income distribution in Turkey. We presented a detailed analysis of the material deprivation situation in our report.

As of 2022, the share of the highest income group in total income is 50.1 percent.

When we divide the society into 20 percent slices, we see that the share of the 20 percent, which represents the highest income group is at the level of 50.1 percent in total income. We calculate the share of the lowest income group in total income as 5.2 percent.

The share of the middle classes in income is changing more rapidly, both up and down.

When we examine the income distribution in Turkey through the change direction of the Lorenz curve, we see that mostly the incomes of the middle classes have narrowed and expanded. In other words, the share of the lowest and highest quintiles in total income over the years changes less than the middle classes.

Kurds, Religious Conservatives and those with less than a high school education are more in the 1st income segment.

With the KONDA Barometer providing the opportunity to examine income distribution from a socio-demographic perspective, we can examine how the 20 percent quintiles change in demographic clusters. Accordingly, we see that the 1st income segment is more prevalent among Kurds, HDP voters, Religious Conservatives and those with less than a high school education.

As of 2022, the relative poverty rate is calculated as 16.7 percent.

When we accept 50 percent of the median income per capita as a threshold, we calculate the relative poverty rate in Turkey as 16.7 percent as of 2022. This rate seems to have increased in the last 2 years.

The current rate of material deprivation in Turkey: 55 percent.

As of November'22, we measure the current rate of material deprivation in Turkey at 55 percent. Material deprivation decreases with the increase in metropolitanization and education level. Larger households are more materially deprived.

Seven out of 10 people think they can't afford an unexpected, sudden expense.

When we take a closer look at the material deprivation criteria, we see that 7 out of 10 people hesitate to meet an unexpected expense. Eight out of 10 people say they can't take a week-long vacation away from home. Half of the interviewees think that they cannot heat their houses during the winter.

Fifty-eight percent of society has difficulties paying their bills.

Fifty-eight percent of the society says they have difficulty paying their bills. While 54 percent of the society says they have difficulty in paying their kitchen expenses, and 32 percent in paying

their credit card debt, the rate of those who say they do not have any payment difficulties is only 13 percent.

Morale Index

The livelihood remains stable: 1 out of every 2 people can hardly afford a living.
In terms of livelihood, a stable situation continues to exist in the general population. Those who can hardly afford a living are dominant. One out of every 2 people can hardly afford a living. One out of every 2 people says that they cannot afford a living and got into debt.

Crisis expectation: Different crisis expectations of the supporters of the government and opposition...
This month, we measured the expectation of economic crisis at the level of 72 percent and the expectation of economic difficulty in one's own life at the level of 73 percent. In order to make sense of this difference, we calculated the difference in scores between the two expectations over the months, and we saw that the voters of the incumbent bloc expected economic difficulties in their own lives more while the voters of the opposition expected economic difficulties in the country.

2. POLITICAL PREFERENCES

2.1. If There Were a General Election Today

Concerning the political findings of the 136th KONDA Barometer survey, which we conducted by interviewing 3641 people on November 5-6, it is observed that a distribution pattern similar to the previous month's findings continues. Before moving on to the analysis of the findings, we would like to remind you that this survey was conducted before the bomb attack on Istiklal Street.

The distribution of answers we received to the traditional question "For whom and which party would you vote if there were an election today?" is as follows for the November'22 Barometer:

Which party would you vote for, if there were an election today? / Direct preferences

| Ak Parti; 23,9 | MHP; 5,8 | CHP; 17,2 | HDP; 8,2 | İyi Parti; 11,8 | Other parties; 3,8 | Swing voter; 22,7 | Non-voter; 6,6 |

%0   %50   %100

Which party would you vote for, if there were an election today? / Swing voters distributed

| Ak Parti; 33,7 | MHP; 8,2 | CHP; 24,3 | HDP; 11,6 | İyi Parti; 16,7 | Other parties; 5,4 |

%0   %50   %100
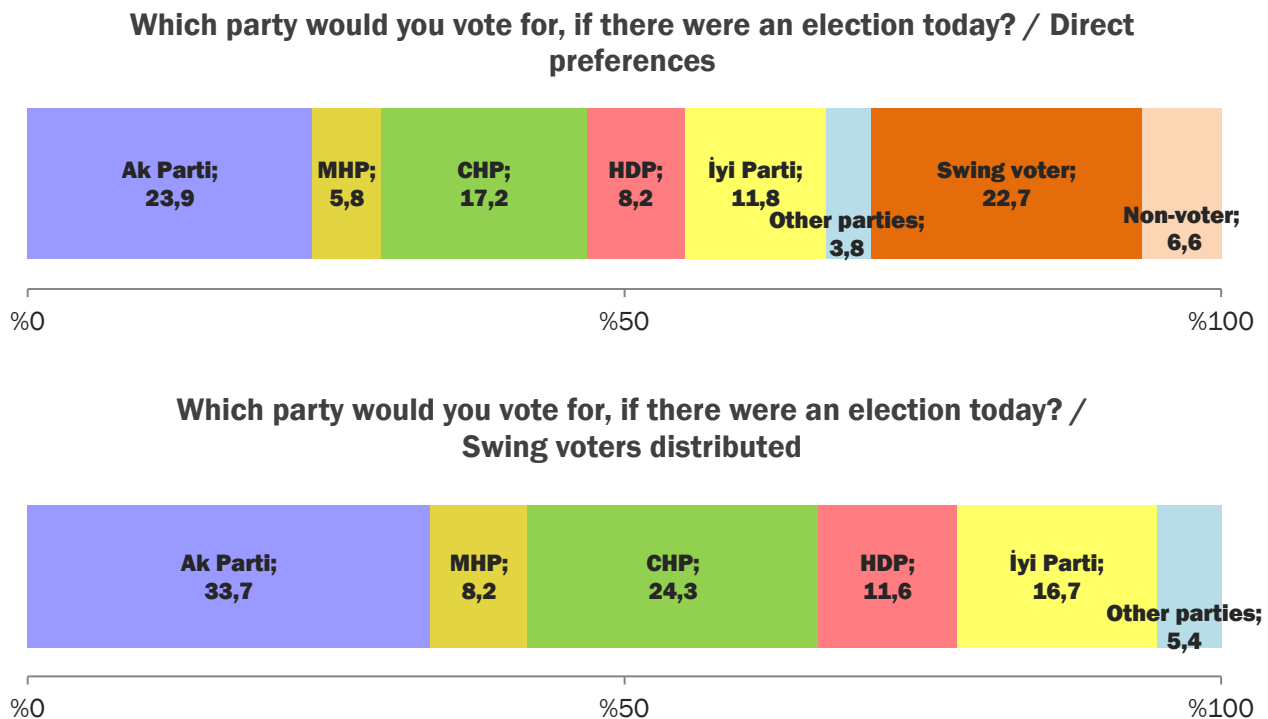
> Considering direct preferences, 23.9 percent of the interviewees say that they will vote for the Ak Parti; 5.8 percent prefer the MHP; 17.2 percent the CHP; 8.2 percent the HDP, 11.8 percent the İyi Parti, whereas 3.8 percent state that they will vote for other parties. In addition, the rate of those who are undecided is 22.7 percent; while the rate of those who will not vote is measured as 6.6 percent.

> When we distribute the swing voters proportionally, the Ak Parti is at the rate of 33.7 percent; the MHP at 8.2 percent; the CHP at 24.3 percent; the HDP at 11.6 percent; the Iyi Parti is at 16.7 percent, while the other parties reach a rate of 5.4 percent.

When we look at the findings of the last three months together:

Which party would you vote for, if there were an election today? / Direct preferences - Monthly change

September'22	Ak Parti; 23,3	MHP; 6,3	CHP; 18,4	HDP; 8,0	İyi Parti; 11,5	Other parties; 4,5	Swing voter; 21,0	Non-voter; 7,1
October'22	Ak Parti; 23,9	MHP; 5,2	CHP; 18,0	HDP; 9,3	İyi Parti; 10,2	Other parties; 4,3	Swing voter; 22,4	Non-voter; 6,8
November'22	Ak Parti; 23,9	MHP; 5,8	CHP; 17,2	HDP; 8,2	İyi Parti; 11,8	Other parties; 3,8	Swing voter; 22,7	Non-voter; 6,6

0%　　　　　　　　　50%　　　　　　　　　100%

Which party would you vote for, if there were an election today? Swing voters distributed - Monthly change

September'22	Ak Parti; 32,4	MHP; 8,7	CHP; 25,6	HDP; 11,1	İyi Parti; 16,0	Other parties; 6,2
October'22	Ak Parti; 33,7	MHP; 7,3	CHP; 25,4	HDP; 13,1	İyi Parti; 14,4	Other parties; 6,0
November'22	Ak Parti; 33,7	MHP; 8,2	CHP; 24,3	HDP; 11,6	İyi Parti; 16,7	Other parties; 5,4

%0　　　　　　　　　%50　　　　　　　　　%100

➢ When we look at the table where the swing voters are distributed, we see that the votes of the Ak Parti remained the same compared to the previous month and that of the MHP increased. Considering the Cumhur Alliance, we see that they have been moving in the 41-42 percent level for the last three months.

➢ While CHP's votes decreased by 1 point compared to the previous month, the Iyi Parti's votes increased by 2 points. The CHP's vote has been decreasing for the last three months within the margin of error. Considering the Iyi Parti, we see the movement in the 14-17 percent level. The votes of other parties, also within the margin of error, have been decreasing for the last three months.

Let's look at the voting preferences from a wider time frame in terms of direct preferences:

Change in direct preferences (With the moving average curve)

Legend: Ak Parti, CHP, MHP, HDP, İyi Parti
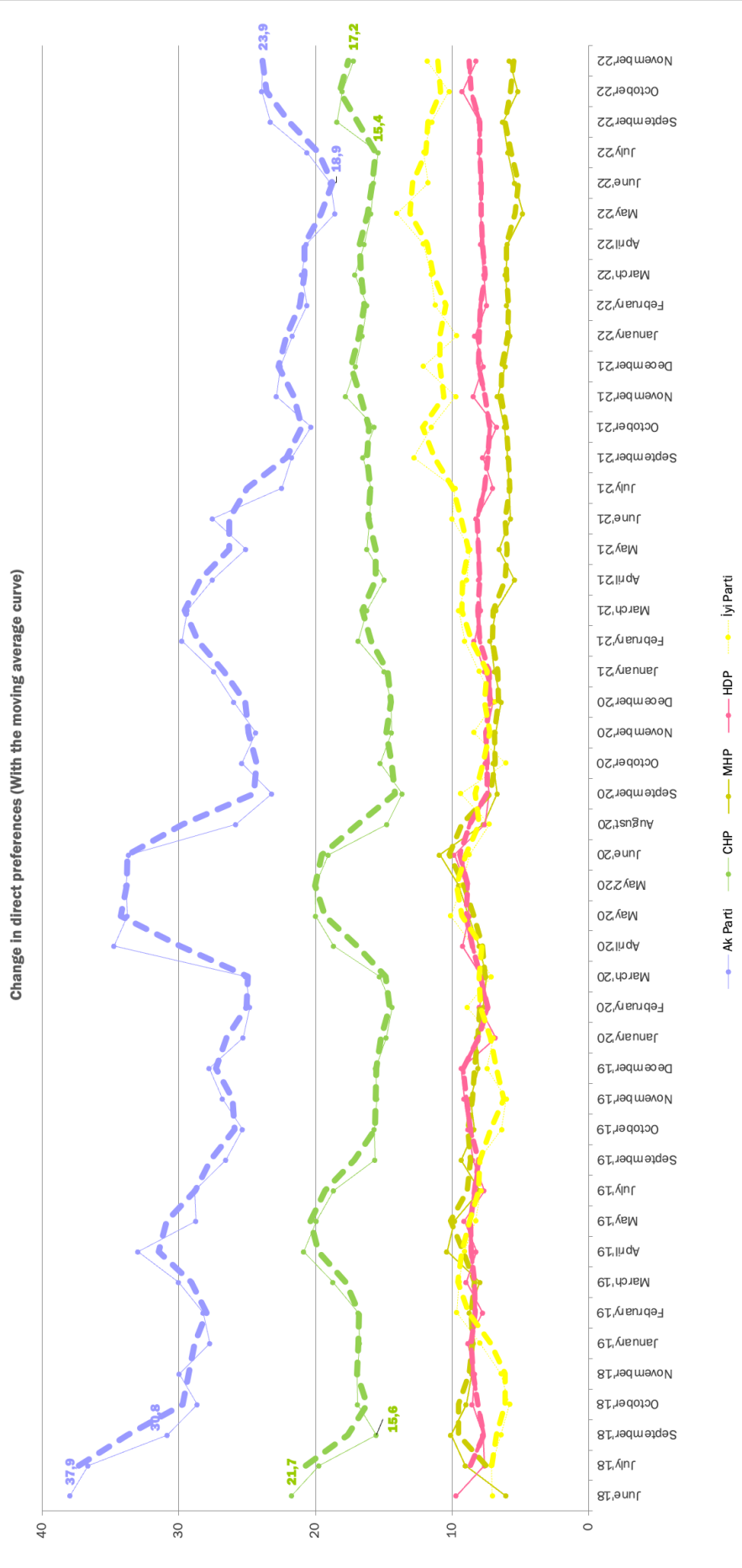
> In June'18, 37.9 percent of the voters said that they would vote for the Ak Parti; today it is 23.9 percent. From this point of view, the Ak Parti votes have seriously eroded. But on June'22, they had dropped below 20 percent in direct preferences. The Ak Parti seems to have stopped this meltdown in its votes in recent months and even increased its votes a bit.

> As the election periods approached, due to the decrease in the swing voters, there was a change in the votes of all parties in direct preferences. However, apart from the election effect, the only movement is seen in the İyi Parti votes, apart from the decrease in Ak Parti's votes.

When we look at the distribution of voters who say they will vote for other parties, the Zafer Party, which approaches the 2 percent band when the swing voters are distributed, is followed by the Deva Party and the Yeniden Refah Party, with close to 1 percent of the total votes.

Other parties in direct preferences (total 3.9%)

Deva	Memleket	Gelecek	Saadet	TİP	BBP	YRP	Zafer Partisi	Other parties
0,7	0,5	0,2	0,1	0,2	0,1	0,6	1,2	0,3

Other parties after swing voters distributed (total 5.3%)

Deva	Memleket	Gelecek	Saadet	TİP	BBP	YRP	Zafer Partisi	Other parties
1,0	0,6	0,2	0,1	0,4	0,1	0,8	1,7	0,4
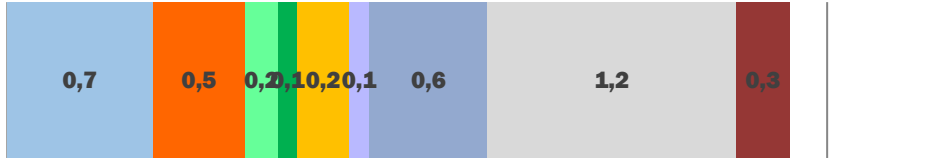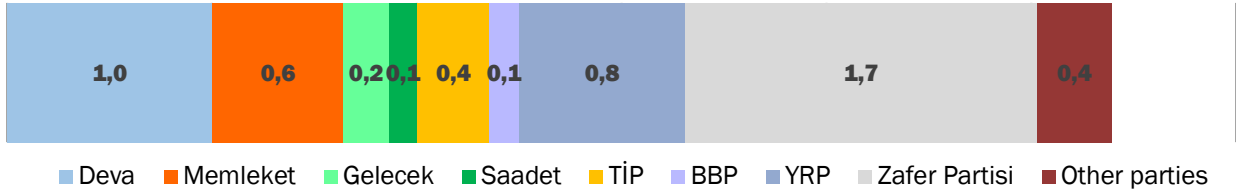
In the Barometer surveys we have been conducting since September 22, after asking all questions to our interviewees, we also ask them to mark their voting preferences by handing out the specially designed ballot paper below.

As a result of marks, we get the following findings:

Ballot paper / Direct preferences

September'22	Ak Parti; 23,7	MHP; 8,6	CHP; 19,4	HDP; 9,0	İyi Parti; 15,9	Other parties; 9,2	Swing voter; 14,3
October'22	Ak Parti; 26,6	MHP; 7,4	CHP; 19,7	HDP; 10,6	İyi Parti; 14,3	Other parties; 7,5	Swing voter; 14,0
November'22	Ak Parti; 26,4	MHP; 7,9	CHP; 18,8	HDP; 8,7	İyi Parti; 15,9	Other parties; 7,2	Swing voter; 15,2

0% — 50% — 100%

Ballot paper / Swing voters distributed

September'22	Ak Parti; 27,6	MHP; 10,1	CHP; 22,6	HDP; 10,5	İyi Parti; 18,5	Other parties; 10,7
October'22	Ak Parti; 30,9	MHP; 8,6	CHP; 22,9	HDP; 12,3	İyi Parti; 16,6	Other parties; 8,8
November'22	Ak Parti; 31,1	MHP; 9,3	CHP; 22,1	HDP; 10,3	İyi Parti; 18,7	Other parties; 8,5

0% — 50% — 100%

➢ The rate of swing voters in the ballot paper decreases by almost half.

➢ Although the vote rate of the Iyi Parti has increased compared to our findings last month, the CHP-Iyi Parti total increases by only one point.

➢ Therefore, although the volatility is higher in the one marked on the ballot according to the vote preference, this volatility occurs mostly within alliances. As a matter of fact, the vote of the Cumhur Alliance is at the level of 37-40 percent; the total of the CHP and İyi Party, on the other hand, moves at the level of 39-42 percent.

➢ Among the other parties, the Zafer Party, the Deva Party and the Yeniden Refah Party received the most votes.

Other parties in direct preferences (total 7.2%)

1,0	0,6	0,2	0,2	0,4	0,3	0,9	1,3	2,3

Other parties after swing voters distributed (total 8.5%)

1,2	0,7	0,2	0,3	0,5	0,4	1,1	1,5	2,7

■ Deva ■ Memleket ■ Gelecek ■ Saadet ■ TİP ■ BBP ■ YRP ■ Zafer Partisi ■ Other parties
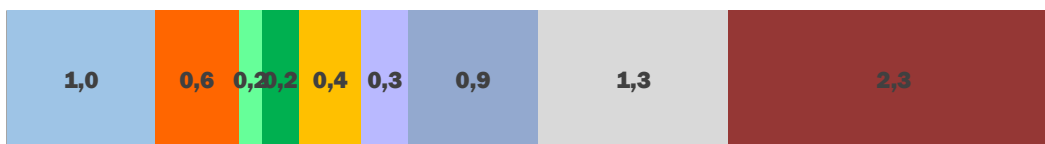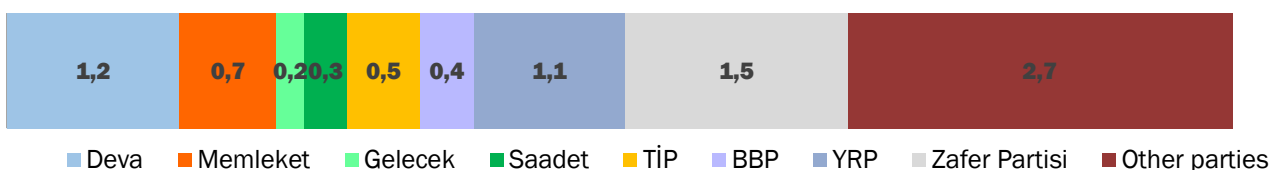
Before continuing our analysis on this issue, let's briefly address the question we asked about the voting motivations of our interviewees.

If there were an election today, 80 out of every 100 people say that they would definitely go to the polls, 10 say that they are undecided whether to go to the polls or not, and 8 of them say that they will definitely not go to the polls. This rate is almost exactly the same as our finding last month. Therefore, the determination of the society to go to the polls does not change much.

Would you go to the ballot box and cast a vote with your current mood if there were an election today?

	I would definitely not go and cast a vote.	I am undecided.	I would definitely go and cast a vote.
July'21	10	13	77
September'21	8	14	77
November'21	8	15	77
September'22	8	12	80
October'22	8	11	81
November'22	8	12	80
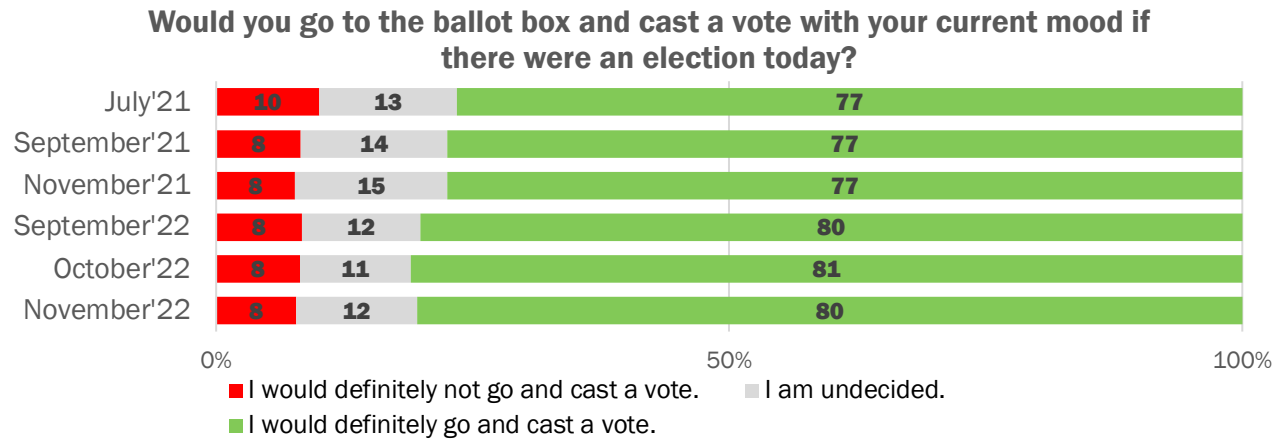
Let's examine the differences between the vote preference marked and the vote preference told to the pollster, by distributing the swing voters proportionally:

Verbal vs. Marked

	Ak Parti	MHP	CHP	İyi Parti	HDP	Other
Verbal	33,7	8,2	24,3	16,7	11,6	5,4
Marked	31,1	9,3	22,1	18,7	10,3	8,5
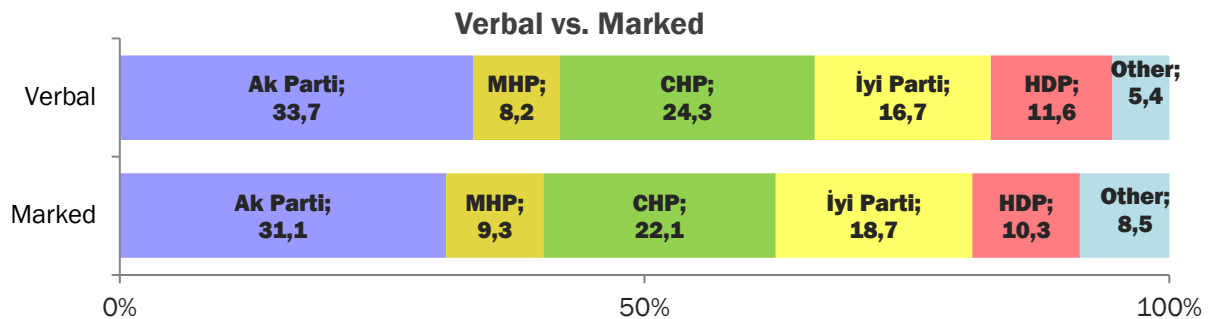
➢ While the votes of Ak Parti and CHP are decreasing in the marked one, the votes of the MHP and İyi Parti are increasing.

➢ The sum of the Ak Parti and MHP votes is less inthe marked ballot compared to the verbal preference: The sum of the Ak Parti and MHP votes, which is 41.9 percent in the verbal preferences, is 40.4 percent in the marked preferences.

➢ The sum of the CHP and İyi Parti votes is 41 percent in the verbal preference and 40.8 percent in the marked.

➢ The main difference is that the votes of other parties increase in the marked one. The votes of the other parties, which are 5.4 percent in the verbal preference, increase to 8.5 percent in the marked one.

To see the difference between the "ballot" and "verbal" preference, let's examine what those who marked a party on the ballot answered when asked by the pollster:

Vote preference on the ballot paper vs. Verbal preference

Legend: Ak Parti | CHP | MHP | HDP | İyi Parti | Other parties | Swing voter | Non-voter

BALLOT PAPER:

Ballot paper	Values
Ak Parti	78, 2, 16, 3
MHP	6, 3, 70, 1, 13, 6
CHP	1, 74, 1, 3, 1, 17, 2
HDP	1, 87, 2, 6, 3
İyi Parti	1, 2, 81, 12, 3
Other parties	2, 3, 2, 2, 2, 37, 39, 14
No answer / Swing voter	5, 4, 3, 4, 1, 59, 24
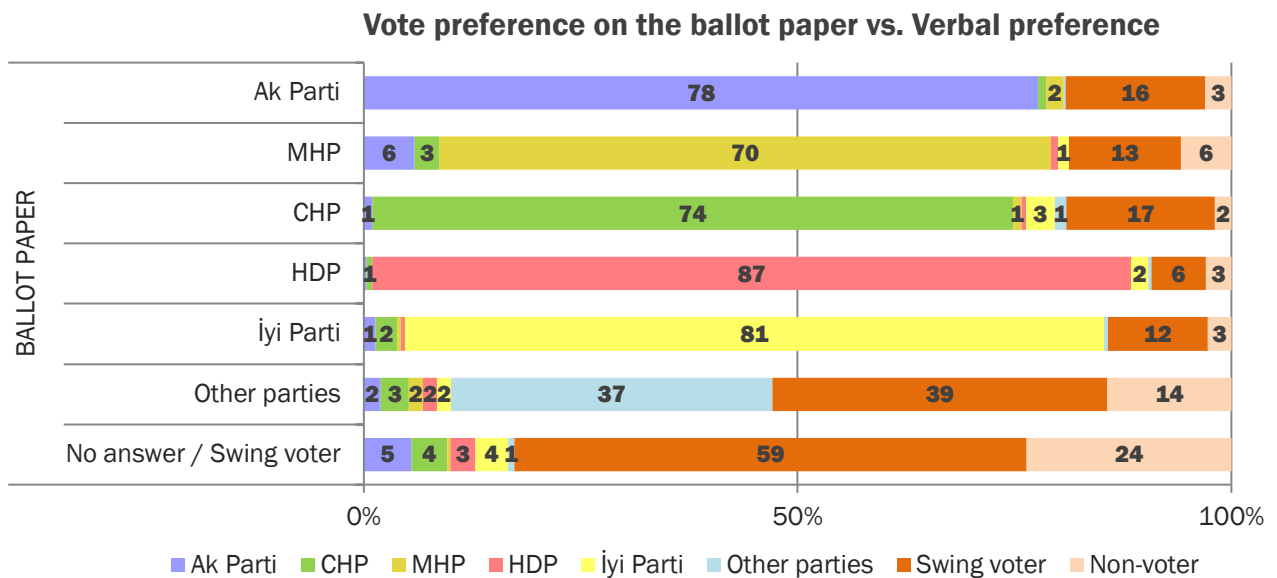
➢ A significant portion of the voters who marked the MHP option on the ballot paper said that they would vote for the Ak Parti when our pollster asked.

➢ Vote shifts within alliances are more evident in this graph. There is a 2-3 point shift between what is said and what is marked concerning the parties within the alliance. This shift is a little more balanced within the Millet Alliance.

➢ The main difference between the verbal and marked vote on the ballot is that those who are undecided have expressed an opinion. Compared to other parties, the HDP is the party that received the least votes among the swing voters concerning the difference of the marked and verbal votes.

➢ We see that other parties received votes from the swing voters mostly on the marked ballot paper although these parties have the potential to receive votes from all parties, albeit in small rates. **Proportionally, those who gave the answer "I am undecided" to our pollster and marked a party on the ballot prefer other parties at most.**

➢ Therefore, if the parties in the category of other parties can increase their votes, they can take back the votes of the voters who prefer to vote for their secondary party with a high rate of votes rather than their primary party with a low vote rate.

2.2.   Erdoğan or Kılıçdaroğlu?

The candidate of the Cumhur Alliance will be certainly Recep Tayyip Erdoğan, but it is not clear who will be the candidate of the six-party table or the social opposition in a broader sense. The claim that Kemal Kılıçdaroğlu will be the candidate among the names spoken has become quite strong in recent months and has started to be discussed in the public. Like last month, we asked the interviewees the following question "Who would you vote for in a Presidential election to be held between Kemal Kılıçdaroğlu and Recep Tayyip Erdoğan?".

Those who answered this question as "Erdoğan" this month are 37 percent with an increase of 1 point compared to the previous month, while those who say "Kılıçdaroğlu" are at the rate of 35 percent, the same rate as last month. **Let us state that these fluctuations are within the margin of error, and the results to be obtained in the following months will produce more explanatory results.**

Erdoğan or Kılıçdaroğlu?

Month	Recep Tayyip Erdoğan	I would not cast a vote.	Kemal Kılıçdaroğlu
June'21	42	26	32
June'22	34	35	31
September'22	35	28	37
October'22	36	28	35
November'22	37	28	35
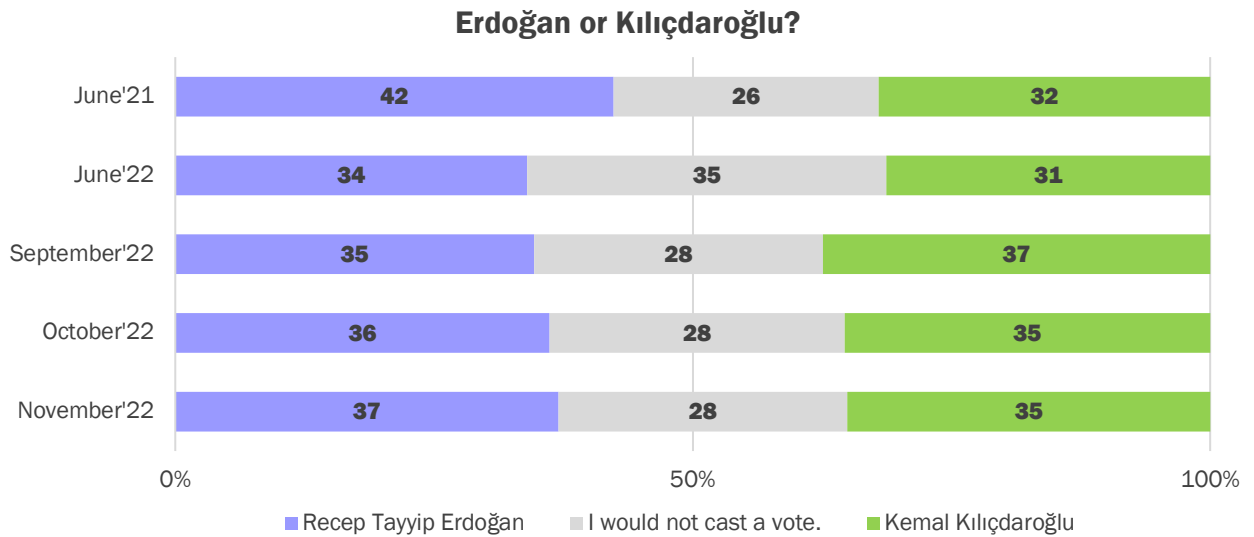
The answers we have received to this question since September'22 do not change much depending on the vote preference. It is noteworthy that while Kılıçdaroğlu's votes among HDP supporters have increased in the last two months, the vote of the İyi Parti has decreased.

Erdoğan or Kılıçdaroğlu?

	Recep Tayyip Erdoğan	I would not cast a vote	Kemal Kılıçdaroğlu
Turkey - June'21	42	26	32
Turkey - June'22	34	35	31
Turkey - September'22	35	28	37
Turkey - October'22	36	28	35
Turkey - November'22	37	28	35
Less than high school - June'21	52	20	28
Less than high school - June'22	41	31	27
Less than high school - September'22	47	25	28
Less than high school - October'22	46	26	28
Less than high school - November'22	47	26	26
High school- June'21	34	32	34
High school- June'22	31	38	32
High school- September'22	27	30	43
High school- October'22	33	31	37
High school- November'22	30	28	42
University - June'21	26	30	44
University - June'22	21	39	40
University - September'22	21	31	48
University - October'22	19	31	49

■ Recep Tayyip Erdoğan   ■ I would not cast a vote   ■ Kemal Kılıçdaroğlu

When we asked the question "Erdoğan or Kılıçdaroğlu?" we stated that almost one out of every three voters gave the answer "I would not cast a vote." **When we analyze the answers we received to the question "If Erdoğan wins, would it be positive or negative?" together, 84 percent of those who answered the question as 'I would not cast a vote' think that Erdoğan's victory in the election would be negative for Turkey.**

Would it be positive or negative for Turkey, if Recep Tayyip Erdoğan wins the next presidential election?
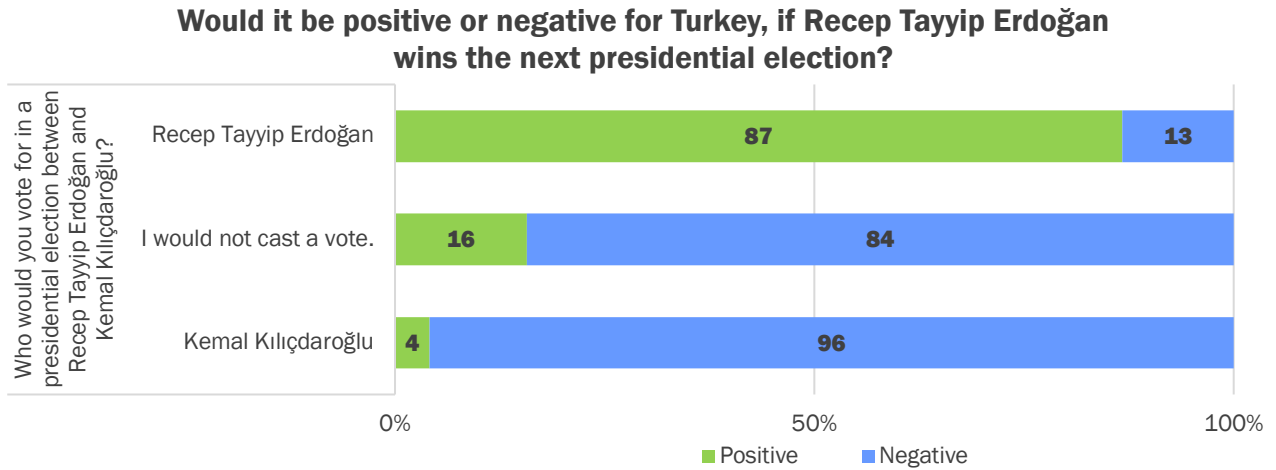
We see a similar situation in the grade given to Erdoğan. When asked "Erdoğan or Kılıçdaroğlu?" only 8 percent of those who answered as "I would not cast a vote" give Erdoğan a "good" or "excellent" grade, while 63 percent give him a "poor" or "very poor" grade.

Erdoğan's Scorecard
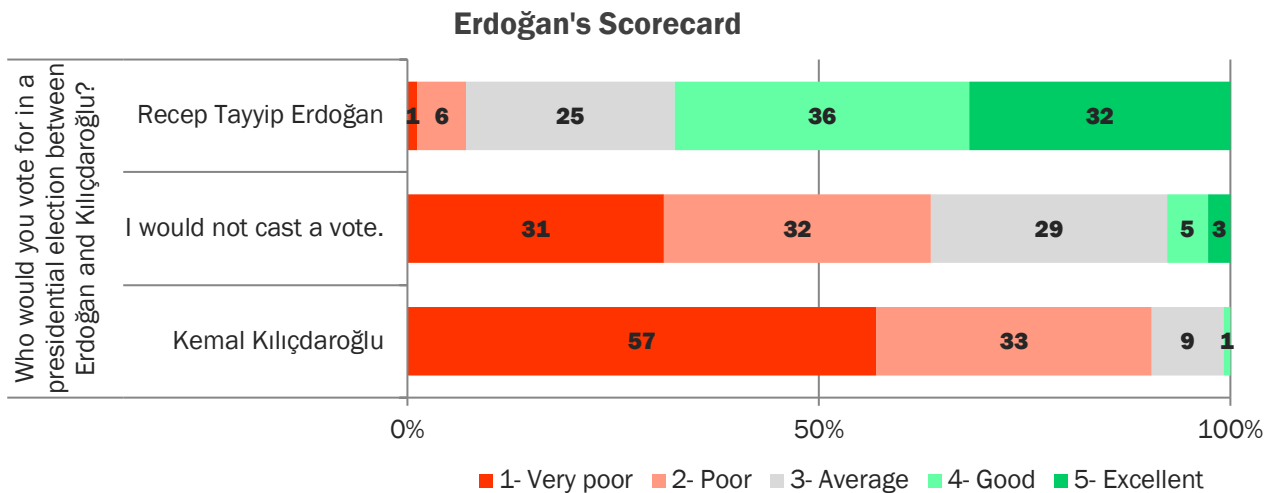
Therefore, when we ask "Erdoğan or Kılıçdaroğlu?" we can say that the majority of those who answered as "I would not cast a vote" are more likely to vote for the candidate in opposition to Erdoğan if they go to the polls.

The difference between "verbal" and "marked" in the presidential election:

This month, we asked the same question with the ballot, just like in the vote preference. According to our findings, there is a difference of three points in favor of Kılıçdaroğlu between the verbal and the marked preference.

However, **this difference is small compared to the preference difference of swing voters between the marked-verbal**. Therefore, it can be said that those who answer this question as "I do not cast a vote" do not have any intention of hiding their preferences.

Verbal	37	28	35
Marked	37	25	38

0%　　　　　　　　50%　　　　　　　　100%

■ Recep Tayyip Erdoğan　■ No answer/will not cast a vote.　■ Kemal Kılıçdaroğlu
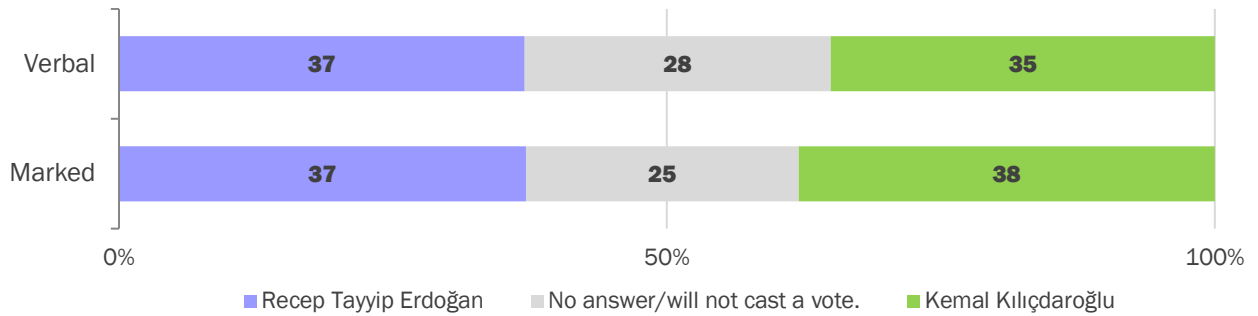
When we look at the monthly series of answers given to the ballot, we see that there is a very similar table to the verbal one.

Ballot paper

September'22	35	26	39
October'22	37	25	38
November'22	37	25	38

0%　　　　　　　　50%　　　　　　　　100%

■ Recep Tayyip Erdoğan　■ No answer　■ Kemal Kılıçdaroğlu
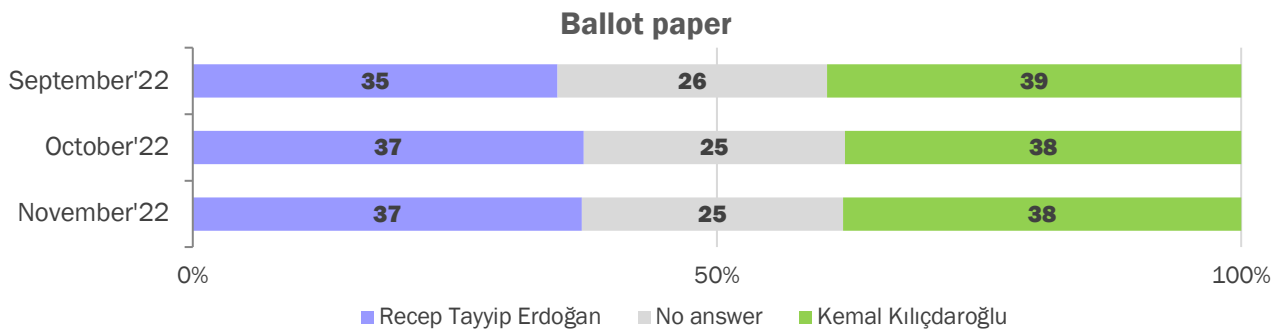
Finally, let's examine the votes that were said and marked according to their participation in the elections:

	What is said			What is marked		
	Turkey	Those who will definitely participate in the elections	Those who will definitely/maybe participate in the elections	Turkey	Those who will definitely participate in the elections	Those who will definitely/maybe participate in the elections
Recep Tayyip Erdoğan	37	40	39	37	40	38
I will not cast a vote/ No answer	28	20	24	25	19	22
Kemal Kılıçdaroğlu	35	40	37	38	42	40

➢ In two of the six parameters by which we examined the possible distribution of votes, Erdoğan's votes are more than Kılıçdaroğlu, in one of them the votes are equal, and in three of them Kılıçdaroğlu's votes are more than Erdoğan.

➢ However, none of the differences within these six parameters are higher than 2 points. Therefore, there is no significant difference in the marked and verbal vote preferenes between a candidate and the other possible candidate.

➤ As the election approaches, as the candidates become final and as the finalized candidates take to the streets, the size of this swing voters and non-voters will decrease. **As of today, it is not clear in which direction this undecided mass will decide.**

➤ On the other hand, only 8 percent of those who say "I will not cast a vote" give Erdoğan a "good" or "excellent" grade, while only 16 percent think that if Erdoğan wins the election, it will be positive for Turkey.

➤ The graph below reveals an even more striking picture. It is examined in detail in the relevant section, but when we asked them "Erdoğan or Kılıçdaroğlu?" only 1 percent of those who say "I would not cast a vote", state that the government's policies have had a positive impact on the family budget in the past year, while 85 percent say that they have had a negative or very negative impact.

How have the government's policies affected your family budget in the past year?

	Very negative	Negative	Neither positive nor negative	Positive	Very positive
Recep Tayyip Erdoğan	18	35	33	12	2
I would not cast a vote.	46	39	13	1	
Kemal Kılıçdaroğlu	62	33	4		
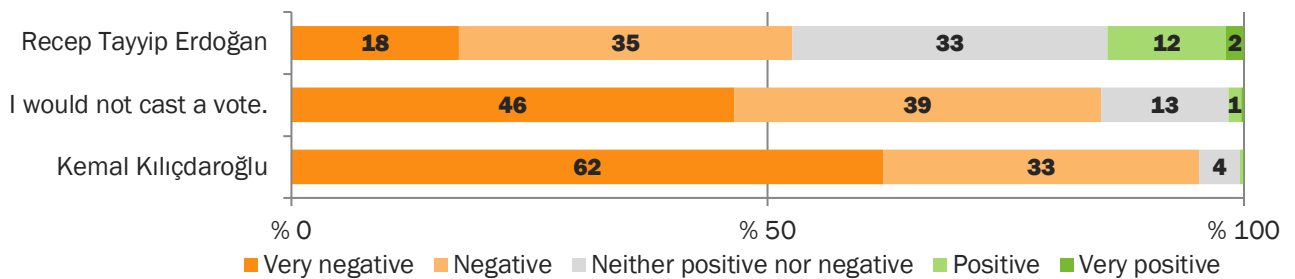
➤ The candidate against Erdoğan is not clear yet, and the candidates who are in the hearts of the opposition voters can also differ. **However, these analyzes show that the public opinion on Erdoğan is quite clear and far from a win of the election for Erdoğan.**

➤ **Erdoğan needs to be able to convince large masses in the next election in a short time.** Still, it should not be forgotten that Erdoğan has been ruling this country for 20 years and can increase his votes as the election approaches. Therefore, it should not be said that he lost the election today.

➤ The biggest chance of the opposition is the mismanagement of the government, especially of the economy, in recent years. **In a way, it can be said that the government is doing the opposition's campaign.** We can interpret the voters' preference not to vote for Erdoğan as a result of this, while the opposition candidate is not yet known.

➤ It is clear that the opposition has not yet produced hope in the society. **The candidate may not have been identified, but even today, if they could give hope and confidence to the society about what they will do when they come to power, no matter what the name is called, a "new period", "new Turkey" in a wider framework, the picture could be formed in favor of the opposition.**

➤ Officially, we have a period of approximately six months ahead of us, and from today's perspective, the opposition seems more advantageous than the government. For the picture to be clear, the government needs a quick success and the opposition needs to gain the trust of wider segments of the society.

2.3. Erdoğan's Scorecard

We have been asking about President Recep Tayyip Erdoğan's scorecard grade since September'18. We have not seen a significant change in political preferences in the last three months, nor do we see it in Erdogan's scorecard. Erdoğan's grade for the last three months is 2.6.

As we emphasized last month, the negative process in the answers to the questions we asked about Erdoğan or the Ak Parti has ended in the last two months. **In other words, neither the meltdown in the Ak Parti votes nor the negative change in Erdoğan evaluations have been seen in the last three months.**

Erdoğan's Scorecard
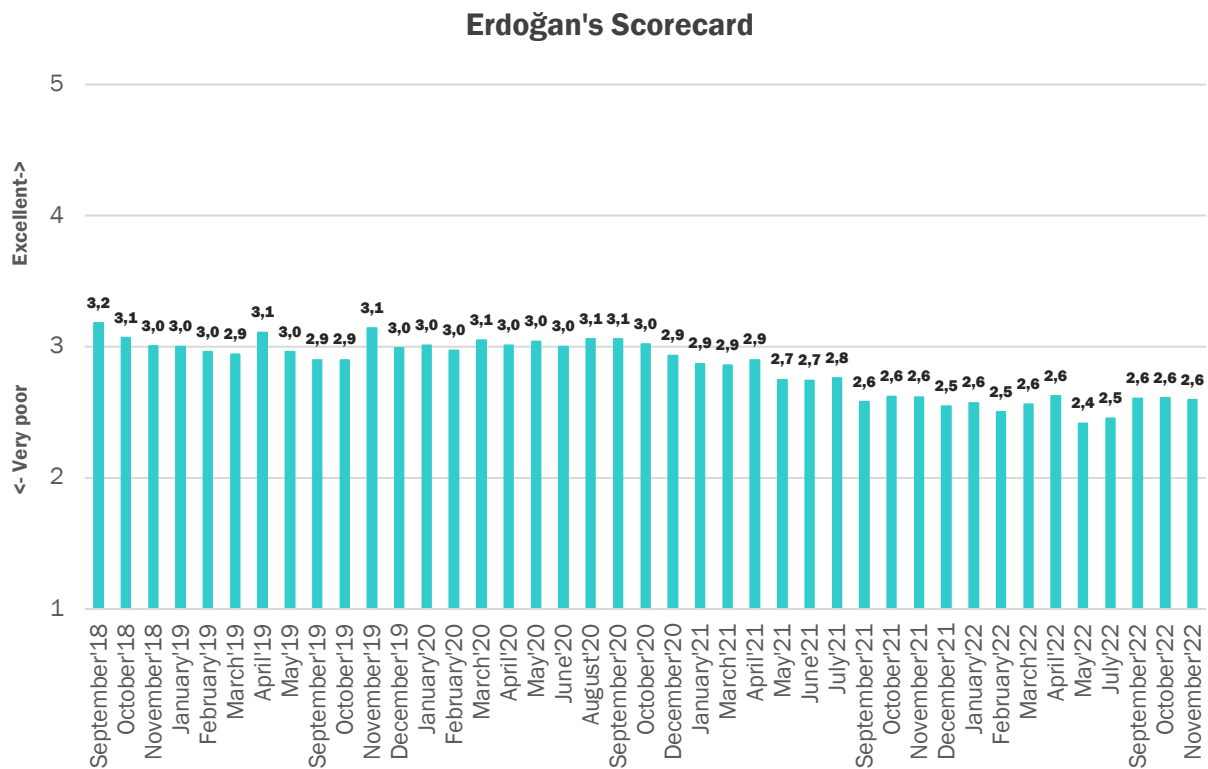
The distribution of grades for the last three months is also quite similar. Those who give Erdoğan a "poor" or "very poor" grade are always at 52 percent; while those who give "good" or "very good" grades are in the 27-29 level.

Erdoğan's Scorecard
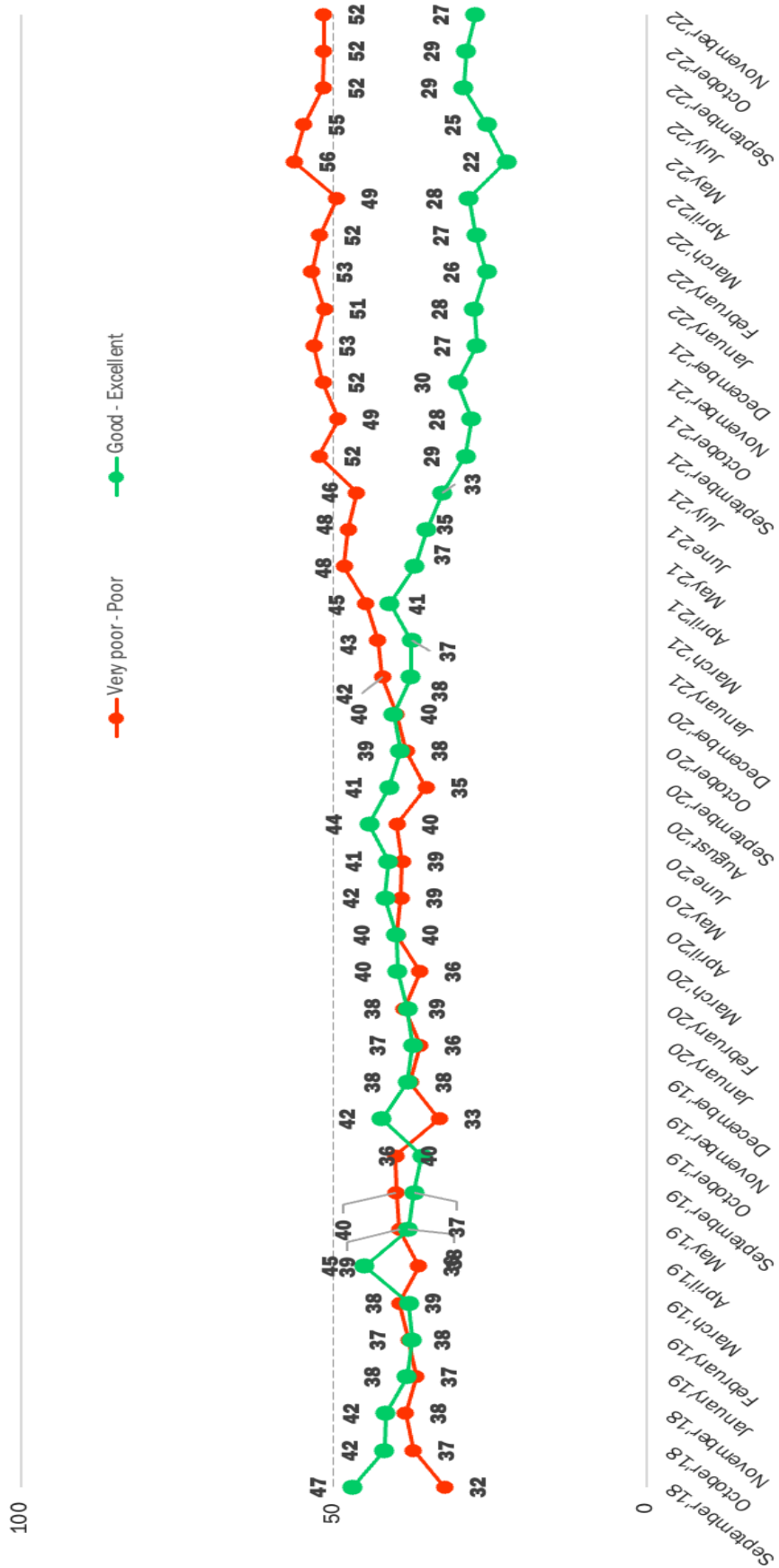
2.4.   Would It Be Positive or Negative if Erdoğan Wins?

By asking this question frequently since February'21, we aim to understand how society evaluates Erdoğan's re-election as president at a time when the candidate against Erdoğan is uncertain.

Would it be positive or negative if Recep Tayyip Erdoğan WINS the next presidential election?
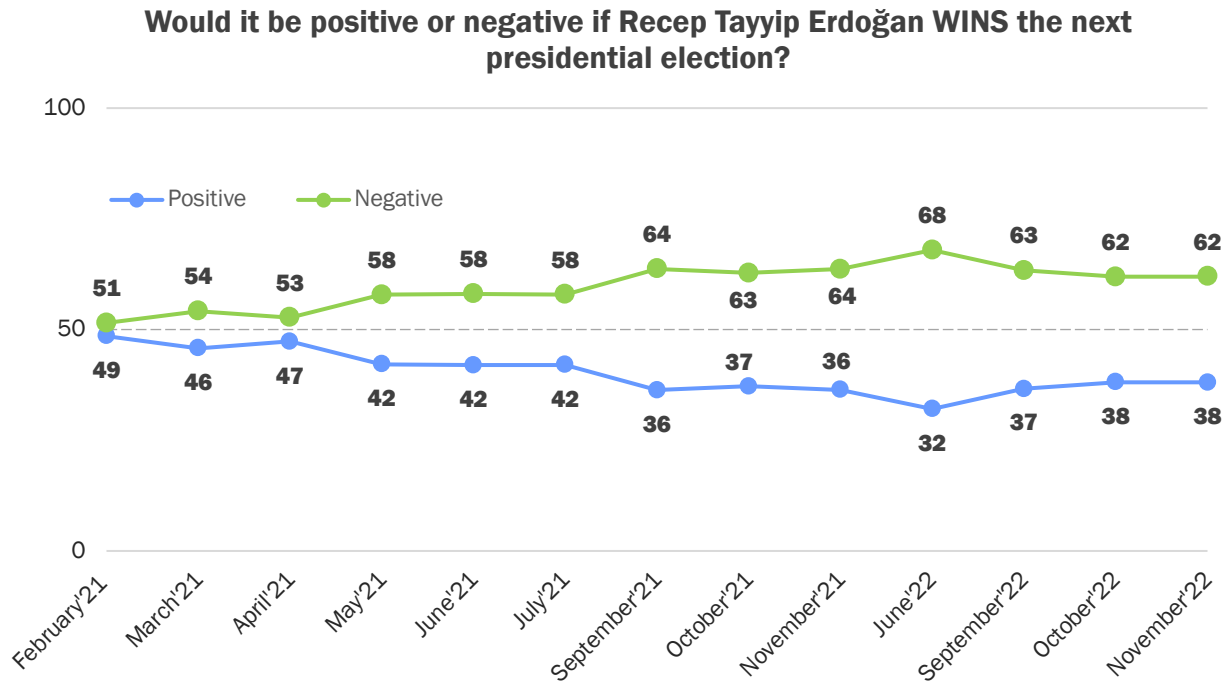
Just like Erdoğan's scorecard, the answers to this question have hardly changed in the last three months. **Therefore, in the last three months, the meltdown in the votes of the Ak Parti or the decrease in Erdoğan's grade stopped. But the current picture is in favor of the opposition. It seems that Erdoğan needs to be able to change this picture.**

2.5.   Who Can Win Against Erdoğan?

While it remains unclear who will be the opposition's candidate in the upcoming presidential election, President Erdoğan is the only person to announce that he will be candidate. Therefore, in order to understand the opinion of the society on this issue, we try to take the pulse of the society by asking either the scenarios about different candidates or the evaluations of Erdoğan directly.

In this context, we asked the interviewees this month, "Who can win as a candidate against Tayyip Erdoğan in the Presidential election" and gave the following options: "No one can win against Erdoğan," "Ekrem İmamoğlu," "Kemal Kılıçdaroğlu," "Mansur Yavaş," "Meral Akşener," "Other (write)." Our interviewees were able to give more than one answer to this question.

➢ **We see that the rate of those who say, "No candidate can win against Erdoğan" is 31 percent,** which increased by 2 points compared to our July'22 finding, when we asked the same question.

➢ Mansur Yavaş is seen as the favorite candidate against Erdoğan. Howeveri Kemal Kılıçdaroğlu is the person with the highest probability of winning in the eyes of the public since July'22. Despite this increase, Kılıçdaroğlu lags behind Yavaş and İmamoğlu.

Who can win against Erdoğan?
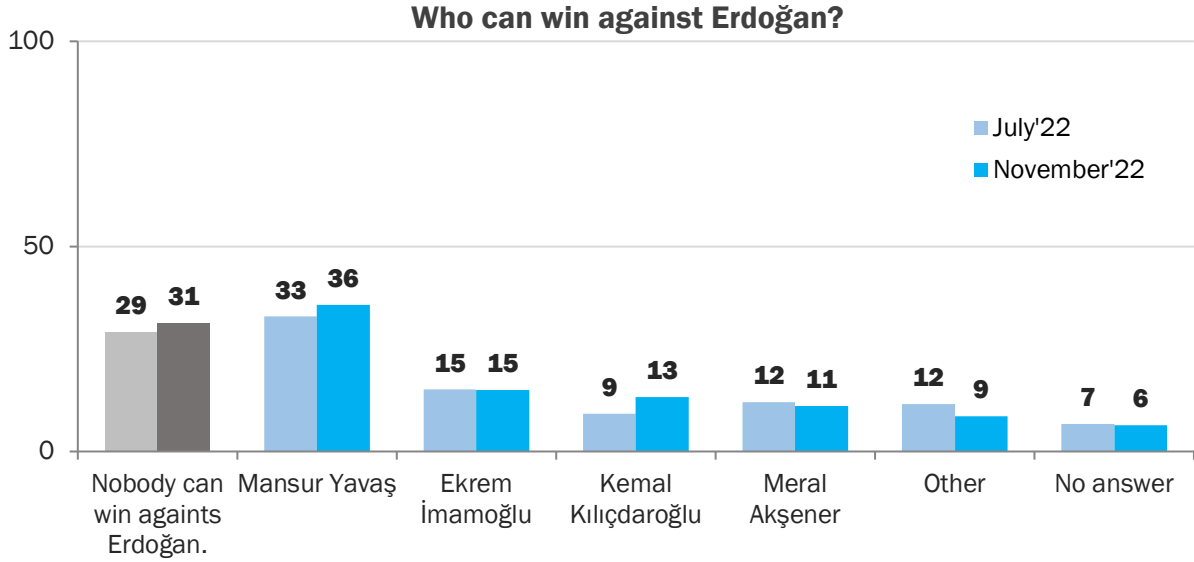
Eighty percent of the voters who say that they would vote for the Ak Parti if there were an election today, think that no one can win against Erdoğan. On the other hand, 11 percent say that Mansur Yavaş will win.

Ak Parti Voters
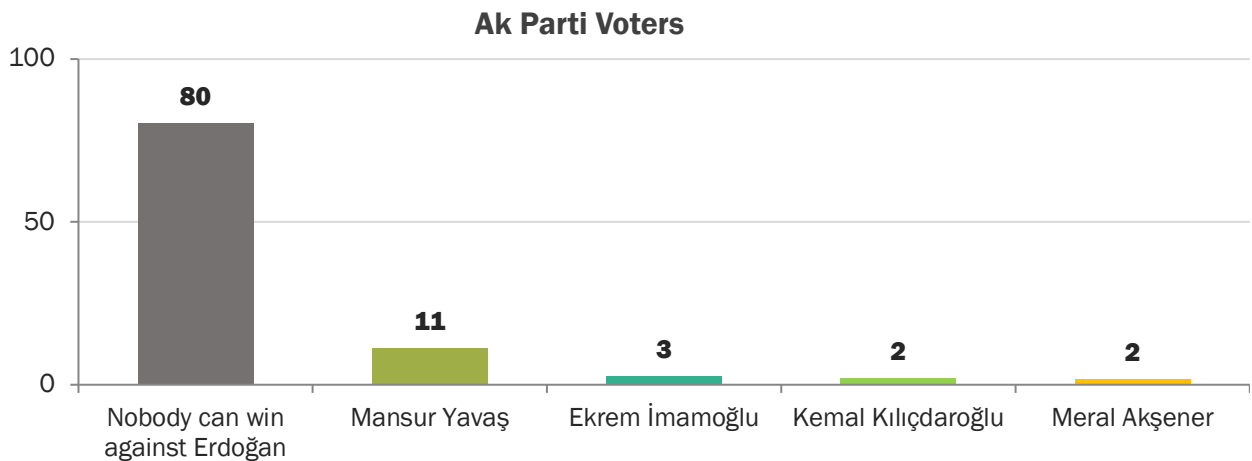
While half of the MHP voters say that no one will win against Erdoğan, approximately 1 out of every 3 MHP voters say that Mansur Yavaş will win.

MHP Voters

Nobody can win against Erdoğan	Mansur Yavaş	Ekrem İmamoğlu	Kemal Kılıçdaroğlu	Meral Akşener
50	36	5	0	5
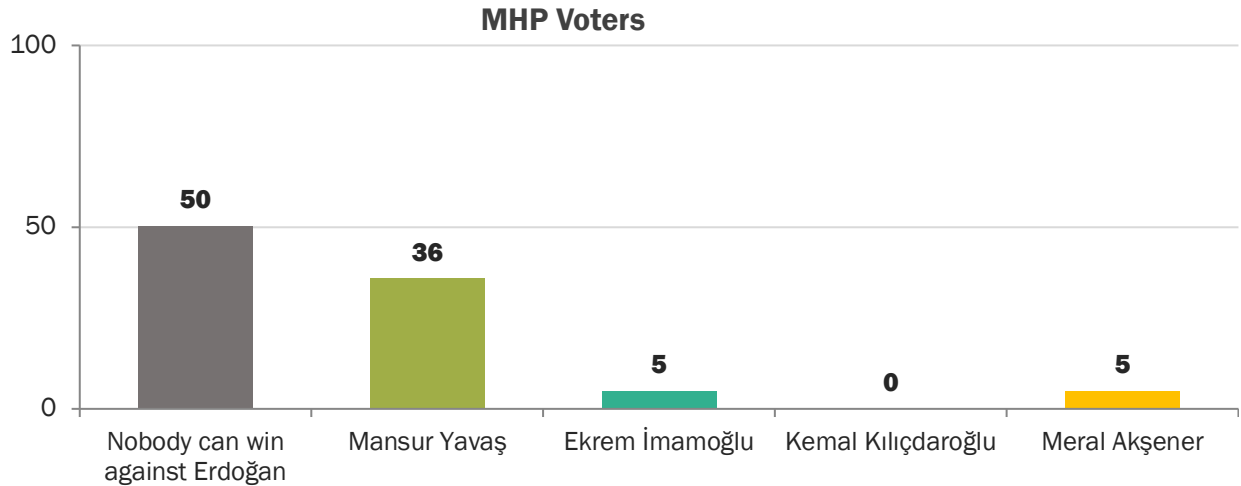
Among CHP voters, those who say, "No one can win against Erdoğan," are only 3 percent. This shows that Erdoğan's image of "winning every election" is not accepted by CHP voters. Moreover, 59 percent of CHP voters think that Yavaş can win against Erdoğan.

Thirty eight percent say that Kılıçdaroğlu, 35 percent İmamoğlu and 14 percent Akşener can win against Erdoğan.

CHP Voters

Nobody can win against Erdoğan	Mansur Yavaş	Ekrem İmamoğlu	Kemal Kılıçdaroğlu	Meral Akşener
3	59	35	38	14
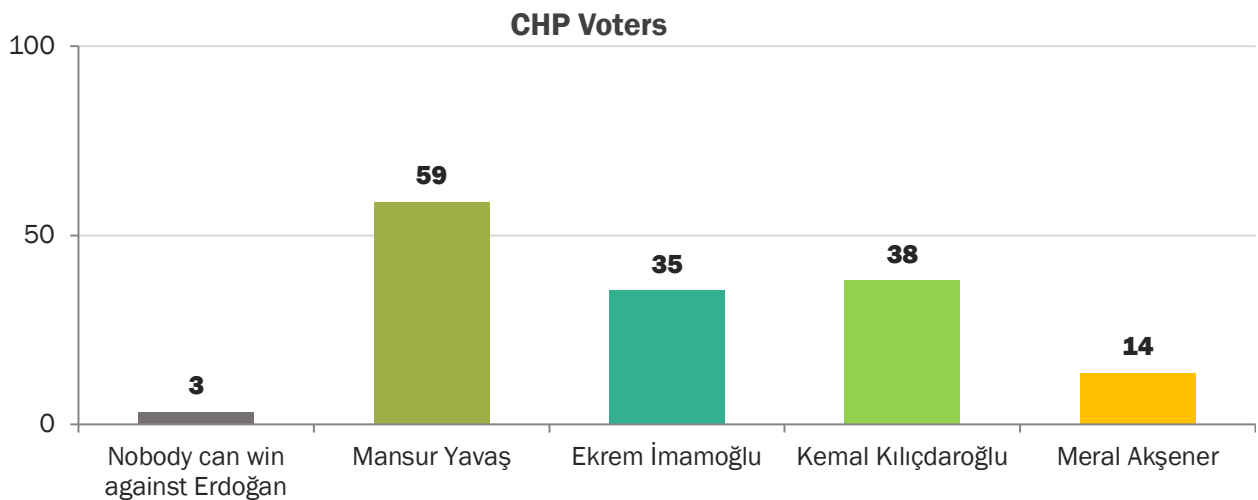
Among the voters of the İyi Parti, there are very few people who say, "No one can win against Erdoğan." The favorite candidate of the Iyi Party voters against Erdoğan is Mansur Yavaş. Akşener comes after Yavaş.

İyi Parti Voters
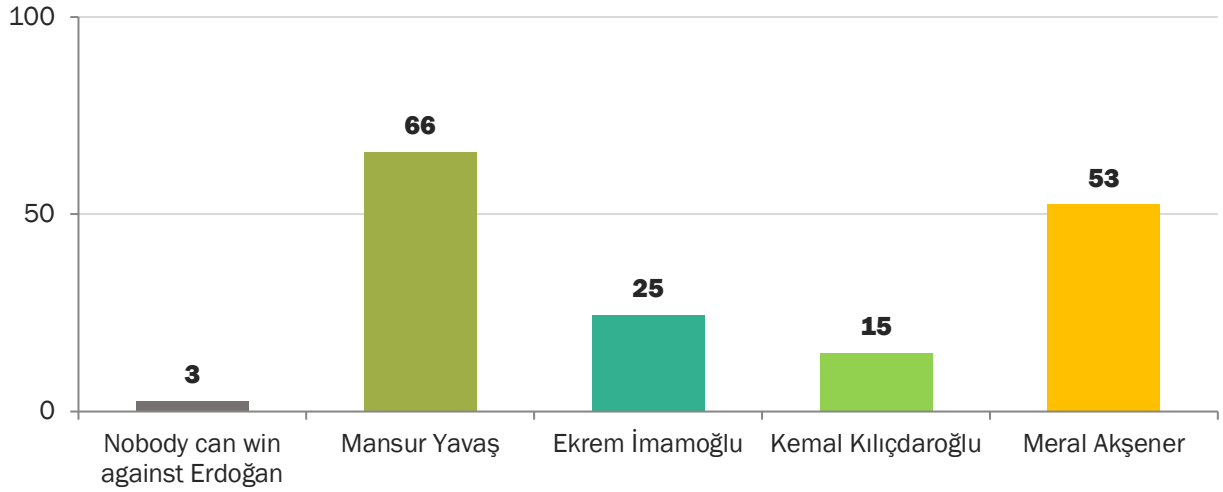
HDP voters, on the other hand, think that Kılıçdaroğlu and then Ekrem İmamoğlu can win the election among the four names we put in the options. Among HDP voters, the rate of those who say "other" apart from these four names is 30 percent.

HDP Voters
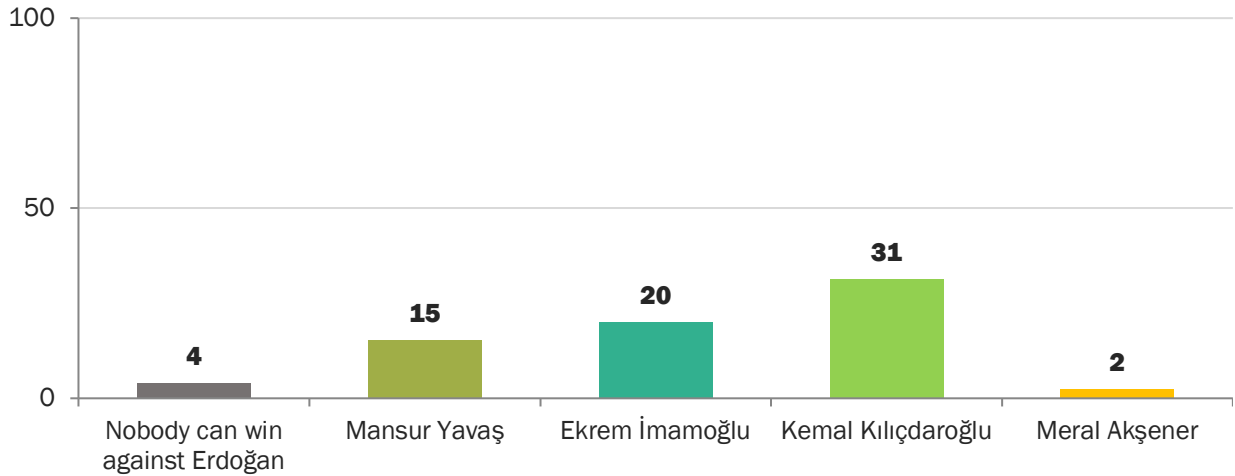
Nearly a quarter of swing voters answer the question as "No one can win against Erdoğan." Therefore, the remaining three quarters think that someone against Erdoğan can win the election. Mansur Yavaş is the person who the swing voters say most when it comes winning against Erdoğan.

Swing Voters

Nobody can win against Erdoğan	Mansur Yavaş	Ekrem İmamoğlu	Kemal Kılıçdaroğlu	Meral Akşener
27	34	10	6	6
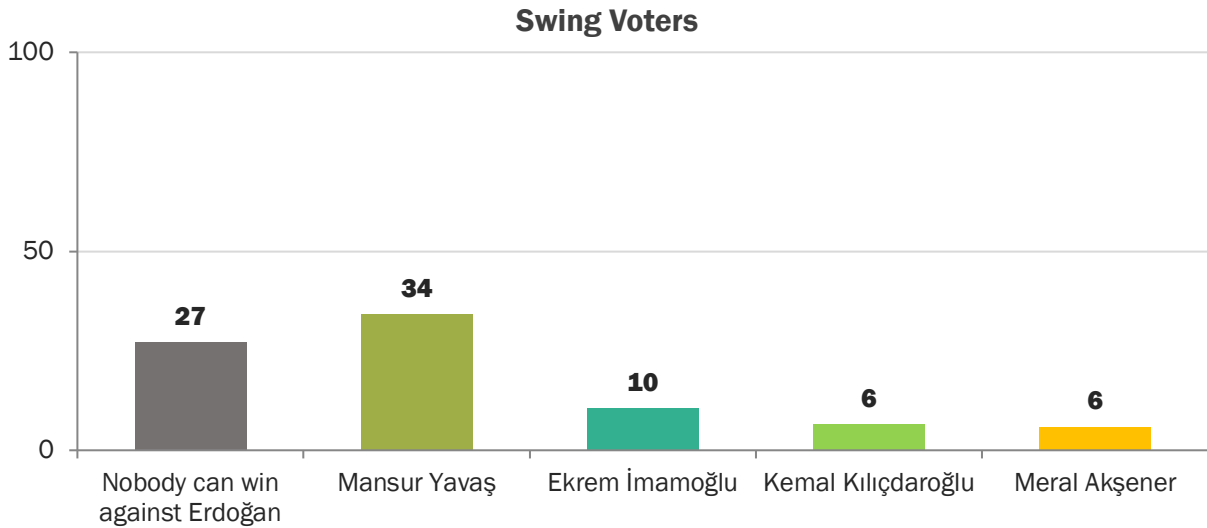
To sum up;

✓ **No matter who opposes Erdoğan in the next election, the rate of those who think that Erdoğan will win is less than one-third,** and those who think so are approximately one-fourth of the swing voters and half of the MHP voters.**.**

✓ **Mansur Yavaş is the name most mentioned when it comes winning against Erdoğan as a candidate.**

✓ **With the exception of HDP voters, the name Yavaş ranks first among all opposition constituencies and swing voters**. HDP voters, on the other hand, state that Kılıçdaroğlu or İmamoğlu can win the election against Erdoğan rather than Yavaş.

2.6. The Wisdom of the Crowds: Presidential Vote Predictions

In addition to asking the interviewees this month who they would vote for, we also asked how many votes they would get if Recep Tayyip Erdoğan and Kemal Kılıçdaroğlu were candidates. Thus, we wanted to learn not the voters' own preferences, but their observations and opinions about the general view of the political landscape. This method we use is called "the wisdom of the crowds."

British statistician Francis Galton describes what he calls the "wisdom of the crowds" in an article he published in Nature magazine in 1907: Although the estimates regarding the weight of a cattle in a festival competition are very contradictory, when the estimates of these 800 individuals are averaged, the number is very close to the actual weight of the cattle althoug nobody can estimate the actual weight correctly and some estimates are exaggerated. At the time of writing the article, Galton actually intends to argue that the public is not qualified to vote, and it is surprising that the average estimates are so close to the truth.[1]

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[1] http://galton.org/essays/1900-1911/galton-1907-vox-populi.pdf

Later studies on this subject show that, in the right circumstances, the average opinion of a group of people can be very illuminating on subjects that are unlikely to be known by any single individual or expert. In one example, a long search at sea for a lost submarine yielded no results, but the location of the submarine could be known with a deviation of 200 meters, thanks to the average of the estimates of a group of experts and non-experts about what happened to the submarine, at what speed and in what direction it might have gone. This method, which is based on the wisdom of the crowd, is used by the CIA, the intelligence agency of the UA to support its traditional methods by predicting when and what kinds of events may affect foreign policy in the world in the future. [2]

While the voter's estimate Erdoğan's vote rate in a possible election is 47 percent according to Turkey's average, this rate is 59 percent according to Ak Parti voters and 52 percent according to MHP voters.

Erdoğan received 52 percent of the domestic vote in the 2018 Presidential election. It seems that all constituencies, except for Ak Parti and MHP voters, have a perception that Erdoğan and therefore Ak Parti are losing votes.

What percentage of votes do you think Recep Tayyip Erdoğan would get if an election were held today?

Turkey	47
Ak Parti	59
MHP	52
CHP	38
HDP	40
İyi Parti	39
Other parties	39
Swing voter	48
Non-voter	49
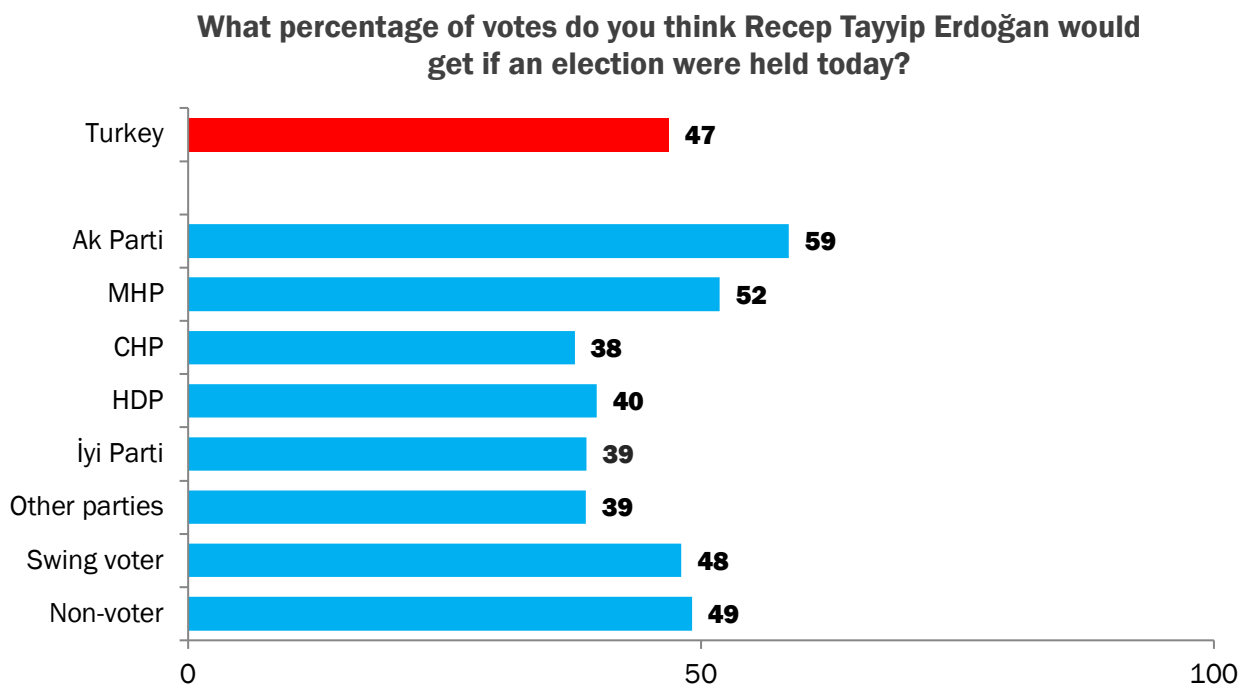
From a demographic point of view, **it can be said that housewives continue to be the cluster in which Erdoğan is strongest.** According to housewives, if Erdoğan enters an election d today, he could get 52 percent of the vote. In contrast, students and white-collar workers continue to be clusters of employment clusters where Erdoğan is weak.

As his lifestyle modernizes, Erdoğan's predicted vote dwindles. Religious Conservatives predict that Erdoğan will receive 53 percent of the total votes, compared to 42 percent by Moderns.

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[2] http://www.npr.org/blogs/parallels/2014/04/02/297839429/-so-you-think-youre-smarter-than-a-cia-agent?utm_campaign=storyshare&utm_source=share&utm_medium=twitter

What percentage of votes do you think Recep Tayyip Erdoğan would get if an election were held today?

Turkey	47
Housewife	52
Retiree	48
Worker,tradesman,farmer	45
Unemployed	45
Student	45
White collar employeee	44
Religious Conservative	53
Traditional Conservative	47
Modern	42
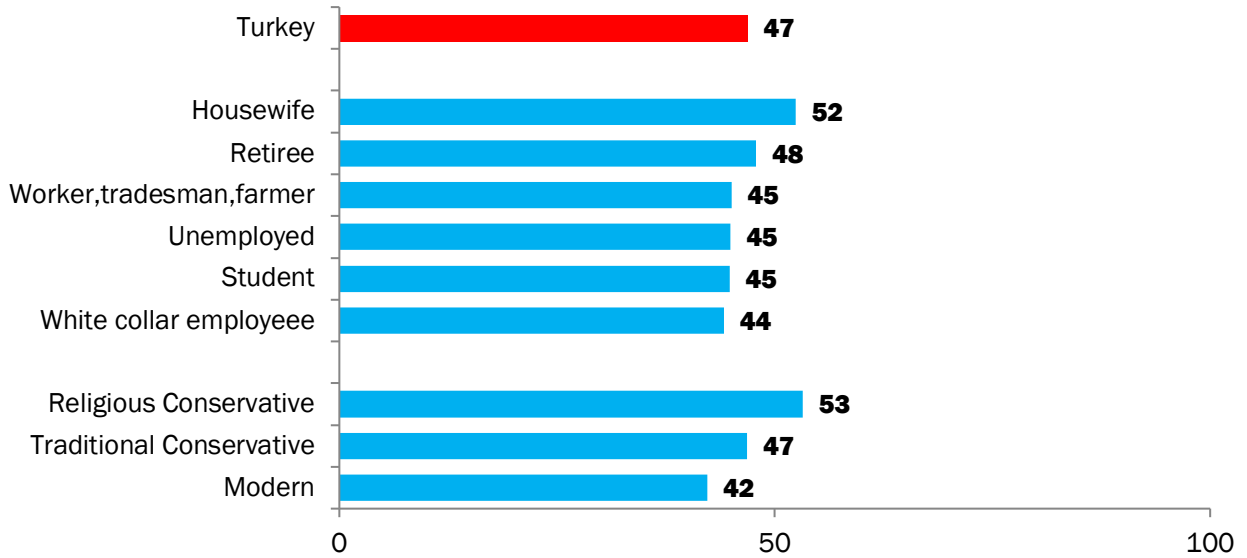
When we ask the same question for Kemal Kılıçdaroğlu, the estimated vote rate is 36 percent. The electorate cluster that predicts the votes that Kılıçdaroğlu will get the highest is CHP partisans. After the CHP, HDP and İyi Parti partisans come.

In your opinion, what percentage of votes would Kemal Kılıçdaroğlu get if an election were held today?

Turkey	36
Ak Parti	27
MHP	30
CHP	45
HDP	42
İyi Parti	38
Other parties	37
Swing voter	35
Non-voter	34
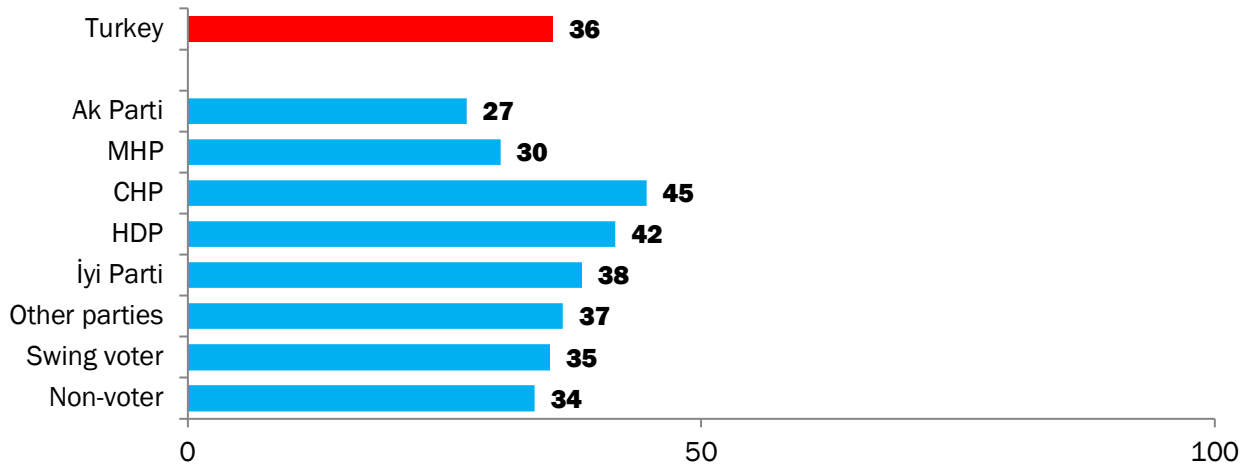
Since it is clear that the candidate of the Cumhur Alliance is Erdoğan, we can read Erdoğan's vote prediction as a more realistic vote prediction. However, the candidate of the Millet Alliance/Six-Party Table or the opposition parties in general against Erdoğan is not clear yet. Since Kılıçdaroğlu's name has come to the fore for the last three months, we asked this question through Kılıçdaroğlu. **Therefore, it would be more accurate to read Kılıçdaroğlu's vote prediction as a view of Kılıçdaroğlu's candidacy rather than a realistic prediction.**

It will be necessary to repeat the method of the wisdom of the crowd when the candidate of the Six-party Table is determined.

3. PERCEPTION OF THE ECONOMIC SITUATION AND LIVELIHOOD STRATEGIES

3.1. Government's Economic Policies

At the November'22 Barometer, we asked our interviewees what they thought about the government's economic policies. To our question, "How have the government's policies affected your family budget in the past year?" 77 percent of respondents say that the government's policies negatively affected their family budgets. Those who give positive answers to this question appear as 6 percent.

How have the government's policies affected your family budget in the past year?
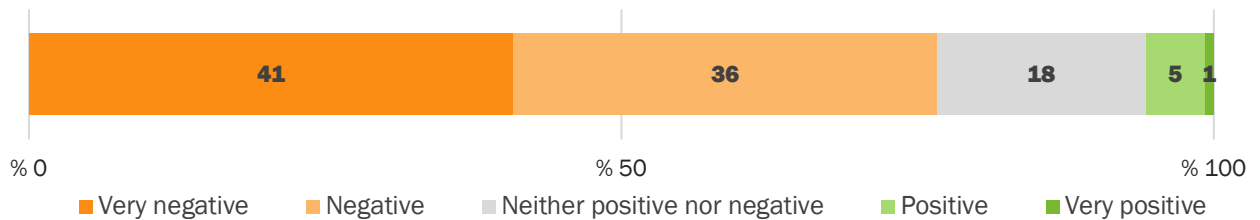
Very negative	Negative	Neither positive nor negative	Positive	Very positive
41	36	18	5	1

■ Very negative ■ Negative ■ Neither positive nor negative ■ Positive ■ Very positive

The highest negative response rate in years belongs to this month.

In the graph below, we see the answers to the question, "How have the government's policies affected your family budget in the past year?" given in the past years. According to the graph, it is seen that the number of those who gave negative answers gradually increased in the period from April'18 Barometer to November'22 Barometer. The 77 percent we measured this month is the highest rate measured in years.

How have the government's policies affected your family budget in the past year?

	Very negative	Negative	Neither positive nor negative	Positive	Very positive
October'15	21	37	25	16	1
February'18	16	40	30	13	1
April'18	11	31	43	13	2
May'18	17	33	33	15	2
June'18	20	32	30	16	2
September'18	19	41	34	5	1
March'19	25	38	25	10	2
September'21	31	37	25	5	1
November'21	38	37	22	3	1
November'22	41	36	18	5	1

■ Very negative ■ Negative ■ Neither positive nor negative ■ Positive ■ Very positive
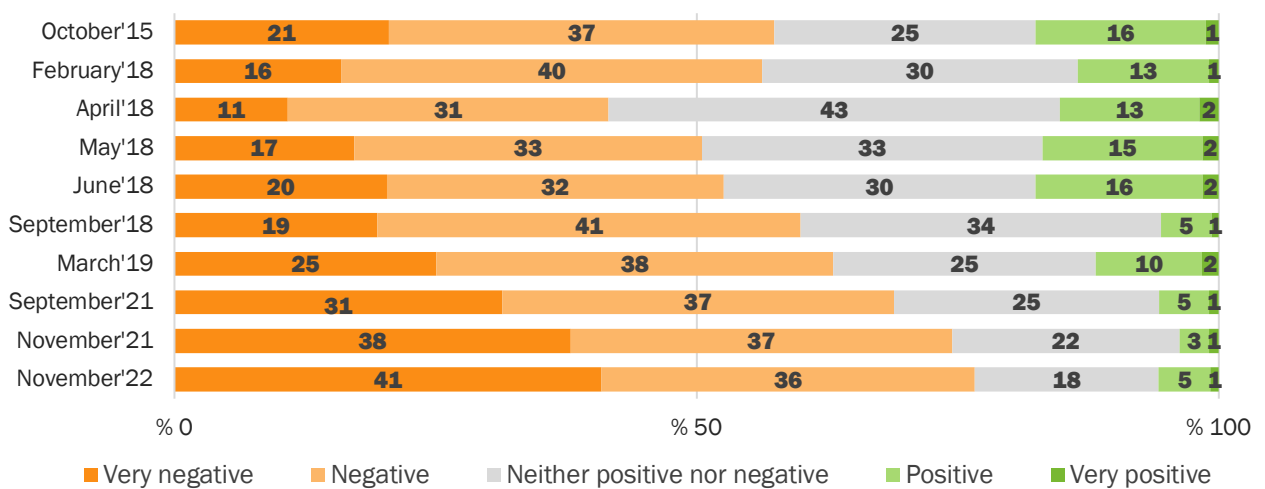
Let's examine the answers given to the question, "How have the government's policies affected your family budget in the past year?" according to the gender, age groups and educational status of the interviewees:

➢ While it is seen that 77 percent of women respond negatively, this rate is 75 percent for men.

➢ We see that those who gave the most negative answers to the question were in the 18-32 age group with 83 percent. This is followed by people aged 33-48 with 79 percent, and people aged 49 and over with 69 percent. We see that the lowest negative response rate, with 66 percent, belongs to the 15-17 age group.

➢ It is seen that as the level of education increases, the negative answers given to the above question also increase. We see that the highest rate of negative response belongs to university graduates with 84 percent.

How have government's policies affected your family budget in the past year?

Group	Very negative	Negative	Neither positive nor negative	Positive	Very positive
Turkey	41	36	18	5	1
Female	40	37	18	4	1
Male	41	34	18	6	1
Age 15 - 17	26	40	27	6	1
Age 18 - 32	43	40	13	3	1
Age 33 - 48	43	36	16	4	1
Age 49+	38	31	23	7	1
Less than high school	39	33	21	6	1
High school	41	38	16	4	0
University	44	40	12	4	1

■ Very negative ■ Negative ■ Neither positive nor negative ■ Positive ■ Very positive

The tendency of the incumbent bloc voters to respond negatively is increasing compared to 2019.
In the graph below, we see that those who gave the least negative answer to the question "How have the government's policies affected your family budget in the past year?" were the voters of the incumbent bloc. However, the rate of those who gave negative answers compared to March'19 shows an increase in the voters of the incumbent bloc this month. While the tendency to give negative answers for Ak Parti voters has increased by 26 points since March'19, it has increased by 16 points for MHP voters.

The negative response rate of opposition voters is over 90 percent.
The negative response rate of the opposition bloc voters has also increased this month compared to March'19. While this rate increased by 11 points in CHP voters compared to 2019, it

increased by 14 points in İyi Parti voters. In HDP voters, we see that this rate has increased by 13 points and reached 95 percent.

How have the government's policies affected your family budget last year?

		Very negative	Negative	Neither positive nor negative	Positive	Very positive
Ak Parti	March'19	4	15	41	33	7
	November'22	11	34	37	16	3
MHP	March'19	12	29	43	15	2
	November'22	29	28	33	9	1
CHP	March'19	46	38	15	2	0
	November'22	63	32	5	0	
HDP	March'19	48	34	12	5	2
	November'22	76	19	4	1	0
İyi Parti	March'19	33	46	18	2	0
	November'22	50	43	7	1	0
Other parties	March'19	29	29	35	6	0
	November'22	55	40	4	1	0
Swing voter	March'19	18	36	36	9	1
	November'22	39	42	18	1	0
Non-voter	March'19	27	44	22	6	1
	November'22	43	41	13	2	0

Now, let's examine the answers to the question, "How have the government's policies affected your family budget in the last year?" according to the monthly household income and economic class of the people:

➢ We see that as the monthly household income of people increases, the rate of negative answers to the above question also decreases. While the highest rate of negative responses belonged to the income group of 2000 TL and below with 89 percent, we see that this rate is 71 percent for those with an income level of 10001 TL and above.

> ➤ We see that there is a decrease in negative response rates as the economic class of people increases. While the highest rate of negative response belongs to people in the lower-income group with 86 percent, the lowest rate is seen to belong to those in the high-income group with 71 percent.

How have the government's policies affected your family budget in the past year?

	Very negative	Negative	Neither positive nor negative	Positive	Very positive
Turkey	41	36	18	5	1
2000 TL and below	64	25	9	2	1
2001 - 3000 TL	55	33	10	1	1
3001 - 5000 TL	47	33	13	6	1
5001 - 8000 TL	45	35	15	4	1
8001 - 10000 TL	39	37	18	5	1
10001 TL and above	33	38	22	7	1
Lower income	52	34	10	3	1
Low middle class	45	35	16	4	1
New middle class	34	38	20	7	1
Upper income	36	35	20	7	1

In the graph below, we analyzed the answers of the people who said, "The government's policies have 'negatively' affected our family budget", along with the trend of change over the years, according to their employment status.

The negative response rate is higher in the working population.

According to the graph below, we see that the rate of negative responses given to the above statement by employed and unemployed people increased in the period from April'18 to November'22. The negative response rate among those who stated that they were working has increased by 34 points in the period since April'18 and reached 79 percent. On the other hand, we see that this ratio has increased by 27 points to 74 percent among those who state that they do not work.

Those who say that government's policies affected the family budget negative
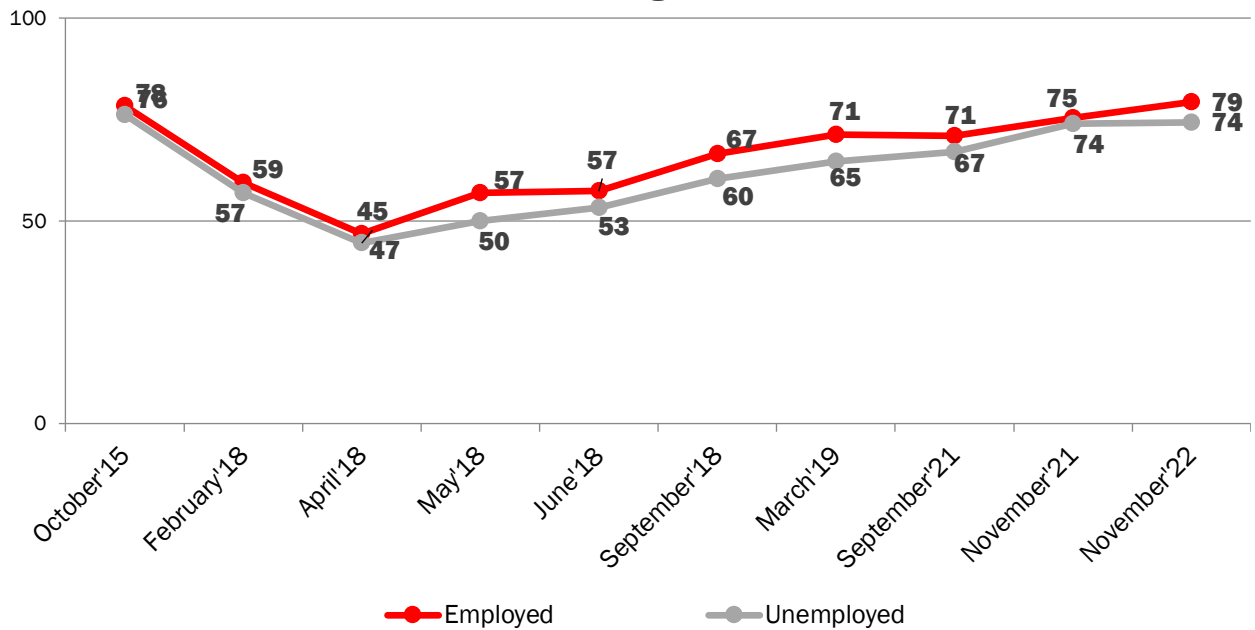
Employed — Unemployed

Four out of 5 people think that the government's policies negatively affect the country's economy.

According to the graph below, 80 percent of society thinks that the government's policies negatively affect the country's economy. The rate of those who answered positively to this question is 7 percent.

How have government's policies affected Turkey's economy in the past year?

| 47 | 33 | 14 | 6 | 1 |

% 0   % 50   % 100

■ Very negative ■ Negative ■ Neither positive nor negative ■ Positive ■ Very positive
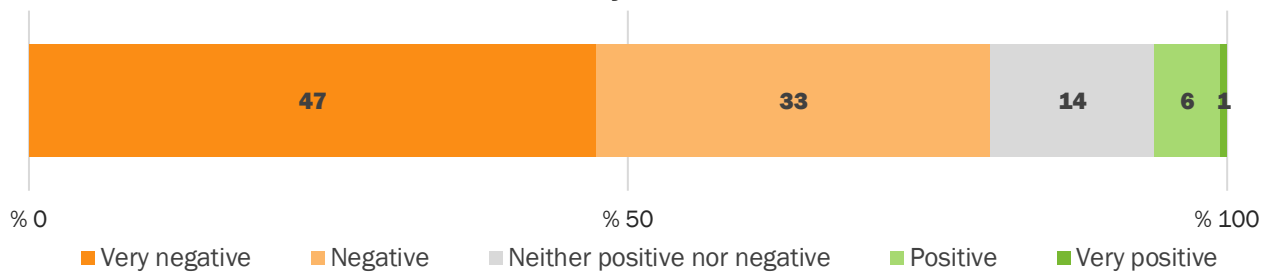
The highest negative response rate in years belongs to this month.

In the graph below, it is revealed that the number of people who gave negative answers to the above question gradually increased from the April'18 Barometer to the November'22 Barometer. We see that 80 percent of the interviewees of the November'22 Barometer gave a negative answer to this question. This is the highest rate measured in years.

How have the government's policies affected Turkey's economy in the past year?

Date	Very negative	Negative	Neither positive nor negative	Positive	Very positive
October'15	22	40	18	18	2
February'18	17	37	25	19	2
April'18	13	33	30	20	3
May'18	20	33	26	18	2
June'18	21	34	24	18	2
March'19	27	37	22	12	2
May'22	37	35	18	9	2
November'22	47	33	14	6	1

■ Very negative   ■ Negative   ■ Neither positive nor negative   ■ Positive   ■ Very positive
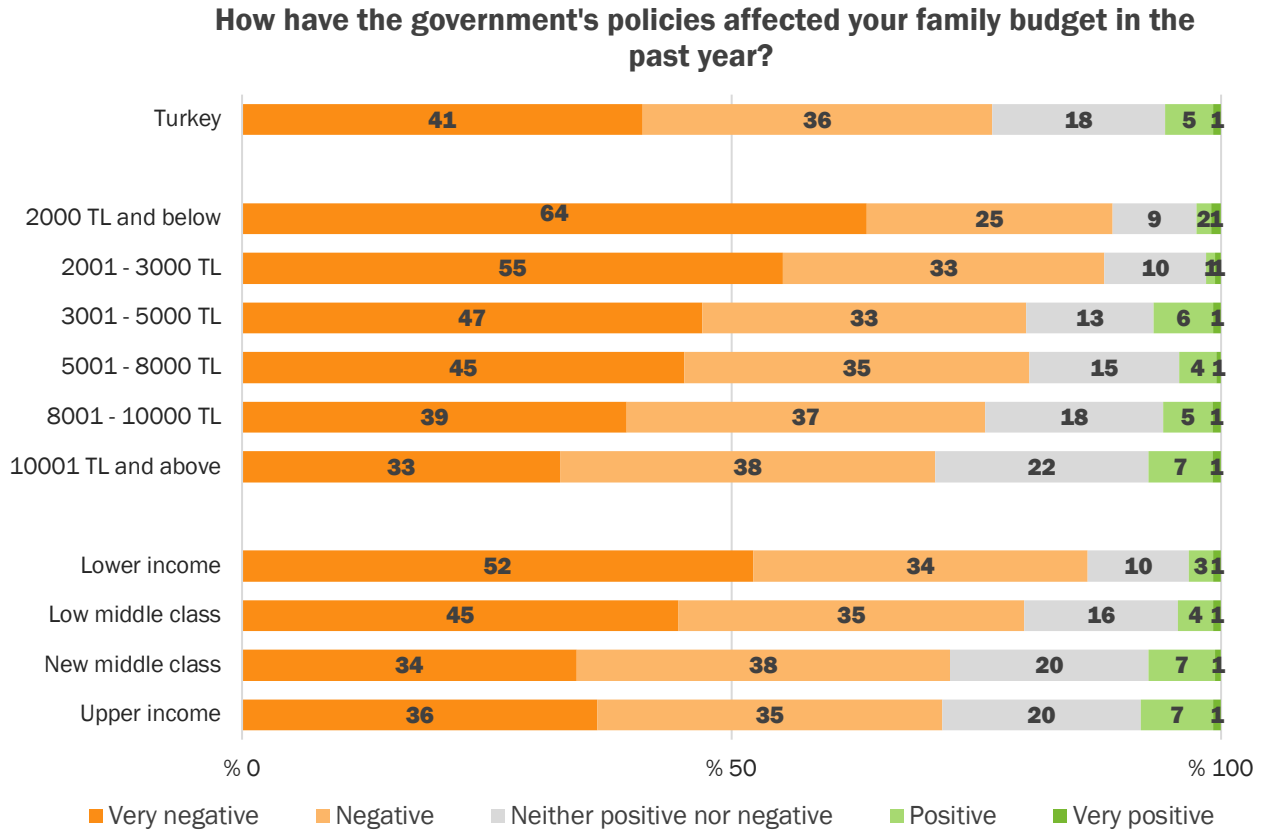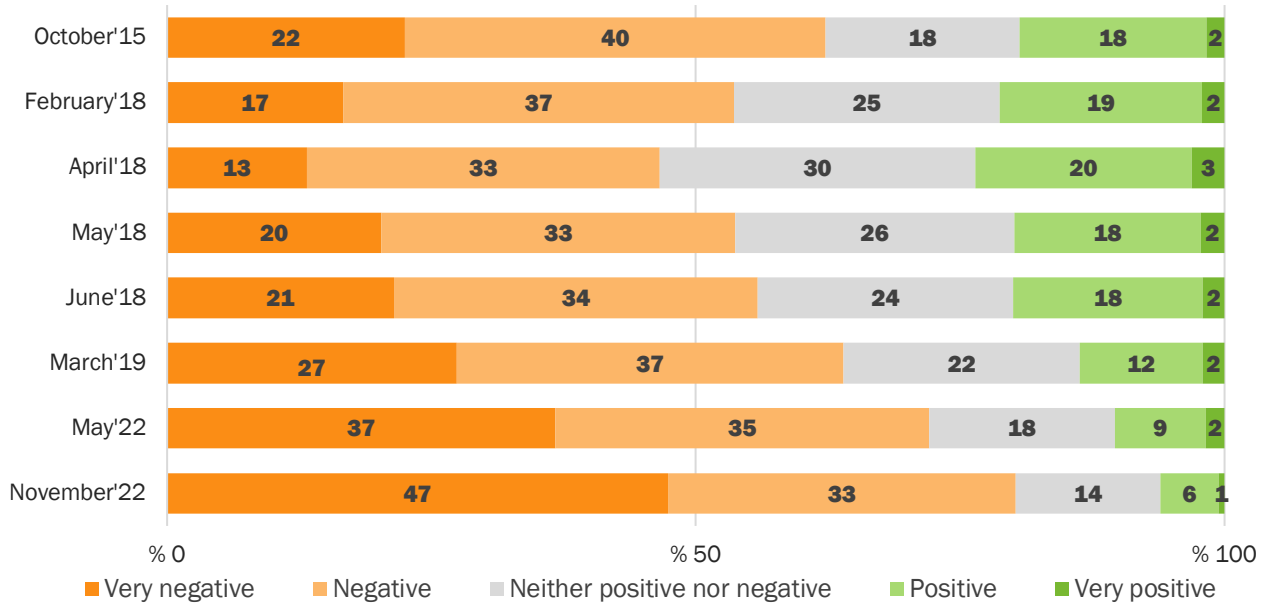
Let's examine the answers given to the question "How have the government's policies affected the country's economy in the last year?" according to the gender, age group and education level of the interviewees.

➢ While 81 percent of women gave a negative answer, this rate is 79 percent for men.

➢ It is seen that the highest rate of those who gave negative answers belonged to the 18-32 age group with 86 percent. The lowest rate of negative responses was seen in the age group 49 and over, with 73 percent.

➢ We see that as the level of education increases, negative responses also increase. Among those who gave negative answers, the highest rate was among university graduates with 88 percent, while the lowest rate was seen in the group with below high school education with 75 percent.

How have the government's policies affected Turkey's economy in the past year?

	Very negative	Negative	Neither positive nor negative	Positive	Very positive
Turkey	47	33	14	6	1
Female	46	35	14	5	0
Male	48	31	13	6	1
Age 15 - 17	41	40	13	6	0
Age 18 - 32	53	33	10	3	0
Age 33 - 48	49	33	13	5	1
Age 49+	41	32	18	9	1
Less than high school	42	33	17	7	1
High school	49	33	12	5	0
University	55	33	8	3	1

The negative response rate among incumbent bloc voters has been increasing since 2019.

We see that those who gave a negative answer the least to the question "How have the government's policies affected the country's economy in the last year?" were again the voters of the incumbent bloc. However, compared to March'19, we see that the rate of those who gave negative answers increased this month among the voters of the incumbent bloc. While the negative response rate for Ak Parti voters has increased by 14 points since March'19, it has increased by 9 points for MHP voters.

The negative response rate of opposition voters is over 95 percent.

Compared to March'19, the rate of negative answers to this question has increased this month among opposition voters. While this rate for CHP and İyi Parti voters increased by 4 points compared to 2019 and reached 97 percent, for HDP voters, this rate increased by 2 points and reached 98 percent.

How have the government's policies affected Turkey's economy in the past year?

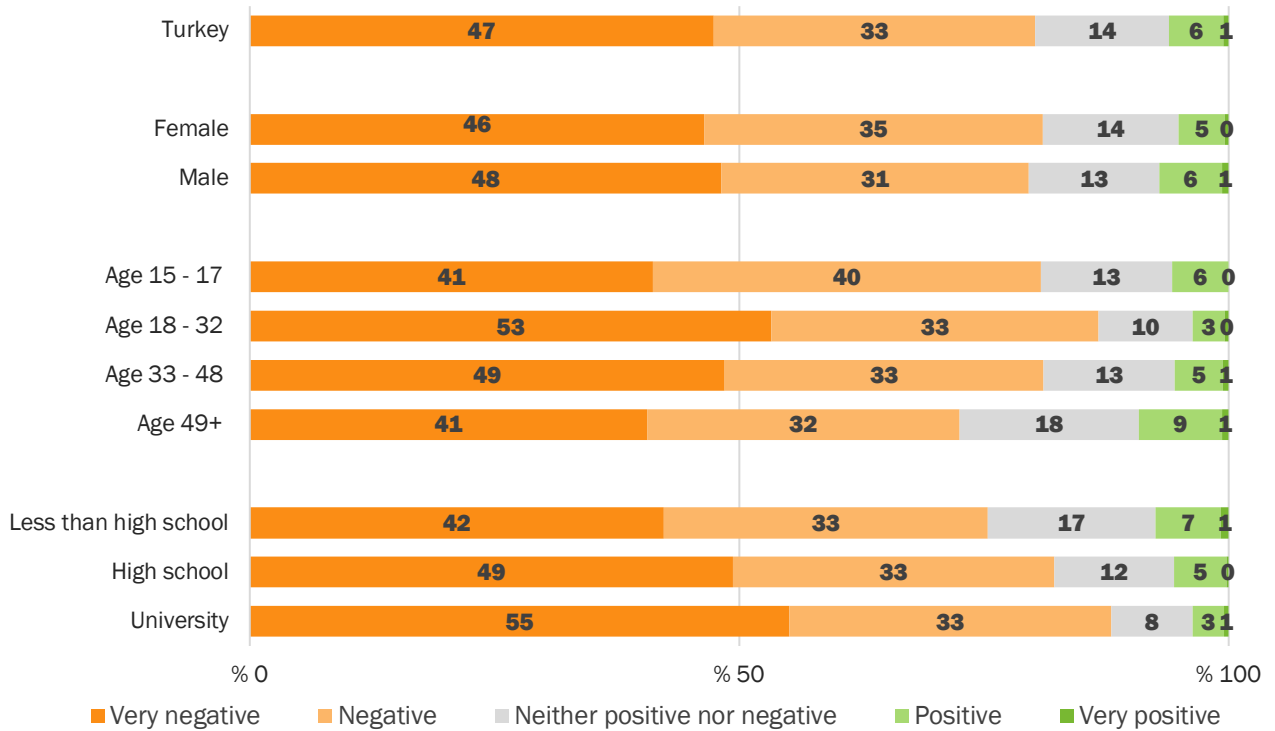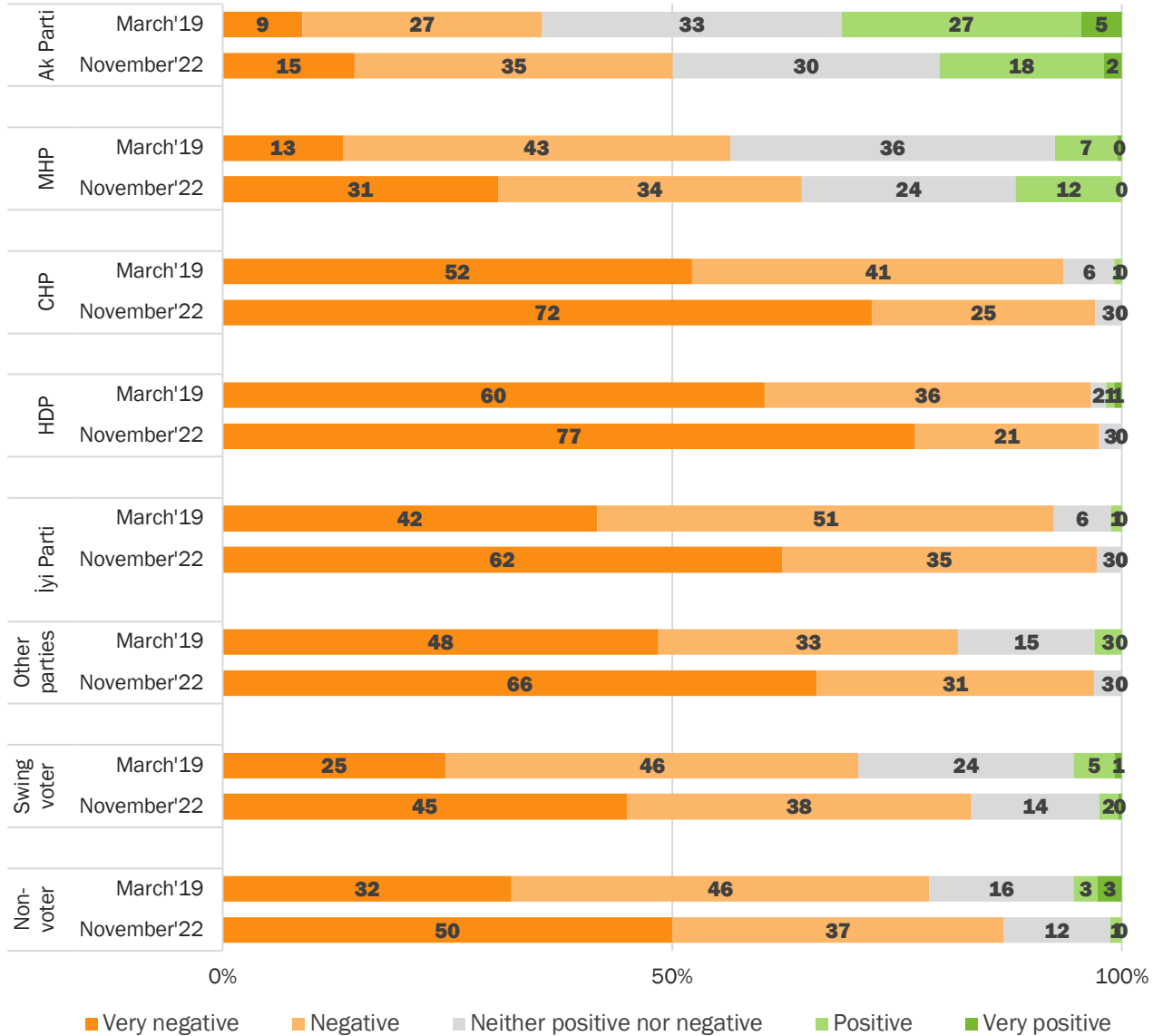|		Very negative	Negative	Neither positive nor negative	Positive	Very positive
Ak Parti	March'19	9	27	33	27	5
	November'22	15	35	30	18	2
MHP	March'19	13	43	36	7	0
	November'22	31	34	24	12	0
CHP	March'19	52	41	6	1	0
	November'22	72	25	3	0	0
HDP	March'19	60	36	2	1	1
	November'22	77	21	3	0	0
İyi Parti	March'19	42	51	6	1	0
	November'22	62	35	3	0	0
Other parties	March'19	48	33	15	3	0
	November'22	66	31	3	0	0
Swing voter	March'19	25	46	24	5	1
	November'22	45	38	14	2	0
Non-voter	March'19	32	46	16	3	3
	November'22	50	37	12	1	0

When we evaluate the answers given to the question "How have the government's policies affected the country's economy?" according to the monthly household income and economic class of the people:

➢ It turns out that as the monthly household income of the people increases, the rate of negative answers to the question also decreases. While the highest rate of negative responses belonged to those in the income group of 2000 TL and below, and those in the 2001-3000 TL income group, 78 percent of the people with an income level of 10001 TL and above think that the government's policies negatively affected their family budgets.

➢ According to the economic classes, we see that the highest negative response rate is in the lower-income group with 89 percent. The lowest negative response rate, 76 percent, belongs to the new middle class.

How have the government's policies affected Turkey's economy in the past year?

	Very negative	Negative	Neither positive nor negative	Positive	Very positive
Turkey	47	33	14	6	1
2000 TL and below	67	21	9	3	1
2001 - 3000 TL	58	30	10	2	0
3001 - 5000 TL	49	33	11	6	1
5001 - 8000 TL	49	34	12	5	1
8001 - 10000 TL	46	33	14	7	1
10001 TL and above	44	34	16	6	1
Lower income	56	33	8	3	1
Low middle class	48	34	13	5	0
New middle class	42	34	16	7	1
Upper income	49	32	12	7	1

■ Very negative ■ Negative ■ Neither positive nor negative ■ Positive ■ Very positive
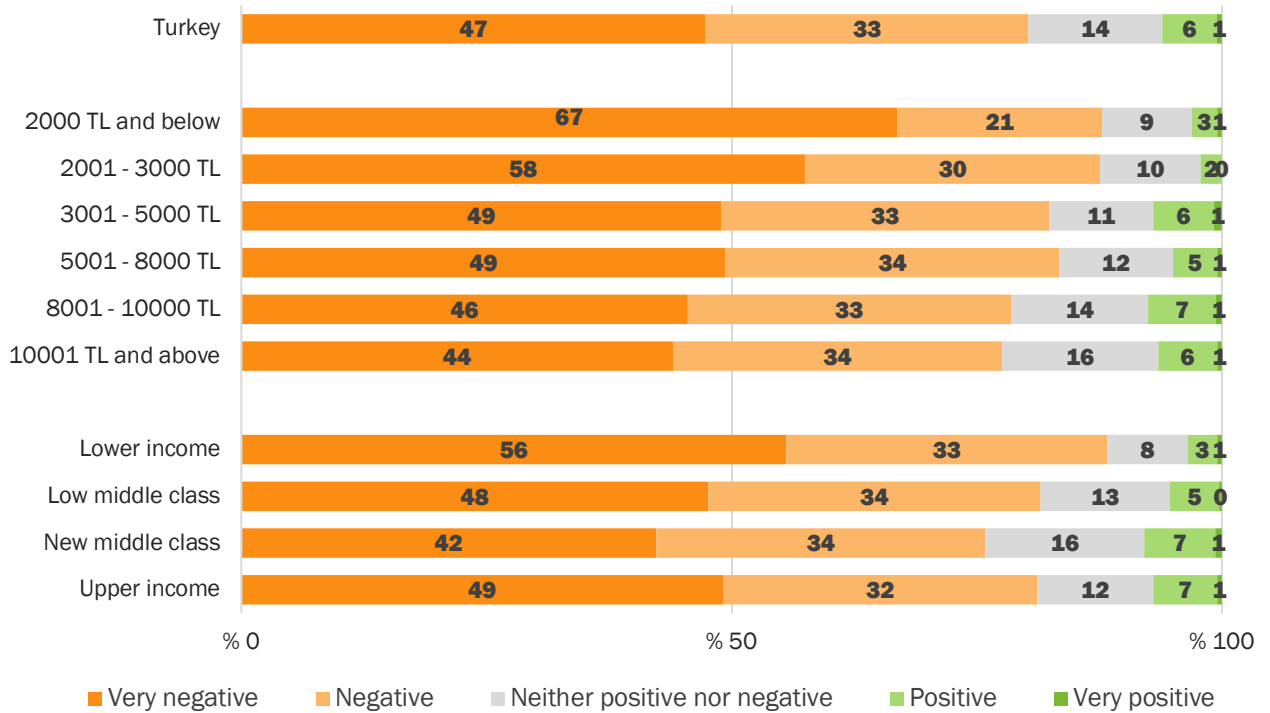
In the graph below, we analyzed the people who said, "The government's policies have 'negatively' affected the country's economy," along with the trend of change over the years, according to their employment status.

Those who say that the government's policies affected Turkey's economy negatively

	October'15	February'18	April'18	May'18	June'18	March'19	May'22	November'22
Employed	66	57	53	61	62	73	75	79
Unemployed	60	54	50	53	56	66	70	82

━●━ Employed   ━●━ Unemployed
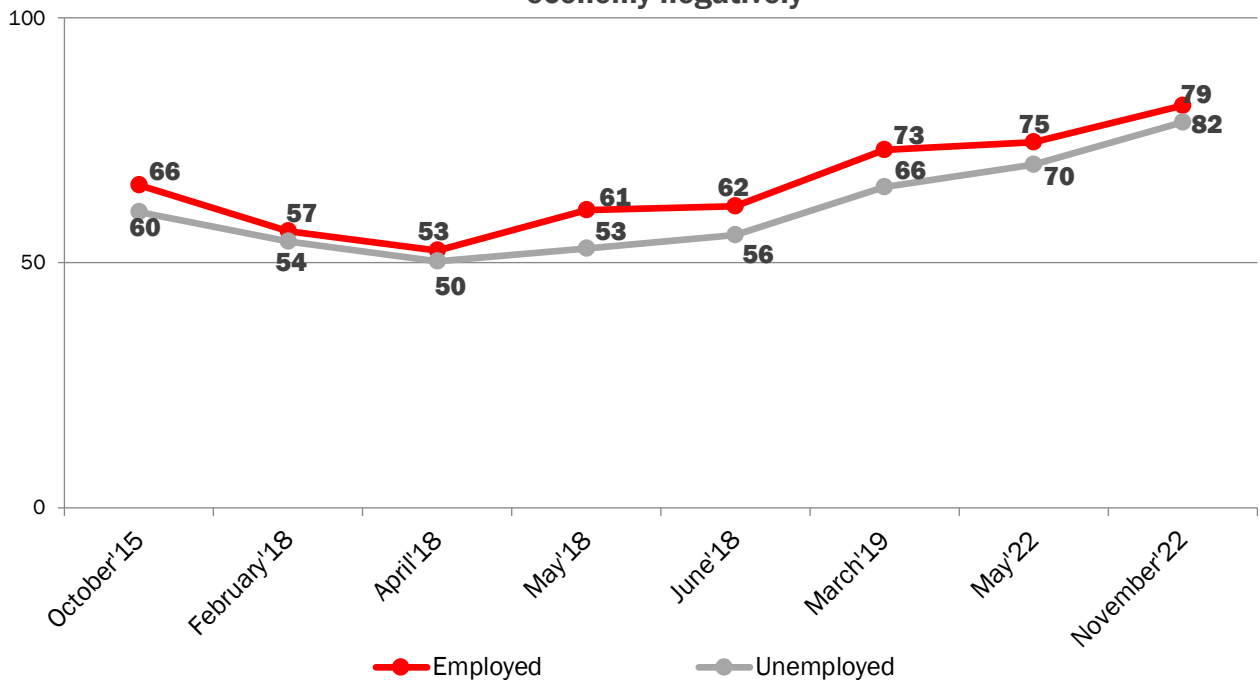
The tendency to respond negatively is higher in the working population.

According to the graph above, we see that the rate of negative responses given by employed and unemployed people increased in the period from April'18 to November'22. The negative response rate among those who state that they are employed has increased by 29 points since April'18 and reached 82 percent. On the other hand, we see that this ratio has increased by 29 points to 79 percent among those who state that they are unemployed.

How can we interpret these findings from a political standpoint?

As can be seen, society's evaluation of how the government's economic policies affect the family budget and the country's economy is parallel to each other. The fact that the voters of the incumbent bloc think that the family budget is more negatively affected against the country's economy may indicate an attitude that depends on the relationship of political support in their perceptions of the country's economy. We will also refer to this situation in the Morale Index section. However, the negative attitude of both Ak Parti and MHP voters towards both situations seems to have increased in the past months.

The monthly change series across society indicates that the negative course strengthened in both cases, but society shifted to an unstable position as the election period approached (April-May'18). Action taken by the government will show whether this situation will progress with similar dynamics in the upcoming election period or not. So much so that the worsening conditions in the country's economy since 2018 may cause society to enter the election period with a negative attitude toward the government's policies.

3.2.   Perception of Class Position

We asked the question "If we divided all the people in our country into 4 groups in terms of income and wealth, which group do you think you are in?" to the November'22 Barometer interviewees and from this question we tried to measure their perception of class position.

If we divided all the people in our country into 4 groups in terms of income and wealth, which group do you think you are in?

	Poor	Below average	Above average	Rich
HT'15	12	43	43	1
September'16	9	54	36	1
March'17	12	54	33	1
May'17	12	55	32	1
HT'18	9	40	49	2
September'18	11	58	30	1
May'22	17	50	32	1
HT'22	14	45	39	1
November'22	20	51	28	1

■ Poor   ■ Below average   ■ Above average   ■ Rich
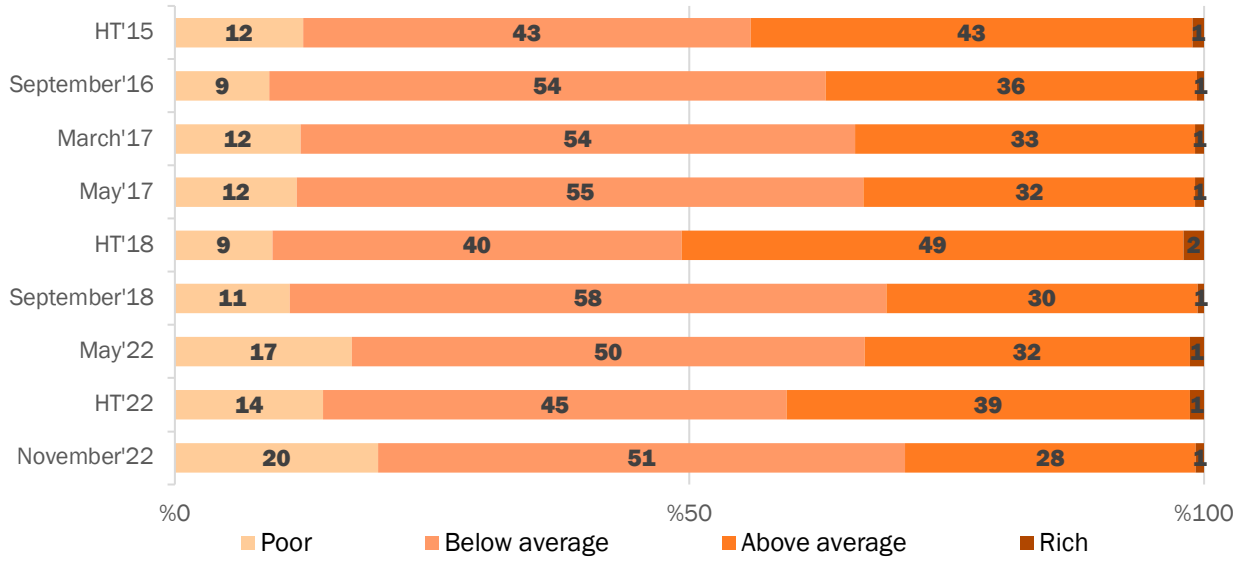
When we compare the answers given to the question with our previous studies, we see that the number of people who state that they are in the poor group has increased in the period from 2015 to the November'22 Barometer. This month, 20 percent of the interviewees think that they are in the poor group. This is the highest rate measured since 2015.

Those who define themselves as the poor group are the least among Ak Parti voters.

Among those who say they are in the poor group; the lowest rate is among Ak Parti voters with 10 percent. This is followed by MHP voters with 13 percent. Accordingly, the rate of those who define themselves in the poor group among the voters of the incumbent bloc is lower than the population of Turkey.

If we divided all the people in our country in 4 groups in terms of income and wealth which group you think you are in?

	Poor	Below average	Above average	Rich
Turkey	20	51	28	1
Ak Parti	10	44	44	2
MHP	13	51	35	2
CHP	22	53	24	1
HDP	48	42	10	0
İyi Parti	18	58	24	0
Other parties	18	52	29	0
Swing voter	19	58	23	0
Non-voter	25	46	28	2
Those who would vote for Kemal Kılıçdaroğlu	25	53	21	0
Those who would vote Recep Tayyip Erdoğan	11	48	40	1
Those who will not cast a vote	24	52	23	1

■ Poor   ■ Below average   ■ Above average   ■ Rich

Those who define themselves as poor are mostly HDP voters.

Among the opposition voters, the rate of those who identify themselves in the poor group is higher than the voters of the incumbent bloc. This rate is 22 percent for CHP voters, 18 percent for İyi Parti voters and other party voters. The highest rate of those who define themselves in the poor group belongs to HDP voters with 48 percent. Among swing voters, 19 percent say they are in the poor group.

While 25 percent of those who prefer Kemal Kılıçdaroğlu for the presidency state that they belong to the poor group, this rate is measured as 11 percent in those who prefer Recep Tayyip Erdoğan. We see that 24 percent of those who say they will not vote for the presidency see themselves as the poor group.

Those who identify themselves in the poor group are the highest among Traditional Conservatives.

Eighteen percent of those who define themselves as Modern think that they are in the poor group. This is 4 points lower than the population of Turkey. While 22 percent of those who define themselves as Traditional Conservatives say they are in the poor group, this rate is 20 percent among Religious Conservatives.

The rate of people who define themselves as poor among Kurds is higher than among Turks.

When we analyze the answers given to the above question according to the ethnic origins of the people, we see that 14 percent of the Turks define themselves as the poor group. This rate is 39 percent among Kurds. Accordingly, the rate of Kurds who define themselves as poor is 25 points more than Turks who define themselves as poor.

If we divided all of the people in our country in 4 groups in terms of income and wealth which group do you think you are in?

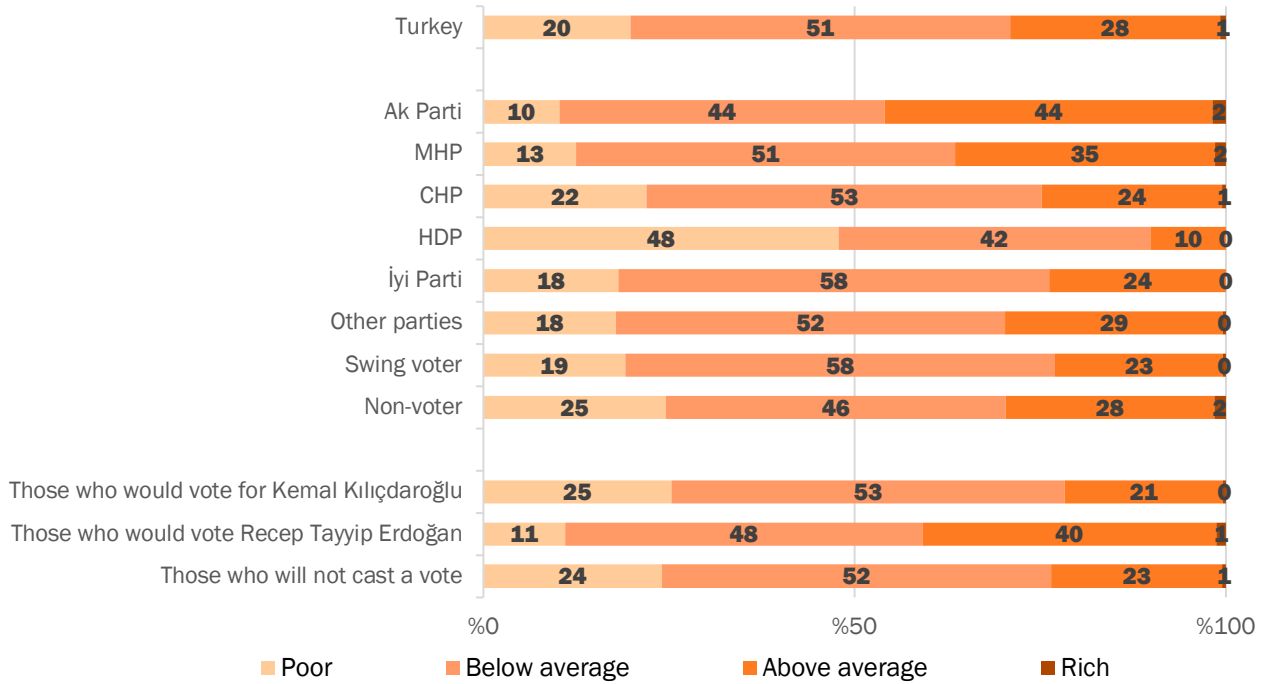|	Poor	Below average	Above average	Rich
Modern	18	49	32	1
Traditional Conservatives	22	52	26	1
Religious Conservatives	20	53	27	1
Turkish	14	52	33	1
Kurdish	39	50	11	1
Atheist	25	44	28	4
Non-believer	27	35	35	3
Believer	19	52	29	1
Religious	19	53	27	1
Devout	20	47	31	2

■ Poor   ■ Below average   ■ Above average   ■ Rich
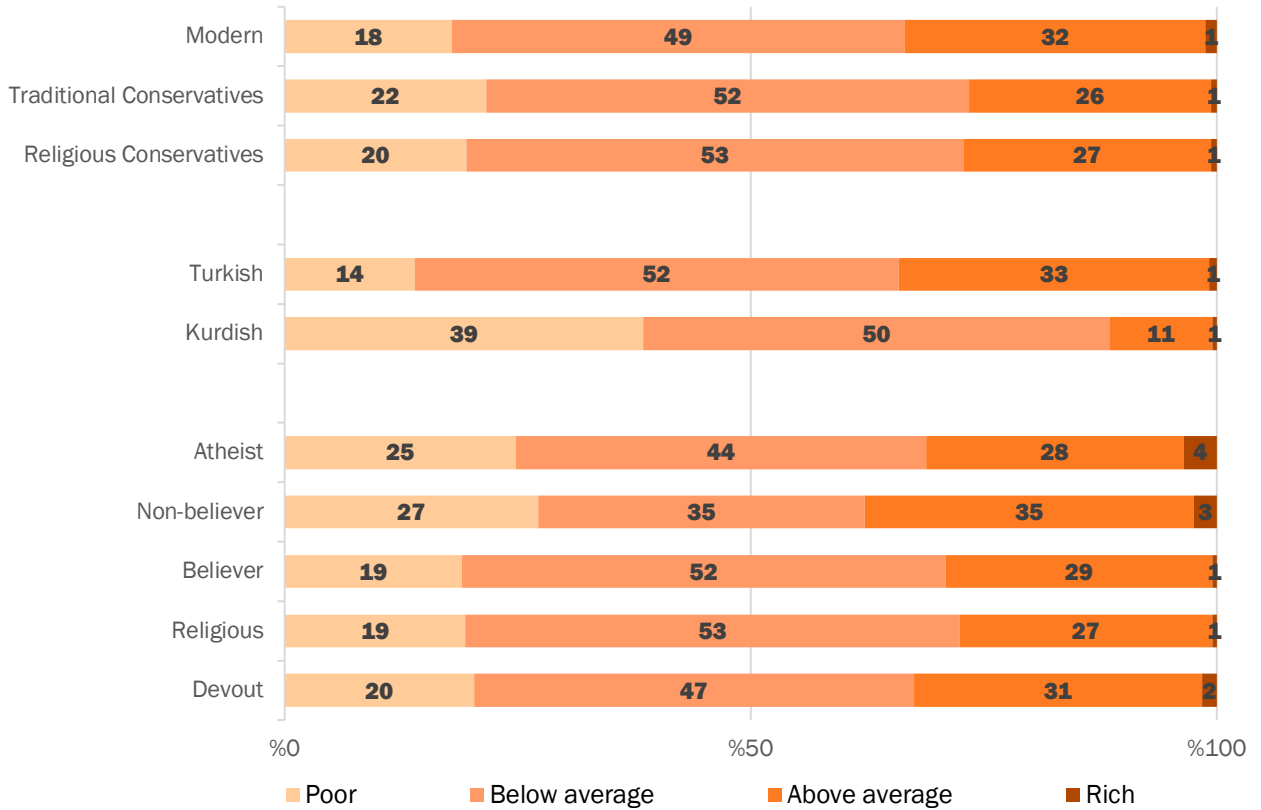
The highest rate of those who define themselves as poor is among non-believers.

We see that the highest rate of those who say they are in the poor group belongs to those who define themselves as non-believers with 27 percent. The lowest rate of those who state that they are in the poor group is those who describe themselves as faithful and religious with 19 percent. We see that 25 percent of atheists define themselves as poor, while 4 percent of them describe themselves as rich.

If we divided all of the people in our country in 4 groups in terms of income and wealth which group do you think you are in?

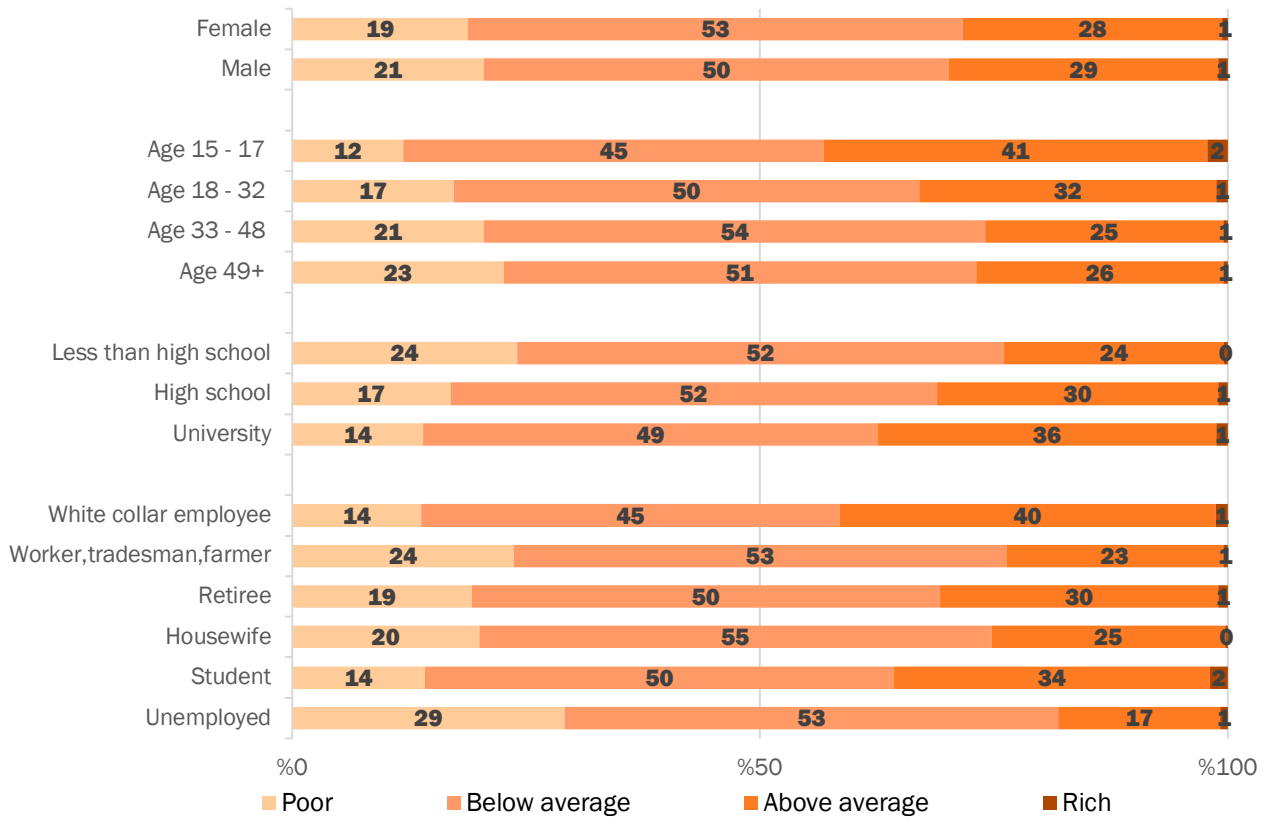|	Poor	Below average	Above average	Rich
Female	19	53	28	1
Male	21	50	29	1
Age 15 - 17	12	45	41	2
Age 18 - 32	17	50	32	1
Age 33 - 48	21	54	25	1
Age 49+	23	51	26	1
Less than high school	24	52	24	0
High school	17	52	30	1
University	14	49	36	1
White collar employee	14	45	40	1
Worker,tradesman,farmer	24	53	23	1
Retiree	19	50	30	1
Housewife	20	55	25	0
Student	14	50	34	2
Unemployed	29	53	17	1

As seen in the graph, 19 percent of women and 21 percent of men describe themselves as poor. In class perception, the group aged 49 and over is the group that feels the highest rate of being poor, with 23 percent. It is seen that this rate is at the lowest level with 12 percent in the 15-17 age group. We can think that the increase in the perception of poverty with the increase in age may be related to whether people are included in the workforce or not.

As the level of education increases, we see a decrease in the number of people who define themselves as poor. We see that the highest rate of those who state that they are poor belongs to those with below high school education with 24 percent, while the lowest rate is among university graduates with 14 percent.

The unemployed have the highest rate with 29 percent in terms of defining themselves as poor. It is followed by workers, tradespeople and farmers with 24 percent and housewives with 20 percent. On the other hand, among those who state that they are in the poor group, we see that the lowest rate, with 14 percent, belongs to white-collar workers and students.

3.3. Possessions

In this month's survey, we repeated the ownership question that we included in our Lifestyles and Barometer surveys. While examining society's perception of the economic situation, we wanted to include the current situation of what they possess in our analysis. We also used the answers given to this question in the material deprivation measurement, which we included in the theme section of our report. We will return to this question in the theme section. Now let's look at what society owns in general.

Which of the following do you own?

Item	Percent
Washing machine	93
TV	86
Smart phone	81
Dishwasher	78
Fixed internet	63
Mobile phone	57
Computer	45
Deep freeze	36
Coffee machine	26
Air conditioning	23
Tea machine	23
Robot vacuum cleaner	20
Tablet	18
Drying machine	13
Game console	6
E-book reader	1
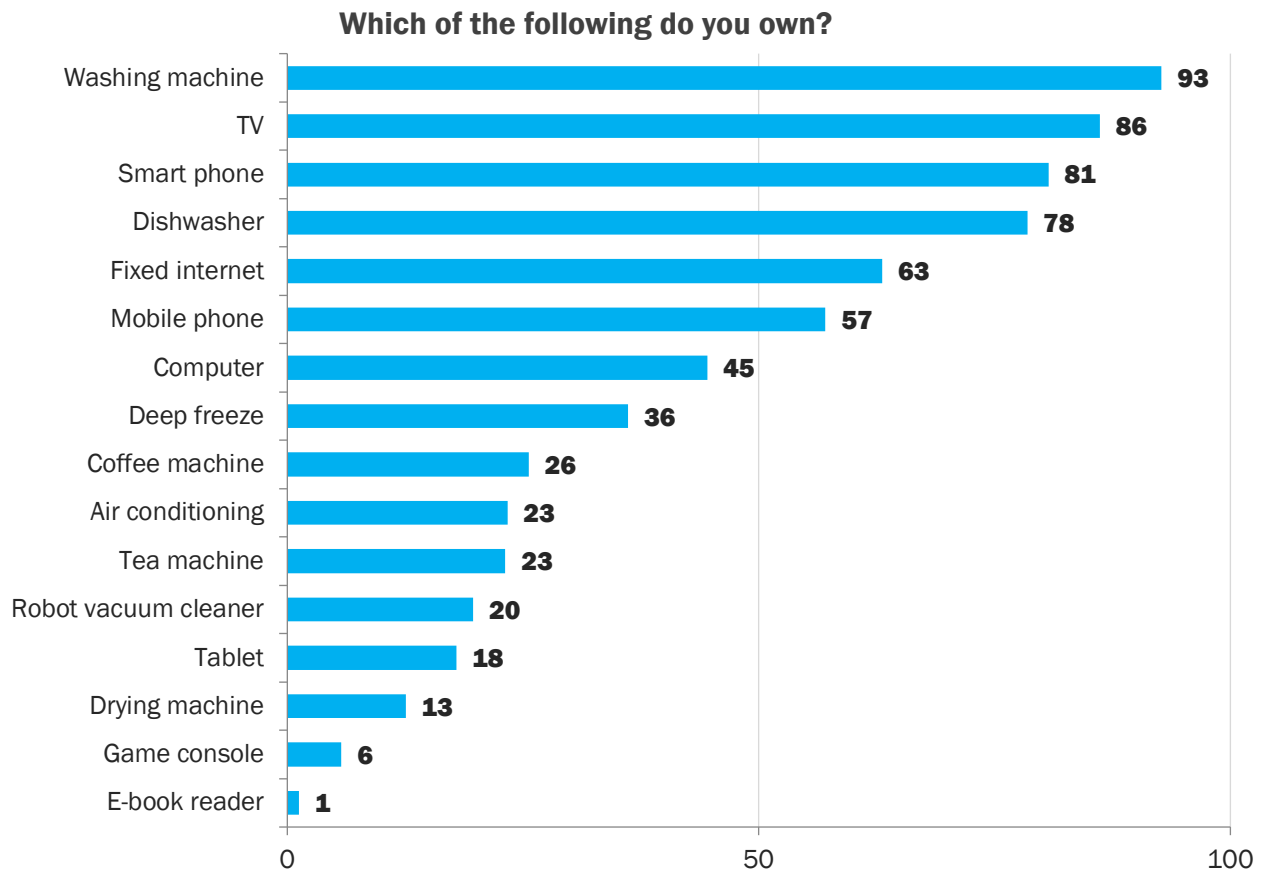
The most owned item is the washing machine.
According to the chart, the most owned item is the washing machine, with 93 percent. This is followed by television with 86 percent, the smartphone with 81 percent and the dishwasher with 78 percent.

The percentage of people who own a computer in society is less than 50 percent.
We see that the rate of those who own a computer is 45 percent. While the rate of those who own a game console is 6 percent, only 1 percent of people own an e-book reader.

Ownership of coffee machines, robot vacuum cleaners and dryers are increasing.
In our research, we see that 26 percent of the society owns a coffee machine, 20 percent has a robot vacuum cleaner and 13 percent has a dryer. These rates point to an increase in the number of people who own these products throughout society.

Now let's look at the demograph breakdown of a few owned items that stand out in ownership.

Freezer ownership is higher in rural areas.

Freezer ownership is higher in rural areas than in urban and metropolitan areas. Ownership of coffee and tea machines, robot vacuum cleaners and dryers are increasing with urbanization. With the metropolitanization, the ownership status of practical products such as coffee machines and robot vacuums is increasing in an effort to make life easier. Similarly, we can think about the relationship between the freezer needs of those living in rural areas and their life practices.

Which of the following do you own?

Item	Rural	Urban	Metropolis
Deep freeze	41	36	35
Coffee machine	12	19	32
Robot vacuum cleaner	11	19	22
Tea machine	9	21	27
Drying machine	7	13	13
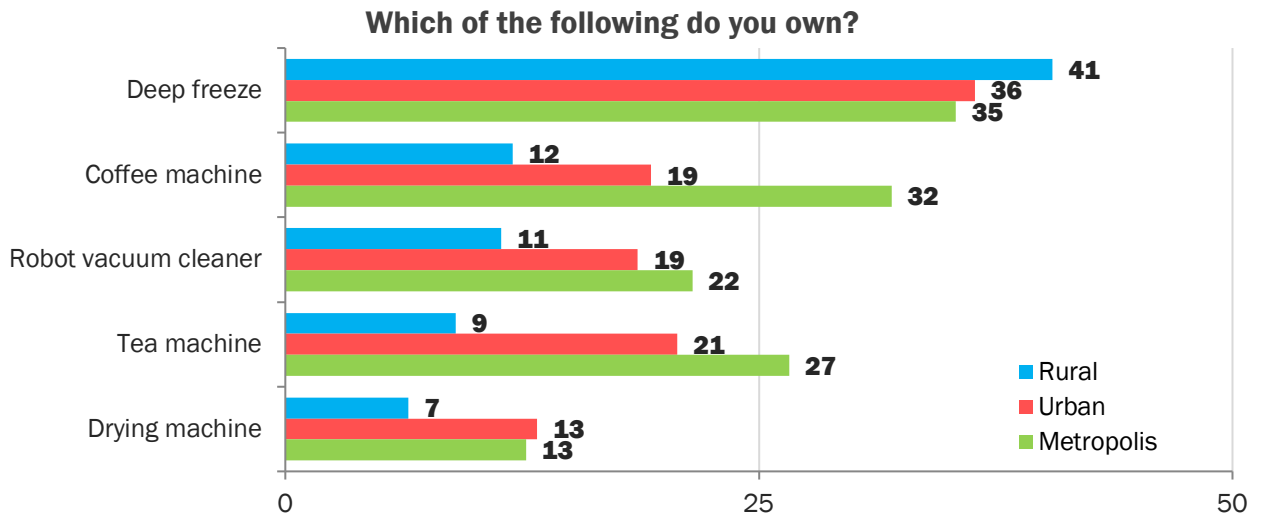
Deep freezer ownership increases with the increase in age, albeit by one point for each age group. On the other hand, other ownerships decrease with increasing age. While 30 percent of the 18-32 age group have a coffee machine, this rate is 26 percent for the 33-48 age group, and 21 percent for those aged 49 and over. 1 out of every 4 people in the 18-32 age group seems to have a robot vacuum cleaner. In the 33-48 age group, this rate drops to one in five, and to 16 percent for those aged 49 and over.

Which of the following do you own?

Item	Age 18 - 32	Age 33 - 48	Age 49+
Deep freeze	35	36	37
Coffee machine	30	26	21
Robot vacuum cleaner	24	20	16
Tea machine	26	24	20
Drying machine	14	13	10
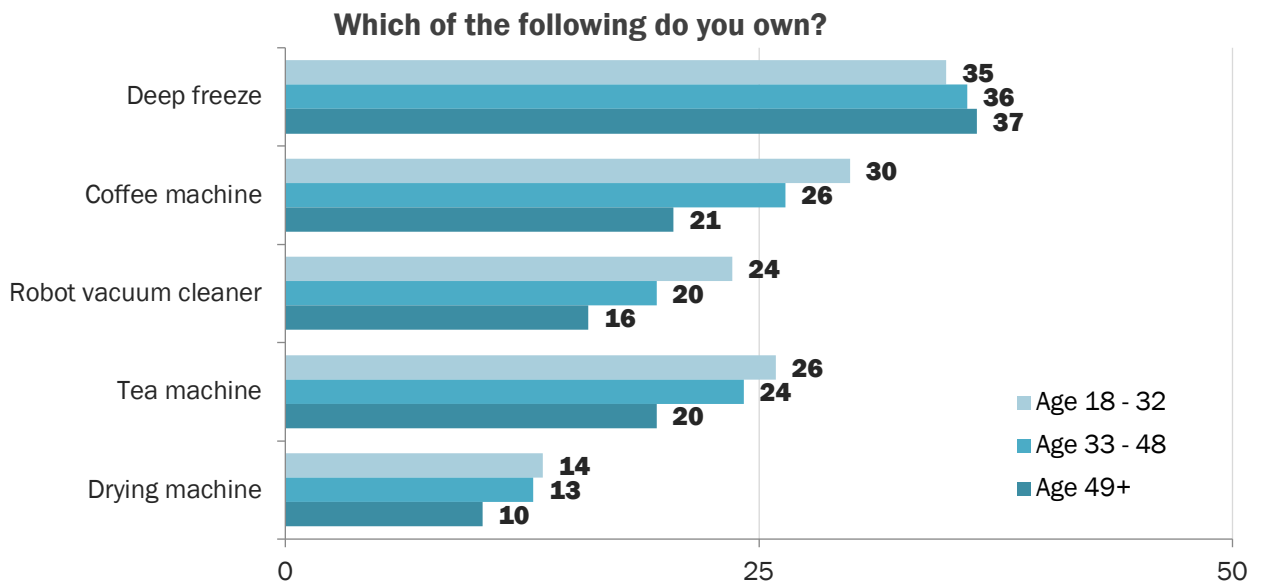
Let's take a closer look at the ownership of coffee machines and robot vacuums, which are most differentiated by the employment status of people. The rate of having both is seen more in white collars and students. Forty percent of white-collar workers seem to have a coffee machine and 29 percent have a robot vacuum cleaner. The same rates are 18 percent and 14 percent for housewives.

On the other hand, 23 percent of workers, tradespeople and farmers, who are the other working cluster, seem to have a coffee machine and 21 percent have a robot vacuum cleaner. While the coffee machine ownership of this cluster is below the Turkey average, the robot vacuum ownership is 1 point above the Turkey average.

Which of the following do you own?

	Coffee machine	Robot vacuum cleaner
White collar employee	40	29
Worker,tradesman,farmer	23	21
Retiree	22	14
Housewife	18	14
Student	30	23
Unemployed	26	17
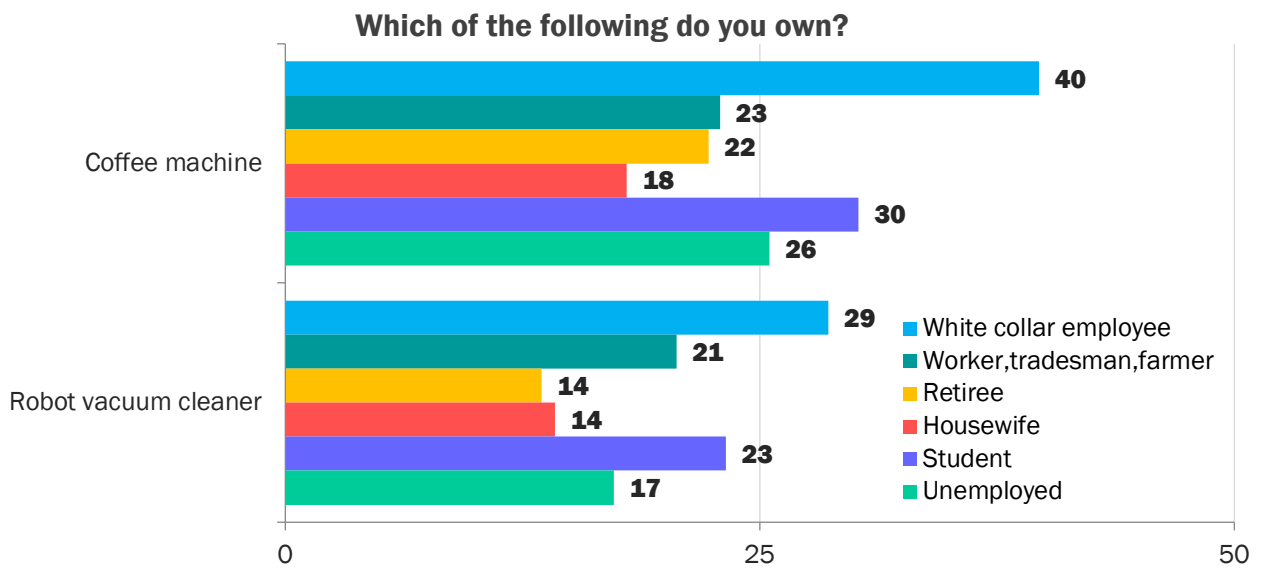
3.4. Plans for a Livelihood

In our survey this month, to evaluate the livelihood plans of our interviewees, we asked the question "What do you plan to do to provide for the household, maintain or improve your economic situation in the coming period?". We first asked this question on June'20, the first period of the coronavirus pandemic. By repeating this question this month, we examined what kind of livelihood plans society has under the conditions of the economic crisis with the rapid rise in inflation and the trend of change in these plans since June'20.

According to the graph below, while the rate of those who answered the above question as "cutting expenses" in June'20 was 45 percent, this rate decreased to 38 percent in November'22. Those who gave the answer to do additional work, on the other hand, seem to have increased by 8 points to 19 percent.

We measured the rate of those who said, "I don't plan anything extra," as 32 percent in the June'20 Barometer. We see that this rate has increased by 5 points to 37 percent this month.

Twelve percent of society plans to start working to earn a living and maintain their economic status, and 9 percent states that another member of the household plans to start working. Plans such as changing jobs, changing cities, changing houses and returning to the hometown are not on the agenda of society.

What do you plan in order to provide the livelihood of the household, to maintain or improve your economic situation in the coming period?

	June'20	November'22
Cutting spending	45	38
Doing additional work	11	19
Starting to work	16	12
Others will start to work in the household	14	9
Getting a loan/become indebted	10	9
Changing job	2	4
Returnig to hometown	3	3
Changing city	2	3
Other	4	2
Changing house	2	2
I'm not planning anything extra	32	37
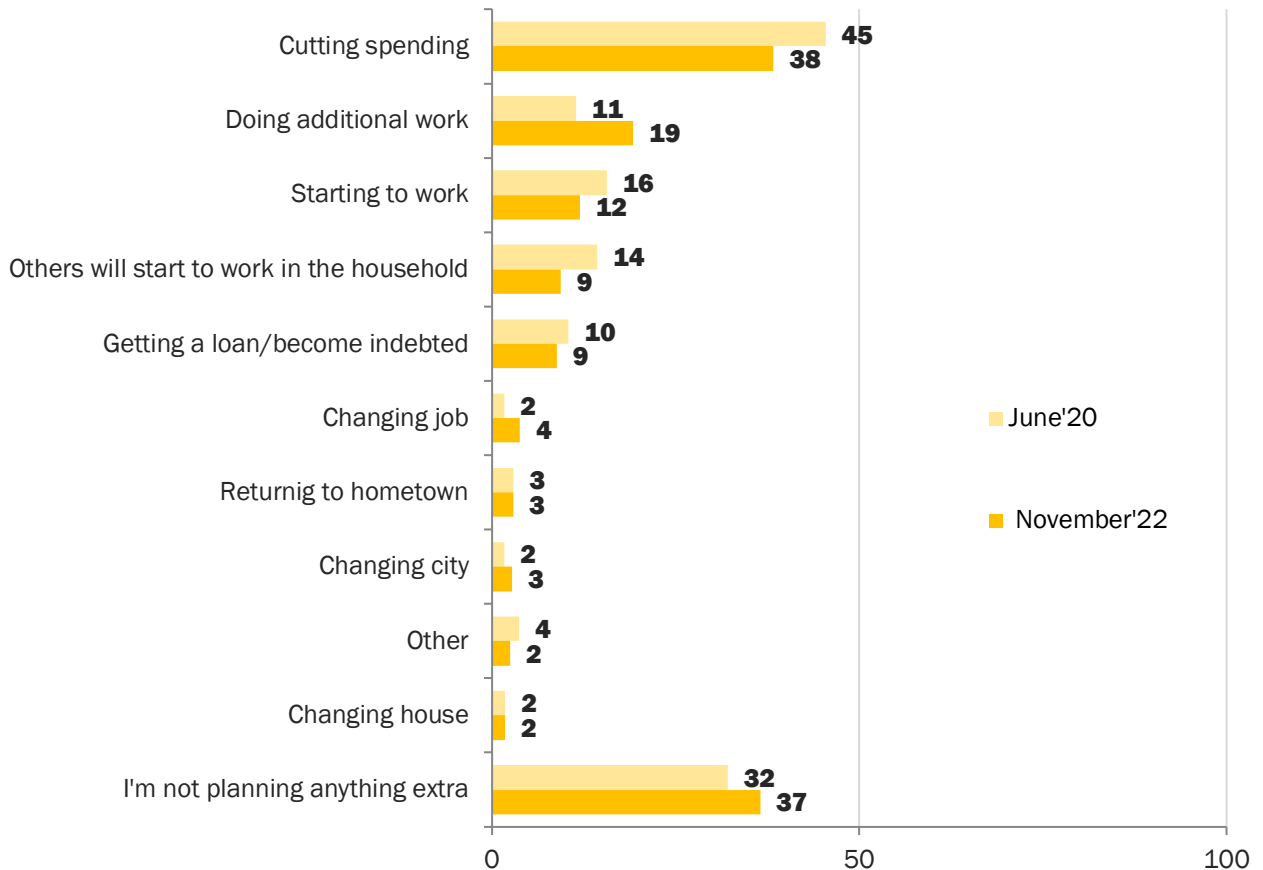
According to age groups...

To the above question, 40 percent of those in the 33-48 age group answered: "to cut down expenses". This is followed by people aged 18-32 and people aged 49 and over with a rate of 38 percent. According to the graph below, the answer "cutting expenses" is the most frequently given answer, regardless of the age of the people.

We see that the people in the 33-48 age group, with 24 percent, give the answer "doing additional work" the most. While 22 percent of those in the 18-32 age group plan to do additional work, this rate is 12 percent for those aged 49 and over.

We see that the highest rate of those who want to take a loan or borrow belongs to the 33-48 age group with 11 percent. This is followed by those aged 18-32 with a rate of 10 percent and those aged 49 and over with a rate of 6 percent. On the other hand, it is seen that those in the 18-32 age group give the answers of "Changing jobs" and "Changing cities" the most.

What do you plan in the coming period to provide the livelihood of the household, to maintain or improve your economic situation?

Plan	Age 18-32	Age 33-48	Age 49+
Cutting spending	38	40	38
Doing additional work	22	24	12
Starting to work	21	8	6
Others will start to work in the household	10	12	7
Getting a loan/become indebted	10	11	6
Changing job	7	4	1
Returnig to hometown	3	3	3
Changing city	5	2	2
Other	2	3	1
Changing house	4	2	2
I'm not planning anything extra	30	33	46
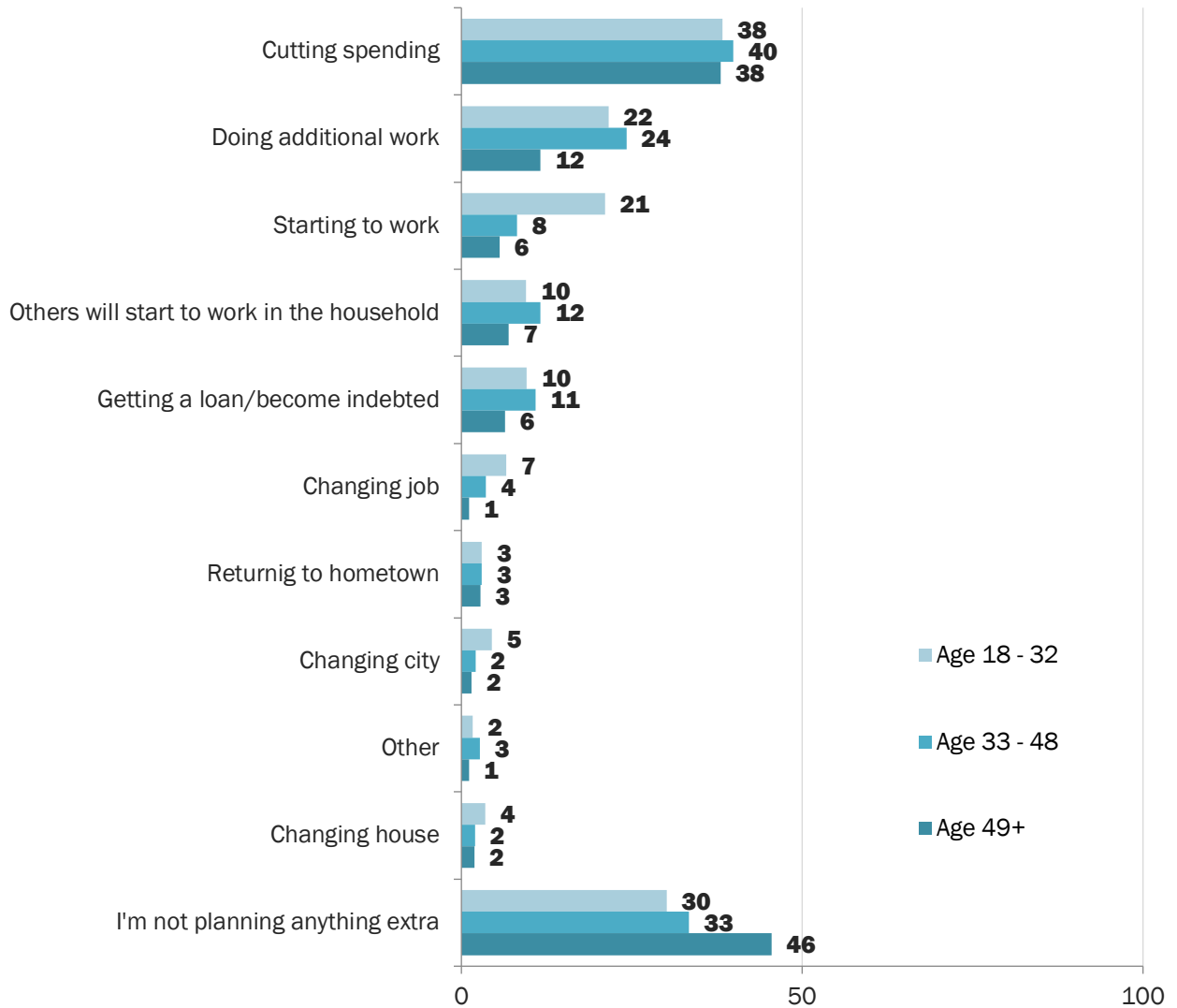
Livelihood plans of women and men:

While the rate of those who plan to cut their expenditures in the coming period is 38 percent for men, we see that this rate is 39 percent for women. On the other hand, while 25 percent of men plan to do additional work, this rate is 12 percent for women.

While 15 percent of women plan to start working, 10 percent of men plan to do so. The rate of those who answered the above question as "Others in the household will start working" is 11 percent for men and 8 percent for women.

While 11 percent of men plan to take out loans or borrow money, we see that this rate is 7 percent for women. Similarly, the proportion of men who plan to change jobs is 3 percent higher than that of women.

What do you plan in the coming period to provide the livelihood of the household, to maintain or improve your economic situation?

Category	Female	Male
Cutting spending	39	38
Doing additional work	13	25
Starting to work	15	10
Others will start to work in the household	8	11
Getting a loan/become indebted	7	11
Changing job	2	5
Returnig to hometown	3	3
Changing city	2	4
Other	2	1
Changing house	2	3
I'm not planning anything extra	39	34

The idea of cutting expenses and doing additional work is more common among the employed.
According to the graph below, 37 percent of unemployed people state that they plan to cut their spending, while this rate is 40 percent among employed people.

Twenty-nine percent of employed people plan to do additional work; for the unemployed, we see that this rate is 10 percent. The loan or borrowing rate is 12 percent for employed people.

We see that 11 percent of those who answered "Others in the household will start working" were employed people. This rate is 8 percent among the unemployed. We also see in the graph below that 7 percent of employed people plan to change jobs.

What do you plan in the coming period to provide the livelihood of the household, to maintain or improve your economic situation?

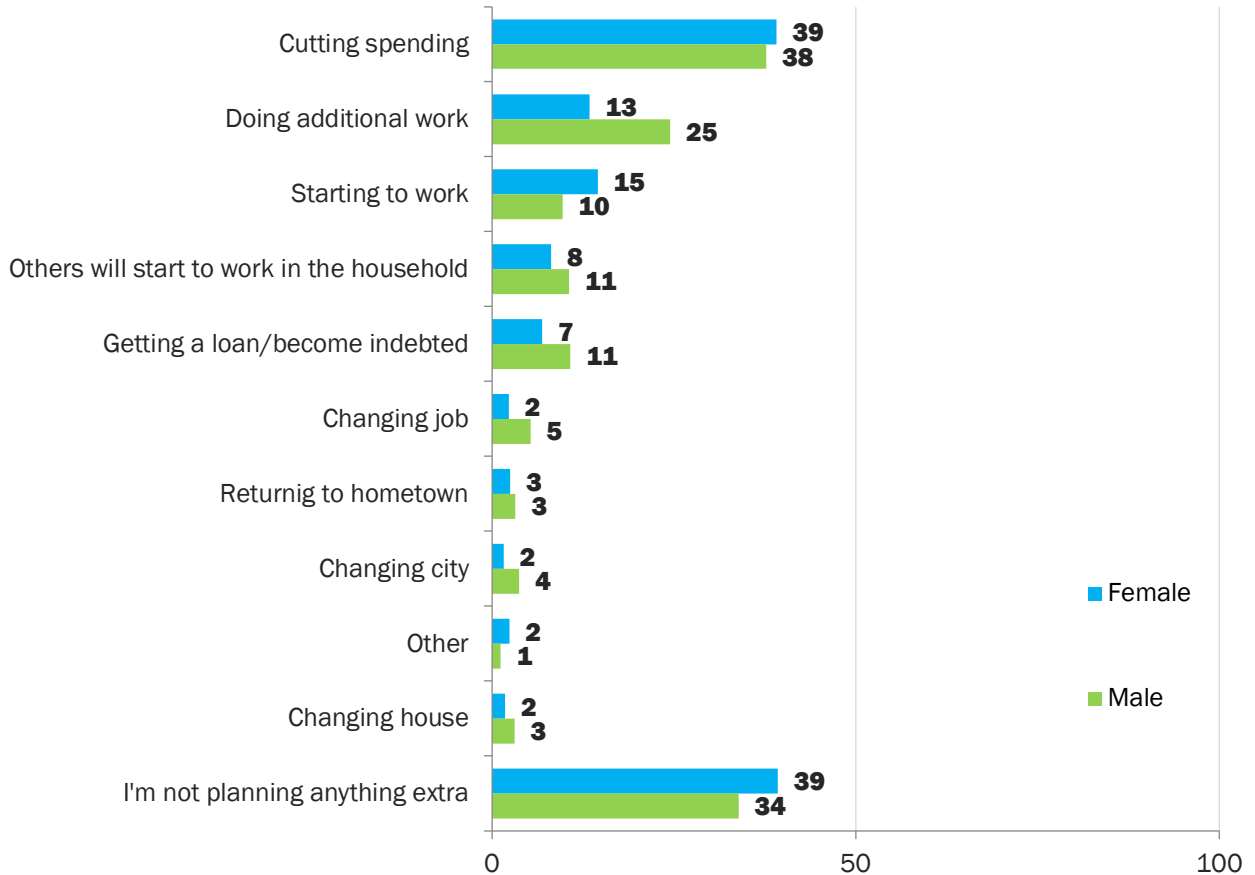| Plan	Employed	Unemployed
Cutting spending	40	37
Doing additional work	29	10
Starting to work	4	19
Others will start to work in the household	11	8
Getting a loan/become indebted	12	6
Changing job	7	1
Returnig to hometown	3	2
Changing city	4	2
Other	2	2
Changing house	3	2
I'm not planning anything extra	32	41
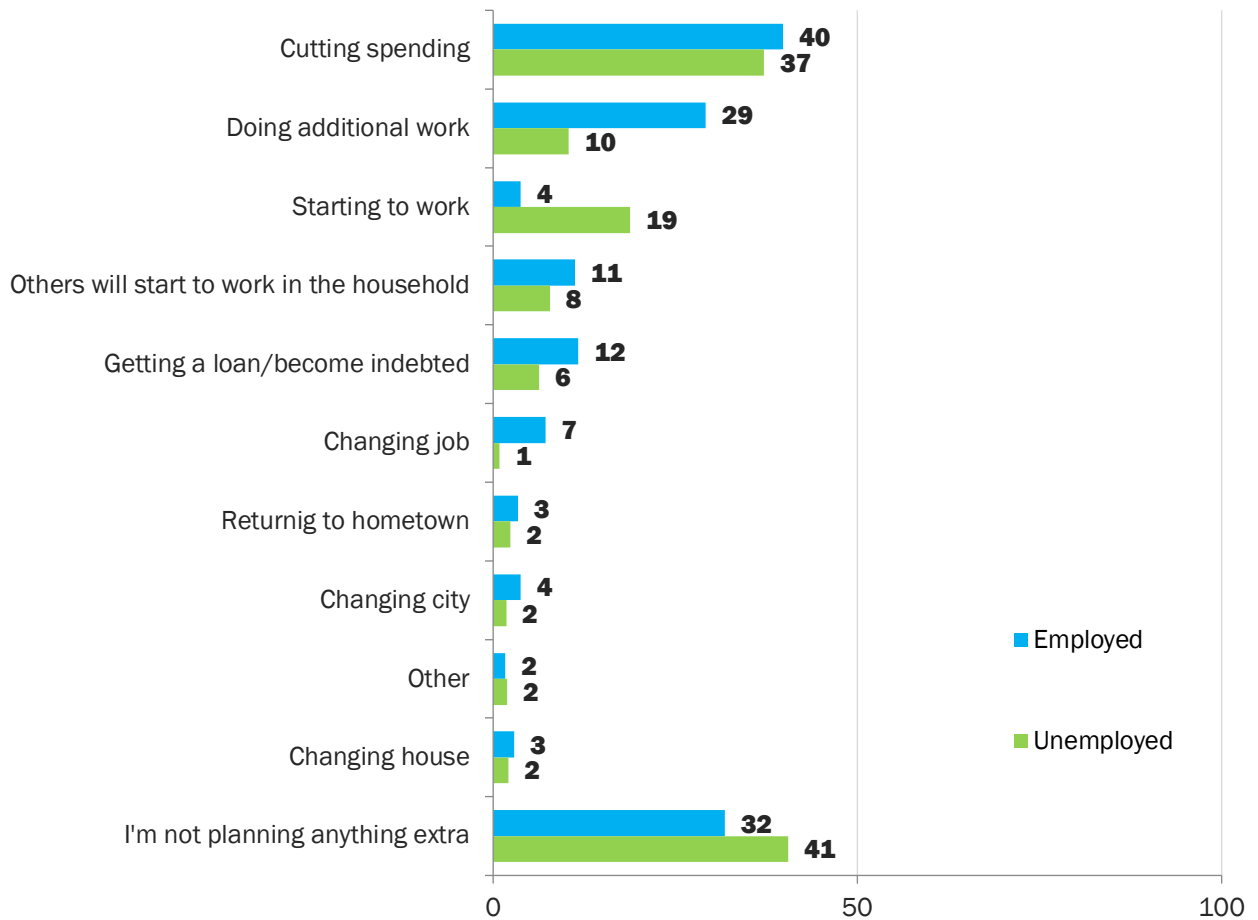
Evaluation

As can be seen, while reducing expenditures for livelihood plans has been replaced by a plan to do additional work, those who do not plan anything extra to make a living also seem to have increased. It is among the plans of 1 out of every 5 young people in the 18-32 age group to start working and 1 of them to do additional work. Among women, starting to work is also among the plans at a higher level than Turkey's average.

The most striking finding here is the plans that differ according to the employment statuses. While starting to work is among the priority plans of the unemployed, it is noteworthy that 3 out of every 10 employees consider doing additional work to make a living. Again, the working segment seems more open to considering alternatives for subsistence than the non-working segment. Two out of 5 employees also plan to cut their spending a little more. With increasing economic difficulties, employed people may also be worried about the shrinkage in their incomes due to the rapid increase in inflation in the future and may try to diversify their alternatives in order to make a living. In the coming period, we need to monitor the living conditions, expenditures and income practices of the working segments.
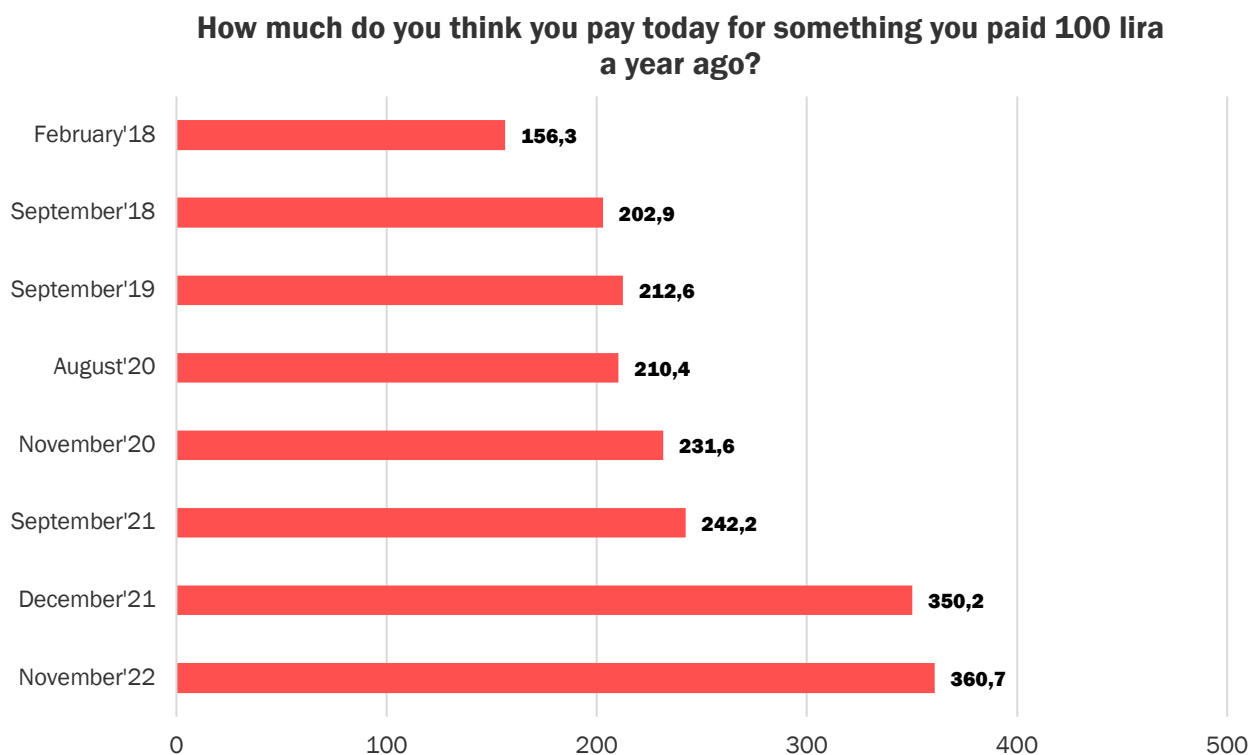
4. PERCEPTION OF INFLATION

Cost of living and inflation has been at the top of the agenda of society and politics for the past year. As we have seen in the previous months, the purchasing and consumption practices of society, the indebtedness situation and the perception of class position are changing rapidly. While it is a fact that the factor triggering this change is the rapid rise in inflation, we also measured society's perception of inflation in our research this month. We should note that the inflation rate, which was 36.08 percent in December'21, when we last measured the society's perception of inflation, increased to 85.51 percent on an annual basis this month.

4.1. Perception of Inflation for the Past Year

While measuring society's perception of inflation, the first thing we asked was, "How much do you think you pay today for something you paid 100 liras a year ago?". In this section, we consider the variation of the average responses to this question over time.

In our research this month, we see that the average of the answers to this question is 360 liras. It is widely believed that a product or service is paid 3.6 times more money than last year. The average of the answers given to this question in the November'20 Barometer was 231 liras, and 350 liras in the December'21 Barometer. We see that the increase in the perception of inflation is not as high as the change experienced in December of last year.

How much do you think you pay today for something you paid 100 lira a year ago?

Period	Value
February'18	156,3
September'18	202,9
September'19	212,6
August'20	210,4
November'20	231,6
September'21	242,2
December'21	350,2
November'22	360,7

How much do you you think you pay today for something you paid 100 TL a year ago?

	November'20	December'21	November'22
TURKEY	232	350	361
Female	238	358	362
Male	225	342	360
age 15 - 17	215	347	329
age 18 - 32	238	380	391
age 33 - 48	239	351	359
age 49+	218	320	333
Less than high school	232	336	357
High school	232	358	365
University	232	371	363
White collor employee	229	362	356
Worker,tradesman,farmer	237	347	381
Retiree	203	319	313
Housewife	237	347	359
Student	232	385	380
Unemployed	227	351	356
Modern	242	383	368
Traditional Conservative	226	338	363
Religious Conservative	229	326	351

The greatest increase in the perception of inflation occurs among workers, tradespeople and farmers.

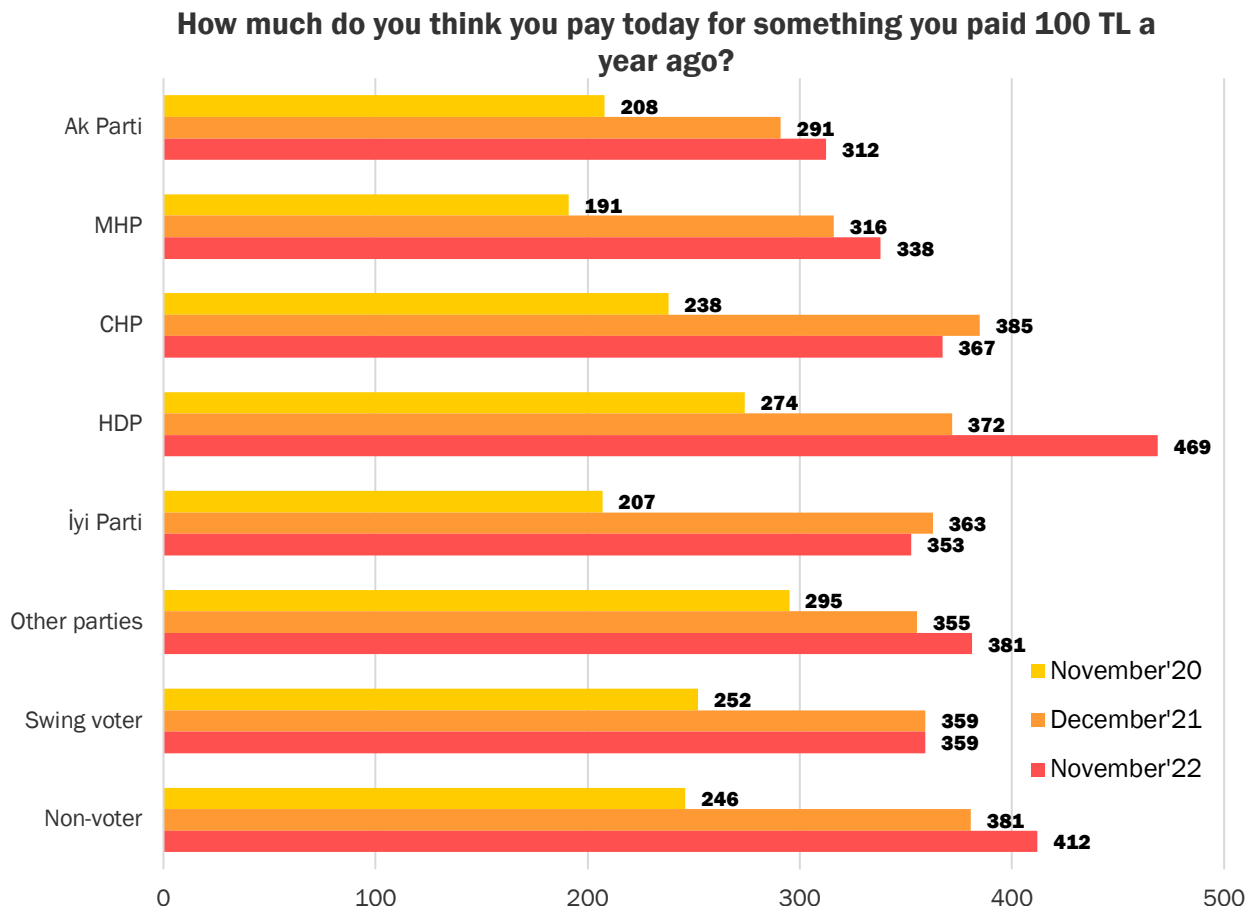While the perception of inflation among housewives and the unemployed seems higher than in other occupational groups, the most significant increase is seen in the worker/tradespeople/farmer group. While this group states that they pay about 381 liras for something they paid 100 liras for last year, housewives say they pay 359 liras and the unemployed 356 liras.

There may be deterioration in the price perception of society.

According to gender, educational status and lifestyle, we cannot obtain more meaningful findings than we see in employment status. As we can see in the graph, inflation perceptions have not changed much in demograph clusters since last year. Compared to November'20, it seems to have changed quite a bit, with similar trends across all demograph clusters. In this case, we can also think that the rapid price increases in the last year have distorted the price perception of society.

The upward movement in the perception of inflation among HDP voters is more evident.

While Ak Parti voters state that they pay about 312 liras for something they paid 100 liras for last year, MHP voters say they pay 338 liras. The striking situation in the perception of inflation is seen in the decrease in the inflation perception of CHP and İyi Parti voters. On the other hand, the strongest increase in inflation perception is among HDP voters. HDP voters say that they pay 469 liras today for something they paid 100 liras for last year.

How much do you think you pay today for something you paid 100 TL a year ago?

Party	November'20	December'21	November'22
Ak Parti	208	291	312
MHP	191	316	338
CHP	238	385	367
HDP	274	372	469
İyi Parti	207	363	353
Other parties	295	355	381
Swing voter	252	359	359
Non-voter	246	381	412

Those who expect an economic crisis in Turkey or in their own lives for the next three months say that they pay 382 liras for something they paid 100 liras for last year, while those who do not expect a crisis in the next three months say that they pay 305 liras for the same thing today. In response to the question, "Did you make a living last month?" we see that the perception of inflation increases upwards as the situation of being unable to live increases. The highest increase is among those who could not make some of their payments and went into debt. This group states that they pay 423 liras today for something they paid 100 liras for last year.

How much do you think you pay today for something you paid 100 TL a year ago?
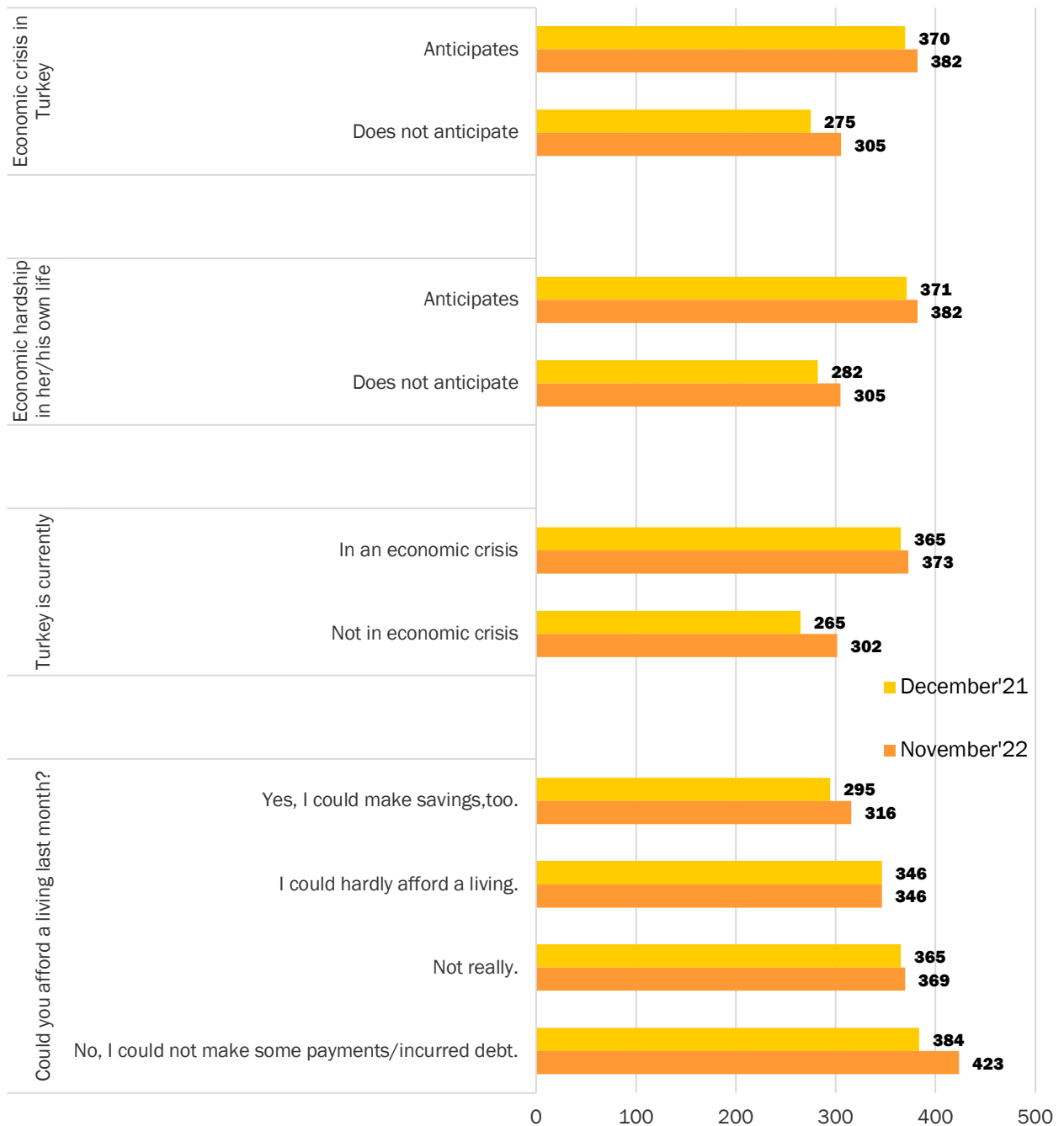
Those who have difficulty making a living have a higher perception of inflation.

When we look at monthly household incomes, we see that the inflation perception of all income groups has increased, except for those with an income of 10001 TL and above. The biggest increase is among those whose monthly household income is 2000 TL or less. The group in question states that they pay 459 liras in November'22 for something they paid 100 liras for last year.

When we look at the economic classes, we see a meaningful picture. As the income bracket rises, the perception of inflation decreases. People in the lower income group say that they pay 399 liras for something they paid 100 liras for last year, while the lower middle-income group says they pay 370 liras, the new middle class 350 liras, and the upper-income groups 343 liras.

How much do you think you pay today for something you paid 100 TL a year ago ?
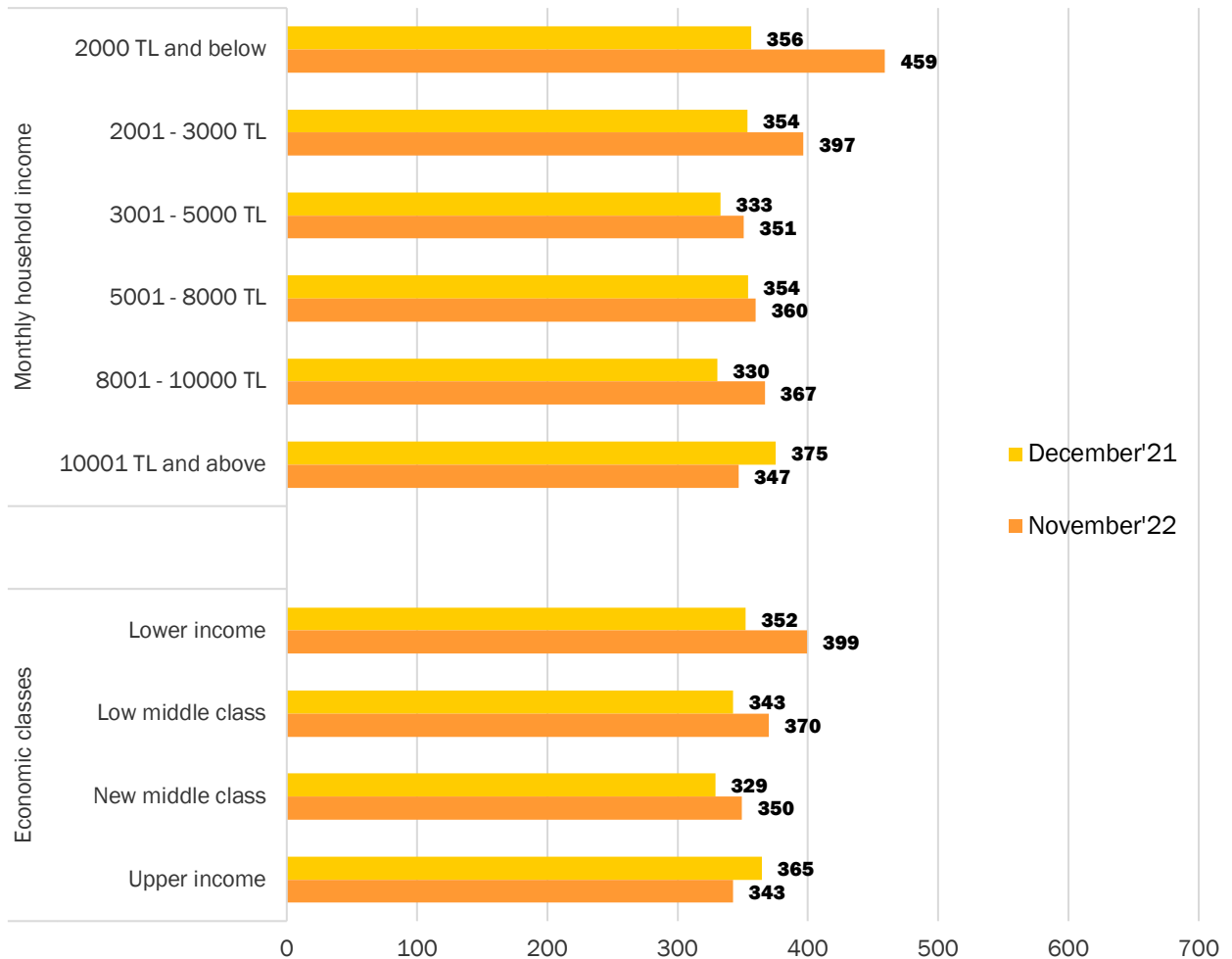
4.2. Perception of Inflation for the Next Year

In the answers given to our question, we asked in the December'21 Barometer, "What do you think the value of something that is 100 liras today will be in 1 year?" we saw that the average of Turkey was 420 liras. In the November'22 Barometer, we see that this expectation has risen to 547 liras. Compared to last year's inflation perception, next year's inflation perception is much higher.

In your opinion, what will be the value of something, which is 100 TL now, will be in 1 year?
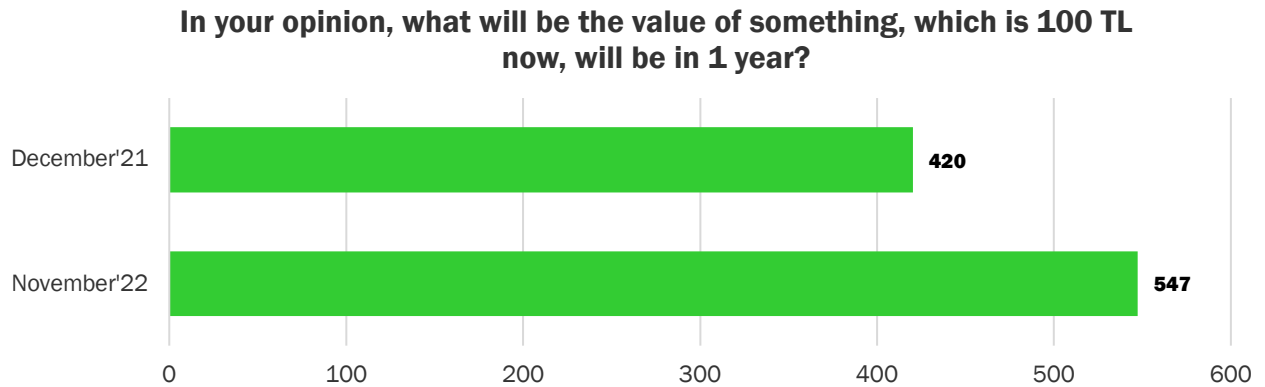
The perception of inflation for the next year is quite high among the 18-32 age group and workers/tradespeople/farmers.

The 15-17 age group says that something that is now 100 liras will be worth 477 liras next year, the 33-48 age group says 546 liras, and those aged 49 and over say 462 liras. The greatest increase is experienced in the 18-32 age group. We see that the answer, which was 469 liras in the December'21 Barometer, increased to 632 liras in November'22.

People in working life expect higher price increases. While the white-collar workers think that the value of something that is 100 liras now will be 600 liras next year, the workers/tradespeople/farmers express that it will be 618 liras. This is followed by housewives with 513 liras.

In your opinion, what will be the value of something, which is 100 TL now, in 1 year?

	December'21	November'22
TURKEY	420	547
Female	447	548
Male	396	546
age 15 - 17	365	477
age 18 - 32	469	632
age 33 - 48	422	546
age 49+	375	462
Less than high school	408	549
High school	424	572
University	443	506
White collor employee	424	600
Worker,tradesman,farmer	392	618
Retiree	375	437
Housewife	439	513
Student	468	498
Unemployed	454	501
Modern	464	586
Traditional Conservative	391	527
Religious Conservative	412	522
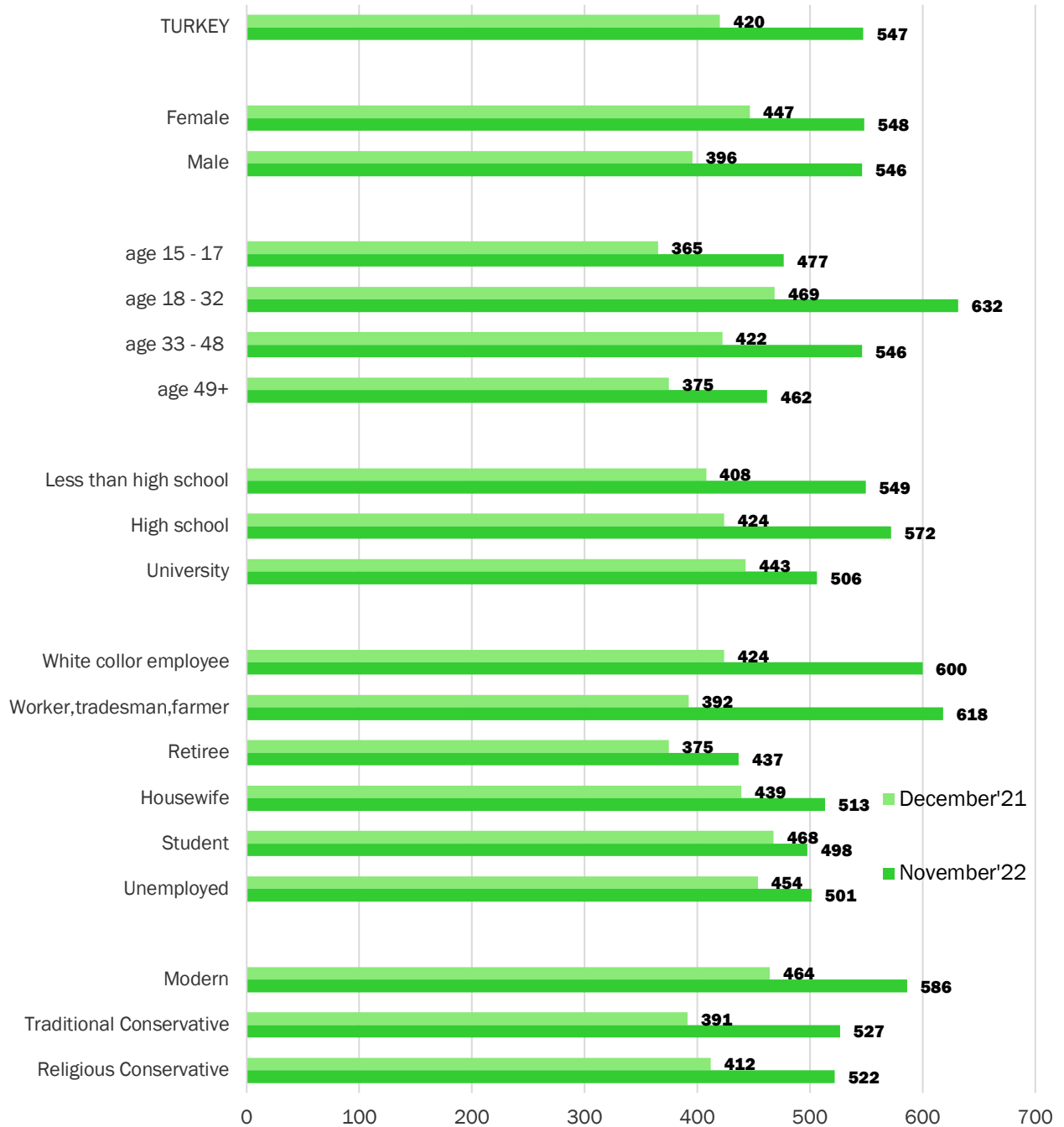
Voters of MHP, HDP and those who do not prefer to go to the polls have a high inflation perception for the next year.

We see that the perception of inflation for the next year has increased the most among MHP and HDP voters and non-voters. MHP voters say that something that currently costs 100 liras will cost 667 liras next year, HDP voters say it will be 714 liras, and non-voters say 823 liras. We see that Ak Parti and CHP voters say 401 liras and 536 liras to this question, respectively.

In your opinion, what will be the value of something, which is 100 TL now, in 1 year?

Party	December'21	November'22
Ak Parti	328	401
MHP	349	667
CHP	462	536
HDP	405	714
İyi Parti	374	588
Other parties	385	598
Swing voter	483	503
Non-voter	533	823
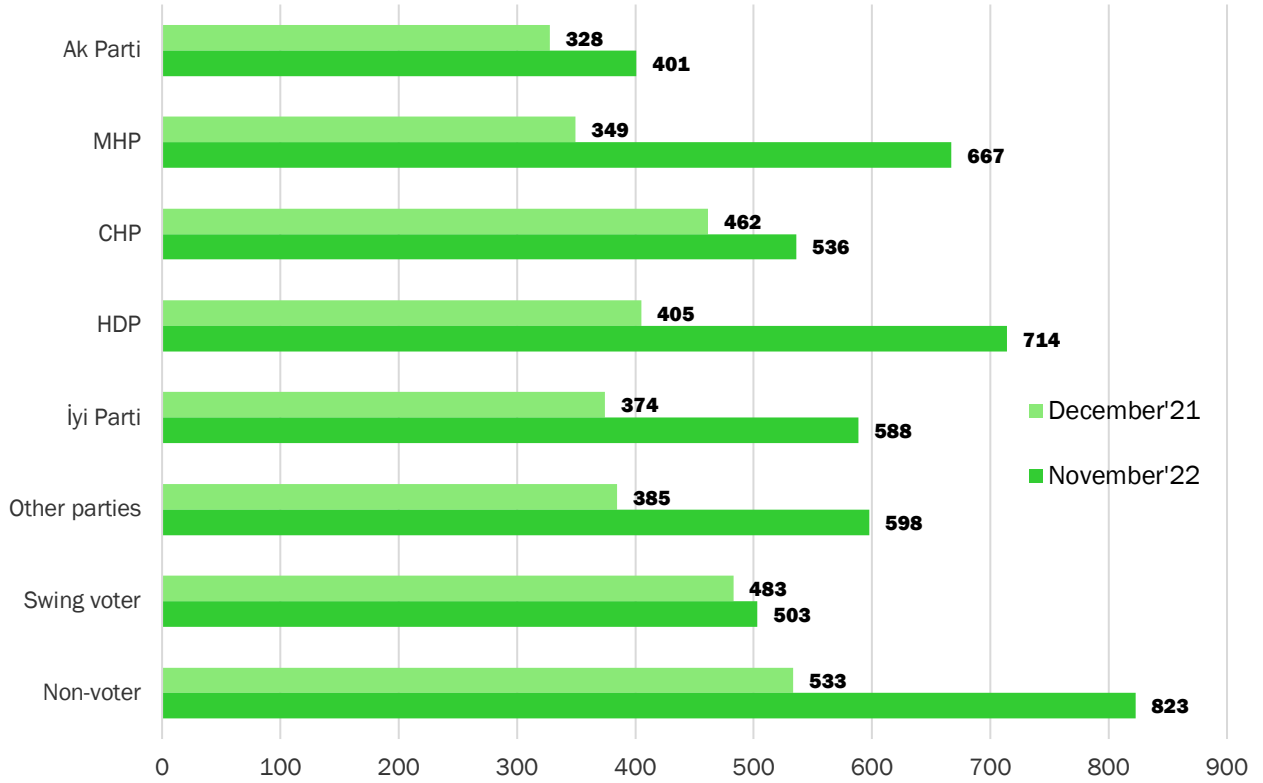
Inflation expectations of those who have difficulty in living are quite high.

Those who answered the question, "Did you make a living last month?" by saying "Yes, I was able to put money aside" say that the value of something that is now 100 liras will be 417 liras next year. We see that those who told that they could not make some of their payments and went into debt gave the answer of 640 liras to this question. As the difficulty of living and the expectation of the crisis increase, the inflation expectation also increases.

In your opinion, what will be the value of something, which is 100 TL now, in 1 year?

Economic crisis in Turkey
- Anticipates: 449 (December'21), 613 (November'22)
- Does not anticipate: 300 (December'21), 377 (November'22)
- 0

Economic hardship in her/his own life
- Anticipates: 445 (December'21), 607 (November'22)
- Does not anticipate: 332 (December'21), 386 (November'22)

Turkey is currently
- In an economic crisis: 443 (December'21), 583 (November'22)
- Not in economic crisis: 294 (December'21), 368 (November'22)

Could you afford a living last month?
- Yes, I could make savings, too.: 342 (December'21), 417 (November'22)
- I could hardly afford a living.: 401 (December'21), 538 (November'22)
- Not really.: 447 (December'21), 590 (November'22)
- No, I could not make some payments/incurred debt.: 493 (December'21), 640 (November'22)

Legend: December'21, November'22

Lower and upper-income groups have higher inflation expectations for the next year.

While the lower income group says that the value of something that is 100 liras now will be 609 lira next year, the upper-income group answers this question as 586 liras. Although the segments with low and middle-income levels have proportionally similar inflation expectations, those with the highest inflation expectations are those with the lowest income level in society.

The difference between urban, metropolitan and rural residents.

Those living in cities and metropolises have higher inflation expectations than those living in rural areas. Rural residents predict that something they paid for 100 liras last year will increase to 460 liras this year, while their forecast for the next year is 511 liras. These figures seem to have increased from 443 liras to 601 liras in the city, and from 396 liras to 510 liras in the metropolis.

In your opinion, what will be the value of something, which is 100 TL now, in 1 year?

Monthly household income

Category	December'21	November'22
2000 TL and below	490	688
2001 - 3000 TL	436	508
3001 - 5000 TL	388	574
5001 - 8000 TL	435	524
8001 - 10000 TL	417	564
10001 TL and above	406	545

Economic classes

Category	December'21	November'22
Lower income	446	609
Low middle class	401	547
New middle class	397	507
Upper income	462	586

Settlement type

Category	December'21	November'22
Rural	460	511
Urban	443	601
Metropolis	396	510

5. INCOME DISTRIBUTION, POVERTY AND MATERIAL DEPRIVATION IN TURKEY

In the thematic part of our research this month, we discussed income distribution, income inequality and poverty in Turkey. While doing this, we followed the methods and measurement techniques provided by the discipline of economics by working on the data of the last 8 years of the KONDA Barometer with also the data mining method, apart from the questions we included in the November'22 Barometer. For this purpose, we created Lorenz curves showing the inequality in income distribution by performing percentage share analysis from the KONDA Barometer data between 2014 and 2022. In addition, in this section, we analyzed how the relative poverty rate changes from year to year by calculating it with KONDA data. Finally, we calculated the material deprivation rate in Turkey as of November'22 by including questions that we can understand the financial distress of the interviewees and that also include the criteria for the measurement of material deprivation.

This month's theme section, which includes the modules and measurements of the Income and Living Conditions Survey, which is carried out annually by TURKSTAT and EUROSTAT, also demonstrates the consistency of KONDA data with TURKSTAT data. In addition, KONDA Barometer data also allows us to examine income distribution according to socio-demograph criteria.

In this section, we will first examine the income distribution in Turkey between the years 2014-2022. Under this heading, the course of change in per capita household income within months, how per capita income is socially distributed, how much share of 20 percent and 10 percent population slices receive from all income, income distribution injustice and distribution of income brackets in social clusters over the years on the Lorenz curve will be discussed. We will examine the distribution of segments in social clusters. Under the second subheading, we will include relative poverty, and under the third subheading, we will include our material deprivation measures.

5.1. Income Distribution in Turkey (2014-2022)

Within the scope of our research, we have included the ranking of per capita incomes in our measurements from the February'14 Barometer to the November'22 Barometer, and the change in the median value of per capita income from month to month.

> **Median Income:**
> When the incomes are ordered from the least to the most, the resulting value represents the median income.

As we can see in the graph below, while the median value of per capita income is in parallel from month to month, it seems to have increased exponentially as of the end of 2021 due to the rapid rise in inflation and the nominal increase in the minimum wage and other wages.

Course of change of per capita income median value
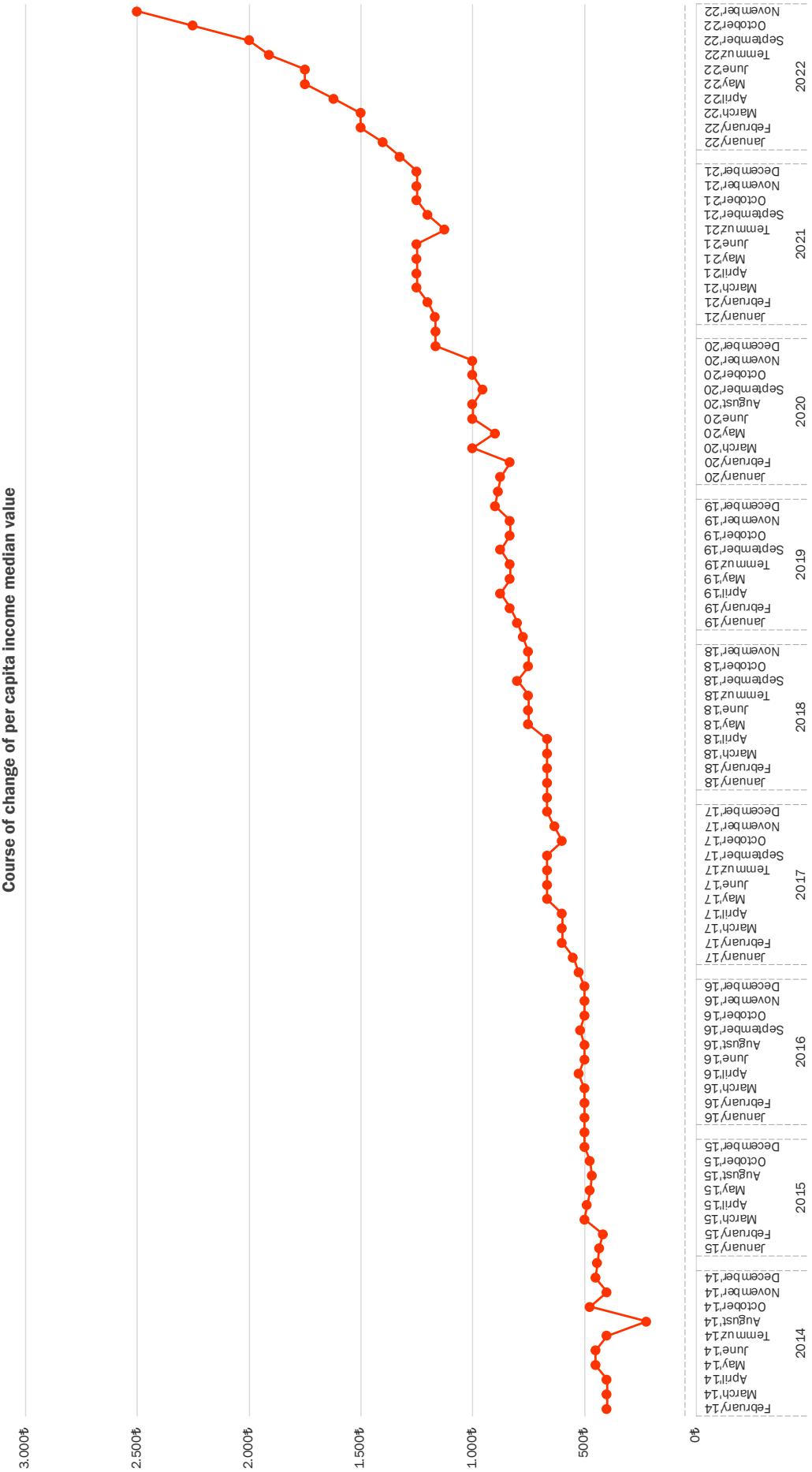
The graph below shows the social distribution of per capita income of 30,675 people we interviewed within the scope of our Barometer research throughout 2022. When we list the per capita incomes of all the interviewees, from the smallest to the largest, the per capita income starts to rise above 20,000 liras, only after the 30 thousandth person out of 30,675 people. In this distribution, which we can accept as a reference point, the number of people with a per capita income of less than 2,000 liras is around 16 thousand. In other words, more than half of all the interviewees seem to have a per capita income of less than 2,000 liras per month.

Social distribution of per capita income (2022)
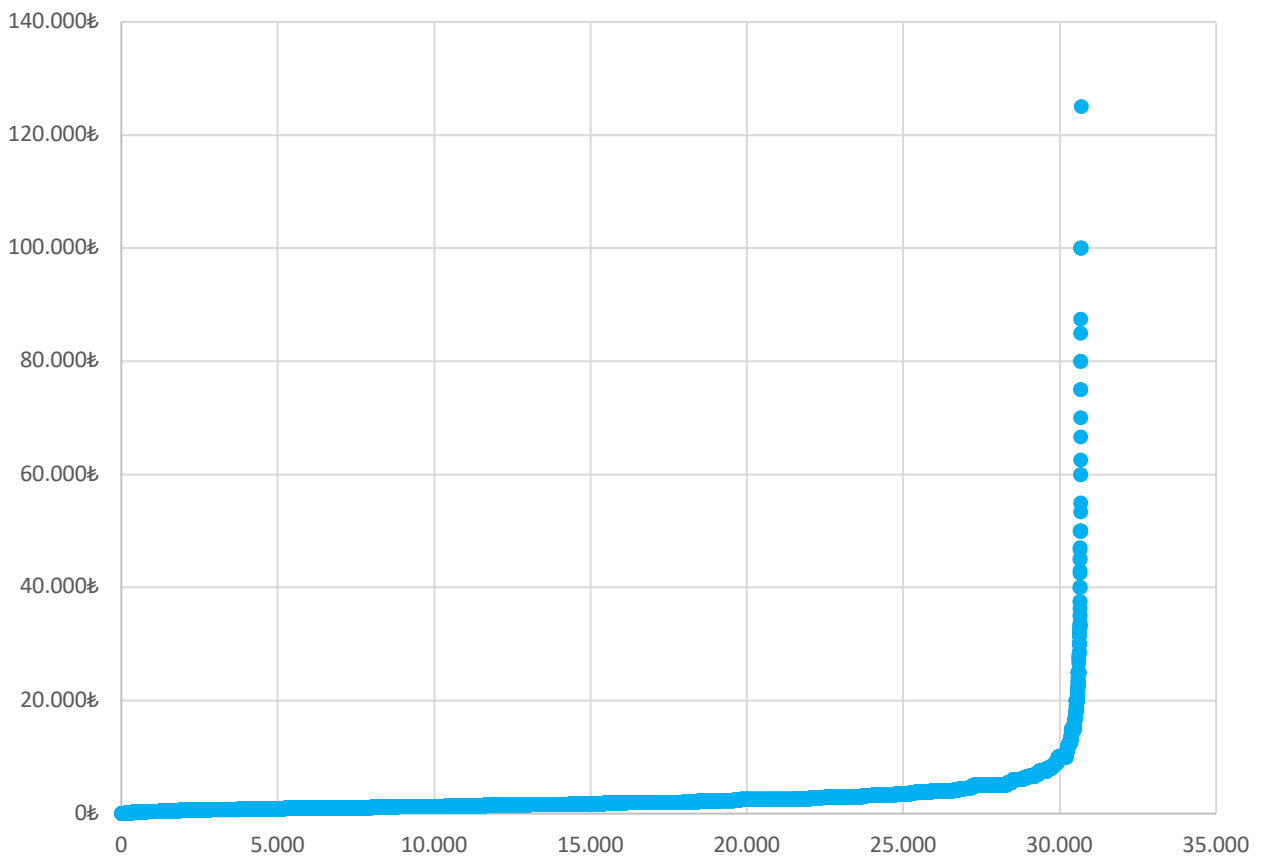
Percentage Share Analysis:

In the percentage share analysis, in order to measure the income distribution in a society, the total population is divided into 5 percent, 10 percent and 20 percent slices and the share of the people in these slices from the total income is calculated.

In 2022, the share of the highest income group in total income is 50.1 percent.

For our measurement in this section, we divided the society into 20 percent and 10 percent slices and calculated how much share these slices received from all income. According to our measurement for 2022 (between January and November), the share of the highest income group in the total income is 50.1 percent. We calculated the share of the lowest income group in total income as 5.2 percent.
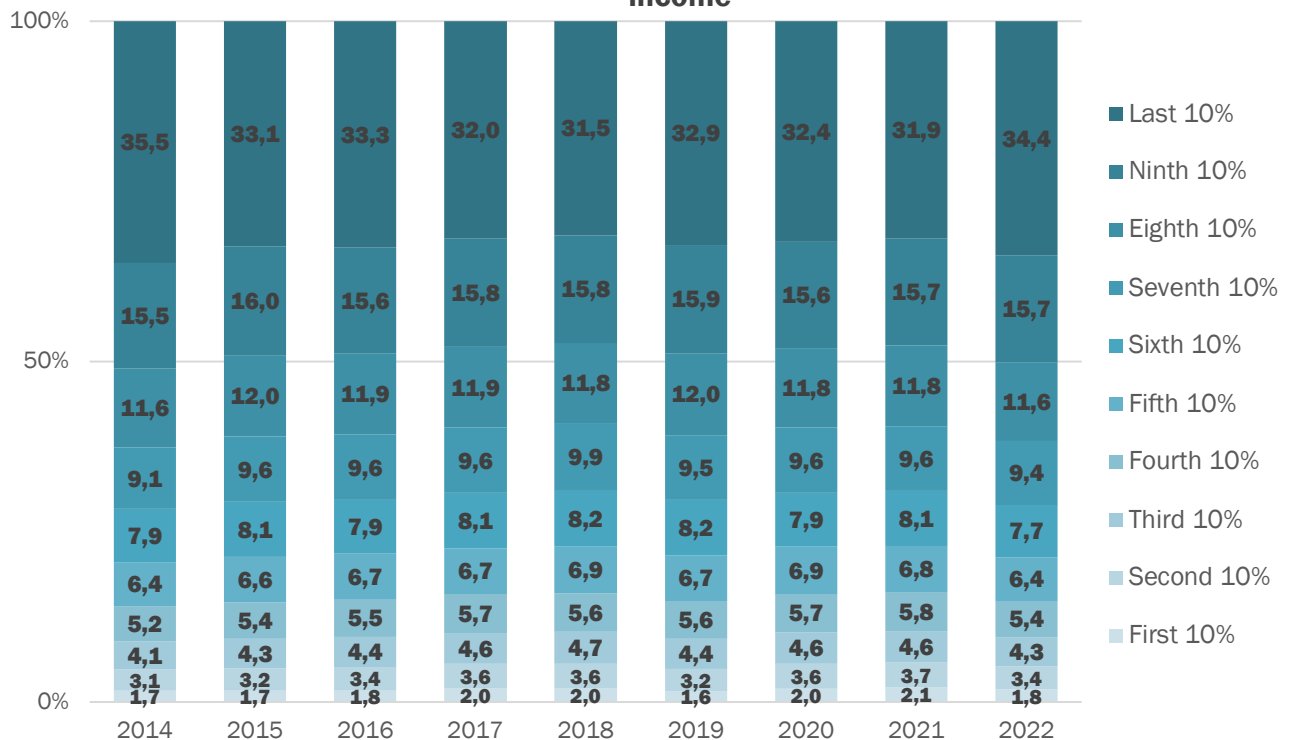
Between 2014 and 2022, the share of the lowest income group in total income seems to have varied between 4.8 and 5.8 percent. The year with the highest share of the highest income group in total income was 2014 with 51 percent, followed by 2022 with 50.1 percent.

The share of by per capita income ordered 20 % groups from total income

Year	First 20%	Second 20%	Third 20%	Fourth 20%	Last 20%
2014	4,8	9,3	14,3	20,7	51,0
2015	4,9	9,7	14,7	21,6	49,1
2016	5,2	9,9	14,6	21,5	48,8
2017	5,6	10,3	14,8	21,5	47,8
2018	5,6	10,3	15,1	21,8	47,2
2019	4,9	10,0	14,9	21,5	48,8
2020	5,6	10,3	14,8	21,3	48,0
2021	5,8	10,4	14,8	21,4	47,7
2022	5,2	9,7	14,1	21,0	50,1
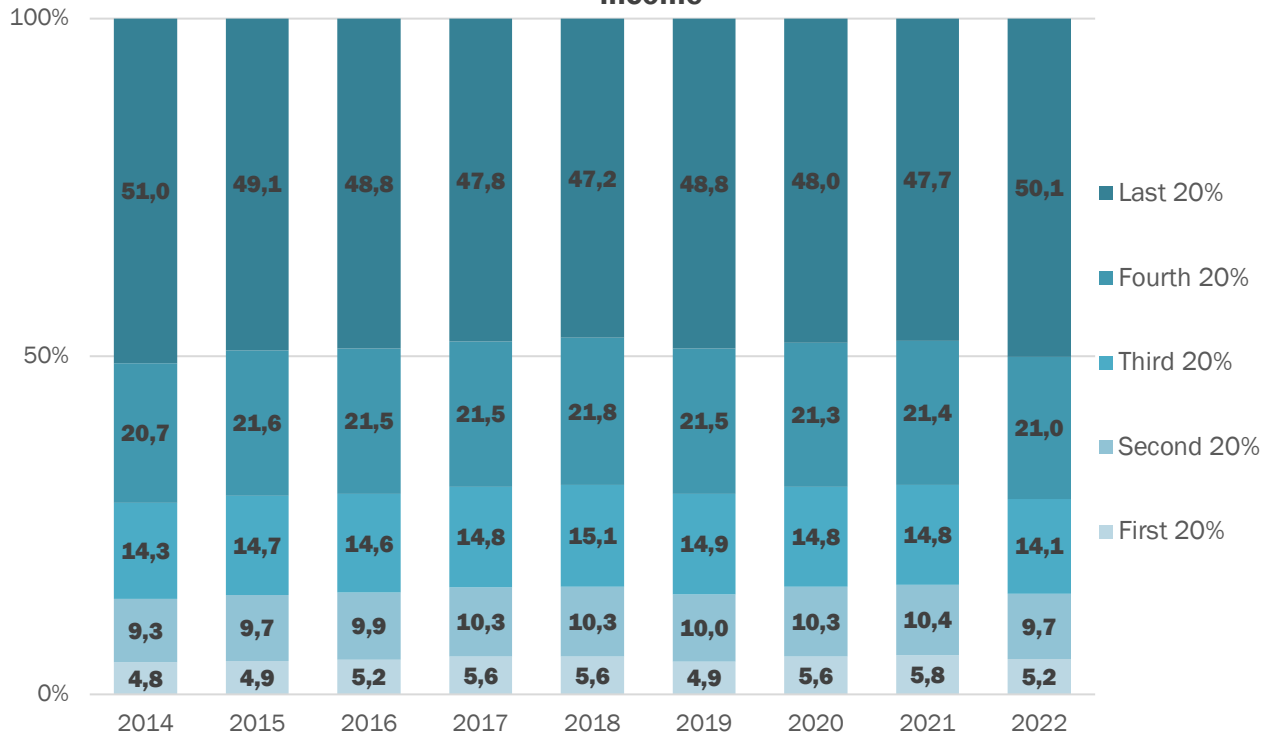
The share of by per capita income ordered 10% groups from total income

Year	First 10%	Second 10%	Third 10%	Fourth 10%	Fifth 10%	Sixth 10%	Seventh 10%	Eighth 10%	Ninth 10%	Last 10%
2014	1,7	3,1	4,1	5,2	6,4	7,9	9,1	11,6	15,5	35,5
2015	1,7	3,2	4,3	5,4	6,6	8,1	9,6	12,0	16,0	33,1
2016	1,8	3,4	4,4	5,5	6,7	7,9	9,6	11,9	15,6	33,3
2017	2,0	3,6	4,6	5,7	6,7	8,1	9,6	11,9	15,8	32,0
2018	2,0	3,6	4,7	5,6	6,9	8,2	9,9	11,8	15,8	31,5
2019	1,6	3,2	4,4	5,6	6,7	8,2	9,5	12,0	15,9	32,9
2020	2,0	3,6	4,6	5,7	6,9	7,9	9,6	11,8	15,6	32,4
2021	2,1	3,7	4,6	5,8	6,8	8,1	9,6	11,8	15,7	31,9
2022	1,8	3,4	4,3	5,4	6,4	7,7	9,4	11,6	15,7	34,4

The share of the last 10 percent in the total income: 34.4 percent.

When we divide the society into 10 percent slices, we see that the last 10 percent slice receives 34.4 percent of all income. The lowest income bracket, the 10 percent, receives only 1.8 percent of all income. If we look at the trend of change over the years, we see that the share of the top 10 percent of all income has increased over the past years.

The table below shows the comparison of the percentage share analysis calculated from the data of KONDA and TURKSTAT between the years 2018-2021. As can be seen, there is a consistent trend within the margins of error between KONDA and TURKSTAT data.

	2021		2020		2019		2018	
	KONDA	TURK-STAT	KONDA	TURK-STAT	KON-DA	TURK-STAT	KON-DA	TURK-STAT
Top 20 percent	5,8	6,1	5,6	5,9	4,9	6,2	5,6	6,1
Second 20 percent	10,4	10,8	10,3	10,6	10,0	10,9	10,3	10,6
Third 20 percent	14,8	15,1	14,8	14,9	14,9	15,2	15,1	14,8
Fourth 20 percent	21,4	21,3	21,3	21,1	21,5	21,4	21,8	20,9
Last 20 percent	47,7	46,7	48,0	47,5	48,8	46,3	47,2	47,6
Total	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0

P80/P20 Ratio:

The P80/P20 ratio expresses the ratio of the income of the 20 percent with the highest income to the income of the 20 percent with the lowest income. As this ratio gets smaller, income inequality decreases.

When we calculate the P80/P20 ratio, that is, when we divide the share of the highest income bracket from the total income by the share of the lowest income bracket from the total income, we calculate this ratio as 9.6 percent for the year 2022. This rate seems to have increased in contrast to the decreasing trend between 2014-2018 and the last 2 years.

Change of the P80/P20 ratio in the last 8 years
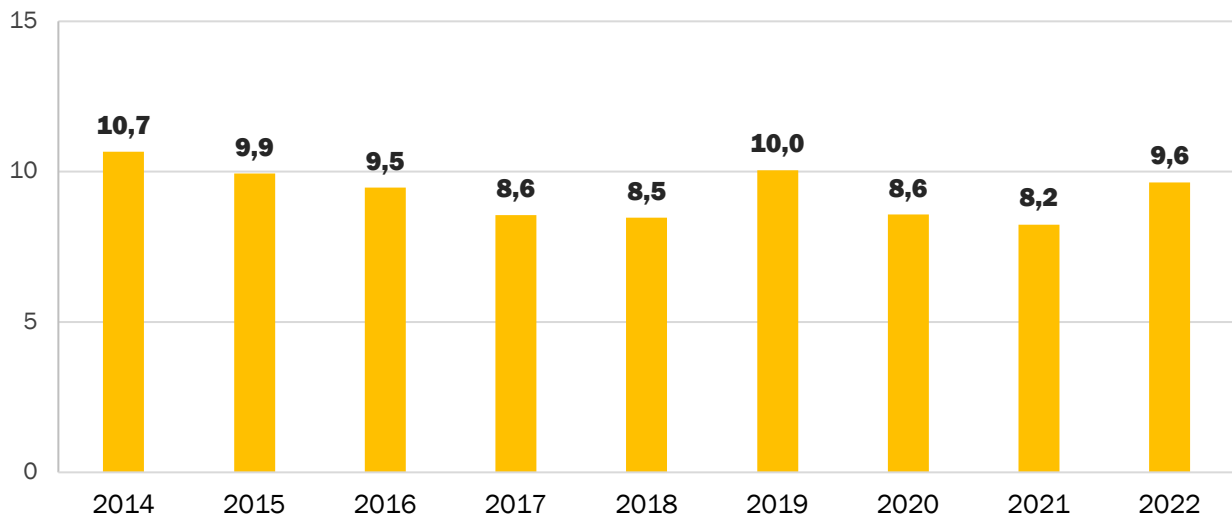
Lorenz Curve:

The Lorenz curve, which shows the income distribution on a diagram, was developed by the American statistician Max Otto Lorenz. The horizontal axis in the diagram represents the cumulative distribution of the population; The vertical axis shows the cumulative distribution of all income in the country. The Lorenz curve mathematically expresses the cumulative distribution function of the income distribution. The absolute equality (perfect equality, equi-distribution) line in the Lorenz curve shows how much the population slices on the horizontal axis receive from the cumulative income on the vertical axis, shows that the income is equally distributed among the population. The closer the Lorenz curve, which shows how much the population receives from the income, approaches the absolute equality line, the more equitably the income is distributed in the society.

The diagram below contains the Lorenz curve showing the income distribution for 2022 according to the KONDA Barometer measurement. We can read the graph in a more understandable way with the percentage share analysis above. As can be seen, the first 20 percent of society seems far from receiving 20 percent of all income. As the Lorenz curve moves away from the absolute equality line, the unequal situation in income distribution also increases. In other words, the share of income groups from all incomes increases upwards and the inequality in income distribution deepens.

Lorenz Curve according to the KONDA Barometer measurement (2022)
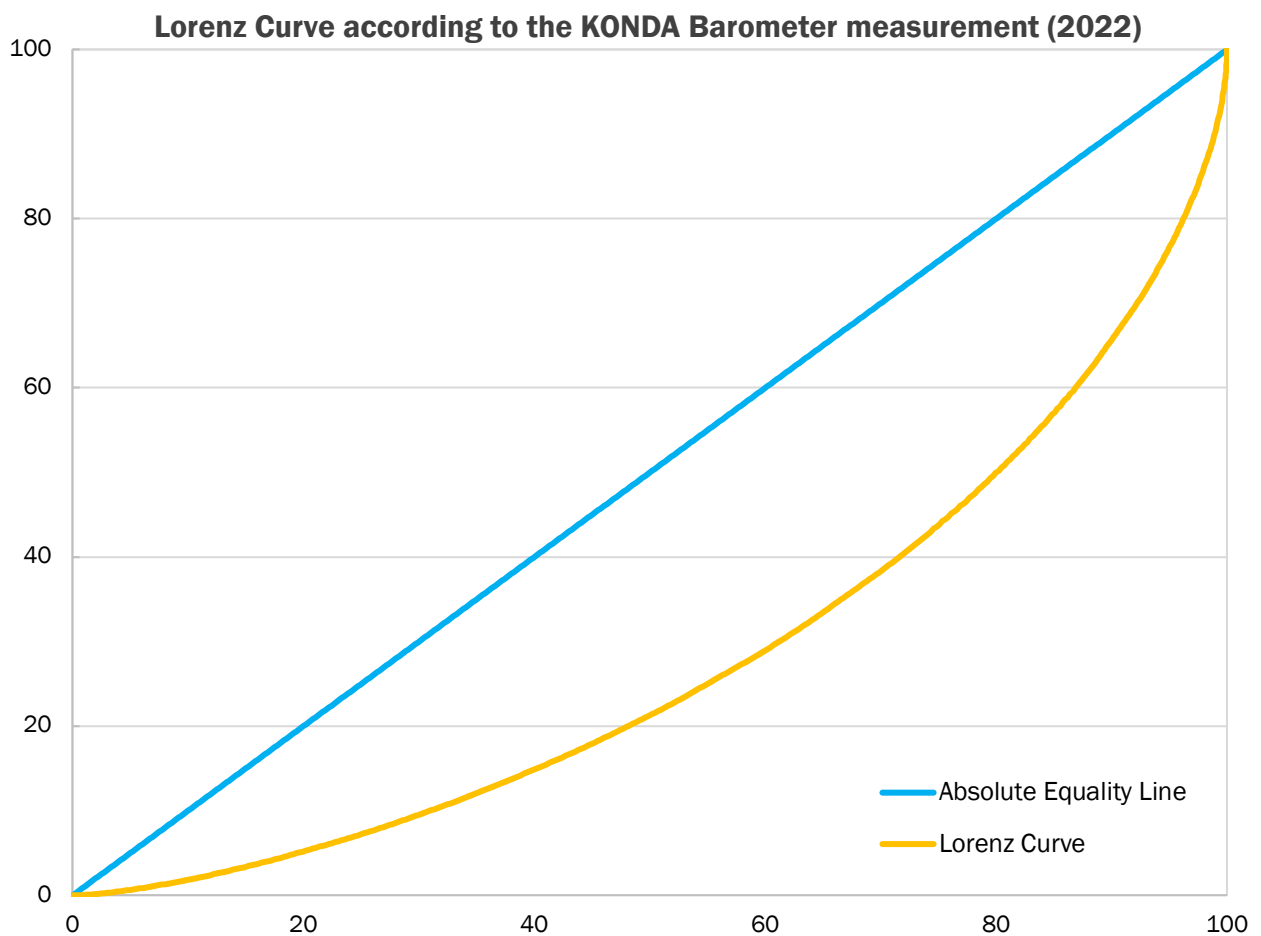
The share of the middle class in income is changing more rapidly, up and down.

When we examine the income distribution in Turkey through the change direction of the Lorenz curve, we see that in the past 8 years, the income distribution has started to be distributed more equitably, but then it has returned to the state it was 8 years ago. The Lorenz curves for 2014 and 2022 are almost parallel to each other. However, it is also seen that the intersection points of the curves of different years are concentrated in the segments with the lowest and highest incomes in the general population. In other words, the incomes of the middle classes tend to move up and down more rapidly over the years than those of the lower and upper classes.

Change of course of Lorenz Curve according to the KONDA Barometer measurement (2014, 2018, 2022)
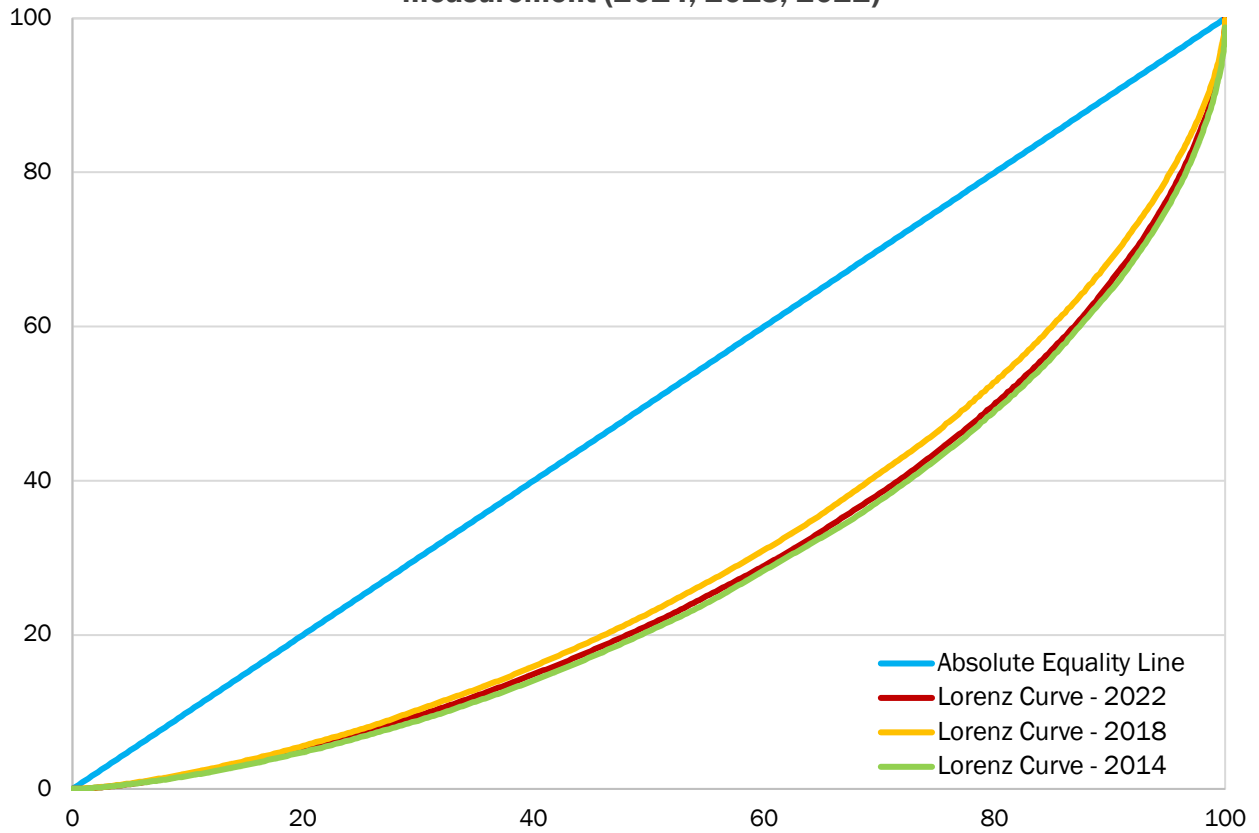
Distribution of income in social clusters:

To examine the distribution of income across society, we divided the society into five segments with a size of 20 percent. When we examine these slices on demograph clusters, we can see the income distribution injustice in society more clearly from a socio-demograph perspective.

Kurds, Religious Conservatives, those with less than a high school education and HDP voters are more in the 1st segment.

The weights of income brackets differ greatly according to ethnic origin, lifestyle, educational background and political preferences. While income strata among Turks are more regularly distributed, the rate of Kurds in the 1st quintile is calculated as 45 percent. With the increase in religiousness, the increase in the number of people in the households, and the decrease in the level of education, the decrease in income increases.

Distribution of income segments in social clusters

	1. segment	2. segment	3. segment	4. segment	5. segment
Age 15 - 17	24	24	21	18	13
Age 18 - 32	20	20	19	19	22
Age 33 - 48	24	21	20	18	18
Age 49+	19	18	21	22	20
Less than high school	30	23	20	16	10
High school	16	21	22	22	19
University	7	11	17	24	41
White collor employee	7	11	16	24	42
Worker, farmer, tradesman	21	20	20	19	19
Retiree	13	16	21	25	25
Housewife	31	26	21	15	7
Student	21	22	22	20	15
Unemployed	33	22	20	15	10
Modern	12	16	18	23	31
Traditional Conservative	24	22	21	19	15
Religious Conservative	30	23	20	16	11
1 - 2 people households	4	9	18	25	45
3 - 5 people households	17	24	23	21	15
6 - 8 people households	63	19	11	5	2
Turkish	15	20	21	22	22
Kurdish	45	22	15	10	8
Atheist	9	11	14	19	48
Non-believer	11	15	20	19	35
Believer	16	19	20	21	25
Religious	24	21	20	19	15
Devout	28	22	21	16	12
Ak Parti	21	22	21	19	17
MHP	16	21	21	21	21
CHP	12	17	19	23	29
HDP	48	22	12	9	9
İyi Parti	12	17	23	23	26
Other parties	14	16	20	20	30
Swing voter	23	21	21	19	16
Non-voter	25	21	20	18	16

5.2. Relative Poverty in Turkey (2014-2022)

In the second stage of our research, we calculated the relative poverty rate in Turkey and examined the change in relative poverty over the years. Under this heading, we will present our findings on our relative poverty calculation.

> **Relative Poverty:**
> Relative poverty refers to the fact that individuals and households in the society have income levels below a certain limit. The income level that is widely accepted as a measure of well-being is the median income level. Those with a per capita income below a certain level of the median income are considered relatively poor. Commonly accepted median income thresholds are 50 percent of median income to 60 percent of median income.

As of 2022, the relative poverty rate is calculated as 16.7 percent.

If we accept 50 percent of the median income as a threshold as of 2022, the relative poverty rate is 16.7 percent; When we accept 60 percent of the median income as a threshold, we see that the relative poverty rate is 23.5 percent.

The relative poverty rate seems to have increased over the years.

When we look at the changing trend of the relative poverty rate between the years 2014-2022, it is seen that the relative poverty rate, which was 11.5 percent in 2014, 13.9 percent in 2016, and 14.9 percent in 2020, has increased from year to year and is 16.7 percent as of this year.
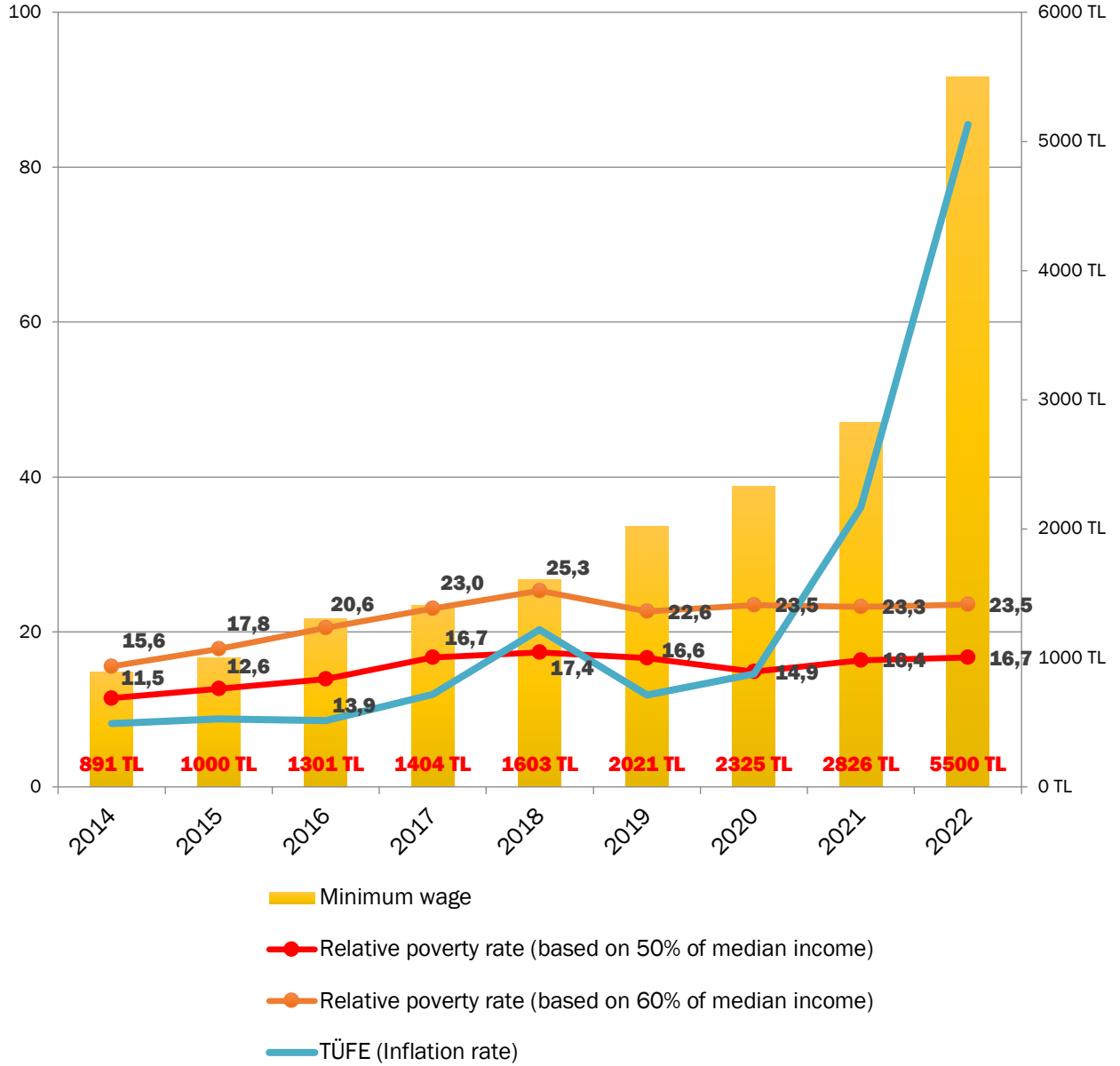
Change of course of relative poverty rate in Turkey according to the KONDA Barometer (2014-2022)

Relative poverty rate (based on 50% of median income)
Relative poverty rate (based on 60% of median income)
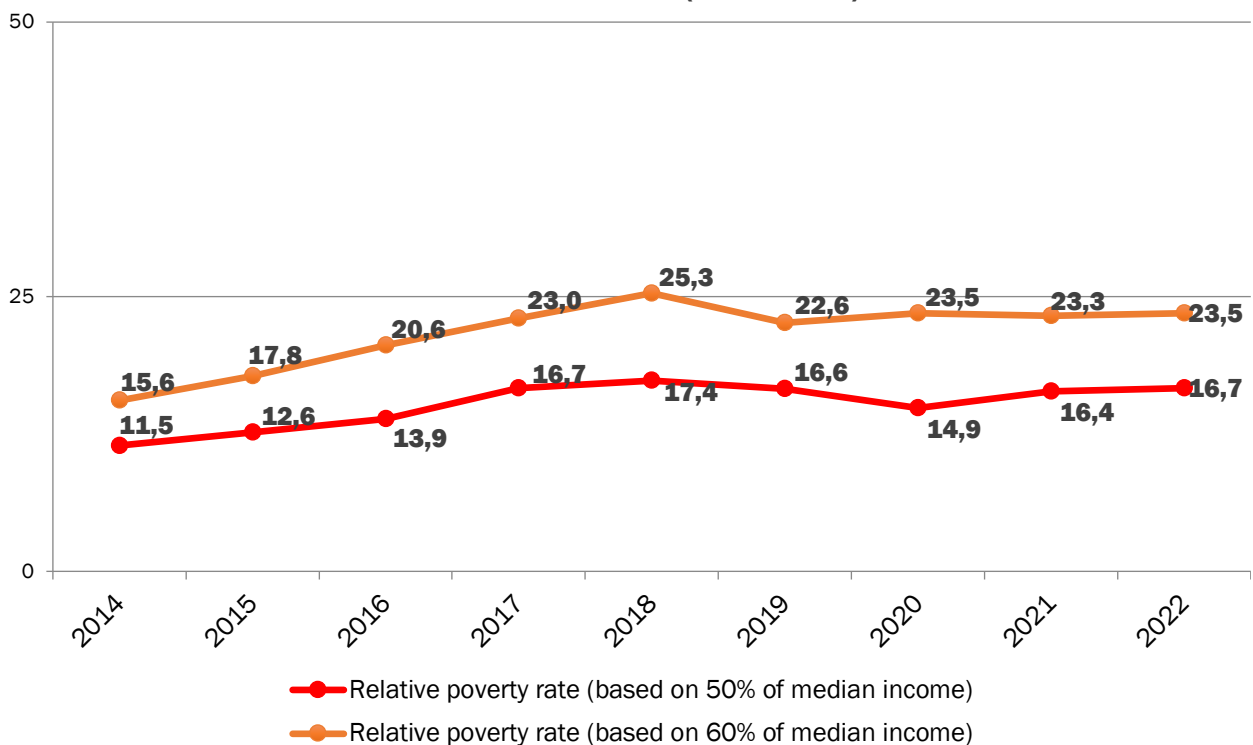
The graph below shows the comparison of the relative poverty rate with the minimum wage and inflation rate. The minimum wage has increased in nominal terms in the last year; The inflation rate has risen steadily since 2020 and continues to rise, while the relative poverty rate has been stable for the last 3 years.

Change of course of relative poverty rates compared with minimum wage and inflation rate

Legend:
- Minimum wage
- Relative poverty rate (based on 50% of median income)
- Relative poverty rate (based on 60% of median income)
- TÜFE (Inflation rate)

Finally, let's compare the relative poverty rates we calculated with the KONDA Barometer data with the rates announced by TURKSTAT. As can be seen in the table, we calculate the relative poverty rate, which was announced as 14.4 percent by TURKSTAT in 2021, as 16.4 percent in the KONDA data. While the rate calculated for 2020 is almost the same, KONDA data in 2018 and 2019 point to a higher relative poverty rate.

	2021		2020		2019		2018	
	KONDA	TURK-STAT	KONDA	TURK-STAT	KON-DA	TURK-STAT	KON-DA	TURK-STAT
Relative poverty rate (based on 50 percent of median income)	16,4	14,4	14,9	15,0	16,6	14,4	17,4	13,9
Relative poverty rate (based on 60 percent of median income)	23,3	21,3	23,5	21,9	22,6	21,3	25,3	21,2

5.3.   Material Deprivation in Turkey

In the third stage of our research, we will examine the current situation of material deprivation in Turkey. First of all, we will evaluate the material deprivation rate over demographic clusters. Then, we will consider the fulfillment of the nine criteria used as the criterion of material deprivation through demographic and social clusters and political preferences.
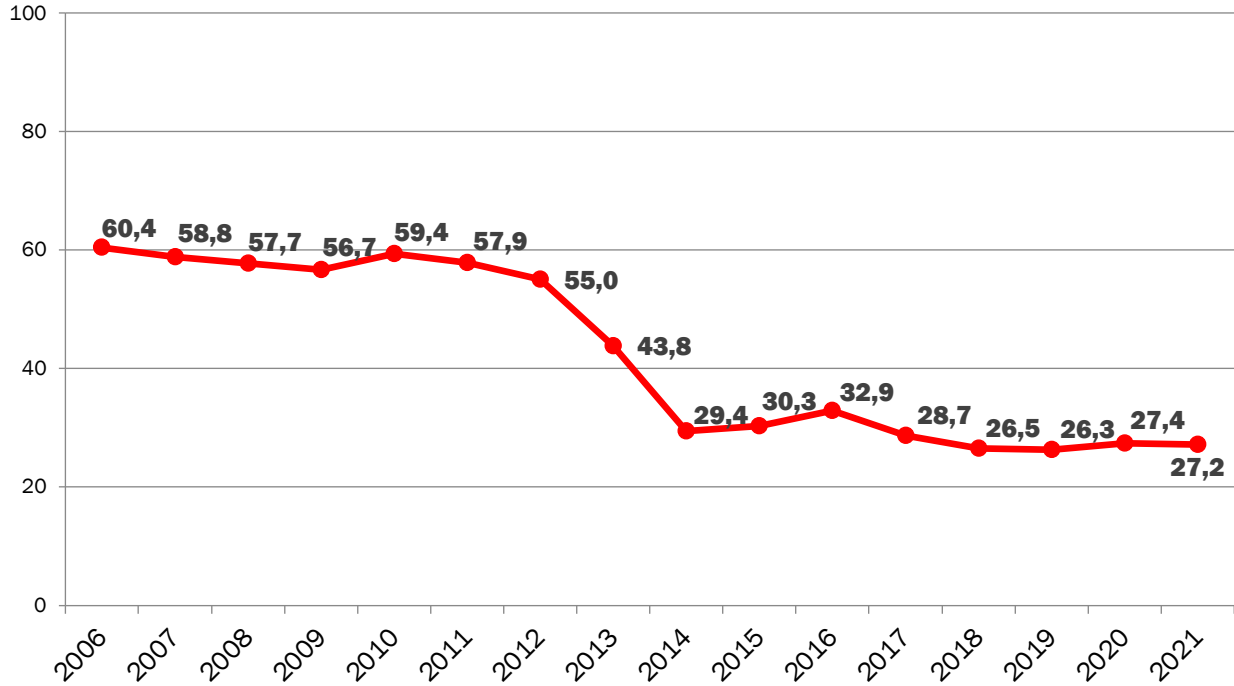
> Material Deprivation:
>
> The concept of material deprivation, which expresses the state of being in financial distress, defines the situation where at least four of the nine criteria are not met in the measurements made by EUROSTAT and TURKSTAT every year. These nine criteria consist of:
> 1. Unexpected expenses,
> 2. A week's vacation away from home,
> 3. Rent, mortgage, bill and debt payments,
> 4. Meeting the heating need of the house,
> 5. Meeting the need for meals containing meat, chicken, fish every two days (protein consumption),
> 6. Washing machine,
> 7. Television,
> 8. Phone,
> 9. Automobile.

In this month's field research, we calculated the rate of material deprivation based on the questions we asked our interviewees for the first time. For this reason, we do not have the chance to calculate the material deprivation rate retrospectively with KONDA data. The graph below shows the course of change in the rate of material deprivation announced by TURKSTAT every year. As can be seen, the rate of material deprivation, which changed between the band of 55-60 percent between 2006 and 2012 according to TURKSTAT, seems to have regressed to the band of 27-33 percent after 2014.

Change of course of material deprivation in Turkey according to the TÜİK data

The current rate of material deprivation in Turkey: 55 percent.

As of November'22, we measure the current rate of material deprivation in Turkey at 55 percent. This rate differs mostly according to the rural-urban-metropolitan breakdown, the number of people in the household, employment status and ethnic origins.

Material deprivation decreases with the increase in metropolitanization and education level.
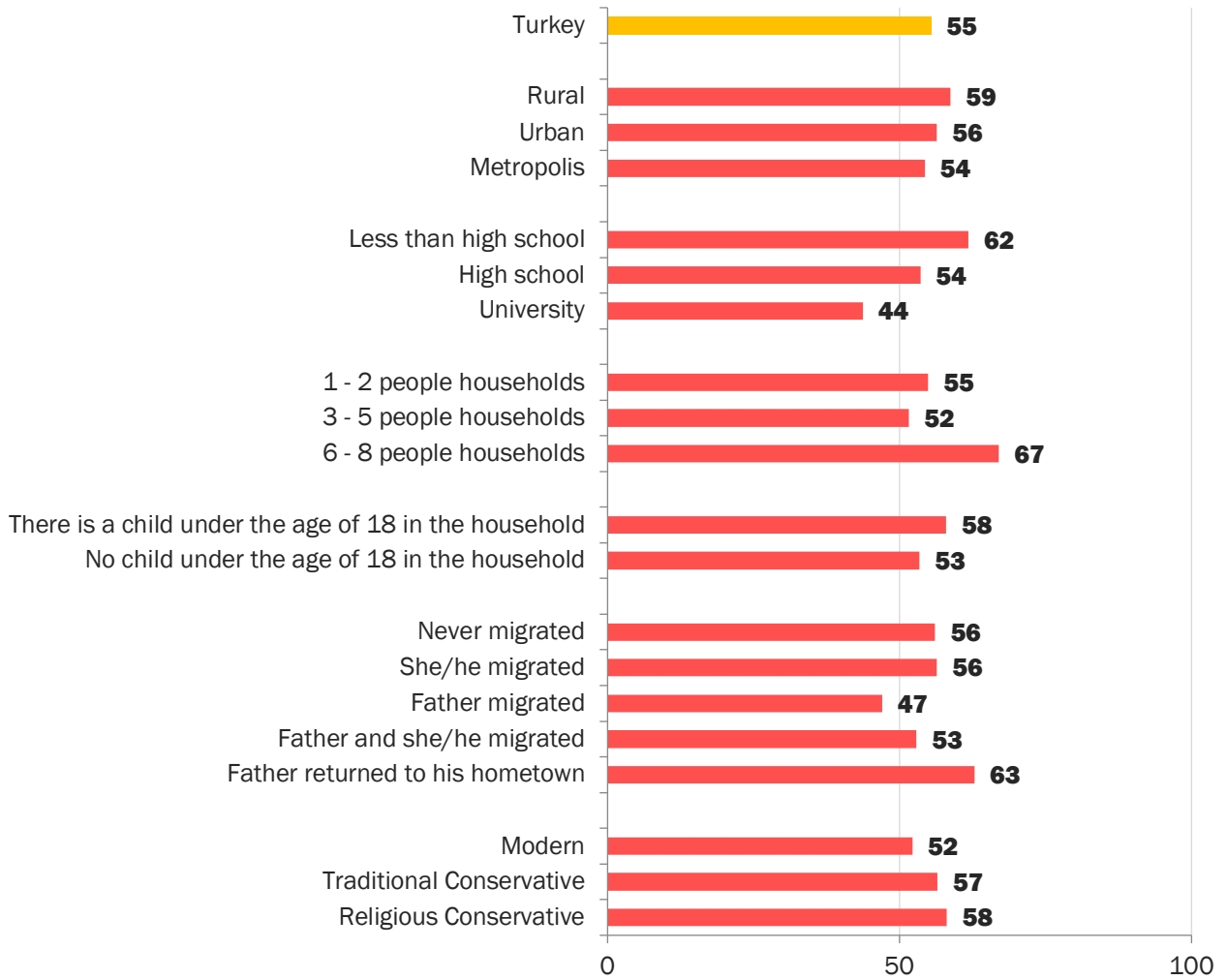
While the rate of material deprivation is 59 percent in rural areas, it reaches 56 percent in urban areas, one point higher than Turkey's average. In metropolitan areas, it is 1 point below the average of Turkey. Educational status, on the other hand, greatly differentiates the rate of material deprivation. As the level of education increases, the rate of material deprivation decreases. The level of material deprivation is 62 percent for those with less than a high school education, and 44 percent for university graduates.

There is more material deprivation in crowded households.

One of the clusters with the highest rate of material deprivation is households with 6-8 people. The financial deprivation rate of households with children under the age of 18 is measured as 3 points above the Turkey average.
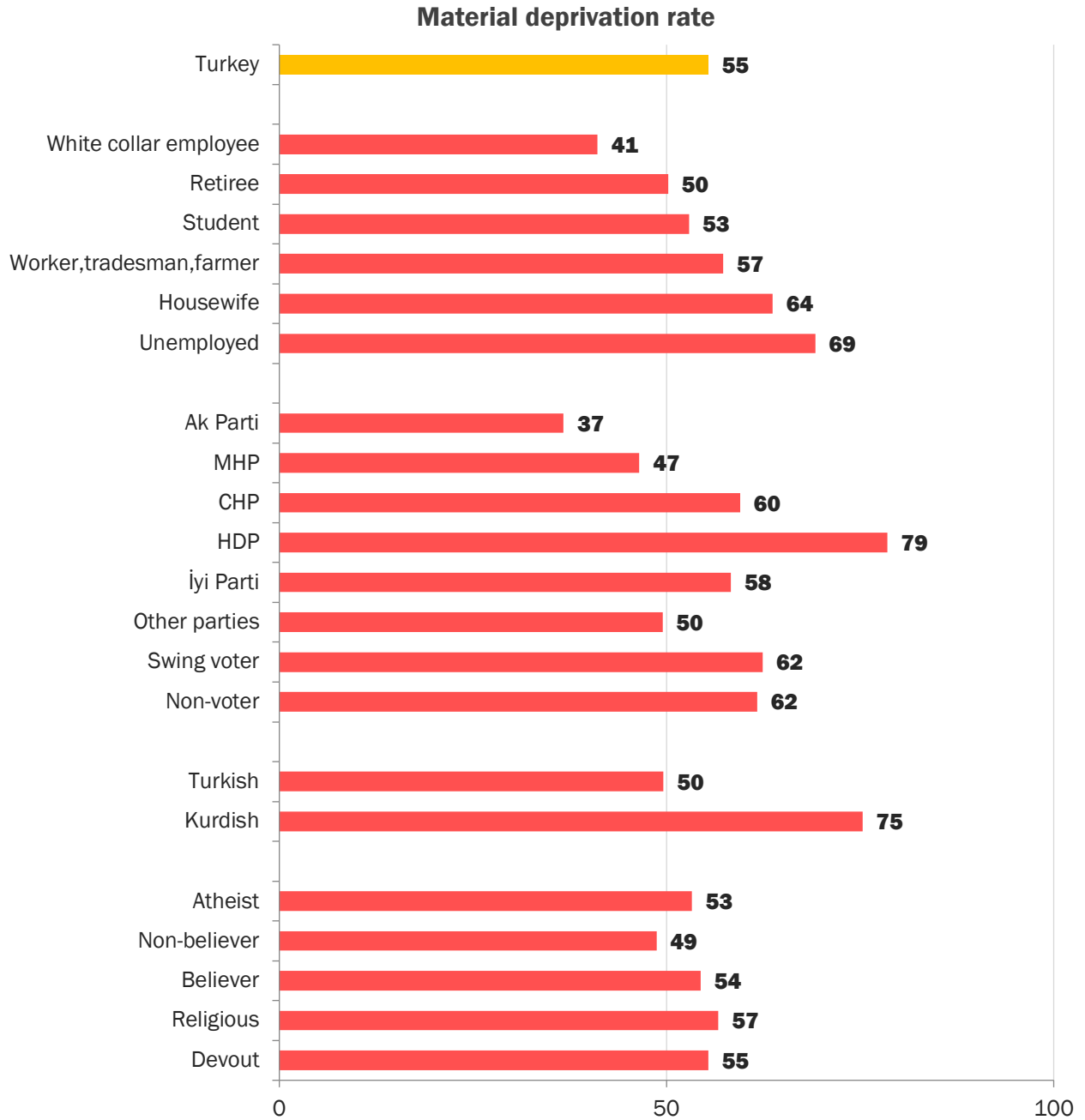
Material deprivation rate

Category	Rate
Turkey	55
Rural	59
Urban	56
Metropolis	54
Less than high school	62
High school	54
University	44
1 - 2 people households	55
3 - 5 people households	52
6 - 8 people households	67
There is a child under the age of 18 in the household	58
No child under the age of 18 in the household	53
Never migrated	56
She/he migrated	56
Father migrated	47
Father and she/he migrated	53
Father returned to his hometown	63
Modern	52
Traditional Conservative	57
Religious Conservative	58

When we look at the migration status, the material deprivation rate of those who have "returned to their father's hometown" is measured at the highest level at 63 percent. With the conservatism of the lifestyle, the rate of material deprivation rises a few points compared to the average in Turkey.

Two out of 5 white-collar workers are in financial deprivation.

According to their employment status, the cluster with the lowest rate of material deprivation is white-collar workers. Although it is below Turkey's average, 2 out of 5 white-collar workers are in material deprivation. The level of material deprivation of retirees and students also lags behind Turkey's average. The rate of material deprivation is measured at 57 percent for workers, tradespeople and farmers, 64 percent for housewives and 69 percent for the unemployed.

The rate of material deprivation in Cumhur İttifakı is below the Turkey average.

The cluster with the highest rate of material deprivation according to political preferences is HDP voters with 79 percent. This is followed by swing voters with 62 percent, CHP supporters with 60 percent, and İyi Parti supporters with 58 percent. The rate of material deprivation is 37 percent among Ak Parti voters and 47 percent among MHP voters.
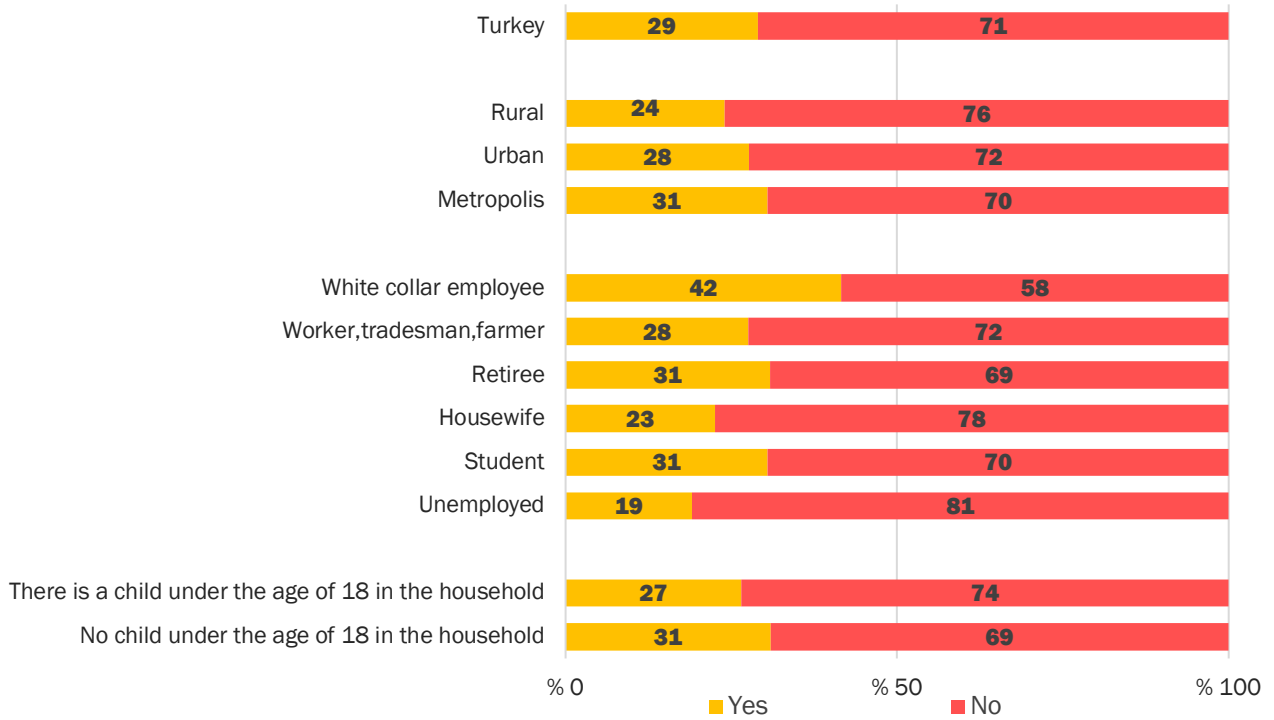
Material deprivation rate

Category	Rate
Turkey	**55**
White collar employee	41
Retiree	50
Student	53
Worker,tradesman,farmer	57
Housewife	64
Unemployed	69
Ak Parti	37
MHP	47
CHP	60
HDP	79
İyi Parti	58
Other parties	50
Swing voter	62
Non-voter	62
Turkish	50
Kurdish	75
Atheist	53
Non-believer	49
Believer	54
Religious	57
Devout	55

Let us now examine the answers given to the questions that we used in our measure of material deprivation, in more detail.

5.3.1. Covering unexpected expenses

To the interviewees this month, we asked the question "When you encounter a sudden expense that you do not expect at the moment, do you think you can afford it?". In the graph below, we have evaluated the answers given to this question separately according to the place of residence, employment status and whether there are children under the age of 18 in the household.

Currently, when you encounter an unexpected expense, do you think you can afford it?

	Yes	No
Turkey	29	71
Rural	24	76
Urban	28	72
Metropolis	31	70
White collar employee	42	58
Worker,tradesman,farmer	28	72
Retiree	31	69
Housewife	23	78
Student	31	70
Unemployed	19	81
There is a child under the age of 18 in the household	27	74
No child under the age of 18 in the household	31	69

In society, 7 out of 10 people think that they cannot afford a sudden expense.

Seventy-one percent of society thinks that they cannot afford an unexpected expense right now. This rate increases by 5 percentage points to 76 percent for those living in rural areas and reach 72 percent by increasing by 1 point for those living in urban areas. For those living in the metropolis, we see that this rate is 70 percent.

When we analyze the answers given to the above question according to the employment status of the people, we see that the highest "no" response rate belongs to the unemployed with 81 percentage points. This is followed by housewives with 78 percent. We see that the least "no" response rate belongs to the white-collar workers.

While 74 percent of those who stated that there were children under the age of 18 in their households answered "no" to the above question, this rate decreased to 69 percent in those who did not have children under the age of 18 in their household.

Those who think that they can afford a sudden expense in the incumbent bloc voters are more.

Among those who think that they cannot afford a sudden expense, the lowest rate belongs to Ak Parti voters with 52 percent, followed by MHP voters with 58 percent.
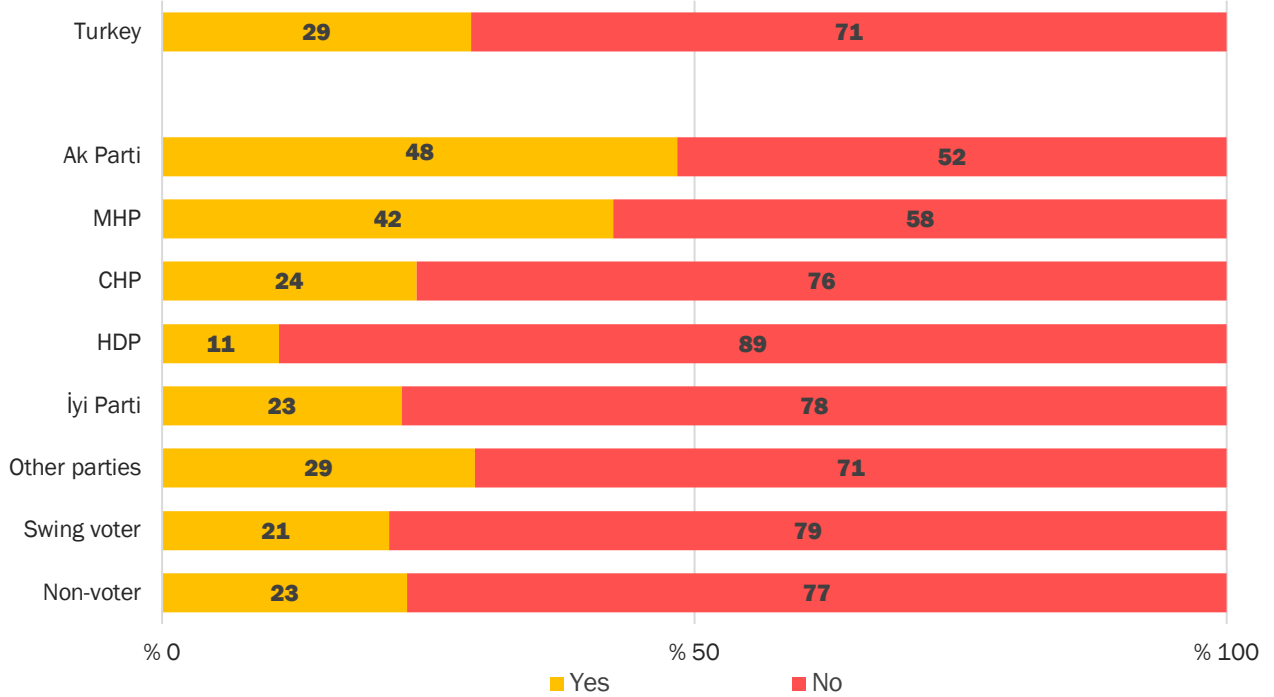
HDP voters have the highest percentage of those who think they cannot afford a sudden expense.

The "no" response rate for CHP voters is 76 percent. This rate has increased by 2 percentage points to 78 percent among İyi Parti voters. We see the highest "no" response rate with 89 percent in HDP voters. After HDP voters, those who gave the highest "no" answer belonged to the swing voters with 79 percent.

Currently, when you encounter an unexpected expense, do you think you can afford it?

	Yes	No
Turkey	29	71
Ak Parti	48	52
MHP	42	58
CHP	24	76
HDP	11	89
İyi Parti	23	78
Other parties	29	71
Swing voter	21	79
Non-voter	23	77

■ Yes ■ No

The proportion of Kurds who think that they cannot afford a sudden expenditure is higher than the Turks.
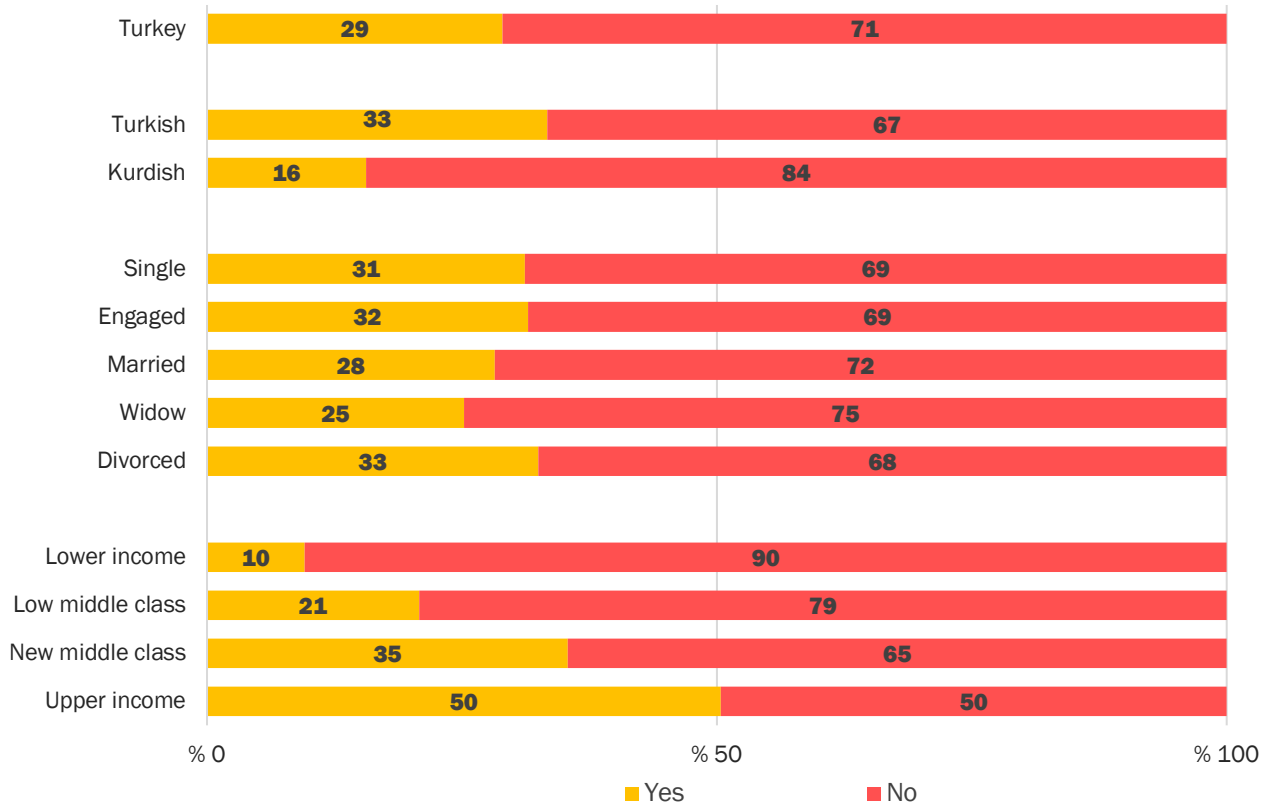
According to the graph below, 84 percent of Kurds think that they cannot afford a sudden expenditure, while this rate is 67 percent among Turks. Accordingly, the rate of "no" answers given by Kurds to the question is 17 points higher than that of Turks.

Half of those in the upper-income group think that they cannot afford a sudden expenditure.

We see that the rate of "no" answers given to the question decreased as the income level increased. While 90 percent of those in the lower income group think that they cannot afford a sudden expenditure, this rate drops to 50 percent in the upper-income group.

Currently, when you encounter an unexpected expense, do you think you can afford it?

	Yes	No
Turkey	29	71
Turkish	33	67
Kurdish	16	84
Single	31	69
Engaged	32	69
Married	28	72
Widow	25	75
Divorced	33	68
Lower income	10	90
Low middle class	21	79
New middle class	35	65
Upper income	50	50

■ Yes   ■ No

5.3.2. Meeting the need for a week's vacation away from home

In order to evaluate the criterion of taking a week's vacation away from home in our research, we included the question "Are you economically able to afford a week's vacation away from home for the entire household?". In the graph below, we analyze the answers to this question by place of residence, employment status, and whether there are children under the age of 18 in the household.

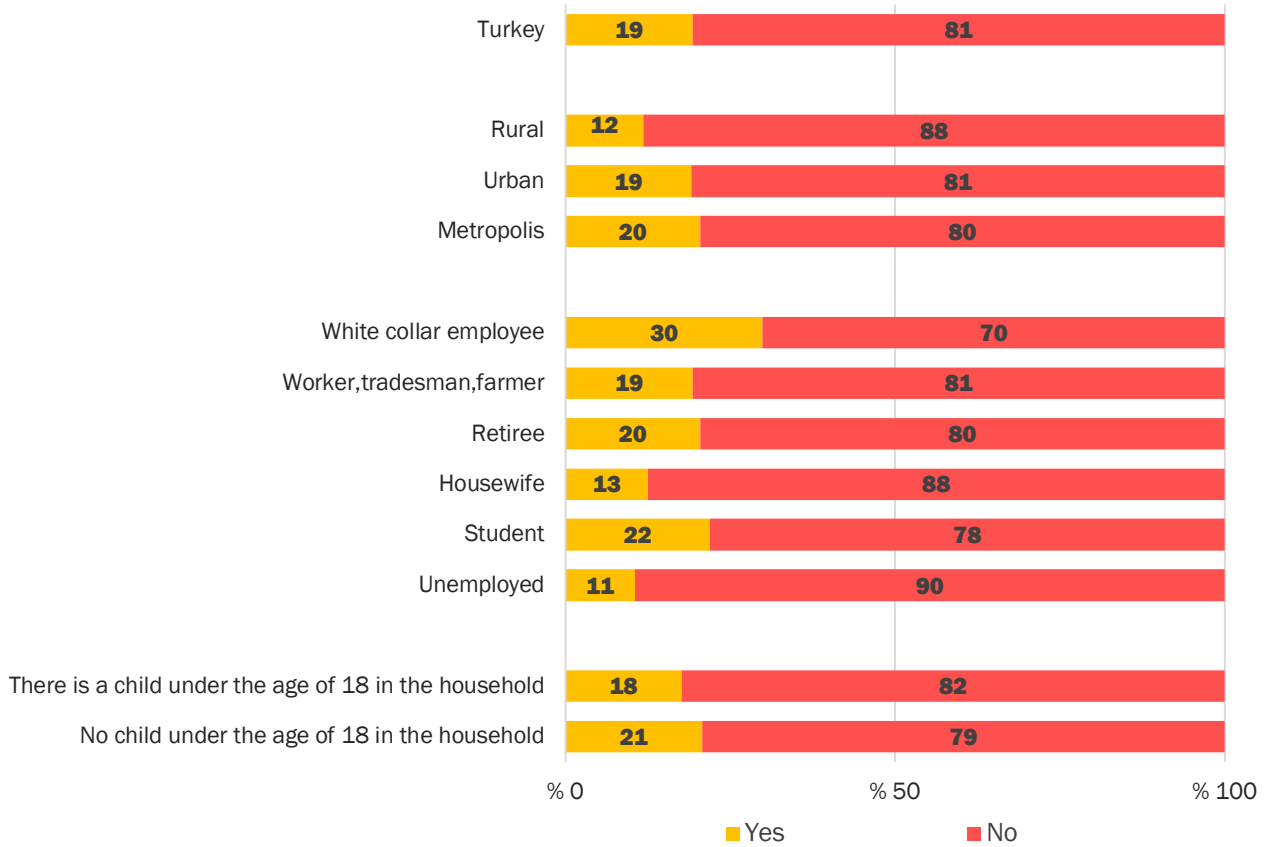**Eight out of 10 people think they can't afford a week's vacation.**

We see that 81 percent of society and urban dwellers think that all household is economically unable to afford a one-week vacation away from home. This rate increases by 7 points and reaches 88 percent for those living in rural areas.

White-collar employees have the highest rate among those who can afford their vacation expenses.

Ninety percent of the unemployed give the answer "no" to this question. This is followed by housewives with 88 percent and workers, tradespeople and farmers with 81 percent. The highest rate of those who can afford the holiday expenses belongs to white-collar employees.
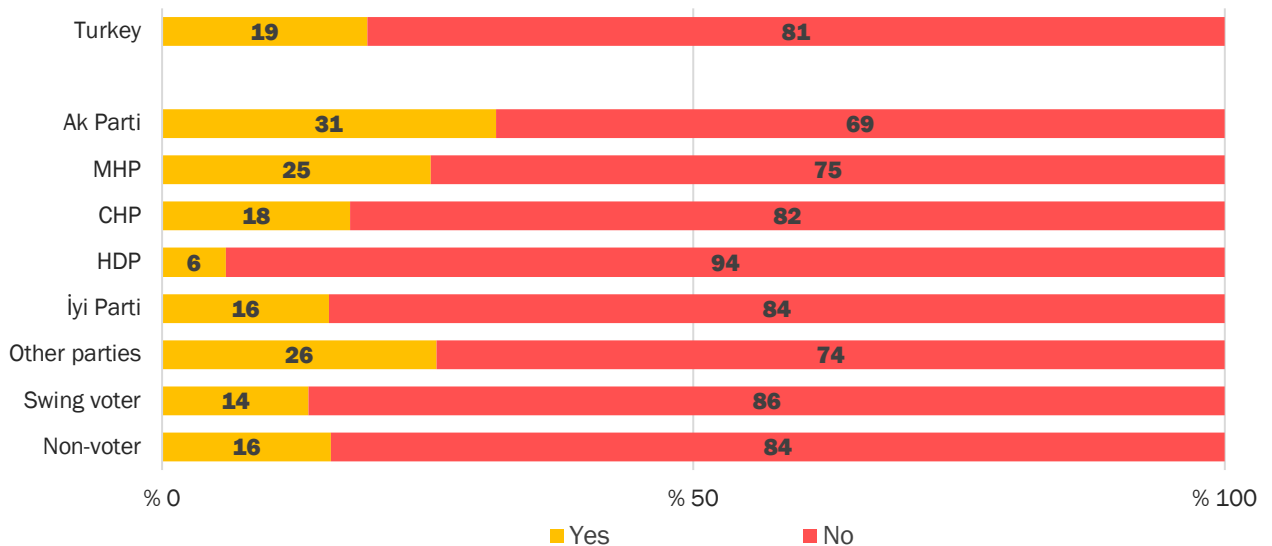
Are you economically able to afford a week's vacation of the entire household away from home?

	Yes	No
Turkey	19	81
Rural	12	88
Urban	19	81
Metropolis	20	80
White collar employee	30	70
Worker,tradesman,farmer	19	81
Retiree	20	80
Housewife	13	88
Student	22	78
Unemployed	11	90
There is a child under the age of 18 in the household	18	82
No child under the age of 18 in the household	21	79

■ Yes ■ No

While 82 percent of those who have children under the age of 18 in their households state that they are unable to afford their vacation expenses, we see that this rate drops by 3 percentage points to 79 percent for those who do not have children under the age of 18 in their household.

Are you economically able to afford a week's vacation of the entire household away from home?

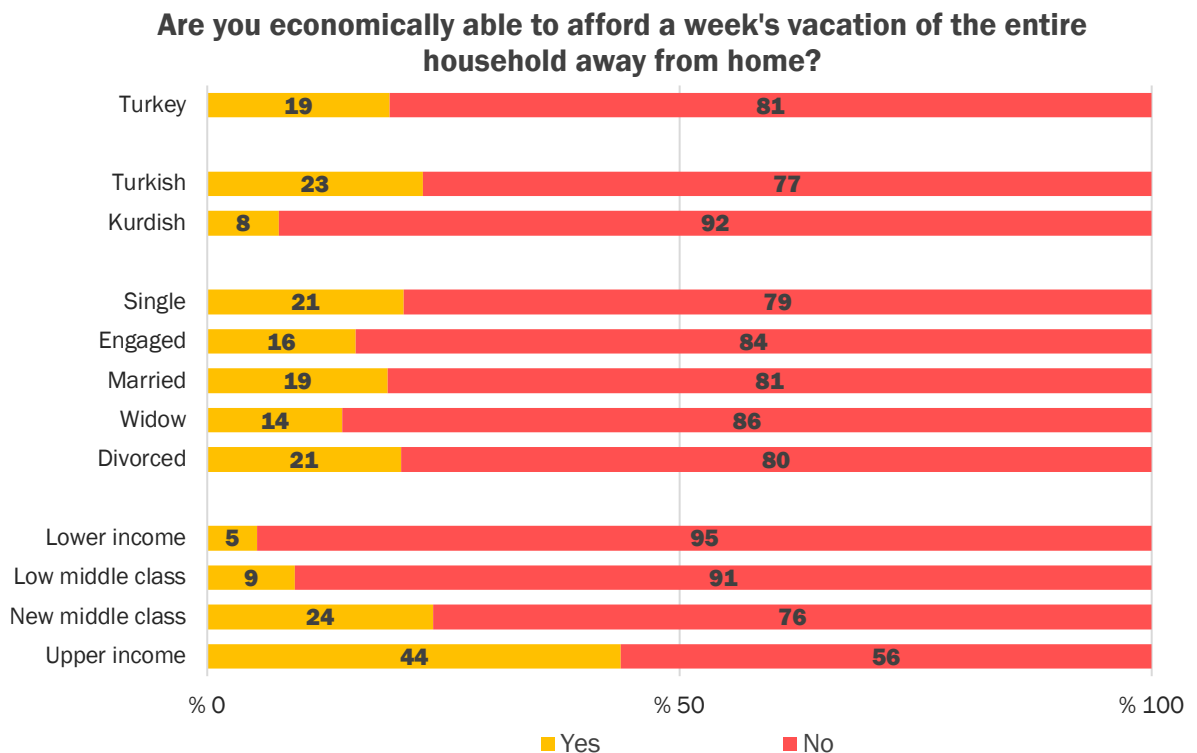|	Yes	No
Turkey	19	81
Ak Parti	31	69
MHP	25	75
CHP	18	82
HDP	6	94
İyi Parti	16	84
Other parties	26	74
Swing voter	14	86
Non-voter	16	84

■ Yes ■ No

The lowest rate of those who stated that they could not afford a one-week vacation away from home belonged to Ak Parti voters with 69 percent. This is followed by MHP voters with 75 percent.

Nine out of 10 HDP voters cannot afford their vacation expenses.

Eighty-two percent of CHP voters answer "no" to this question. This rate increases by 2 points to reach 84 percent among the voters of the İyi Parti. HDP voters seem to have the highest "no" response rate, with 94 percent. We see that the voters with the highest "no" response rate after HDP voters are the swing voters.

Are you economically able to afford a week's vacation of the entire household away from home?

	Yes	No
Turkey	19	81
Turkish	23	77
Kurdish	8	92
Single	21	79
Engaged	16	84
Married	19	81
Widow	14	86
Divorced	21	80
Lower income	5	95
Low middle class	9	91
New middle class	24	76
Upper income	44	56

The rate of those who think that they cannot afford the holiday expenses among the Kurds is higher than the Turks.

Let's evaluate the answers given to the above question according to the ethnic origins of the people. According to the graph, while 92 percent of Kurds answered "no" to the question, we see that this rate is 77 percent for Turks. Accordingly, the proportion of Kurds who state that they cannot afford a one-week vacation away from home is 15 points more than Turks.

When we analyze the answers given according to the marital status of the people, we see that those who gave the highest "no" answer are widowed people. It is followed by engaged partners with 84 percent. The group that gives the least "no" answer is single people.

More than half of those in the upper-income group think that they cannot afford their vacation expenses.

According to the graph, the rate of people answering "no" decreases as economic income increases. While the rate of people in the lower-income group answering "no" is 95 percent, we see that this rate drops to 56 percent in the high-income group.
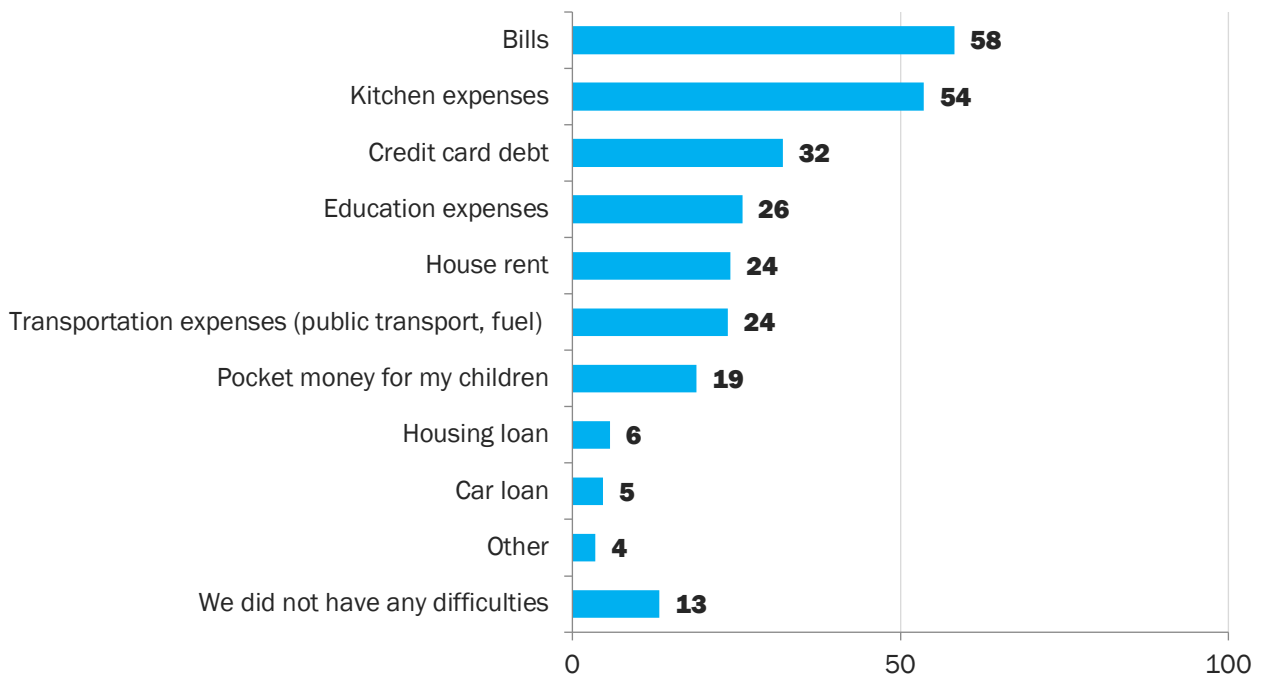
5.3.3. Payment difficulty

To the interviewees this month, we also asked the question "What expenditures have you had difficulty with in the last three months?". Let's examine the answers given again according to the place of residence, employment status and whether there are children under the age of 18 in their households.

We should also note that in our calculation of the material deprivation rate, we use the rates of bills, rent, housing loans and credit card debt among the options we gave in this question.

In the graph below, we see the responses of society to the above question. According to the graph, more than half of the society stated that they had difficulties in paying bills and kitchen expenses in the last three months. Three out of 5 people say they have difficulty paying their bills. This is followed by credit card debt with a rate of 32 percent.

Twenty-six out of every 100 people in society have difficulties in meeting their education expenses. While 1 out of every 4 people say that they have difficulty paying the rent, 1 out of every 5 people says that they have difficulty in giving pocket money to their child. One out of every 4 people states that they have difficulty meeting their transportation expenses.

**With what expenditures did you have difficulty in the last three months?**

Category	Value
Bills	58
Kitchen expenses	54
Credit card debt	32
Education expenses	26
House rent	24
Transportation expenses (public transport, fuel)	24
Pocket money for my children	19
Housing loan	6
Car loan	5
Other	4
We did not have any difficulties	13

In the graph below, we examine the answers given to the question "Which expenditures did you have difficulty in paying within the last three months?" according to the place of residence of the people.

Sixty-one percent of the population living in the city stated that they had difficulty paying the bills in the last three months. While this rate decreased by 3 points to 58 percent for those living in metropolitan areas, 45 percent of those living in rural areas stated that they had difficulty paying bills.

Fifty-six percent of those living in the metropolis state that they have had difficulties in the last three months while making their kitchen expenses. This rate is measured as 54 percent for rural residents and 50 percent for urban residents. We see that those who have the most difficulty in paying for house rent and education expenses are those in the metropolitan area.

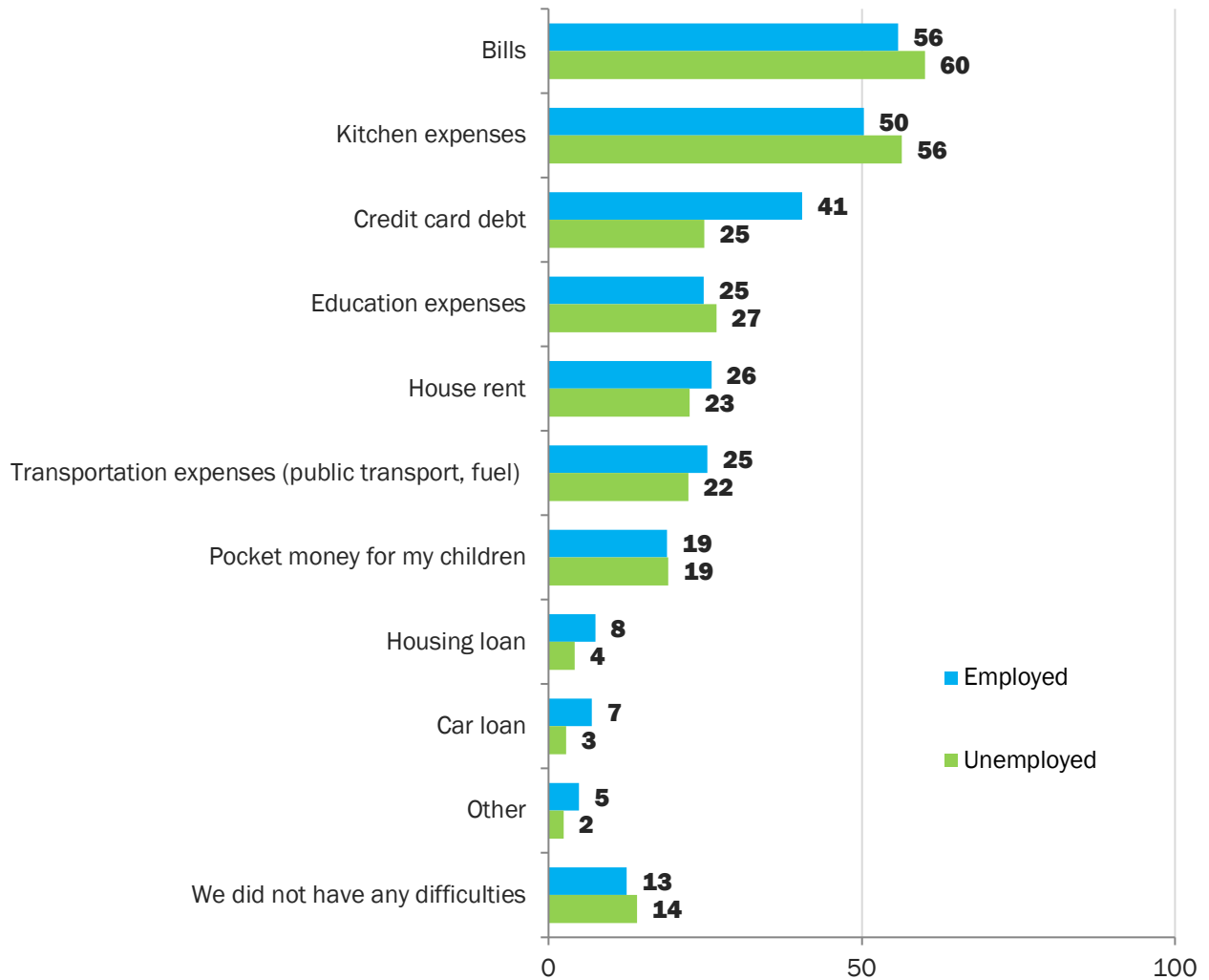## With what expenditures did you have difficulty in the last three months?
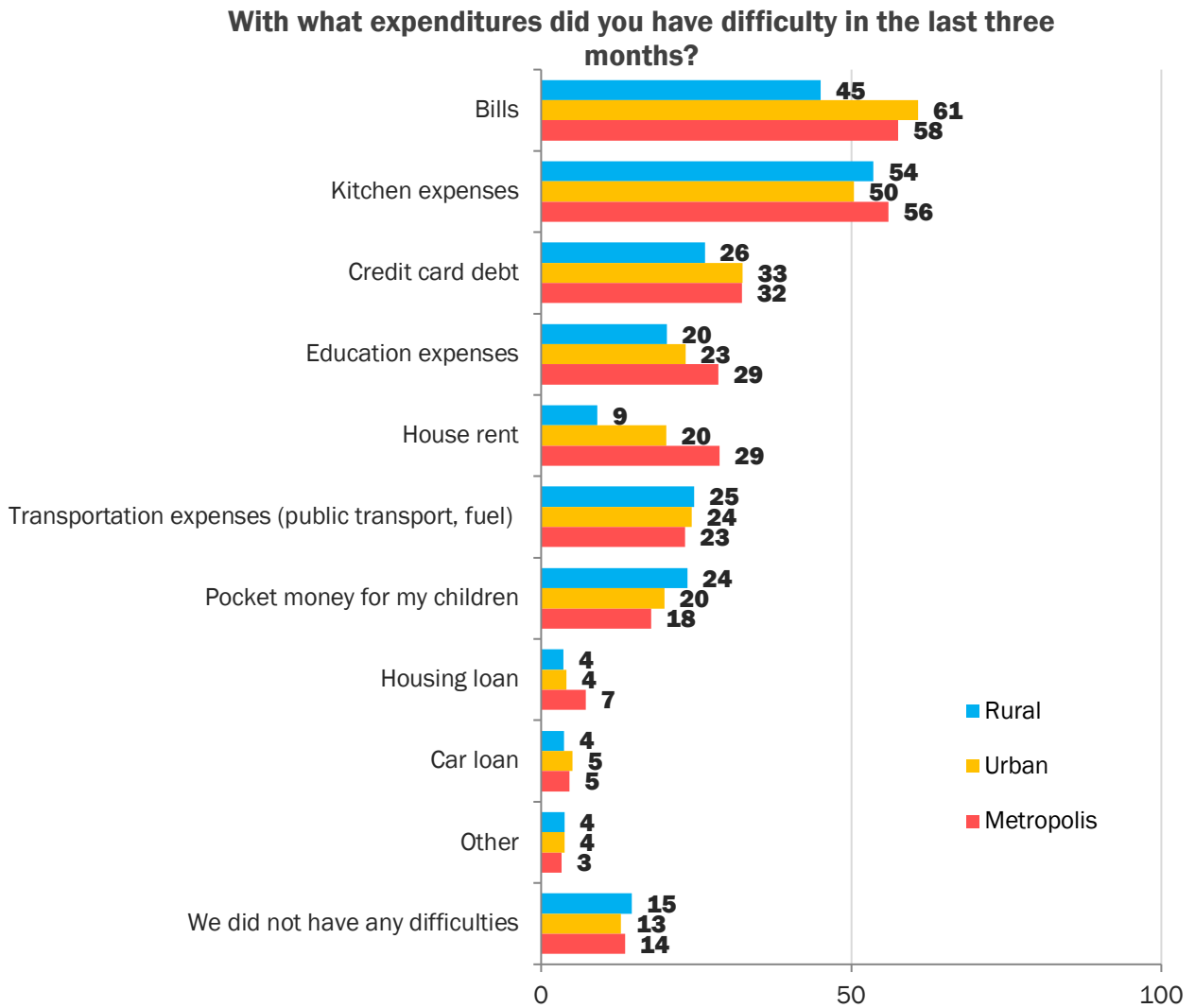
Now, let's evaluate the answers given to the above question according to the employment status of the people:

According to the graph below, while 60 percent of the unemployed say that they have difficulty paying their bills, this rate is 56 percent among the working population. In terms of kitchen expenses, 56 percent of the non-working and half of the working people state that they have difficulty in making their kitchen expenses.

Forty-one percent of employed people and 25 percent of unemployed people state that they have difficulties paying off their credit card debt. Likewise, we see that the rate of employees who state that they have difficulties in terms of house rent and transportation costs is higher than those who do not work.

With what expenditures did you have difficulty in the last 3 months?

Category	Employed	Unemployed
Bills	56	60
Kitchen expenses	50	56
Credit card debt	41	25
Education expenses	25	27
House rent	26	23
Transportation expenses (public transport, fuel)	25	22
Pocket money for my children	19	19
Housing loan	8	4
Car loan	7	3
Other	5	2
We did not have any difficulties	13	14

Finally, let's evaluate the answers given to the above question according to whether there is a child under the age of 18 in the household:
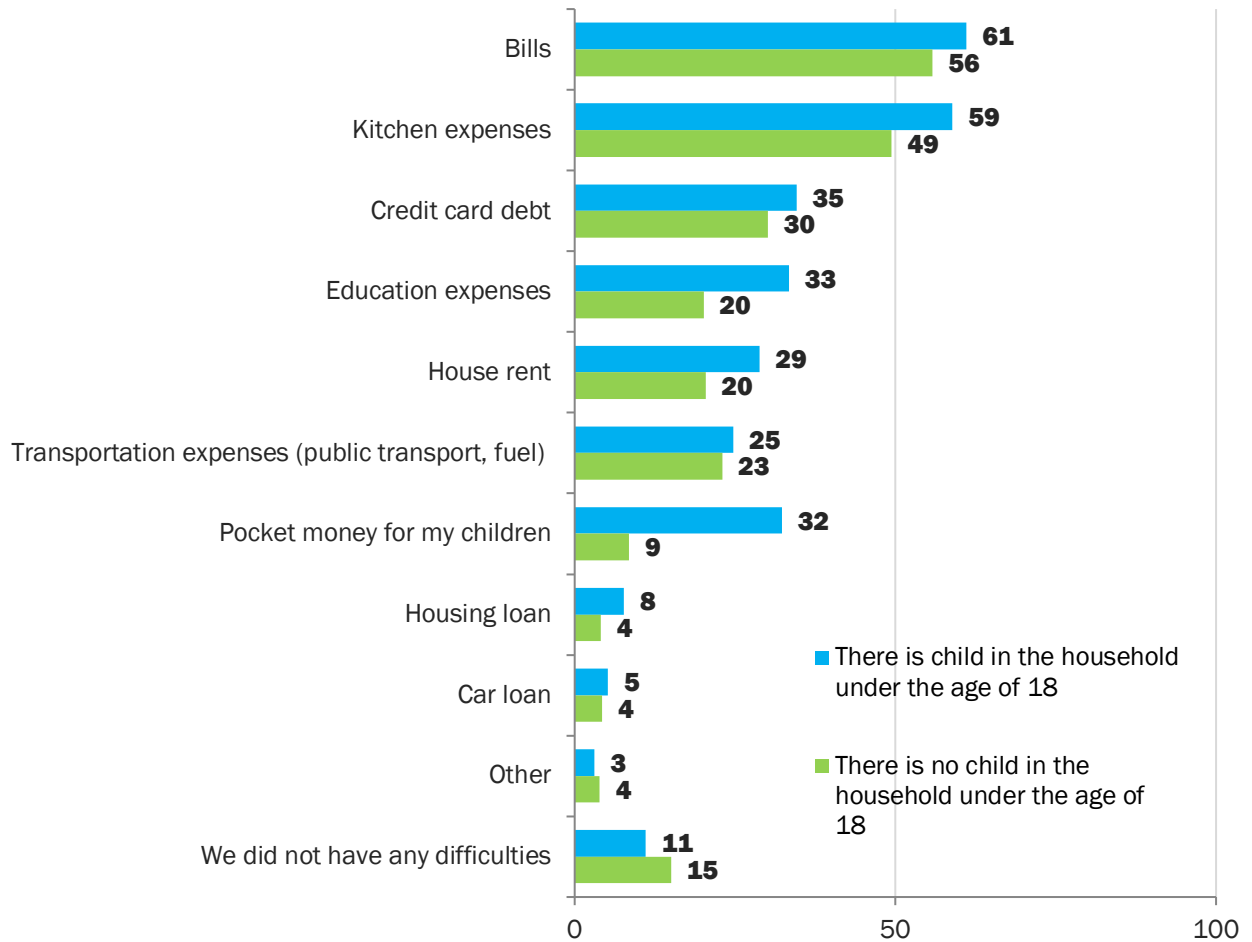
According to the graph below, we see that 61 percent of those who state that they have children under the age of 18 in their household have difficulty paying bills, and 59 percent have difficulty meeting their kitchen expenses. These rates are 56 percent and 49 percent, respectively, for those who do not have children under the age of 18 in their household.

Thirty-five percent of those who have children under the age of 18 in their household say that they have difficulty paying their credit card debt, and 33 percent say that they have difficulty paying for education expenses. Again, 32 percent of this group state that they have difficulties with the pocket money given to the child. We see that this rate is 9 percent for people who do not have children under the age of 18 in their household.

Among those who stated that they did not have any difficulties, the rate of those who do not have children under the age of 18 in their household is 4 points higher than the rate of those who do.

With what expenditures did you have difficulty in the last 3 months?

Expenditure	There is child in the household under the age of 18	There is no child in the household under the age of 18
Bills	61	56
Kitchen expenses	59	49
Credit card debt	35	30
Education expenses	33	20
House rent	29	20
Transportation expenses (public transport, fuel)	25	23
Pocket money for my children	32	9
Housing loan	8	4
Car loan	5	4
Other	3	4
We did not have any difficulties	11	15

5.3.4. Meeting the heating needs of the house

To the interviewees this month, we asked the question "Do you think you can meet the heating needs of your house economically in the coming winter months?". In the graph below, we analyzed the answers to this question according to the place of residence, employment status, and whether there are children under the age of 18 in the household.

Accordingly, 48 percent of the adult population of Turkey thinks that they will not be able to meet the heating needs of their homes economically in the coming winter months. This rate increases by 6 points to 54 percent for those living in rural areas, to 51 percent by increasing 3 points for those living in urban areas, and to 46 percent with a decrease of 2 percentage points for those living in metropolitan areas.
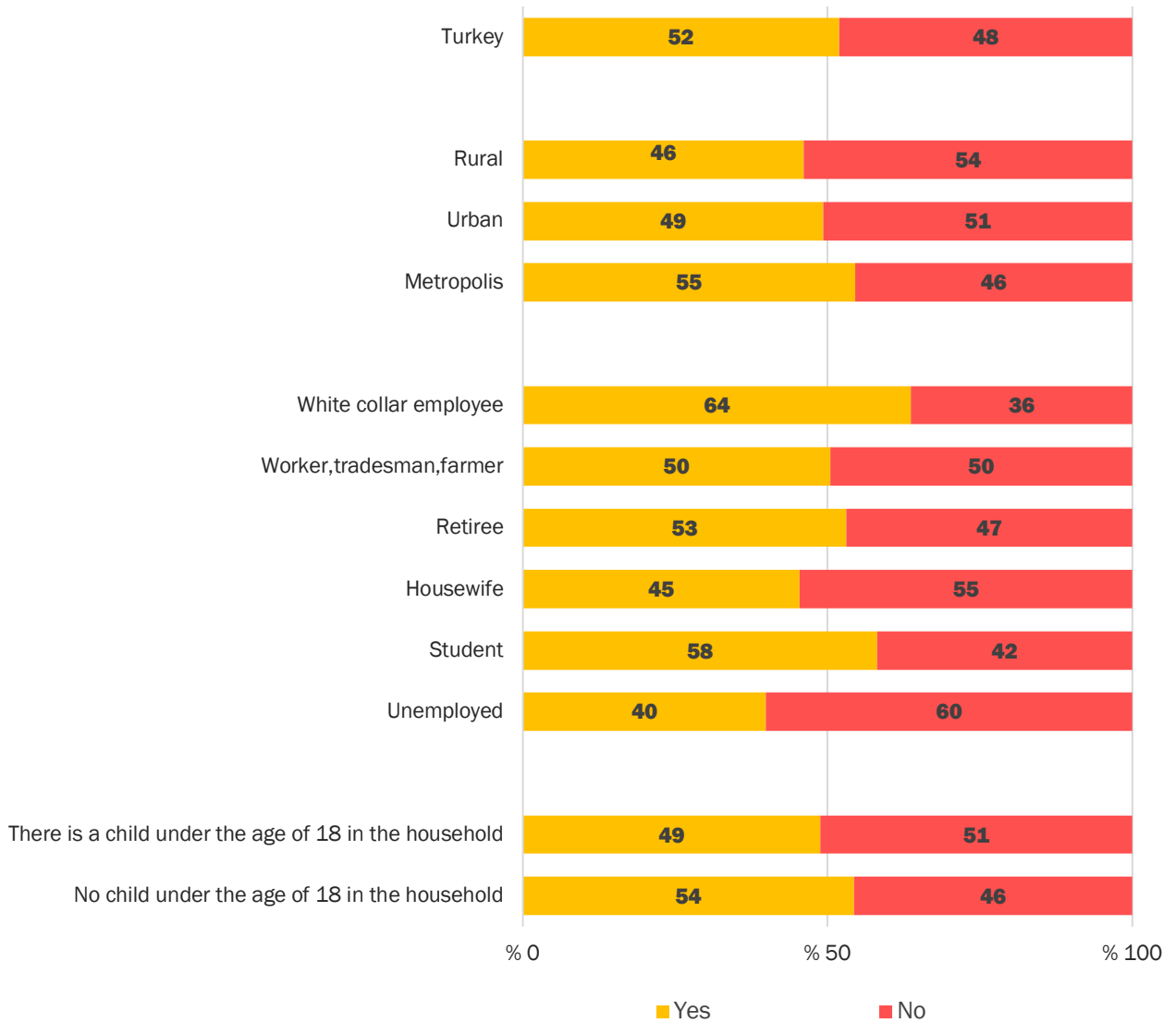
Sixty percent of the unemployed and 55 percent of housewives state that they cannot meet their heating needs economically in winter. The group with the lowest rate in terms of having difficulties paying the heating bills is white-collar employees with 36 percent.

Fifty-one percent of those with children under the age of 18 in their household and 46 percent of those without children state that they do not have the power to economically meet the heating needs of their homes in winter.

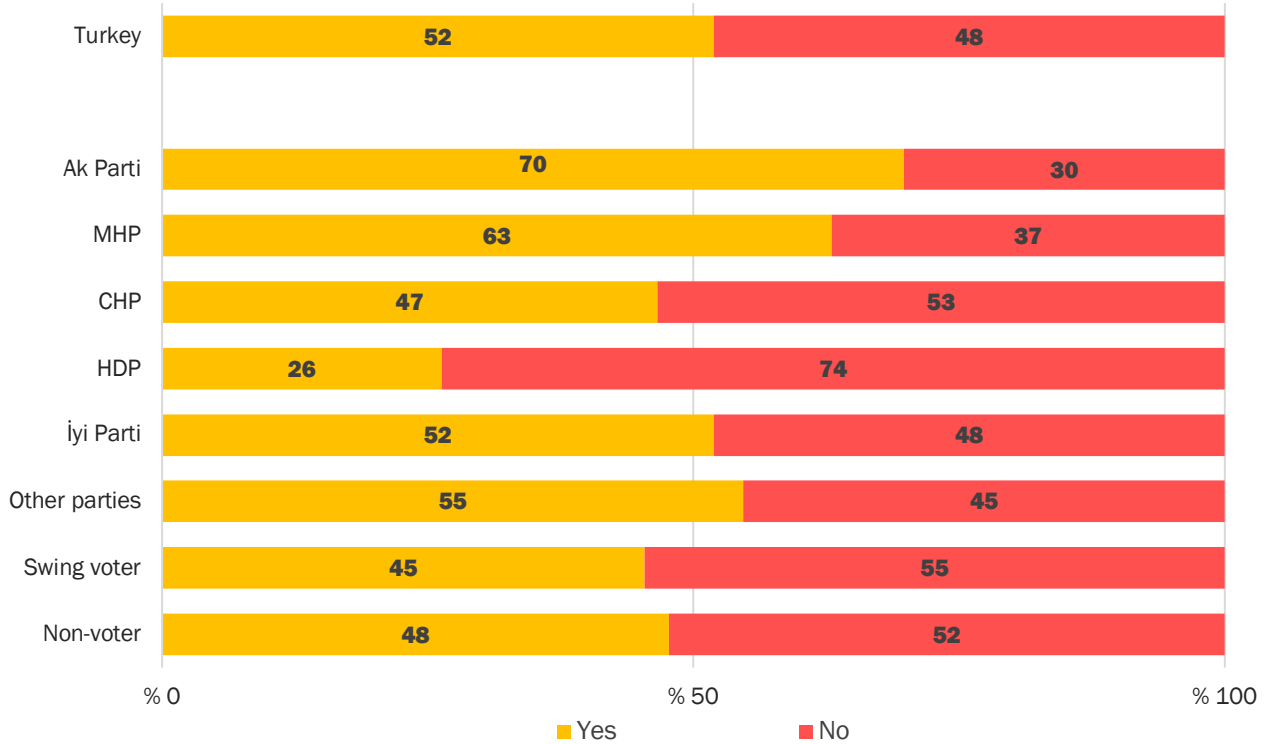## Do you think you can meet the heating needs of your house economically in the coming winter months?

	Yes	No
Turkey	52	48
Rural	46	54
Urban	49	51
Metropolis	55	46
White collar employee	64	36
Worker,tradesman,farmer	50	50
Retiree	53	47
Housewife	45	55
Student	58	42
Unemployed	40	60
There is a child under the age of 18 in the household	49	51
No child under the age of 18 in the household	54	46

■ Yes　■ No

Answers based on political preference:

We see that the highest percentage of those who state that they can meet the heating need of their house economically in the coming winter months belongs to Ak Parti voters with 70 percent. This rate decreases by 7 points to 63 percent in MHP voters.

While 53 percent of CHP voters answered "no" to the above question, it is followed by İyi Parti voters with 48 percent. On the other hand, 74 percent of HDP voters think that they cannot economically meet the heating needs of their houses in winter. Fifty-five percent of the swing voters answer "no" to this question.

Do you think you can meet the heating needs of your house economically in the coming winter months?

	Yes	No
Turkey	52	48
Ak Parti	70	30
MHP	63	37
CHP	47	53
HDP	26	74
İyi Parti	52	48
Other parties	55	45
Swing voter	45	55
Non-voter	48	52

Now, let's examine the answers they gave to the question "Do you think you can meet the heating needs of your house economically in the coming winter months?" separately according to the ethnic origin, marital status and economic class of the people:
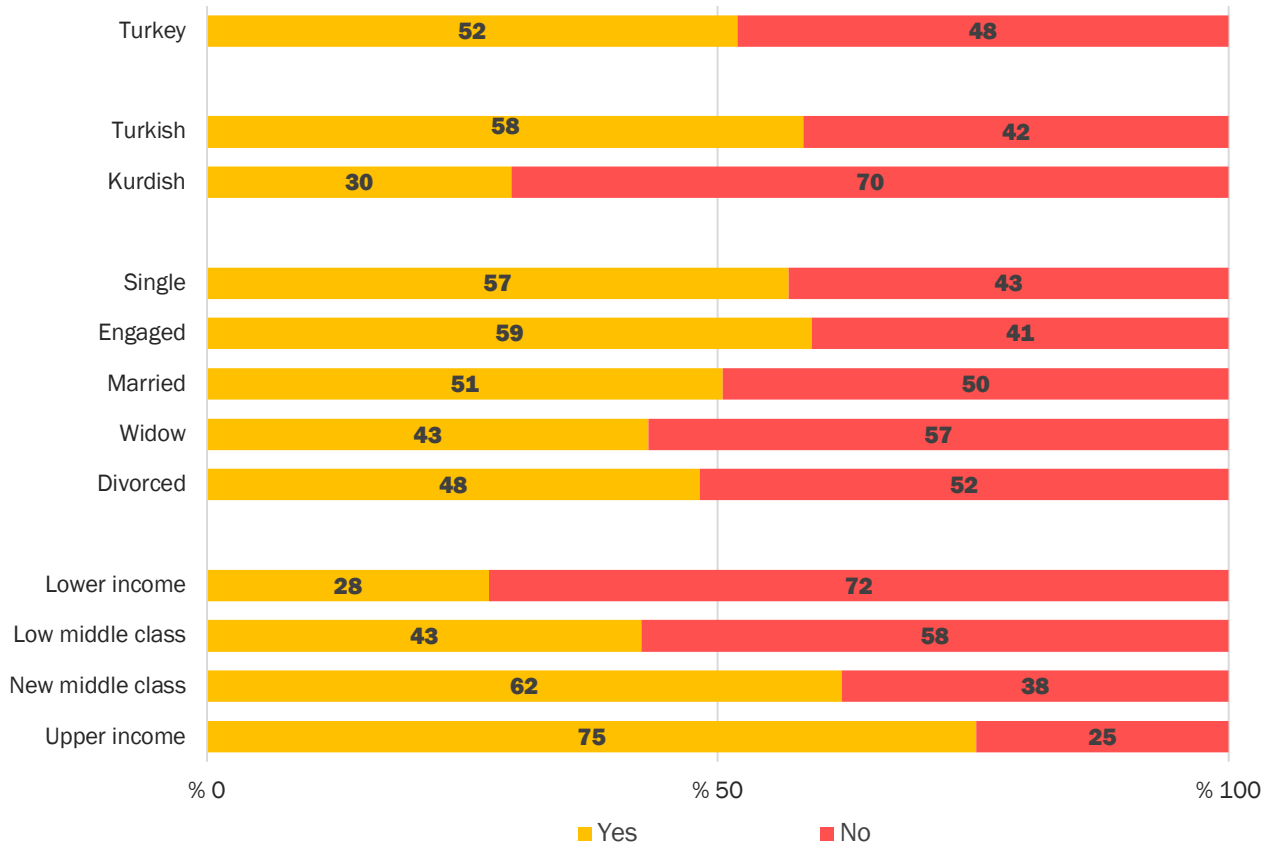
According to the graph below, the rate of Kurds who state that they cannot meet their heating needs economically in winter is 70 percent, which is 28 points higher than Turks.

When we evaluate according to their marital status, we see that those who gave the highest "no" answer were widows. The lowest "no" response rate was 41 percent of engaged people and these rates were followed by singles with 43 percent.

According to the graph, the rate of "no" answers to this question decreases as the income level increases. In other words, the more people's economic income increases, the less their concerns about heating in winter.

Do you think you can meet the heating needs of your house economically in the coming winter months?

	Yes	No
Turkey	52	48
Turkish	58	42
Kurdish	30	70
Single	57	43
Engaged	59	41
Married	51	50
Widow	43	57
Divorced	48	52
Lower income	28	72
Low middle class	43	58
New middle class	62	38
Upper income	75	25

■ Yes ■ No

5.3.5. Meeting the need for meals containing meat, chicken, and fish every two days

To the interviewees this month, we asked "Do you consume meat, chicken, or fish at least 3 days a week in your household?". In the chart below, we analyze the answers to this question by place of residence, employment status, and whether there are children under the age of 18 in the household.
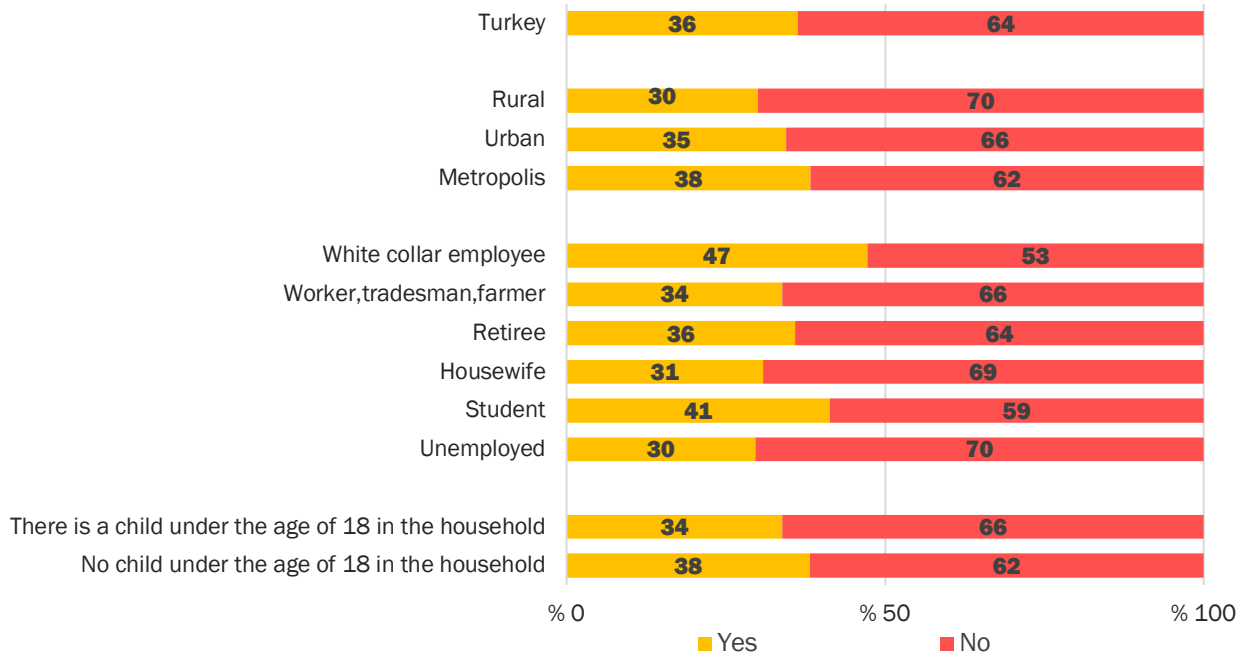
Sixty-four percent of the population state that they cannot consume meat, chicken, or fish at least 3 days a week.

This rate increases by 6 points to 70 percent for those living in rural areas, and to 66 percent by increasing by 2 points for those living in urban areas. Sixty-two percent of the population living in the metropolis state that they cannot consume meat, chicken, or fish for at least three days a week.

While 70 percent of the unemployed answered "no" to the above question, we see that this rate is 69 percent among housewives. It is seen that the highest rate of those who state that they can consume meat, chicken, or fish at least 3 days a week belongs to white-collar workers with 47 percent.
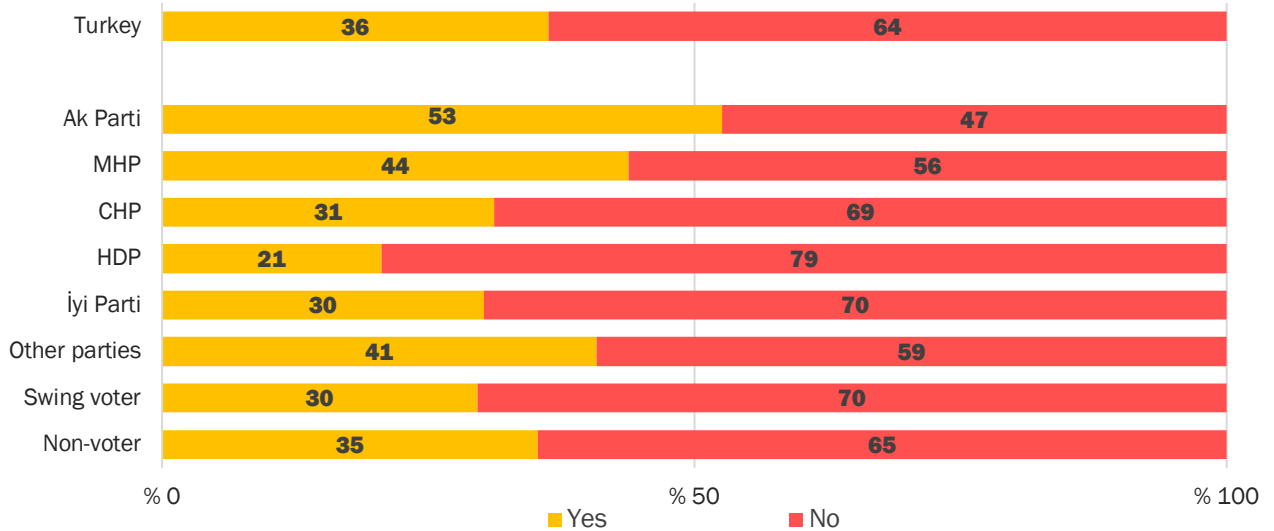
Do you consume meat, chicken or fish at least 3 days a week in your household?

	Yes	No
Turkey	36	64
Rural	30	70
Urban	35	66
Metropolis	38	62
White collar employee	47	53
Worker,tradesman,farmer	34	66
Retiree	36	64
Housewife	31	69
Student	41	59
Unemployed	30	70
There is a child under the age of 18 in the household	34	66
No child under the age of 18 in the household	38	62

Sixty-six percent of those with children under the age of 18 in their household can consume less meat, chicken, or fish. This rate decreases by 4 points to 62 percent for those who do not have children under the age of 18 in their household.

Let's evaluate the answers given by our interviewees to our question about protein consumption, according to their political party preferences:
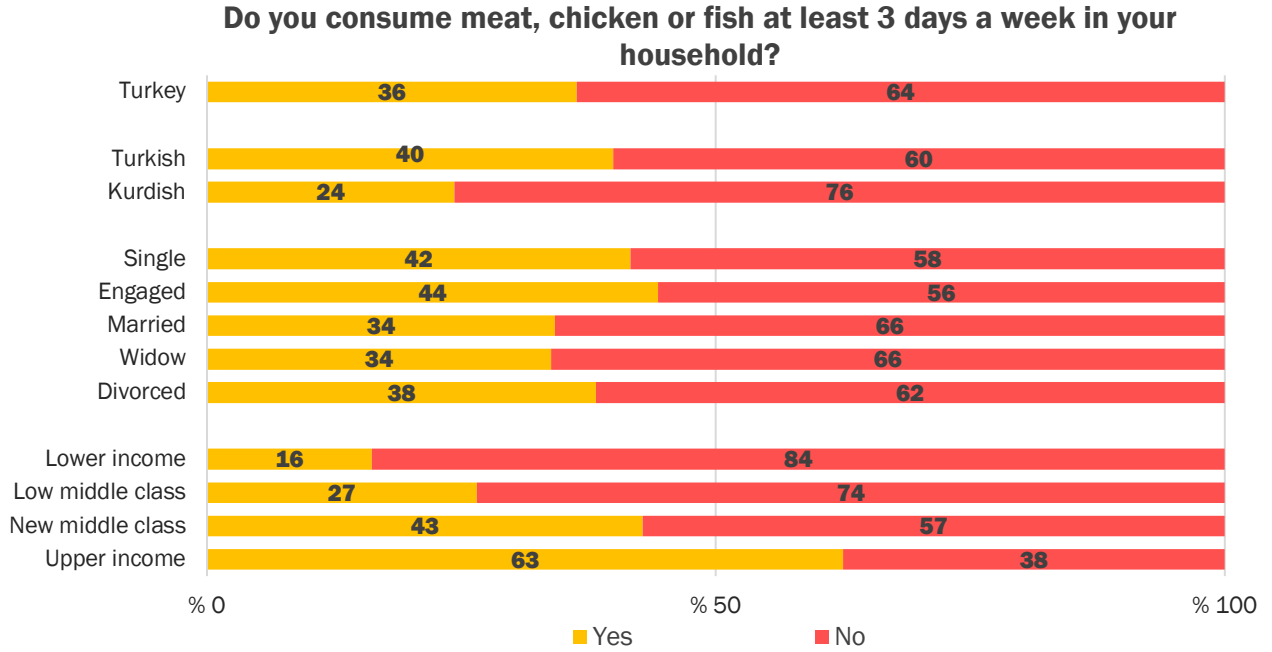
Do you consume meat, chicken or fish aat least 3 days a week in your household?

	Yes	No
Turkey	36	64
Ak Parti	53	47
MHP	44	56
CHP	31	69
HDP	21	79
İyi Parti	30	70
Other parties	41	59
Swing voter	30	70
Non-voter	35	65

We see that the highest rate of those who state that they can consume meat, chicken, or fish at least 3 days a week belongs to Ak Parti voters with 53 percent. This rate decreases by 9 points to 44 percent for MHP voters.

Among CHP voters, the rate of those who answered "no" to the above question is 69 percent. This rate is 70 percent for İyi Parti voters and swing voters. The highest rate of those who stated that they could not consume meat, chicken, or fish at least 3 days a week belonged to HDP voters with 79 percent.

Do you consume meat, chicken or fish at least 3 days a week in your household?

	Yes	No
Turkey	36	64
Turkish	40	60
Kurdish	24	76
Single	42	58
Engaged	44	56
Married	34	66
Widow	34	66
Divorced	38	62
Lower income	16	84
Low middle class	27	74
New middle class	43	57
Upper income	63	38

%0   %50   %100

■ Yes   ■ No

As income increases, people can consume more meat, chicken, or fish.

When we evaluate the answers given according to the economic class of the people, the rate of consuming meat, chicken, or fish at least 3 days a week increases as the economic income increases. Only 16 percent of those in the lower-income group seem to be able to meet their protein needs at an adequate level.
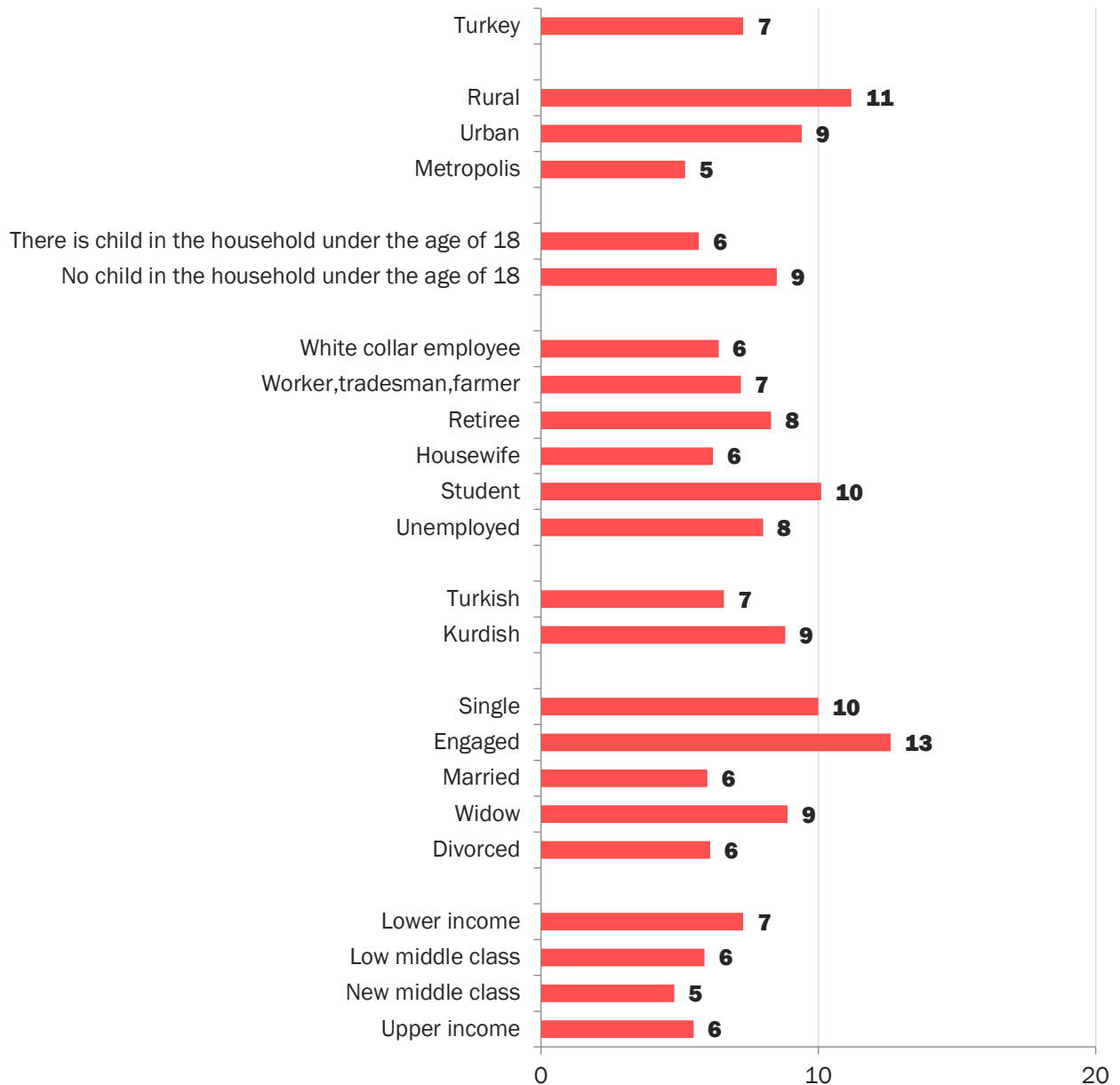
5.3.6. Those who do not own a washing machine

Since four of the nine criteria of material deprivation are related to ownership, we have included the items in the measure of material deprivation from the ownerships that we examined in the perception of economic situation section, under separate headings. Since it is a material deprivation criterion, we analyzed our ownership analysis here on the basis of those who do not have, not those who have. First, let's examine the interviewees at the November'22 Barometer who do not own a washing machine. We evaluated the situation of not having a washing machine according to the place of residence, whether or not they have 18-year-old children in their household, employment status, ethnicity, marital status and economic class.

We see that 7 percent of society does not have a washing machine. With metropolitanization, the ownership of washing machines is increasing. While 5 percent of those living in metropolitan areas do not own a washing machine, this rate is 9 percent for urban residents and 11 percent for rural residents.

Those who do not have washing machine

Category	Value
Turkey	7
Rural	11
Urban	9
Metropolis	5
There is child in the household under the age of 18	6
No child in the household under the age of 18	9
White collar employee	6
Worker,tradesman,farmer	7
Retiree	8
Housewife	6
Student	10
Unemployed	8
Turkish	7
Kurdish	9
Single	10
Engaged	13
Married	6
Widow	9
Divorced	6
Lower income	7
Low middle class	6
New middle class	5
Upper income	6

We see that the group that owns the least amount of washing machines is students with 10 percent. This is followed by the unemployed and retirees with 8 percent, workers, tradespeople and farmers with 7 percent. We see that 6 percent of white-collar workers and housewives do not have a washing machine.

We see that 13 percent of those who are engaged do not have a washing machine. Singles follow this with 10 percent. We see the lowest rate as 6 percentage points for those who are married or divorced.

It turns out that 7 percent of those in the lower income group do not have a washing machine. This is followed by the lower middle class and upper-income groups with a rate of 6 percent, while the lowest rate belongs to the new middle class with a rate of 5 percent.
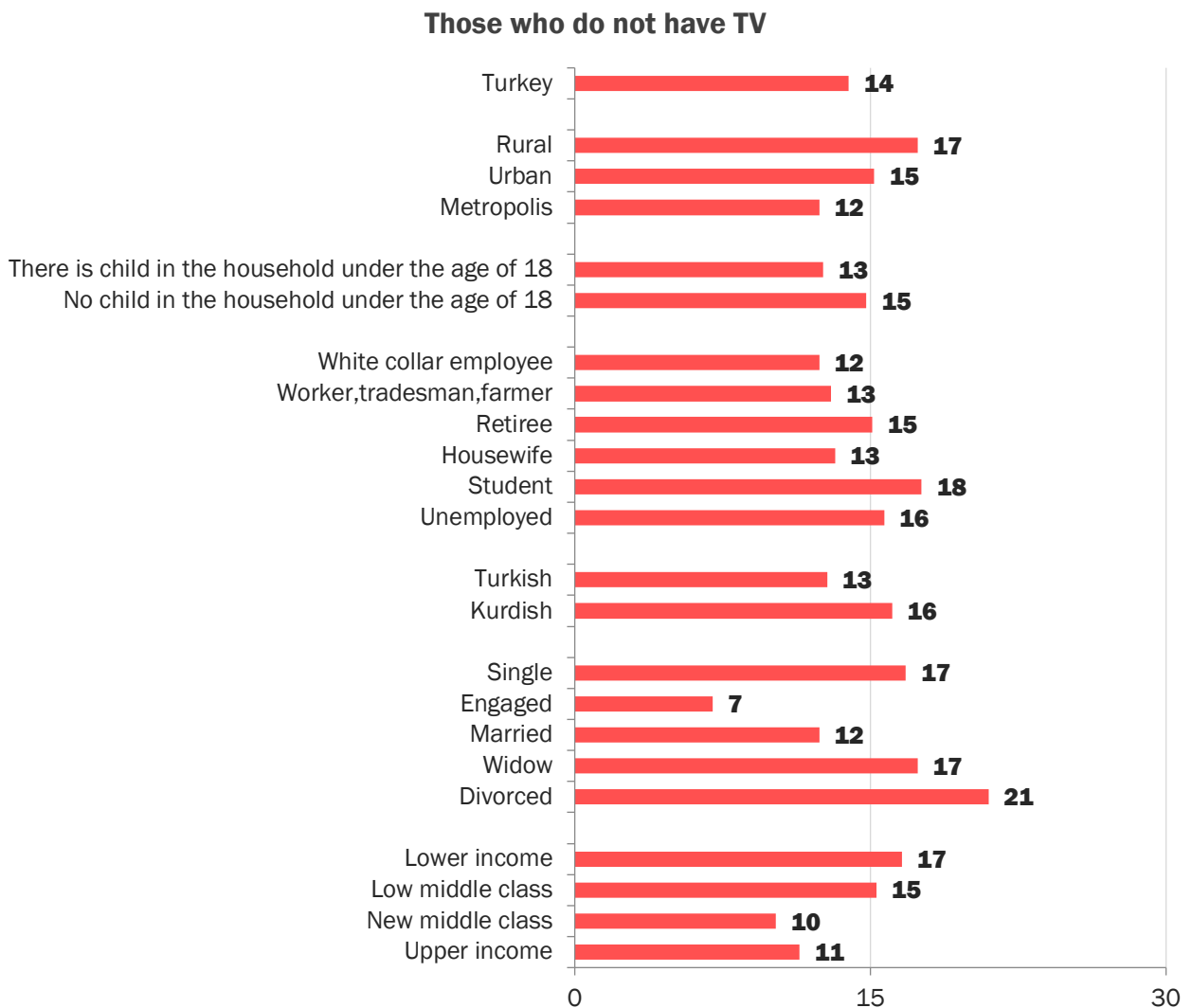
5.3.7. Those who do not own a TV

We see that 14 percent of society does not own a television. When we evaluate the rate of those who do not have a television according to the place of residence of the people, we see that this rate is 17 percent in rural areas, 15 percent in urban areas and 12 percent in metropolitan areas.

While 13 percent of those with children under the age of 18 do not have a television, we see that this rate is 15 percent for those who do not have children under the age of 18.

The cluster with the highest rate of not owning a television is students with 18 percent. This is followed by the unemployed with 16 percent and retirees with 15 percent. The group with the lowest rate of not having a television is white-collar workers with 12 percent.

Those who do not have TV

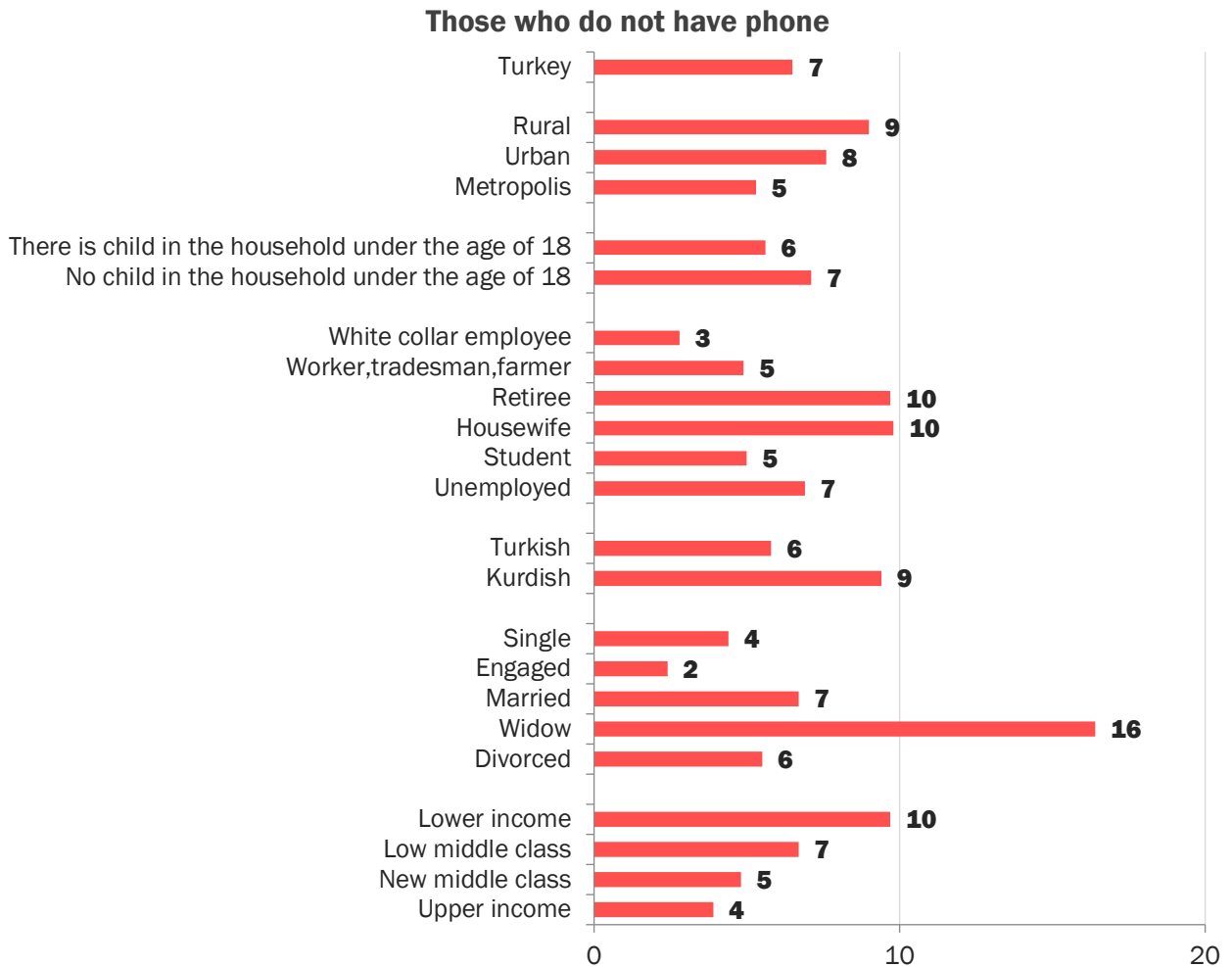| Group	Value
Turkey	14
Rural	17
Urban	15
Metropolis	12
There is child in the household under the age of 18	13
No child in the household under the age of 18	15
White collar employee	12
Worker,tradesman,farmer	13
Retiree	15
Housewife	13
Student	18
Unemployed	16
Turkish	13
Kurdish	16
Single	17
Engaged	7
Married	12
Widow	17
Divorced	21
Lower income	17
Low middle class	15
New middle class	10
Upper income	11

When we evaluate the answers given according to the marital status of the people, it is seen that 21 percent of divorced people do not have a television. This is followed by widows and singles with a rate of 17 percent. We see that as income increases, the rate of not owning a television decreases. The group with the highest rate of not owning a television is the lower-income group with 17 percent.

5.3.8. Those who do not have a phone

Our research shows that 7 percent of the general population does not own a smartphone or cell phone. With metropolitanization, the proportion of those who do not have a telephone is decreasing. Nine percent of those living in rural areas and 5 percent of those living in metropolitan areas do not have a telephone.

Those who do not have phone

Category	Value
Turkey	7
Rural	9
Urban	8
Metropolis	5
There is child in the household under the age of 18	6
No child in the household under the age of 18	7
White collar employee	3
Worker,tradesman,farmer	5
Retiree	10
Housewife	10
Student	5
Unemployed	7
Turkish	6
Kurdish	9
Single	4
Engaged	2
Married	7
Widow	16
Divorced	6
Lower income	10
Low middle class	7
New middle class	5
Upper income	4

We see that 10 percent of retirees and housewives do not have a phone. This is followed by the unemployed with a rate of 7 percent. The group with the lowest rate of not having a phone is white-collar workers with 3 percent.

While 9 percent of Kurds do not own a phone, this rate decreases by 3 percentage points to 6 percent among Turks.

Sixteen percent of those who state that they are widowed do not have a phone. This is followed by married with 7 percent and divorced with 6 percent. The group with the lowest rate of not having a phone is seen in engaged people with 2 percent.

As the income level increases, the rate of not having a phone decreases. Ten percent of those in the lower income group do not have a smartphone or mobile phone. This rate is 7 percent

in the lower middle class, which is on the same level as Turkey's average. This rate is 5 percent in the new middle class and 4 percent in the upper-income group.

5.3.9. Those who do not own car

As of November'22, 53 percent of the population says that they do not have a car in their household. This rate increases with metropolitanization. The rate of those who do not own a car is 45 percent in rural areas and 49 percent in urban areas. We see that 57 percent of the people living in the metropolis do not own a car.

While 51 percent of those with children under the age of 18 states that they do not have a car, this rate is 55 percent for those who don't.

According to their employment status, the highest rate of those who state that they do not have a car belongs to the unemployed with 66 percent, followed by housewives with 62 percent, workers, tradespeople and farmers with 54 percent. On the other hand, the rate of not owning a car among white-collar employees is measured as the lowest rate with 40 percent.

We see that 71 percent of Kurds do not own a car, and this rate has decreased to 47 percent among Turks.

Finally, when we evaluate the answers given according to the marital status of the people, we see that 85 percent of those who stated that they were divorced did not own a car. We see that the lowest rate belongs to the married group with 50 percent.

Those who do not have automobile in the household

Turkey	53
Rural	45
Urban	49
Metropolis	57
There is child in the household under the age of 18	51
No child in the household under the age of 18	55
White collar employee	40
Worker,tradesman,farmer	54
Retiree	50
Housewife	62
Student	48
Unemployed	66
Turkish	47
Kurdish	71
Single	55
Engaged	56
Married	50
Widow	75
Divorced	85
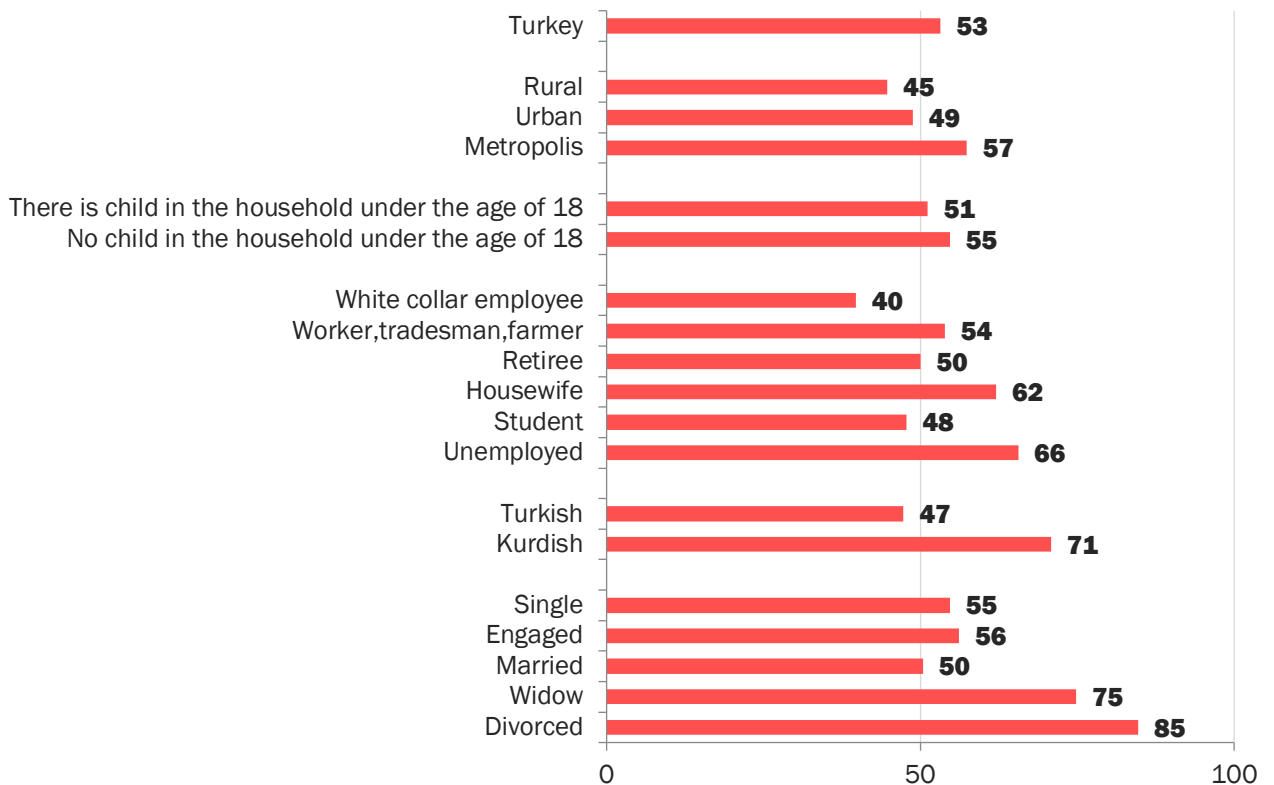
5.4. Evaluation

Income distribution inequality, with its most general definition, expresses the unequal distribution of income in an economy among those who earn it. Inequality in income distribution negatively affects the welfare levels of individuals in the short term, and the growth and productivity of the country's economy in the long term. With the increasing inequality in income distribution, governments resort to fiscal policies called redistribution in order to close the imbalance and gap between income brackets. In Turkey, first with the coronavirus pandemic, and then with the rapid rise in inflation, the government turned to these policies with packages such as rent and bill support. As we can see in the KONDA Barometer measurements, income inequality in Turkey has been showing an increasing trend over the past years.

The basis of the models and measurement techniques developed to measure inequality in income distribution is the calculation of how income is divided. The most basic indicator of this calculation is how much the percentage of population slices receive from income. This is followed by the Lorenz curve as a visual model. We made these calculations for this month's report, based on the income per capita, calculated from monthly household income and the number of people in the household, which we ask for each month in the KONDA Barometer. The income taken as the basis here is per capita income over household income and should be accepted as a reference in terms of economic indicators. The KONDA Barometer, which is a political and social research series, has the chance to follow the course of change in household income and analyze it through socio-demograph clusters, rather than realizing measurement techniques such as national income calculation or functional income distribution. Thus, we can catch important clues about inequality in income distribution based on ethnicity, age, political preference clusters, lifestyles, religiosity and work clusters.

When we look at the KONDA Barometer data, we see that as of 2022, half of all income in Turkey is received by 20 percent of the population. The lowest 20 percent can receive only 5.2 percent of the income. Despite the relative improvement in 2021, the unequal distribution of income seems to have increased in 2022. When we visualize it through Lorenz curves, we see that mainly the income of the middle classes tends to increase and decrease more rapidly.

Our second step in examining income distribution in Turkey was to look at measures of poverty and material deprivation. There are indicators such as food poverty, relative poverty and permanent poverty in the economic literature and measurement techniques. Among these, relative poverty provides an important insight into the unequal distribution in an economy. This ratio shows how much of the society have income below a certain income level. We made these calculations retrospectively on per capita incomes. We have seen that as of 2022, 16.7 percent of the population has an income below 50 percent of the median income per capita, that is, 16.7 percent of the population lives in conditions of relative poverty in Turkey.
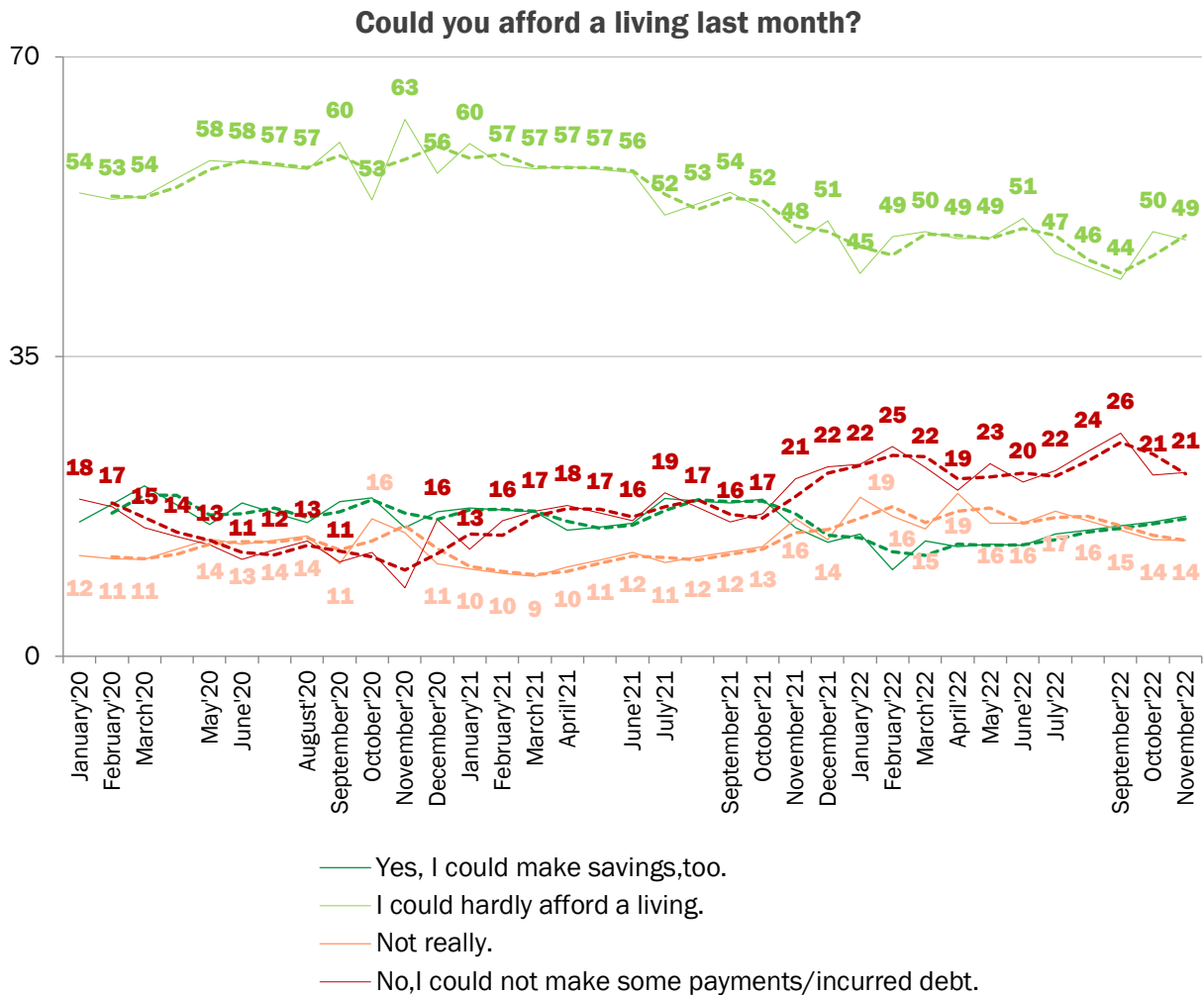
On a more concrete level, the measurement of material deprivation draws a framework for the financial difficulties of society in general. We calculated the material deprivation rate, which was announced as 27.2 percent in 2021 by TURKSTAT, as 55 percent in our research this month. The financial deprivation measurement, which includes criteria such as meeting the heating need of the house, meeting an unexpected expenditure, and difficulty in paying bills, rent and debt, moves upwards with exactly these criteria. In general, 7 out of 10 people think they can't afford an unexpected expense and 8 out of 10 people think they can't afford a one-week vacation away from home for their household. While 3 out of 10 people pay their bills, 3 out of 10 people have difficulty paying their credit card debt. Moreover, 64 percent of the society cannot consume meat, chicken and fish 3 days a week, that is, they have difficulty meeting their protein needs. When the figures are at these levels, the rate of material deprivation moves upwards.

With the rapid rise of inflation and the uncertainties in the election period, we can predict that income distribution and poverty in Turkey will not be able to maintain their stable status and the gap in income distribution may increase. While this situation causes the state to turn to redistributive policies through social transfers, as we have mentioned in our report, the nominal increase in the minimum wage cannot reduce relative poverty. We should draw attention to the importance of considering these indicators while making sectoral, financial and political evaluations. In the coming years, we will continue to examine society from a socio-economic perspective by carrying out these measurements within the scope of the KONDA Barometer.

6. MORALE INDEX

As every month, we included our Morale Index measurement in the November'22 Barometer. In this section, we will examine the livelihood situation and crisis expectations of the society.

Could you afford a living last month?

—— Yes, I could make savings,too.
—— I could hardly afford a living.
—— Not really.
—— No,I could not make some payments/incurred debt.

The livelihood situation remains stable: 1 out of every 2 people could hardly afford a living.

The rate of those who answer the question "Could you afford a living?" as "I could hardly afford a living" had been decreasing since May'22. In the last two months, we see that the downward trend of the previous months has reversed. The rate of people who could hardly afford a living, which has been between 44-51 percent in the last year, is measured at the level of 49 percent as of this month.

There has been a decrease in the last two months of those who say that they cannot make a living and go into debt to make a living. We cannot say that there is a clear aspect of the change of those who say that they have gone into debt to make a living, it has changed throughout the year. In September'22, it reached its highest rate with 26 percent. While there has been a general decrease of those who say they can not afford a living since the beginning of the year, the rate of both clusters has not yet returned to September'21 levels.

There is a decrease in the expectation of the crisis.

In the two-year period, we saw that the crisis expectation rose above 70 percent for the first time after the start of the Covid-19 pandemic after March'20. With the rapid increase in inflation, the crisis expectation did not fall below 75 points in the last year. Our measure of crisis expectation this month, on the other hand, decreased by 5 points compared to the previous month and is at 72 percent.

In this process, we can talk about two different expectation ranges. The 61-77 percent range from the start of the Covid-19 outbreak to September'21 and the 71-85 percent range from October'21 to October'22. This month's expectations seem to be approaching the second range.

Those who anticipate economic crisis in Turkey in the coming months
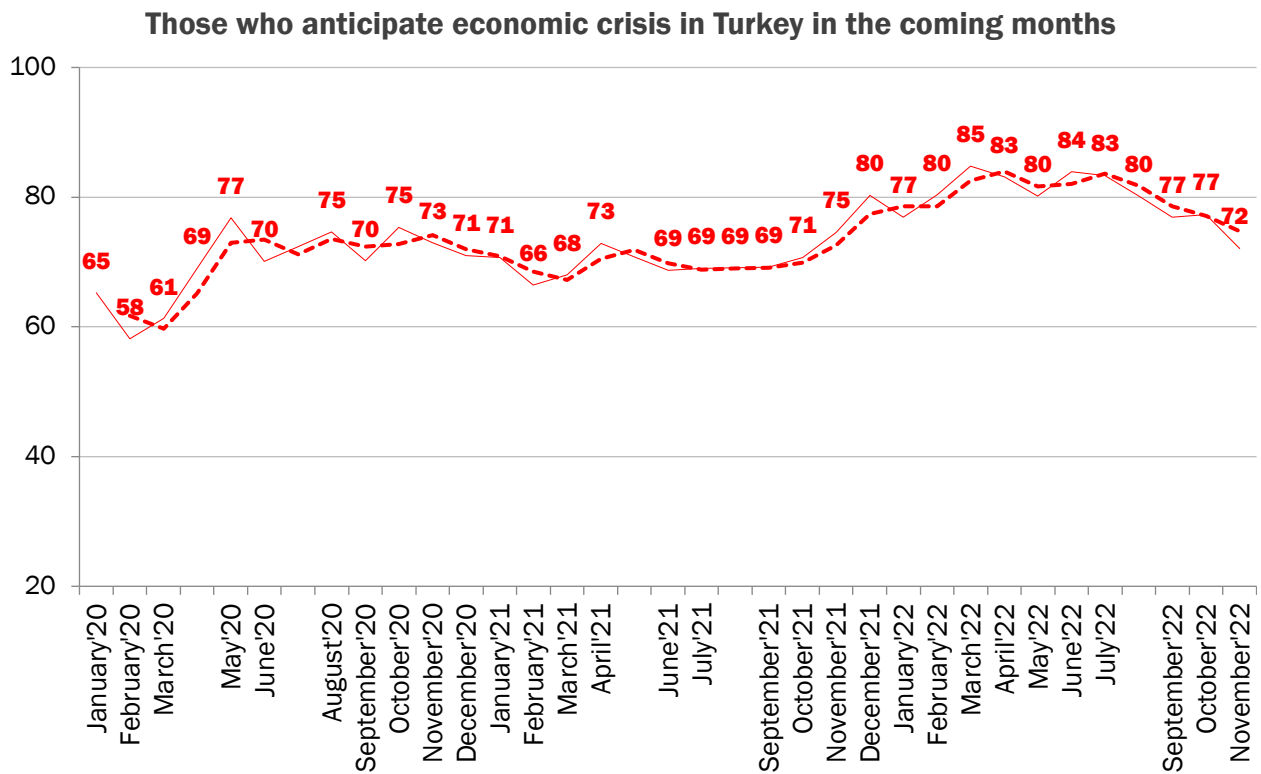
The expectation of difficulty in the individual economy is not decreasing at the same rate.

In general, a similar change is observed among those who expect difficulties in their own lives with those who expect an economic crisis in the country. However, if we consider the last two months, the decline in those who expect difficulties in their own lives has been more abstaining. When we look at the process during the year proportionally, the rate of those who expect economic difficulties in their own lives decreased at a lower rate than those who expect economic crisis in the country.

Those who anticipate personal economic hardship
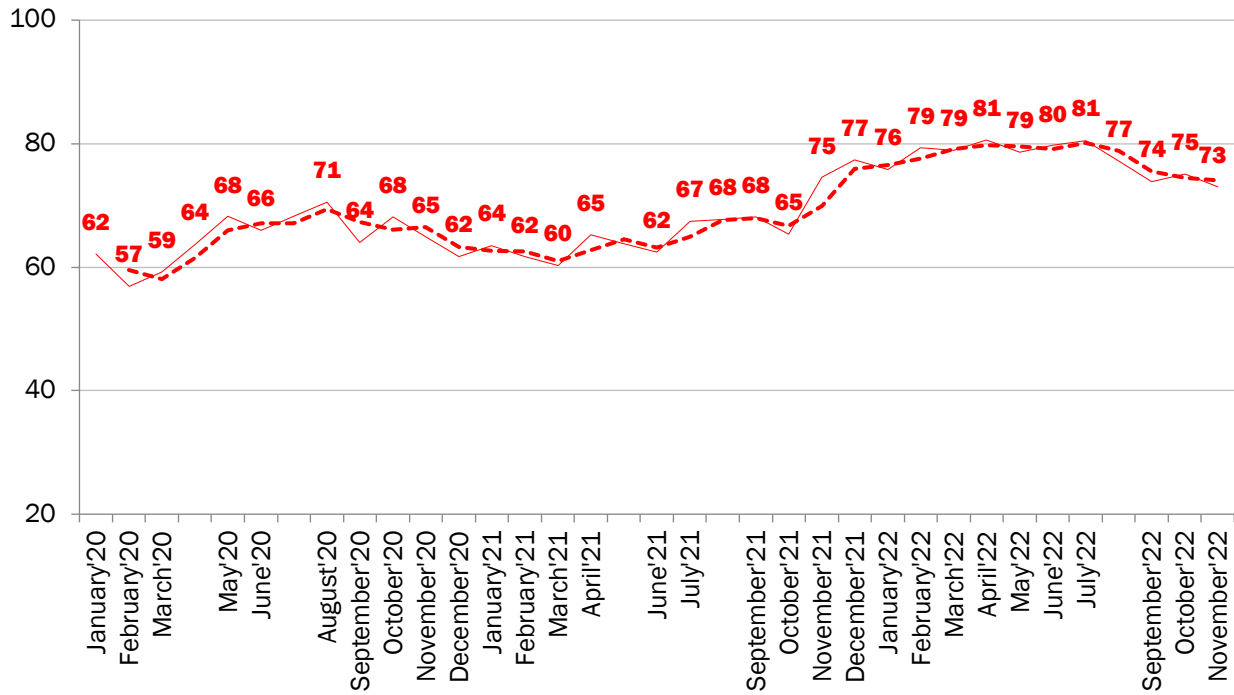
### Crisis expectation according to political preferences

We see that the crisis expectation of opposition party voters dropped to 90 percent for the first time since December'21. The crisis expectation of HDP voters had not fallen below 95 percent since December'21. It decreased by 6 points this month, approaching CHP and İyi Parti voters. There is a decrease in crisis expectation with a similar tendency among CHP voters. Crisis expectation among Iyi Parti voters had been lower than CHP and HDP voters since June'22. In the last case, there has not been a great decrease in the expectation of the crisis.

There is a positive trend of MHP voters. The crisis expectation has decreased by 28 points from 79 percent to 51 percent since June'22. There has been a return to the low crisis expectation levels in the two-year movement graph. When we look at the movement that has taken place since March'22, the month in which Ak Parti voters expected the economic crisis at the highest rate, there has been a decrease in the crisis expectation. However, unlike the MHP voters, there is no linear movement. In addition, we see in the two-year graph that the low crisis expectation is still higher than when it existed.

If we look comparatively, the crisis expectation of the voters of the ruling party is lower than the voters of the opposition party. However, we can say that, on average, there has been a general decline in crisis expectations since June'22.

Crisis anticipation in the country according to political preferences

— Ak Parti voters   — CHP voters   — HDP voters   — MHP voters   — İyi Parti voters
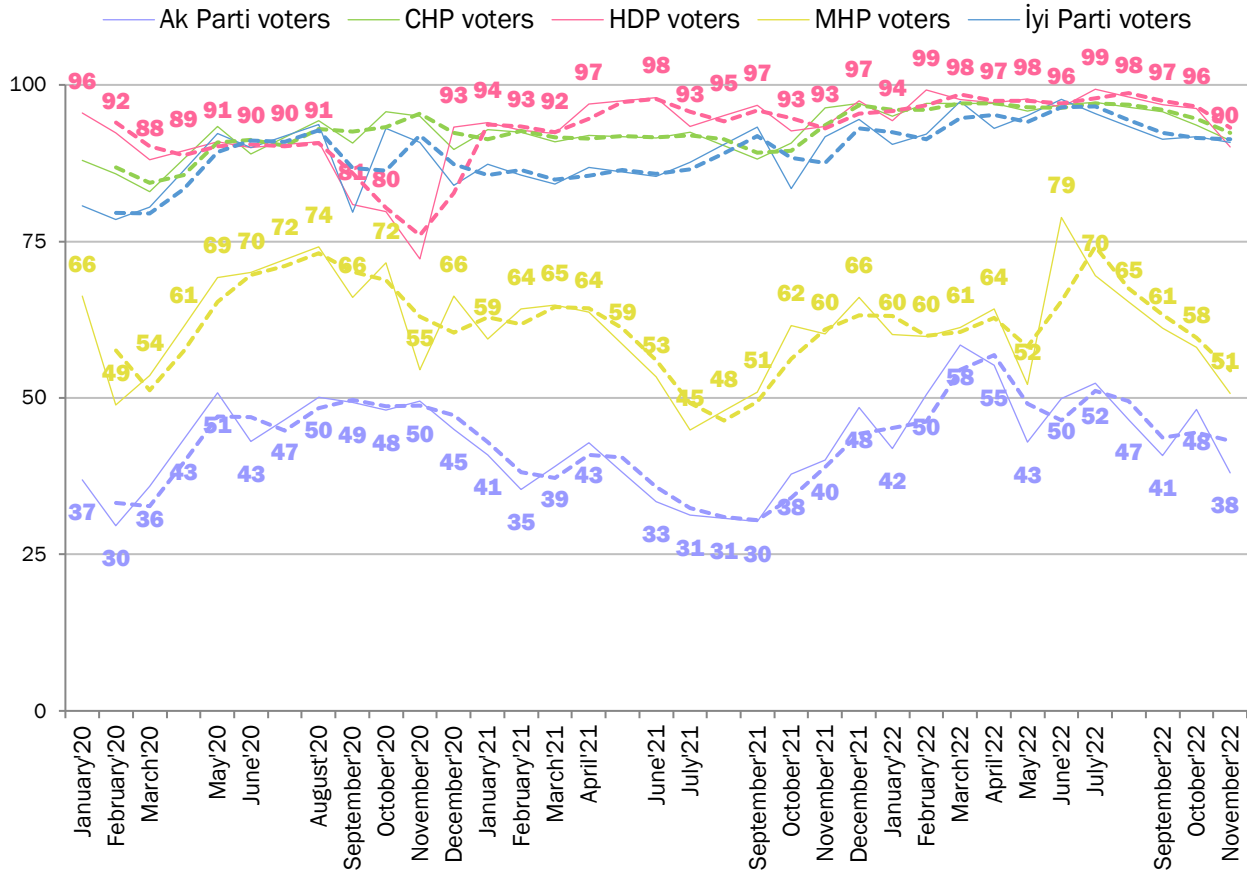
Similar to the crisis expectation, the rate of those who think that the country is in an economic crisis has been decreasing since July'22. The rate of those who think that the country is in crisis remains at the level of November-December'21, when the Turkish lira experienced a sudden depreciation.

In your opinion, is the country in economic crisis currently?
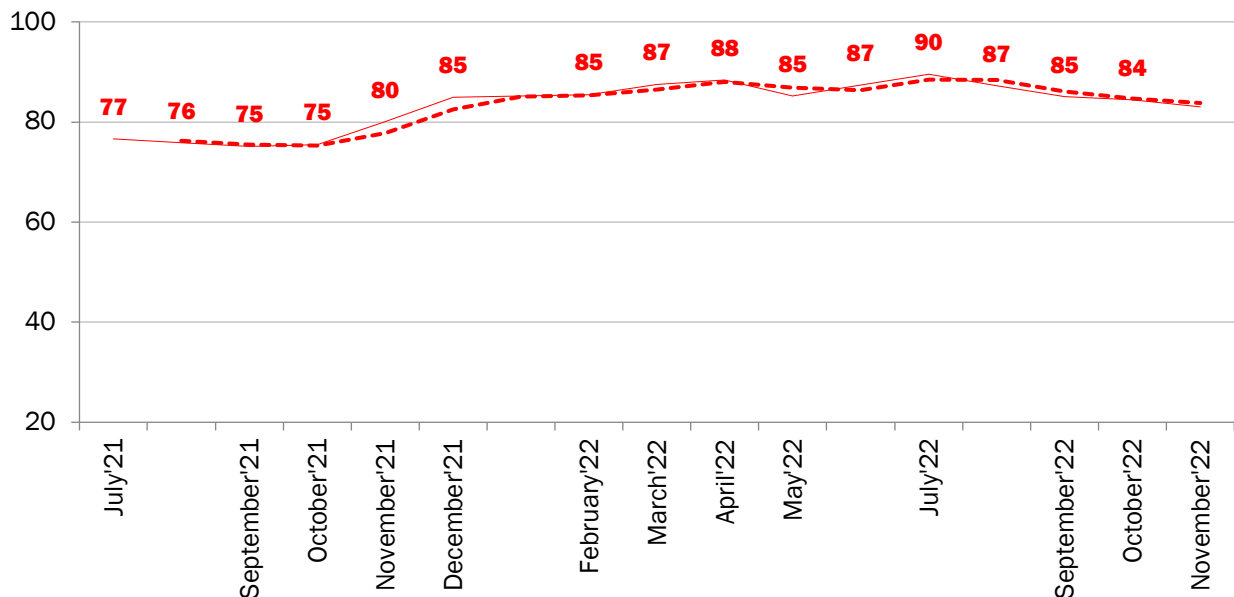
Let's make a different analysis according to political preferences in order to make sense of the changing trends in society's expectation of economic crisis and economic difficulties in their own life. The graphs below show the difference between the rate of those who expect an economic crisis in Turkey from the rate of those who expect economic difficulties in their own lives. To make it more understandable, let's give an example for the last month's finding: As of November'22, the rate of those expecting an economic crisis in Turkey is 72 percent, and the rate of those expecting economic difficulties in their own life is 73 percent. In this case, the difference between the two expectation scores is -1. Those who expect an economic crisis in Turkey are 1 point less than those who expect economic difficulties in their own life.

First, let's look at Turkey in general. In the last year, we see that those who expect an economic crisis in Turkey are more than those who expect economic difficulties in their own lives. However, for the first time in the last year, those who expect economic difficulties in their lives this month seem to have increased by 1 point compared to those who expect an economic crisis in the country.

The difference between those who expect economic crisis in Turkey and who anticipate personal economic hardship
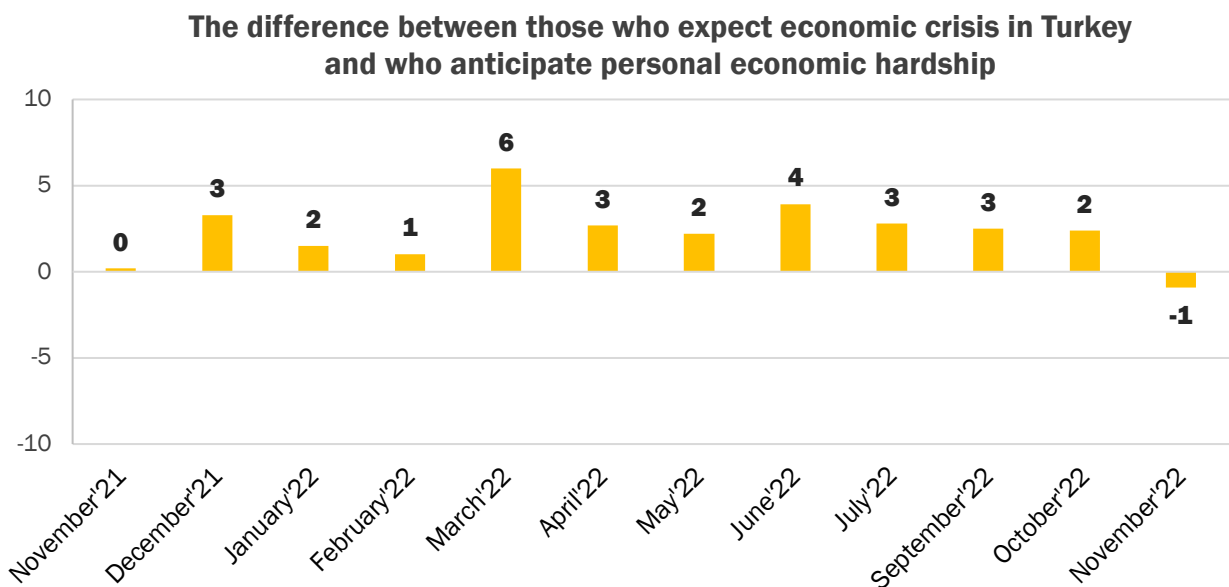
Let's examine this trend, which we have examined for the general population, according to political preferences.
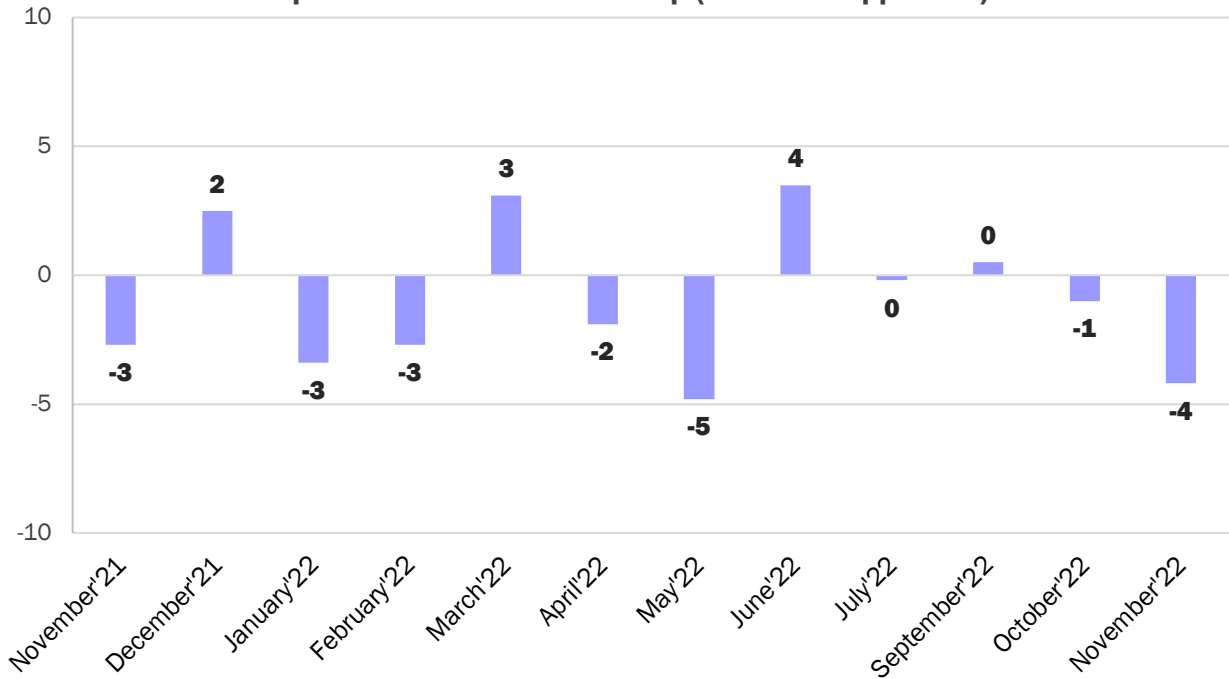
First of all, if we look at the trends in the economic crisis expectations of Ak Parti and MHP supporters, we see that within the margins of error, those who expect an economic crisis in the country in consecutive months are less than those who expect economic difficulties in their own lives.

While this situation may be an indication of the improvement of confidence in the country's economy, it may also indicate the presence of concern among the voters of both parties that they will face economic difficulties in their own lives. So much so that only this month, the difference between the two crisis expectations among MHP partisans seems to have reached 10 points.
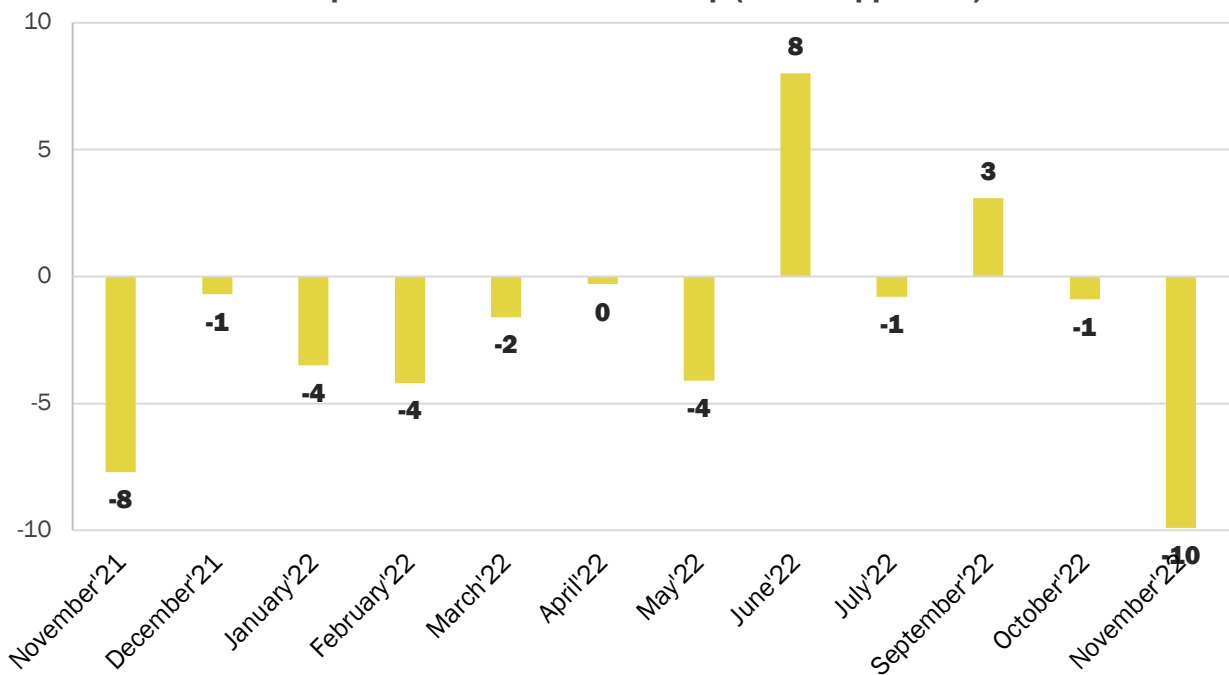
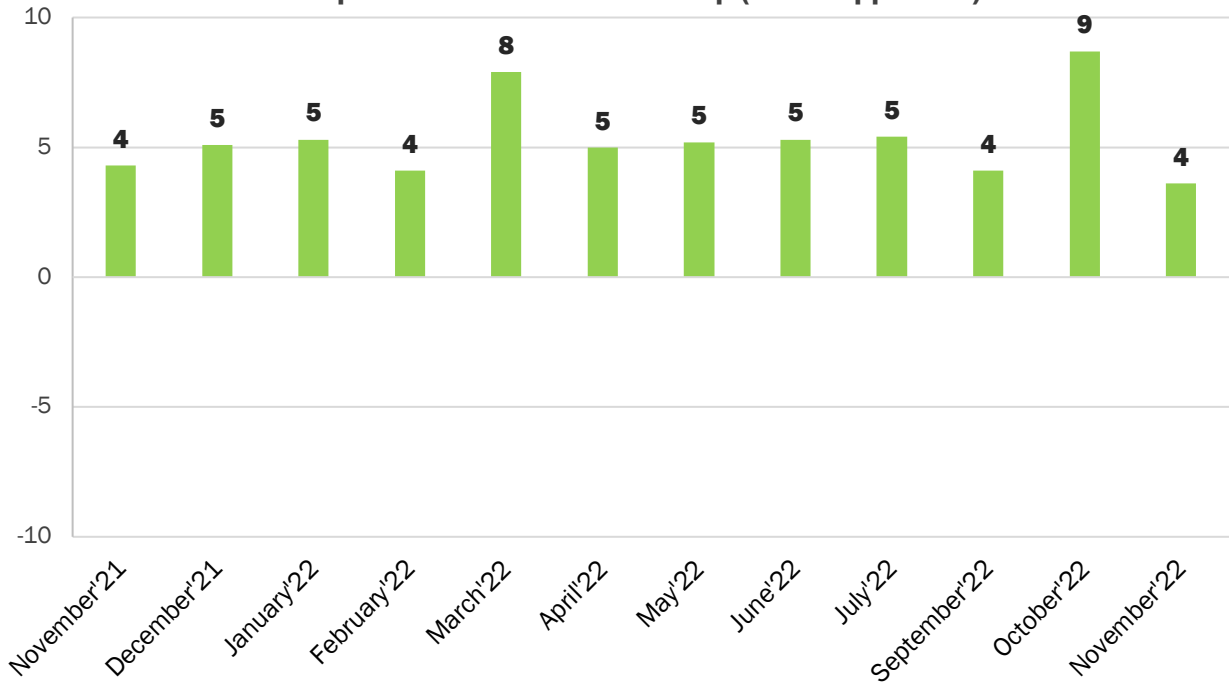## The rate difference between those who expect economic crisis and personal economic hardship (Ak Parti Supporters)

Month	Value
November'21	-3
December'21	2
January'22	-3
February'22	-3
March'22	3
April'22	-2
May'22	-5
June'22	4
July'22	0
September'22	0
October'22	-1
November'22	-4

The rate difference between those who expect economic crisis and personal economic hardship (MHP Supporters)

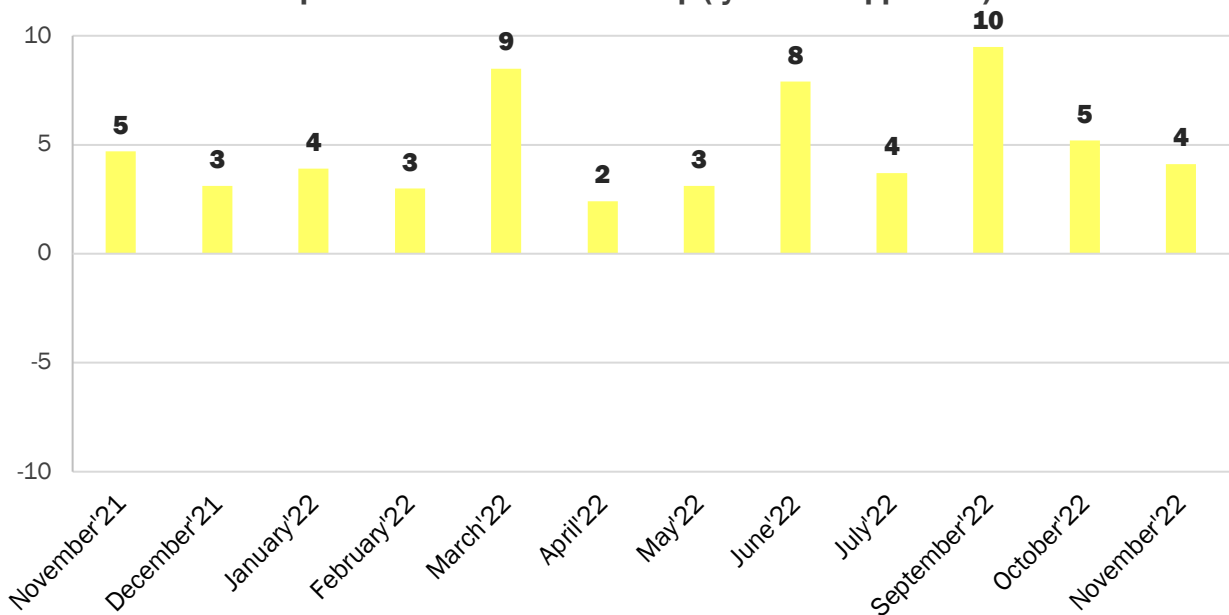| Month	Value
November'21	-8
December'21	-1
January'22	-4
February'22	-4
March'22	-2
April'22	0
May'22	-4
June'22	8
July'22	-1
September'22	3
October'22	-1
November'22	-10

Now let's look at the trends of opposition voters. First of all, if we look at the voter bases of CHP and İyi Parti, we see that the trend in the voter bases of both parties is in the direction of higher expectations of the economic crisis in the country. The tendencies of CHP and İyi Parti partisans are also similar in consecutive months.

## The rate difference between those who expect economic crisis and personal economic hardship (CHP Supporters)

Month	Value
November'21	4
December'21	5
January'22	5
February'22	4
March'22	8
April'22	5
May'22	5
June'22	5
July'22	5
September'22	4
October'22	9
November'22	4

The rate difference between those who expect economic crisis and personal economic hardship (İyi Parti Supporters)

Month	Value
November'21	5
December'21	3
January'22	4
February'22	3
March'22	9
April'22	2
May'22	3
June'22	8
July'22	4
September'22	10
October'22	5
November'22	4

Similarly, for HDP partisans, the expectation of a crisis in the country is above the expectation of economic difficulties in their own lives. This difference is lower among HDP partisans than CHP and İyi Parti partisans. In fact, in November'21, May'22 and this month's measurement, there is no difference between the two crisis expectations. For HDP partisans, the expectation of an economic crisis in the country and the expectation of economic difficulties in their own life are not very different from each other.

The rate difference between those who expect economic crisis and personal economic hardship (HDP Supporters)
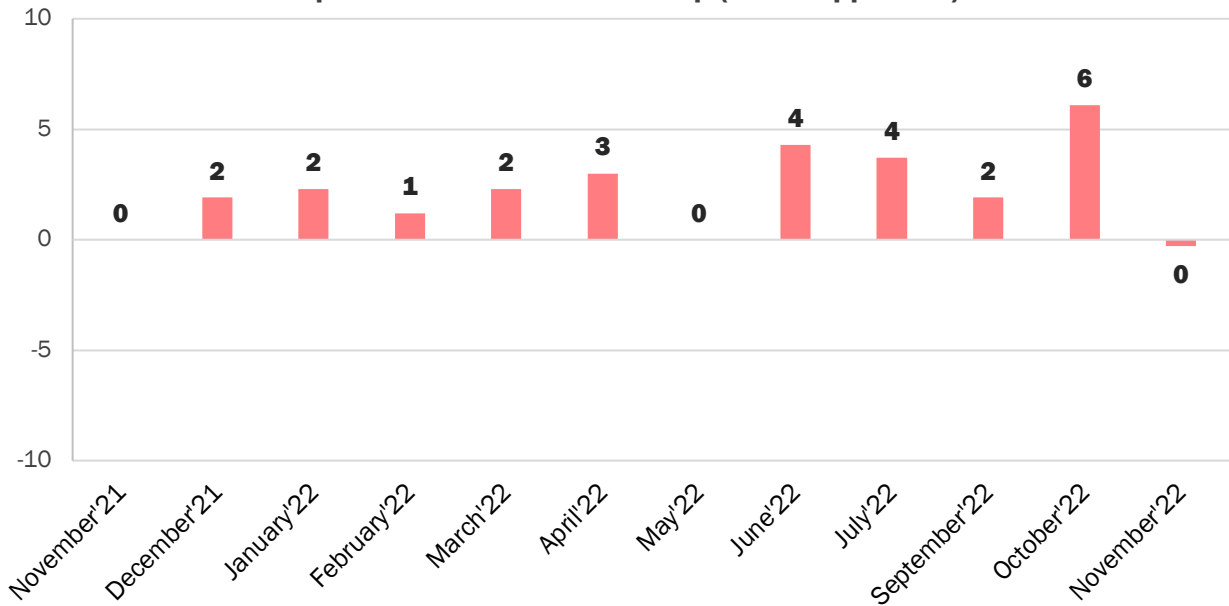
The tendency of swing voters is that those who expect a crisis in the country have a higher course than those who expect economic difficulties in their own lives. The swing voters are most similar to Turkey's average with this tendency.

The rate difference between those who expect economic crisis and personal economic hardship (Swing voters)
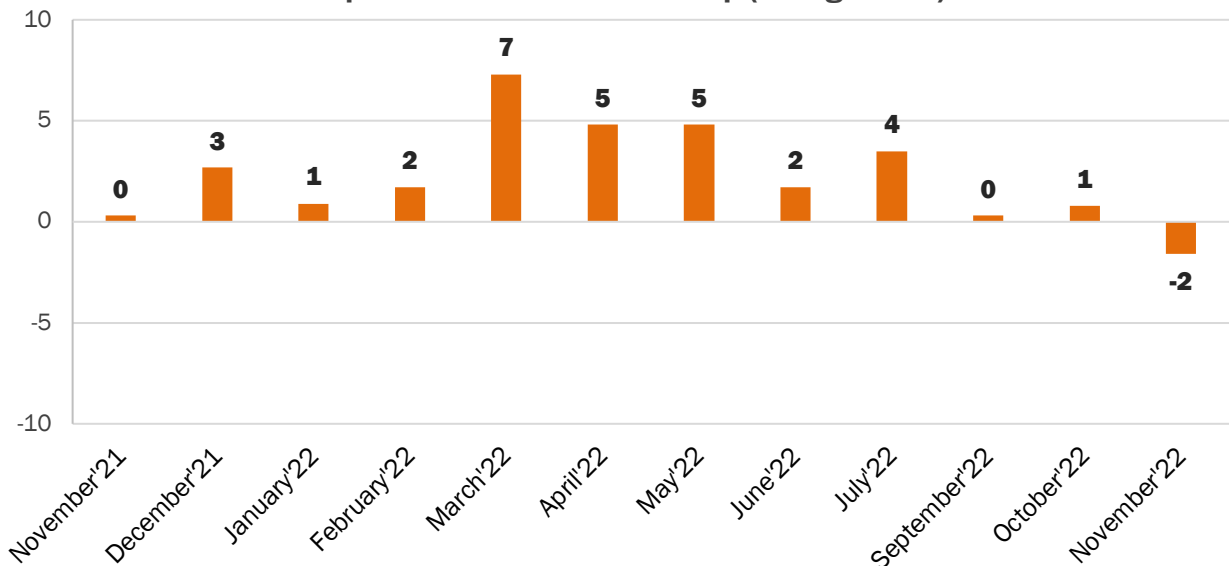
The voters of the incumbent bloc mostly expect an economic crisis in their own life, while the opposition voters expect an economic crisis in the country.

As can be seen, a trend emerges in the axis of political preferences: The voters of the incumbent bloc expect economic difficulties in their own lives rather than in the country in general. This is the opposite for opposition voters. The swing voters also expect an economic crisis in the country rather than in their own lives, as is the case in Turkey.

In order to evaluate whether this emerging trend has a political engagement, let's first recall the class status of the electorate clusters. As can be seen in the graph below, lower income groups are at the highest rate among HDP and than Ak Parti partisans. MHP partisans, on the other hand, have a higher weight in the middle classes than Ak Parti partisans. While the class positions of CHP and Iyi Parti partisans are more similar, the weight of the lower classes among the swing voters is higher than in Turkey in general.

Economic Classes

	Lower income	Low middle class	New middle class	Upper income
Turkey	19	32	28	21
Ak Parti	18	31	33	18
MHP	6	34	39	21
CHP	12	34	25	30
HDP	57	17	17	10
İyi Parti	6	34	30	30
Swing voter	23	35	27	15

In this case, we can think that the differentiation in crisis expectations, which we examined in the axis of incumbent bloc, opposition bloc and swing voters, is determined by the political engagement of the voters rather than their economic situation. Accordingly, the class positioning of the society according to political preferences seems far from being the driving force that can move Ak Parti and MHP supporters or opposition party voters together in anticipation of the crisis. The fact that the incumbent bloc voters' expectations for the economic crisis in the country are lower than their expectations of individual economic hardship may indicate their relations with the power field rather than their class position. The opposite seems to be the case for opposition voters and swing voters.

7.   BAROMETER OF THE AGENDA

We moved the Agenda Barometer to digital media. The agenda barometer, which will no longer be included in our reports, is available at https://gundem.konda.com.tr/ with its 8-year archive and accessible at any time.

To access it, you can introduce the QR code below to your phone or visit https://gundem.konda.com.tr/.

8. RESEARCH ID

8.1. The General Description of the Survey

The survey that this report is based on was conducted by KONDA Research and Consultancy Limited (KONDA Araştırma ve Danışmanlık Ltd. Şti.).

The field survey was conducted on 5 –6 November 2022. This report reflects the political tendencies, preferences and profiles of the adult population over the age of 15 in Turkey at the time of the fieldwork.

The survey is designed and conducted with the purpose to determine and to monitor trends and changes in the preferences of respondents who represent the adult population above the age of 15 in Turkey. The margin of error of the survey is +/- 1.7 at 95 percent confidence level and +/- 2,3 at 99 percent confidence level.

8.2. The Sample

The sample was prepared by stratification of the data on population and educational level of neighborhoods and villages based on Address-Based Population Registration System with the neighborhood and village results of the 24 June 2018 General Elections. Residential areas were first graded as rural/urban/metropolitan and then the sample was identified based on 12 regions.

Within the scope of the research, 3641 people were interviewed face-to-face in their households in 201 neighborhoods and villages of 122 districts of 33 provinces, including the center. Age and gender quotas were applied for 18 surveys conducted in each neighborhood.

Visited province	33
Visited district	133
Visited neighborhood/village	202
Number of interviewee	3641

Age group	Female	Male
Age 15-32	3 subjects	3 subjects
Age 33-48	3 subjects	3 subjects
Age 49 and above	3 subjects	3 subjects

	Level 1 (12 regions)	Provinces visited
1	İstanbul	İstanbul
2	West Marmara	Balıkesir, Çanakkale, Kırklareli
3	Aegean	Aydın, Denizli, İzmir, Manisa, Uşak
4	East Marmara	Bolu, Bursa, Eskişehir, Kocaeli
5	West Anatolia	Ankara, Konya
6	Mediterranean	Adana, Antalya, Hatay, Mersin
7	Central Anatolia	Kayseri, Sivas
8	West Black Sea	Amasya, Samsun, Tokat
9	East Black Sea	Giresun, Trabzon
10	Northeast Anatolia	Erzincan, Kars
11	Middle East Anatolia	Malatya, Van
12	Southeast Anatolia	Diyarbakır, Gaziantep, Şanlıurfa

	Regions of the Survey	Rural	Urban	Metropolis	Total
1	İstanbul			18,5%	18,5%
2	West Marmara	,5%	3,1%	1,0%	4,6%
3	Aegean	2,1%	6,4%	5,7%	14,3%
4	East Marmara	,2%	3,4%	6,5%	10,1%
5	West Anatolia		3,1%	6,9%	9,9%
6	Mediterranean		6,7%	5,8%	12,5%
7	Central Anatolia	,6%	2,8%	1,2%	4,7%
8	West Black Sea	,9%	4,0%	1,2%	6,1%
9	East Black Sea	,2%	2,3%	,9%	3,4%
10	Northeast Anatolia	,6%	1,9%		2,5%
11	Middle East Anatolia	,3%	2,6%	1,4%	4,3%
12	Southeast Anatolia	,5%	4,6%	4,0%	9,2%
	Total	6,0%	40,8%	53,1%	100,0%

9. FREQUENCY TABLES

9.1. Profile of Subjects

Gender	Percent
Female	48,6
Male	51,4
Total	100,0

Age	Percent
Age 15-17	3,2
Age 18 - 32	32,9
Age 33 - 48	33,4
Age 49+	30,5
Total	100,0

Educational Status	Percent
Illiterate	4,5
Literate without degree	2,5
Primary school graduate	22,6
Middle school graduate	17,3
High school graduate	32,0
University graduate	19,1
Master	1,8
Doctorate	,2
Total	100,0

Educational status? (grouped)	Percent
Less than high school	46,8
High school	32,0
University	21,1
Total	100,0

How many people live in this household (including children) ?	Percent
1-2 people	22,1
3-5 people	64,1
6-8 people	12,3
9 and more people	1,5
Total	100,0

Where did you grow up?	Percent
Village	25,4
Town/District	26,4
City	32,7
Metropolis	15,5
Total	100,0

Have you worked to earn money last week? If yes, what is your profession?	Percent
Public officer	6,7
Private sector	7,4
Worker	9,5
Small retailer	9,5
Merchant/businessman	1,8
Self-employed	2,6
Farmer, agriculturer,stockbreeder	2,3
Employed, other	6,1
Retiree	11,7
Housewife	24,8
Student	10,4
Unemployed	5,2
Unemployable	1,9
Total	100,0

Have you worked to earn money last week? If yes, what is your profession? (grouped)	Percent
White collar employee	18,5
Worker,tradesman,farmer	27,5
Retiree	11,7
Housewife	24,8
Student	10,4
Unemployed	7,2
Total	100,0

Lifestyle	Percent
Modern	34,3
Traditional Conservative	39,1
Religious Conservative	26,6
Total	100,0

Which TV channel do you prefer to follow the news?	Percent
I do not watch the news on TV.	11,9
I do not follow the news.	10,7
I do not watch TV.	8,1
A Haber	5,1
ATV	8,9
CNN Türk	2,5
Fox TV	23,5
Haber Türk	2,6
Halk TV	4,1
Kanal 7	1,0
Kanal D	3,4
NTV	1,9
Show TV	4,5
Star TV	1,3
TRT	7,5
Ulusal Kanal	,3
Other channels	2,7
Total	100,0

Which social media platforms do you use?	Percent
Facebook	41,5
Twitter	28,4
Whatsapp	74,3
Youtube	43,6
Instagram	54,1
Tiktok	12,7
Other	1,0
I use Internet but not social media	4,0
I never use Internet	12,8

Ethnicity	Percent
Turkish	75,1
Kurdish	18,0
Zaza	2,2
Arab	2,3
Other	2,3
Total	100,0

Religion and sect	Percent
Sunni (Hanafi or Shaafi) Muslim	90,6
Alevi Muslim	5,6
Other	3,8
Total	100,0

Religiousness	Percent
Atheist	3,0
Non-believer	3,3
Believer	34,5
Religious	47,3
Devout	11,9
Total	100,0

Do you have an automobile owned by this household?	Percent
Yes	46,8
No	53,2
Total	100,0

Household income	Percent
2000 TL and below	4,5
2001 - 3000 TL	3,4
3001 - 5000 TL	13,5
5001 - 8000 TL	29,6
8001 – 10000 TL	16,2
10001 TL and above	32,7
Total	100,0

Economic classes	Percent
Lower income	18,9
Low middle class	31,9
New middle class	28,2
Upper income	21,0
Total	100,0

Type of household	Percent
Slums	5,3
Separate, traditional house	28,2
Apartment	60,6
In the housing estate	5,8
Very luxury building, villa	,1
Total	100,0

9.2. Current Politics

How would you grade Recep Tayyip Erdoğan in terms of fulfilling his presidential tasks?	Percent
Very poor	28,6
Poor	23,0
Average	21,1
Good	14,8
Excellent	12,5
Total	100,0

If Recep Tayyip Erdoğan WINS the next presidential election; would it be positive or negative for Turkey?	Percent
Positive	38,1
Negative	61,9
Total	100,0

If there were an election today, would you go to the ballot box with your current mood?	Percent
I will definitely go and cast a vote.	80,4
I am undecided.	11,8
I would definitely not go and not cast a vote.	7,8
Total	100,0

For whom would you vote for in a presidential election between Kemal Kılıçdaroğlu and Recep Tayyip Erdoğan?	Percent
Kemal Kılıçdaroğlu	35,1
Recep Tayyip Erdoğan	37,0
I would not cast a vote.	27,9
Total	100,0

Who can win against Erdoğan?	Percent
Nobody can win against Erdoğan?	31,3
Ekrem İmamoğlu	15,0
Kemal Kılıçdaroğlu	13,2
Mansur Yavaş	35,7
Meral Akşener	11,0
Other	8,5

9.3. Perception of Economic Situation

How have the government's policies affected your family budget in the past year?	Percent
Very negative	40,9
Negative	35,7
Neither positive nor negative	17,6
Positive	5,0
Very positive	,8
Total	100,0

How have the government's policies affected the country's economy in the last year?	Percent
Very negative	47,4
Negative	32,9
Neither positive nor negative	13,7
Positive	5,5
Very positive	,6
Total	100,0

9.4. Income Distribution, Poverty and Material Deprivation in Turkey

Do you think you can meet the heating needs of your house economically in the coming winter months?	Percent
Yes	51,9
No	48,1
Total	100,0

Do you consume meat, chicken or fish at least 3 days a week in your household?	Percent
Yes	36,3
No	63,7
Total	100,0

Are you economically able to afford a week's vacation away from home for the entire household?	Percent
Yes	19,3
No	80,7
Total	100,0

When you encounter an unexpected expense, do you think you can afford it?	Percent
Yes	29,0
No	71,0
Total	100,0

Which of these do you have?	Percent
Fixed internet	63,1
Computer	44,5
Dishwasher	78,5
Deep freeze	36,1
Washing machine	92,7
Air conditioning	23,4
Drying machine	12,5
Coffee Machine	25,6
Tea machine	23,1
Robot vacuum cleaner	19,7
Game console	5,7
TV	86,1
Tablet	17,9
E-book reader	1,2
Smart phone	80,7
Mobile phone	57,1

For which expenditures did you have difficulty with in the last three months?	Percent
Bills	58,2
House rent	24,1
Housing loan	5,7
Car loan	4,7
Kitchen expenses	53,6
Credit card debt	32,1
Education costs	25,9
Transportation costs (public transport, fuel)	23,7
Pocket money I give to my children	18,9
Other	3,5
We did not experience any difficulties	13,3

If we divided all the people in our country into 4 groups in terms of income and wealth, which group do you think you are in?	Percent
Poor	19,8
Below average	51,2
Above average	28,3
Rich	,8
Total	100,0

What do you plan to do in the coming period to provide for the livelihood of the household, to maintain or improve your economic situation?	Percent
Return to hometown	2,9
Changing house	1,8
Changing city	2,7
Get a credit/loan	8,8
Starting to work	12,0
Doing additional work	19,2
Changing job	3,8
Other starting to work in the household	9,4
Cutting spending	38,3
Other	2,5
I do not plan anything extra	36,5

9.5. Morale Index

Could you afford a living last month?	Percent
Yes, I could make savings, too.	16,4
I could hardly afford a living.	48,6
Not really.	13,5
No, I could not make some payments/incurred debt.	21,5
Total	100,0

Do you anticipate economic crisis in Turkey in the coming 3 months?	Percent
Yes	72,1
No	27,9
Total	100,0

Do you anticipate personal economic hardship in the coming 3 months?	Percent
Yes	73,1
No	26,9
Total	100,0

Do you think that the country is in an economic crisis now?	Percent
Yes	83,1
No	16,9
Total	100,0

10. GLOSSARY of TERMS

All findings in Barometer reports are based on answers to the questions directed to respondents who were interviewed face-to-face in field surveys. Some questions and response options are then used in the rest of the report in short or simplified form. For example, the respondents who respond to the question on how religious they see themselves as "a person who is a believer, but does not fulfill religious requirements" are shortly identified as "believers" in the report. This glossary is prepared for both the readers who receive the report for the first time and the readers who need further clarification on the terms. The first table provides a list of the terms and their explanations, and the following tables list the questions and response options which establish the basis for these terms.

	DEFINITION
ALEVI MUSLIM:	A person who identifies his/her religion/sect as Alevi Muslim
ARAB:	A person who identifies his/her ethnic origin as Arab
ATHEIST:	A person with no religious belief
BELIEVER:	A person who believes in the requirements of the religion, but does not fulfill them completely
CHADOR:	A woman who wears chador or a man whose spouse wears a chador
HEADSCARF:	A woman who does not cover her head or a man with a headscarf or whose spouse does not cover her head with a headscarf
KURDISH:	A person who identifies his/her ethnic origin as Kurdish
LOWER CLASS:	Households whose income per capita is in the lowest 20 percent segment
LOWER MIDDLE CLASS:	Households with an income per capita in the 60 percent segment but which do not own a car
METROPOLITAN:	Settlements which are located within the integrated boundaries of the most crowded 15 cities (differs from the official definition)
MODERN:	A person who identifies his/her lifestyle as modern
NEW MIDDLE CLASS:	Households whose income per capita is in the 60 percent segment and which own a car
NO COVER:	A woman who does not cover her head or a man whose spouse does not cover her head
NON-BELIEVER:	A person who does not believe in the requirements of the religion
PIOUS:	A person who fulfills the requirements of the religion completely
RELIGIOUS:	A person who tries to fulfill the requirements of the religion
RELIGIOUS CONSERVATIVE:	A person who identifies his/her lifestyle as religious conservative
RURAL AREA:	Settlements with a population of less than 4000 (differs from the official definition)
SUNNI MUSLIM:	A person who identifies his/her religion/sect as Sunni Muslim
TURBAN:	A woman who wears a turban or a man whose spouse wears a turban
TURKISH:	A person who identifies his/her ethnic origin as Turkish
TRADITIONAL CONSERVATIVE:	A person who identifies his/her lifestyle as traditional conservative
URBAN AREA:	Settlements with a population of more than 4000 (differs from the official definition)

UPPER CLASS:	Households whose income per capita is in the highest 20 percent segment
ZAZA:	A person who identifies his/her ethnic origin as Zaza
MULTIPLE CORRESPOND-ENCE ANALYSIS	A data analysis technique for showing the structure of relationships between nominal-categoric data and possible patterns between them in a two dimensional plane. It corresponds to the requirement of appliance of multiple correspondence analysis on more than two variables and big datasets. Multiple Correspondence Analysis was formed with the studies of mathematician and linguist Jean-Paul Benzécri in the 60's. Studies and publications in the field have increased in the 80's with the start of the translations of the researches to English and after French Sociolog Pierre Bourdieu have used this method in his articles.

10.1. Questions and Response Options

Which of the three lifestyle clusters below do you feel yourself belonging to?

Modern
Traditional Conservative
Religious Conservative

We are all citizens of the Turkish Republic, but we may have different ethnic origins; which identity do you know/feel that you belong to?

Turkish
Kurdish
Zaza
Arab
Other

Which of the below describes you in terms of piety?

A person who does not believe in the requirements of the religion
A person who believes in the requirements of the religion, but does not fulfill them completely
A person who tries to fulfill the requirements of the religion
A person who fulfills the requirements of the religion completely

Which religion or sect do you feel you belong to?

Sunni Muslim
Alevi Muslim
Other

Settlement Code (Data obtained from the sample)

Rural
Urban
Metropolitan

Do you cover your head or does your spouse cover her head when going out of your home? How do you cover your head?

No head cover
Headscarf
Turban
Chador
Bachelor male

Economic classes (determined by using household size, household income and car ownership)

Lower class
Lower middle class
New middle class
Upper class