

KONDA

April'17

Barometer

Political and Social Survey Series

**Analyses of the April 16th
Referendum Results and the Electorate**

(This open-access document includes the 'Referendum Results'
section of the KONDA April'17 Barometer Report)



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1. EXECUTIVE SUMMARY

The April'17 Barometer Report covers the analysis of data obtained by the survey conducted on 8-9 April 2017 by face-to-face interviews with 3555 people in their homes in 199 neighborhoods and villages of 129 districts of 30 provinces including the central districts as well as the district-based electoral results of the 16 April referendum.

As is known, our survey results which we first shared with our subscribers and then with the public 3 days before the referendum, completely overlap with the electoral result. Since this shows the accuracy of our survey data, the following analysis also reveals the social situation that is the closest to reality.

This report we are sharing with our subscribers now consists of 3 determinative sections:

Election Analysis section covers the multi-dimensional analysis of the district-based data of the 16 April referendum;

This extensive section covers the analysis of the distribution of the “yes/no” rates in terms of regions, provinces, districts and residential types through various mapping methods; comparison of these rates with 1 November and 7 June 2015 elections; the effect of the distribution of the electoral turnout and the invalid votes to the general electoral arithmetic, the distribution of the votes in terms of population characteristics and the analysis about the correlation among these characteristics.

***The section on the survey data** covers the analysis of the data collected in the survey we conducted one week before the referendum, the results of which completely overlapped with the electoral results;

As usual, this section covers political preferences, approach on current events and time series. However, specific to this report, the profiles of those who said “yes” or “no” in the referendum were analysed in terms of basic demographic characteristics such as gender, age and income as well as parameters such as religiousness, lifestyle, TV preferences, ethnicity and sect. Further, the distribution of yes/no in all social clusters was analysed. Other than that, the change in the attitude of different clusters towards the referendum in a period of 2 years was also included. In addition, these profiles and series were analysed in terms of political preferences. As a result, considering that the data on which the report is based has been confirmed through the electoral result, social dynamics were realistically revealed. Therefore, certain topics of public discussion were replied such as the preferences of the Kurds, HDP supporters or MHP supporters in the referendum, whether public officers hid their preferences, whether the spiral of silence was more prominent among the “yes” voters or “no” voters and whether the preferences of urban conservatives or modern conservatives have changed or not.

***Evaluation section** covers interpretations, estimations and analyses based mostly on electoral results;



In this section, the situation revealed by the 16 April referendum was handled in a different point of view for an analysis of different possibilities for different actors. Although these analyses are based on electoral results, they are nevertheless supported by the estimations and scenarios that KONDA puts forward in the light of the 30-year experience in public surveys and political dynamics. In conclusion, the evaluation section provides not only an extensive observation but also a look towards the future.

The 3 sections described above expose the significant findings indicated below:

- “Yes” votes were dominant in those places where the Ak Parti had been strong in the 1 November elections. Although it is difficult to measure the contribution of the MHP accurately, it is observed that it was lower than expected.
- The rate of the “yes” votes is 10 points below the total voting rate of the Ak Parti and the MHP in the 1 November elections. Various analyses of the electoral result show that the MHP did not significantly contribute to the success of the “yes” front.
- In the districts previously dominated by the HDP, the rate of the “no” votes seems to be lower than the HDP voting rates. It would be wrong to interpret this situation as the HDP electorate’s voting “yes.” The portion of the electorate that passed from the Ak Parti to the HDP in the 7-June period might have returned back to the Ak Parti and hence the preference in the referendum might have turned out as “yes.” On the other hand, especially in those districts where the HDP municipalities were replaced by trustees, the electoral turnout was low and the invalid votes were quite higher than the average, therefore this situation might be the indication of a change in the population dynamics rather than a change in preferences.
- In metropolises where the Ak Parti had been strong in previous elections, the “yes” votes were lower than the “no” votes. The “yes” votes start to dominate as the population of the provinces get smaller. The significant difference is that in metropolises with crowded populations, the “no” front won with small differences whereas in provinces with small populations where the “yes” votes dominated, the difference was very high. The balance that brought the current result has been the “no” votes around 51-54 percent in metropolises vs. the “yes” votes around 60-70 percent in small provinces.
- The geographical distribution of the yes/no balance is parallel to socio-economic development.
- The results of the referendum bring forward as the main pattern a trilateral structure: 1) Western and Mediterranean coasts from Thrace to Hatay, 2) at another corner, Eastern and Southeastern regions dominated by the Kurds, and 3) the region that covers Central Anatolia, Middle Anatolia and the Black Sea.
- It is observed that the electoral turnout is higher in those regions where the “no” votes prevail, especially in the western regions whereas it is lower in the Kurd-dominated regions, especially in those districts the municipalities of which have been replaced by trustees.
- The distribution of the invalid votes also reveal significant clues. The map shows that the rate of invalid votes has increased in 2-3 folds compared to the previous election in the districts dominated by the HDP whereas it has decreased in Central Anatolia where the rate of the “yes” votes is above average.



- Almost all “yes” voters are the Ak Parti electorate. On the other hand, the rate of the MHP voters is 5 percent within the “yes” voting rate.
- Even though at first glance the “no” voters seem to be predominantly the CHP electorate, it is observed that at least 60 percent of the MHP electorate and 93 percent of the HDP electorate are also “no” voters.
- It seems that one fourth of those who stated that they would vote “no” consists of swing voters and non-voters. Therefore, the cluster that forms the “yes” front is more defined whereas the “no” front has a more flexible structure as it consists of different political preferences.
- In terms of the time series, it is observed that although there has been some fluctuation in the “no” votes in time, it ended up the level it had been 2 years ago. The “yes” votes increased after the 15 July Coup Attempt and accelerated in the last three months. Specifically, the majority of the Ak Parti supporters who stated that they were undecided, eventually decided for “yes.”
- The profiles of the “yes/no votes” reveal no significant differences in terms of basic demographic characteristics, however these two groups are quite different in terms of lifestyle, religiousness and head-covering status. The “yes” cluster has lower educational and income levels whereas the religiousness level is higher and this cluster covers less of those who consider themselves modern in terms of lifestyle (one tenth).
- The rate of the “yes” voters among the Kurds is lower than the rate of the Ak Parti supporters among the Kurds.
- The rate of the “yes” voters among the Alevis is negligible.
- The possibility of voting “no” is higher among those who live in metropolises or who state that they were raised in metropolises.
- The “yes” front is stronger in rural areas whereas the “no” front is stronger in metropolises. There is no dominance of no votes among the conservatives living in cities.
- The TV channel preferred for obtaining the news is the second most determinative feature after political preference in the distribution of “yes/no.” The viewers of A Haber, ATV, TRT and Kanal 7 are almost completely “yes” voters while at the other front, there is only FOX TV, as almost half of those who voted “no” stated that they watch FOX TV for obtaining the news.
- The “no” preference of those who stated that they support the CHP and the HDP has not changed in 2 years. Within the MHP electorate, the change towards “yes” clearly increased but did not reach the 40-percent range.
- In the past 5 months, the preference for “yes” has visibly increased among those in the lowest educational cluster, housewives, workers, small retailers and low-income groups. The rate of preference for “no” among the public officers has dropped in the past 2 years, however the rates of “yes” and “no” votes developed closer in the past 6-month term.
- In general, the “no” voting rate could not surpass the potential that it had at the beginning of 2015 when the discussion on presidential system started to intensify whereas the “yes” voting rate has gradually increased in the past 3 months in many different clusters.



You will see in the report that some of the questions we asked in our face-to-face interviews as well as the answer choices are shortened and simplified to fit the everyday norms of speech and communication. This is why, we suggest you looking at the 'Glossary of Terms' section located at the end, where you can find the wider definitions of those terms used in the report.



2. ANALYSIS OF THE 16 APRIL REFERENDUM RESULTS

2.1. Maps and Clustering Analyses

In this section, you will find maps of yes-no voting rates, turnout rates and invalid voting rates in province and district basis as well as graphs showing the voting distribution of metropolises, big cities and cities separated according to the number of voters, prepared on the basis of the unofficial temporary results of the 16 April referendum.

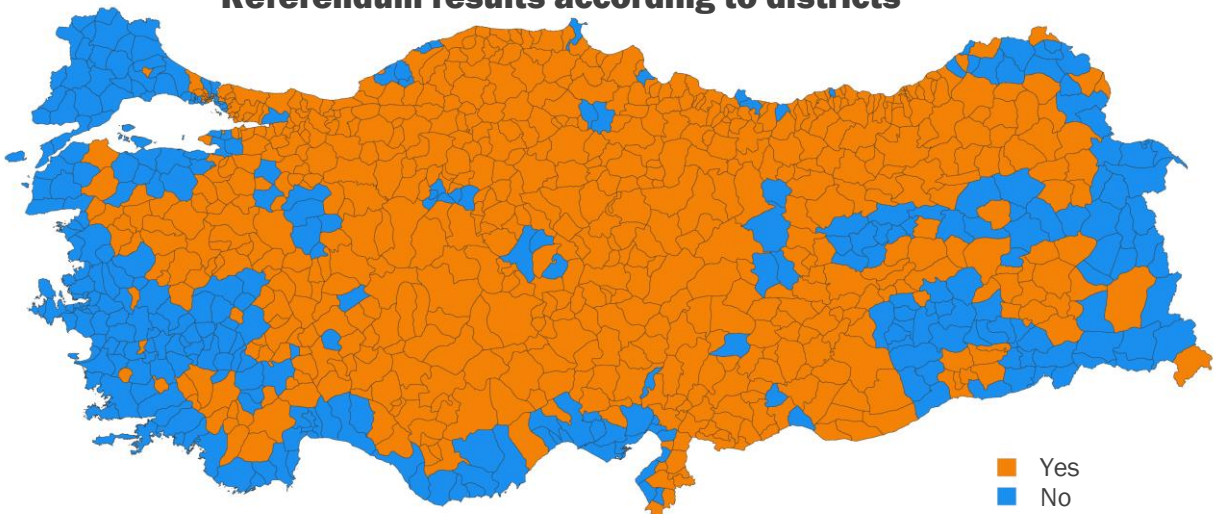
The first clustering analysis shows the voting preferences of the clusters we have determined on the basis of the 1 November 2015 General Election results. The second one involves a profile of the districts according to both the referendum results and the invalid voting rates and turnout rates. All analyses have been prepared in view of the domestic votes only.

2.1.1. Distribution of Yes / No Votes

Referendum results according to provinces

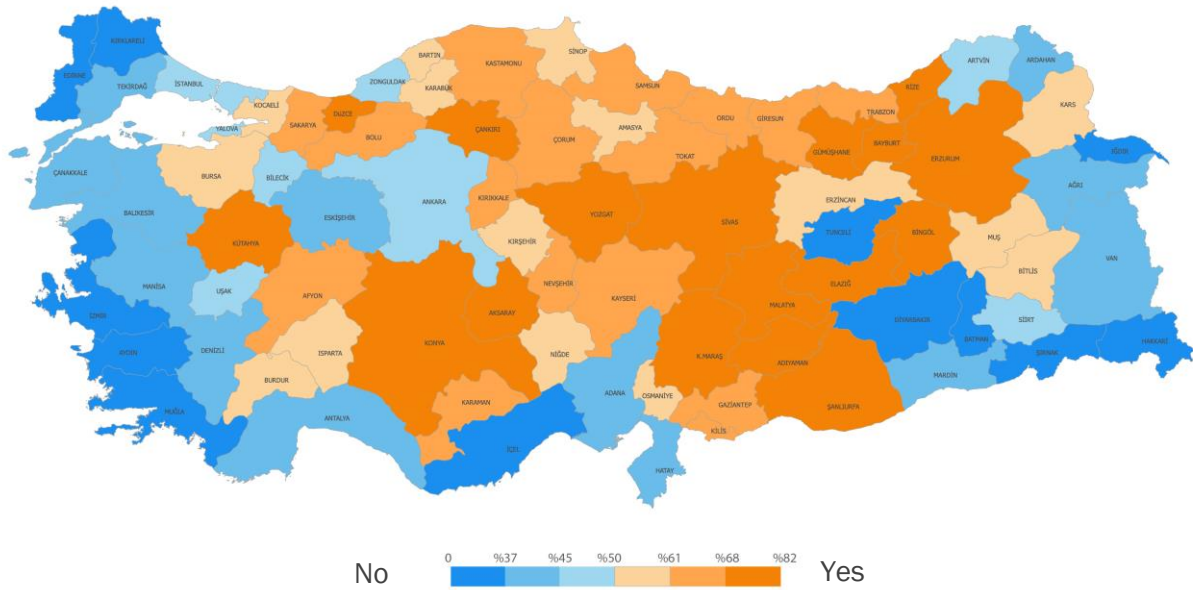


Referendum results according to districts

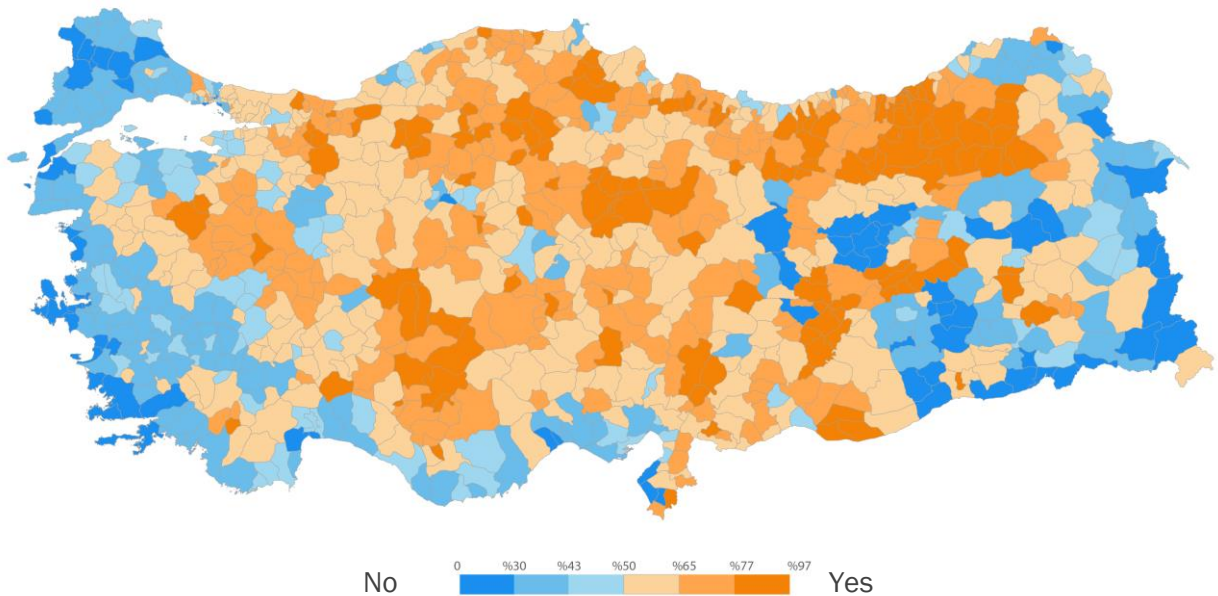




Referendum results according to provinces (6 categories)



Referendum results according to districts (6 categories)



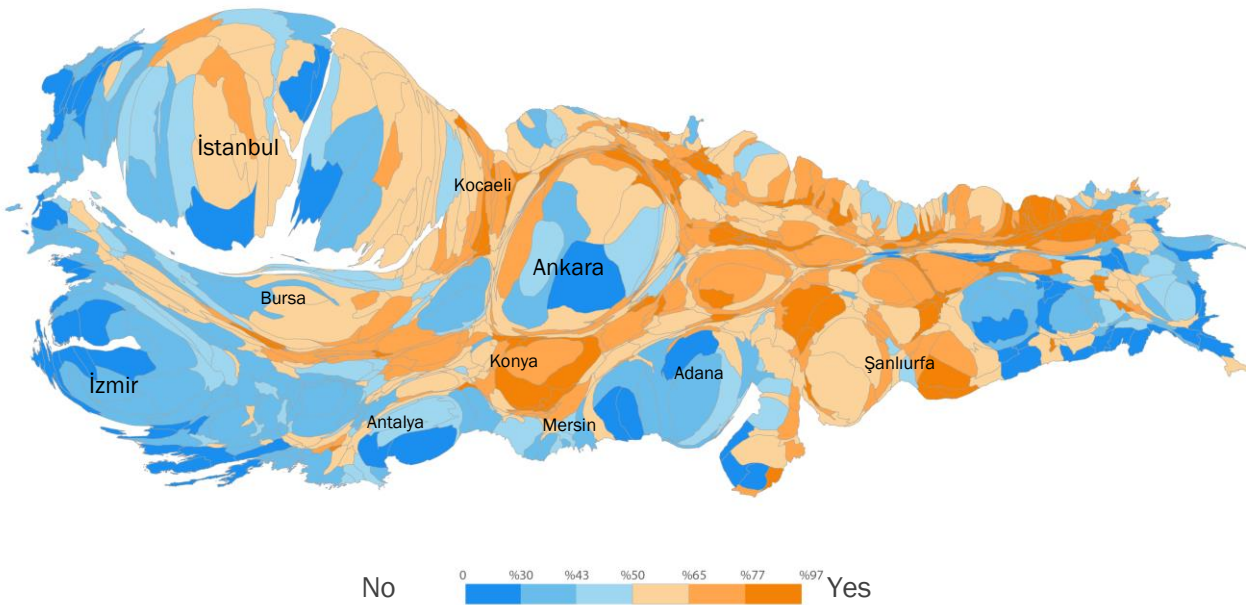


While mapping the referendum results, in addition to the usual maps showing the administrative borders, we also sought an answer to question “If the number of the voters was a determinative factor in establishing the administrative borders, how would Turkey look?”

We applied the cartogram mapping method we first used after the 1 November 2015 General Elections again in a district level according to the new number of voters. These maps were obtained through the re-drawing of the district borders in Turkey in proportion to the number of voters. Therefore, those places with high electorate numbers took a wider place in the map compared to the original surface area. As might be expected, in the cartogram of Turkey, the number of voters and the size of the districts decrease from the west to the east.

The coloring of the map was made using the same percentage ranges as the “district referendum results” map above.

Referendum results according to districts (6 categories)



In addition to the cartogram shaped according to the number of voters in Turkey as a whole, we also analyzed as to how Turkey would look if we re-drew the map in view of the “yes” or “no” votes. The first of the two consecutive cartograms below was generated by re-drawing the map of the district map of Turkey according to the number of “yes” voters whereas the second was generated according to the number of “no” voters.

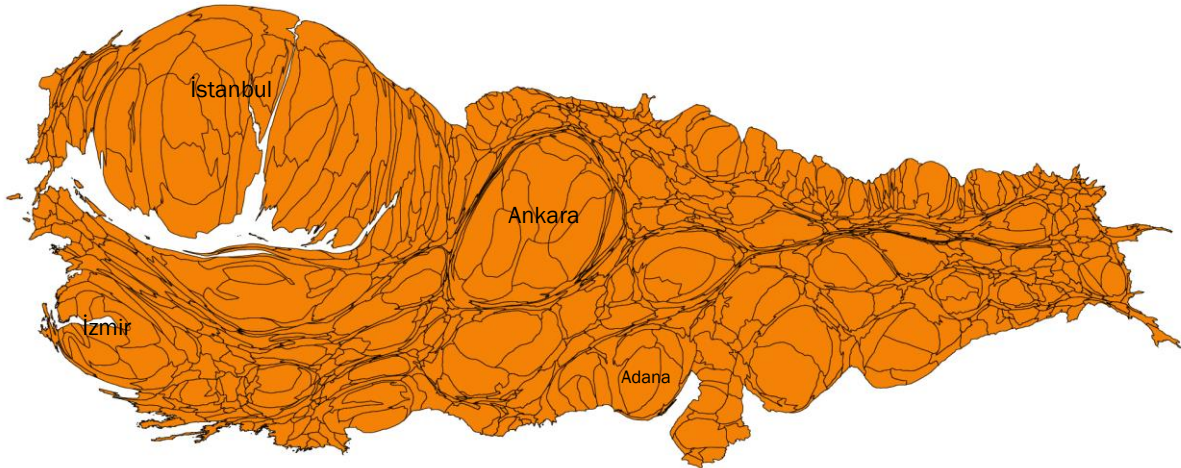
We had also engaged in a similar mapping in the analyses of the 1 November election results and presented a cartogram of Turkey consisting of the electorates of each party¹. The Turkey depictions of the Ak Parti, CHP, MHP and especially the HDP electorates were quite different from each other.

¹ <http://konda.com.tr/tr/rapor/1-kasim-sandik-ve-secmen-analizi/>

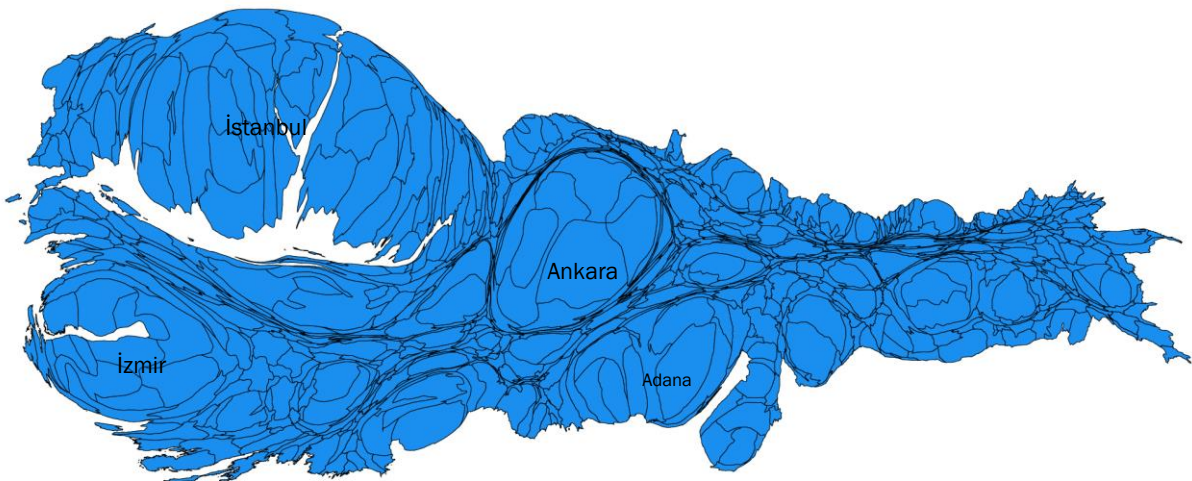


When we view the two different depictions of Turkey on the basis of the referendum results, we do not come across a great difference other than Izmir being slightly bigger for the “no” voters and the Black Sea Region and Central Anatolia being slightly more distinctive for the “yes” voters. The “yes” and “no” votes do not densify in one particular geographic area and the maps are basically the same when proportionated to the number of voters.

The Turkey of the “yes” voters...

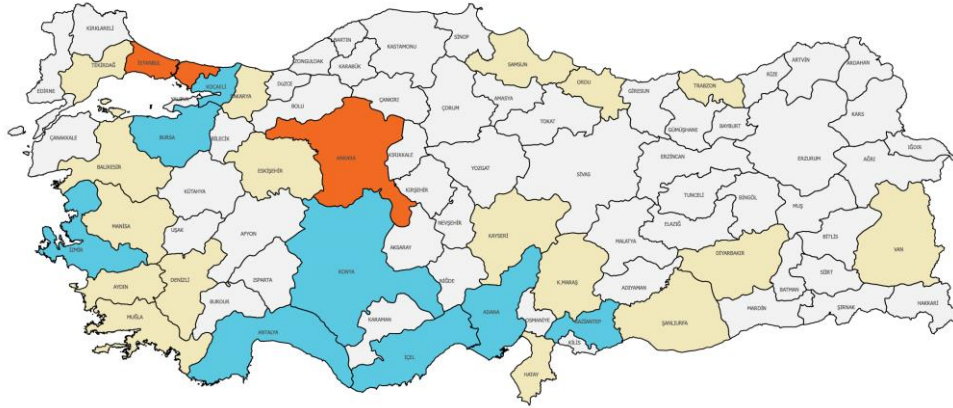


The Turkey of the “no” voters...

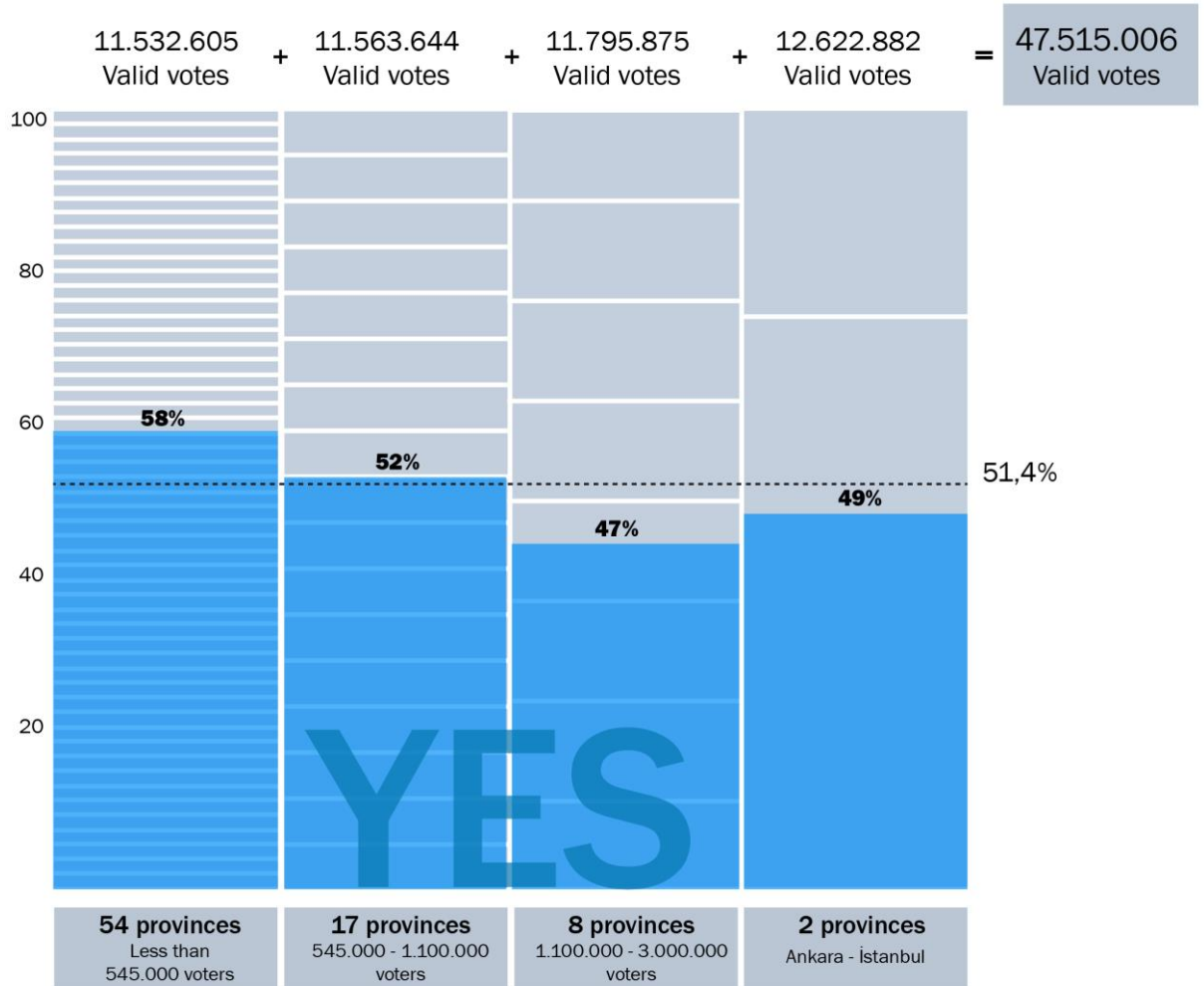




“Yes” voting rates in provinces according to number of voters

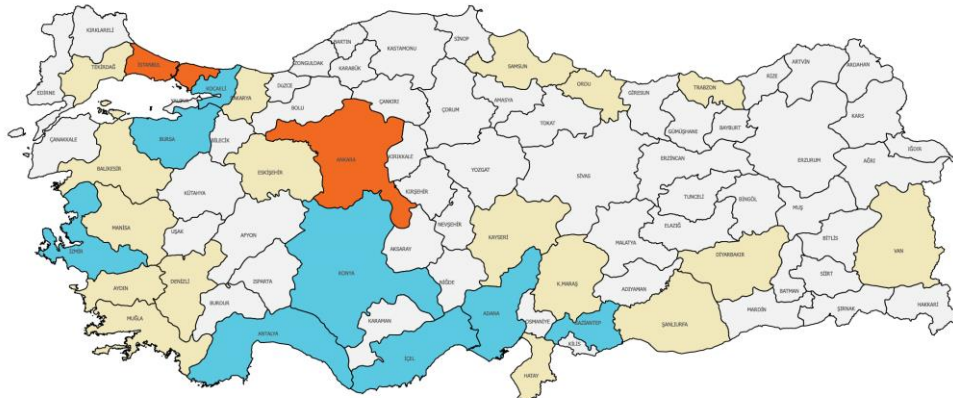


- 2 Metropolitan areas (Number of voters > 3.000.000)
- 17 Metropolitan areas (545.000 < Number of voters < 1.100.000)
- 8 Metropolitan areas (1.100.000 < Number of voters < 3.000.000)
- 54 provinces (Number of voters < 545.000)

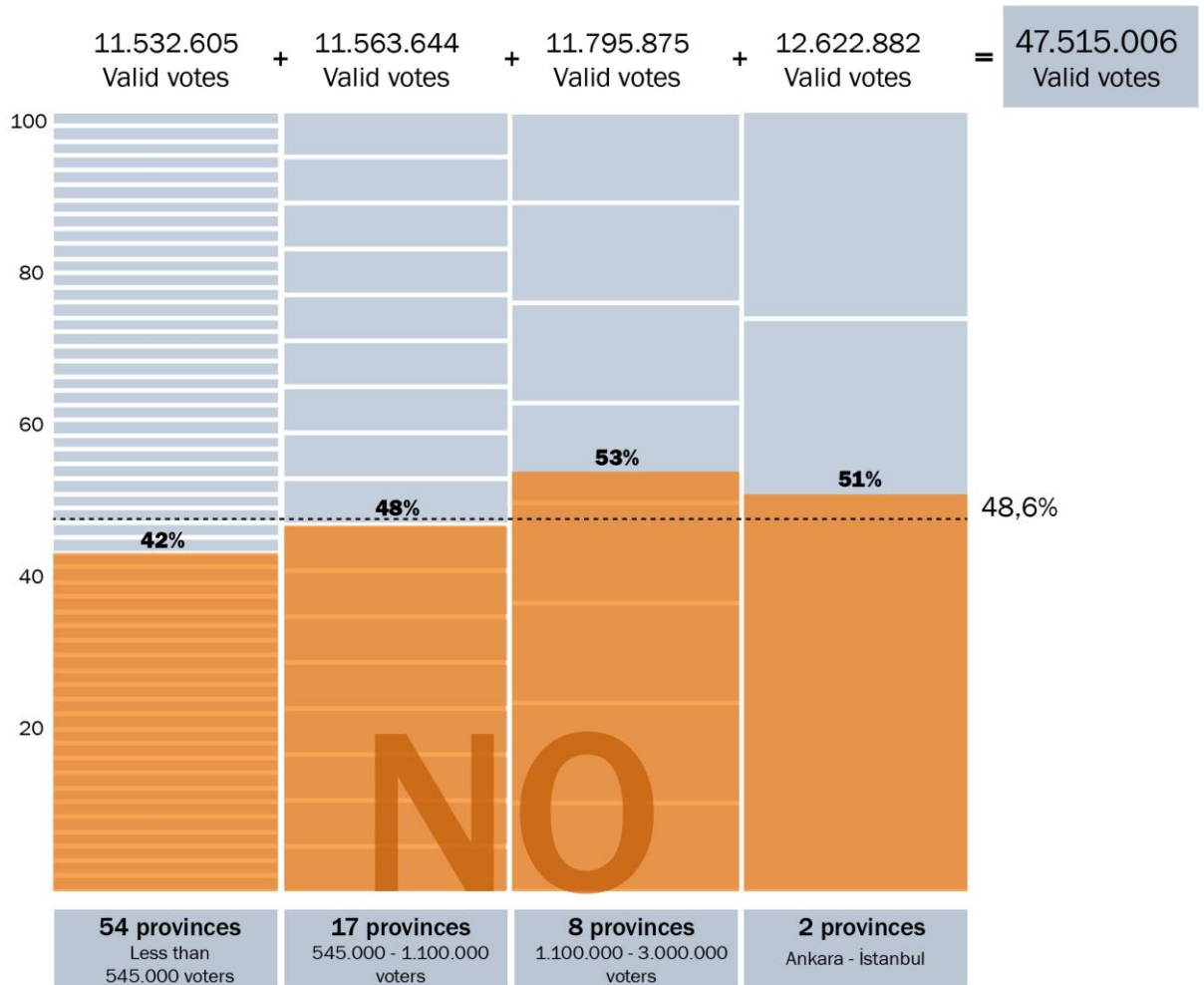




“No” voting rates in provinces according to number of voters



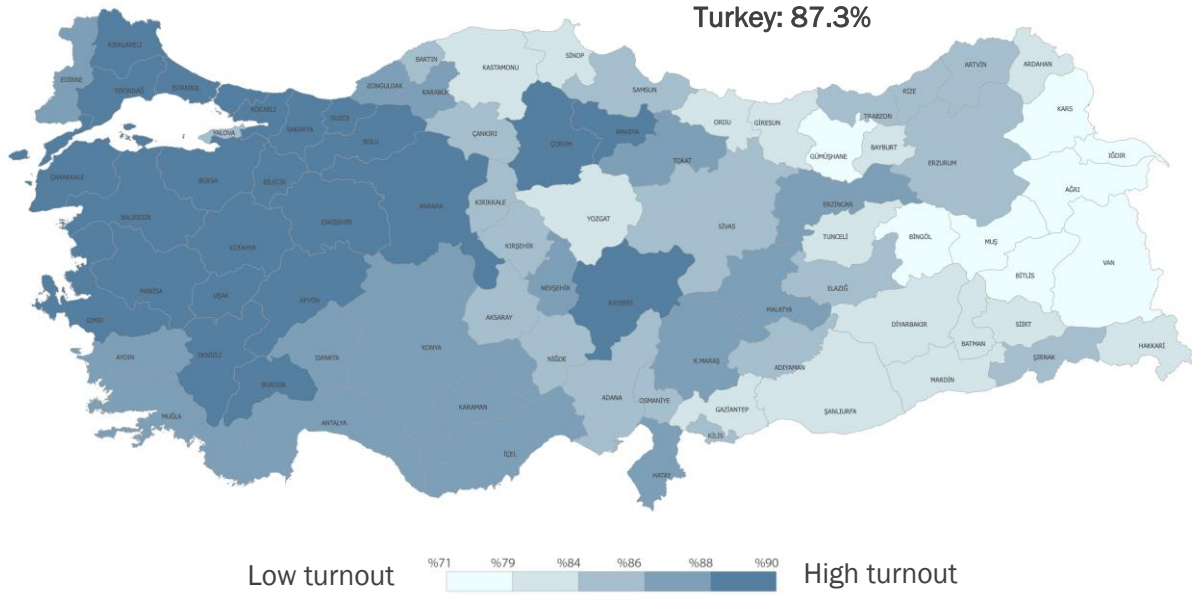
- 2 Metropolitan areas (Number of voters > 3.000.000)
- 8 Metropolitan areas (1.100.000 < Number of voters < 3.000.000)
- 17 Metropolitan areas (545.000 < Number of voters < 1.100.000)
- 54 provinces (Number of voters < 545.000)



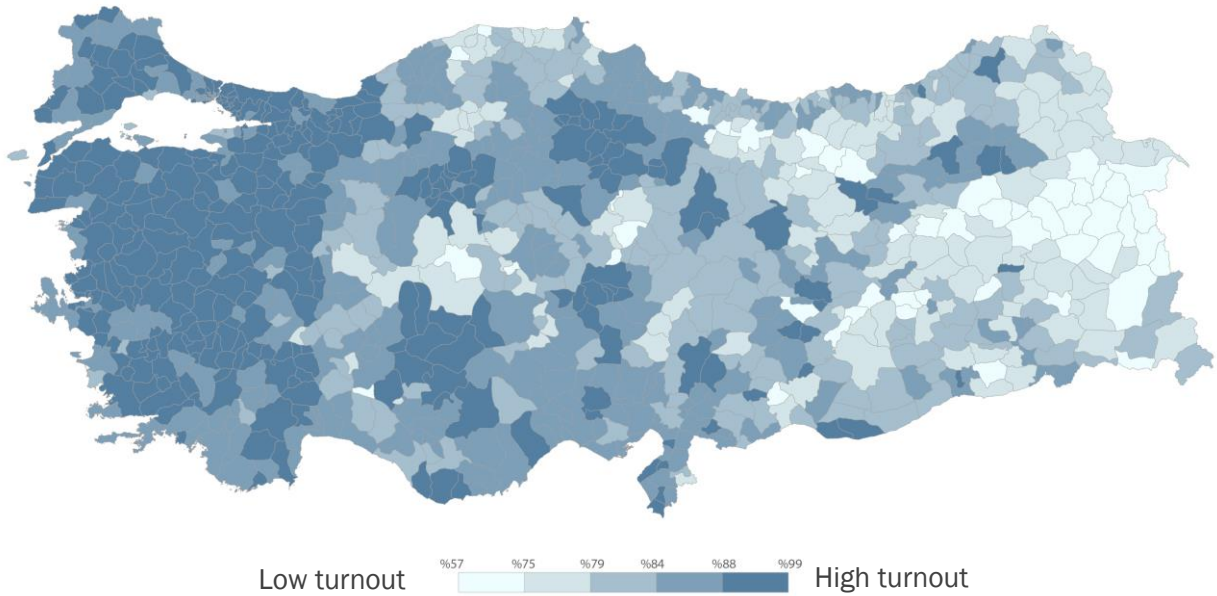


2.1.2. Referendum turnout

Turnout in provinces (%)



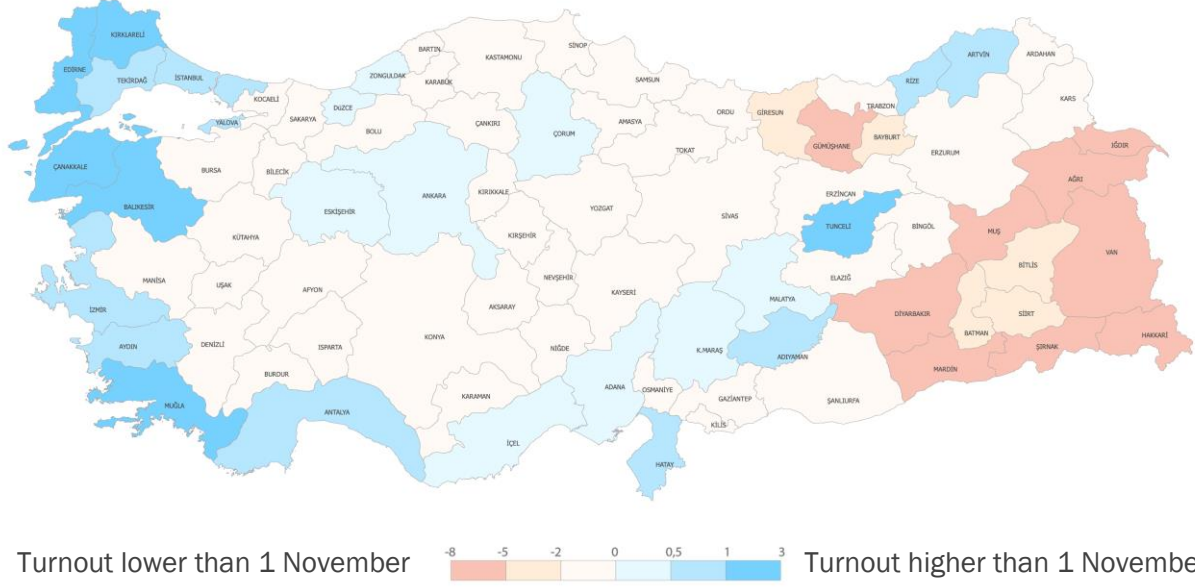
Turnout in districts (%)



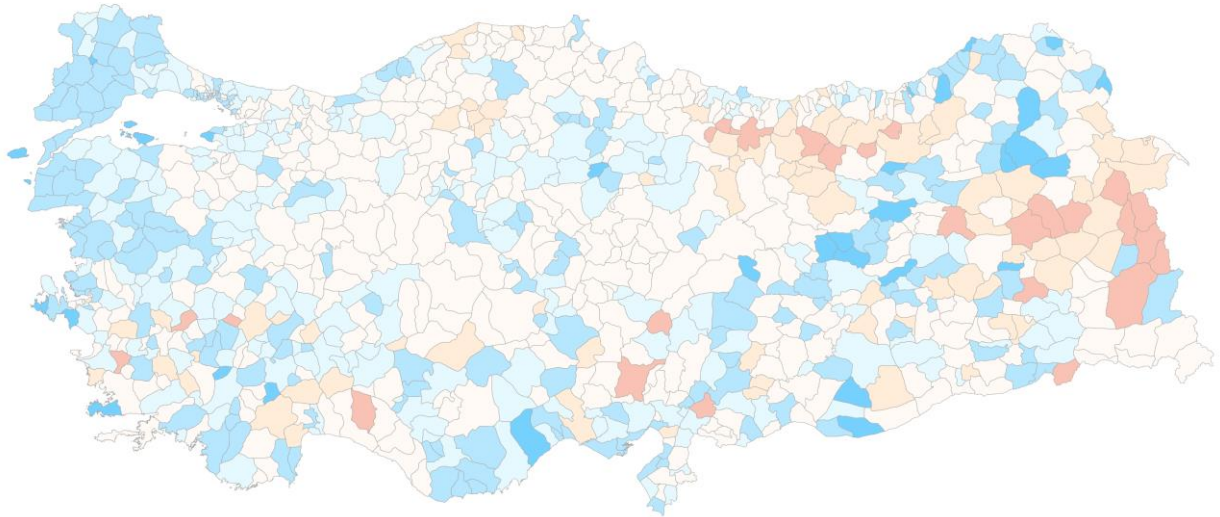


16 April 2017 – 1 November 2015 Turnout difference in provinces

16 April 2017: 87.3% – 1 November 2015: 87.3%*



16 April 2017 – 1 November 2015 Turnout difference in districts



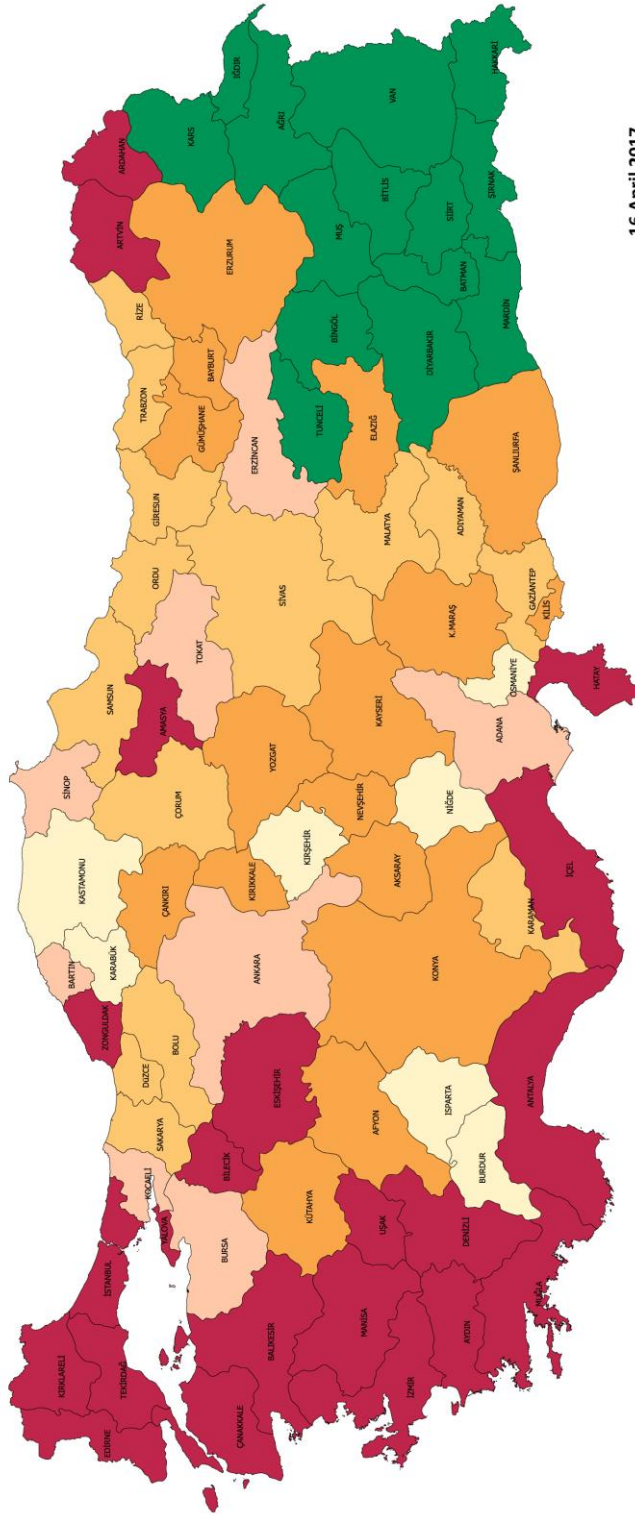
Turnout lower than 1 November -20 -8 -3 0 1 3 10 Turnout higher than 1 November

*The 16 April turnout rate obtained through unofficial results, the 1 November turnout rate obtained through <https://sonuc.ysk.gov.tr/>.

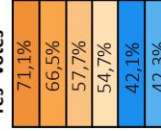


2.1.4. Clustering analysis in province level according to the 1 November election results

November 1st, 2015 General Election Results
Political Preference by Province



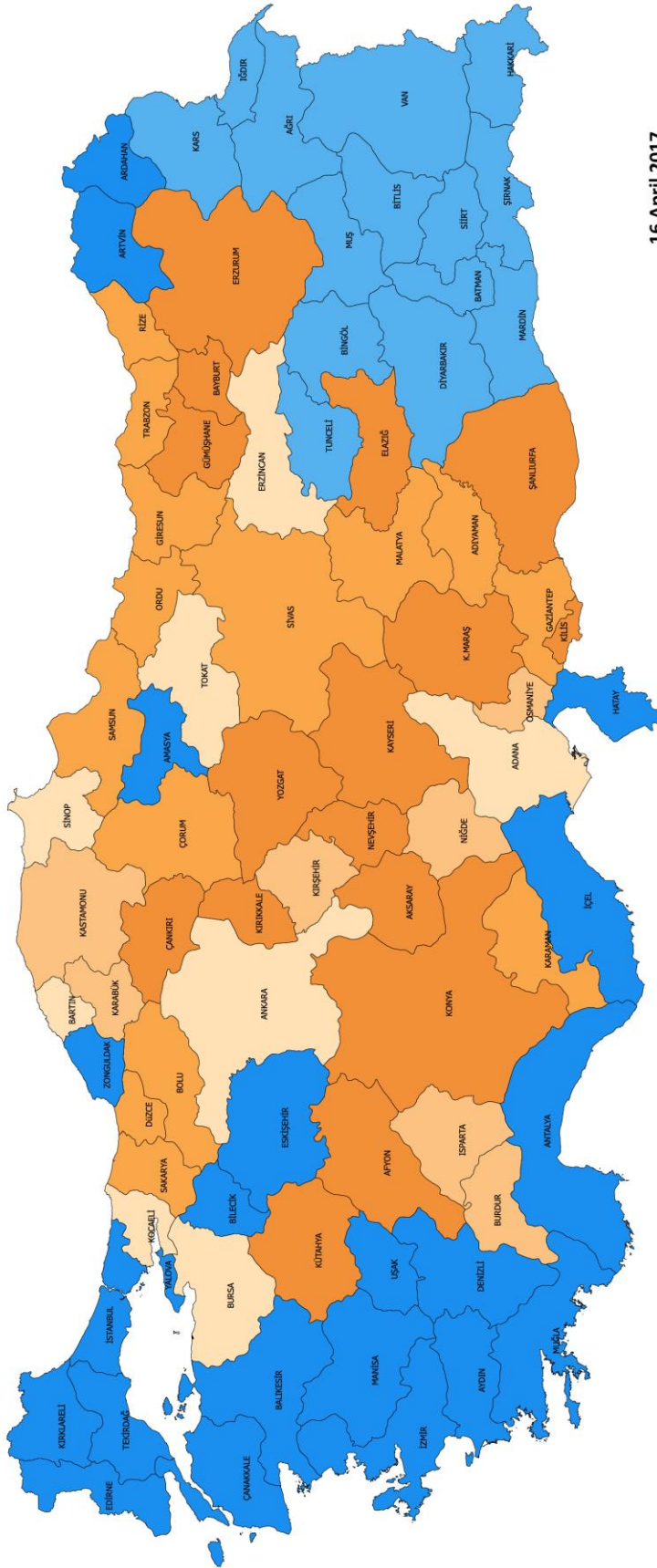
16 April 2017
Distribution of
"Yes" votes



Political Preferences in Clusters	Clusters	Ak Parti	CHP	MHP	HDP	Other	Total
Ak Parti, MHP, Other Parties	1	67.9	9.1	13.3	6.7	2.9	100
Ak Parti, Other Parties	2	65.0	17.5	10.5	4.0	2.9	100
Ak Parti, MHP, Other Parties	3	53.8	18.3	22.6	1.9	3.4	100
Ak Parti, CHP, MHP	4	50.1	27.9	13.9	5.6	2.5	100
CHP	5	42.8	34.8	11.9	8.0	2.4	100
HDP	6	28.8	2.8	2.0	64.2	2.2	100
Turkey (%)		49.5	25.4	11.9	10.8	2.55	100



April 16th, 2017 Referendum Results
Distribution of "yes" votes by Province



16 April 2017
Distribution of
"Yes" votes

71,1%
66,5%
57,7%
54,7%
42,1%
42,3%

Political Preferences in Clusters	Clusters	Ak Parti	CHP	MHP	HDP	Other	Total
Ak Parti, MHP, Other Parties	1	67.9	9.1	13.3	6.7	2.9	100
Ak Parti, Other Parties	2	65.0	17.5	10.5	4.0	2.9	100
Ak Parti, MHP, Other Parties	3	53.8	18.3	22.6	1.9	3.4	100
Ak Parti, CHP, MHP	4	50.1	27.9	13.9	5.6	2.5	100
CHP	5	42.8	34.8	11.9	8.0	2.4	100
HDP	6	28.8	2.8	2.0	64.2	2.2	100
Turkey (%)		49.5	25.4	11.9	10.8	2.5	100



2.1.5. Clustering analysis in district level according to the 16 April referendum results

The map below was created by Prof. Dr. Murat Güvenç², showing the clustering of the unofficial results of the 16 April referendum in district level, in consideration of the “yes” and “no” voting rates, turnout rate and the distribution of the invalid votes by multicorrespondence analysis. The first five of a total of eight clusters show those district with predominantly “yes” votes whereas the final three show the regions where the “no” votes dominate.

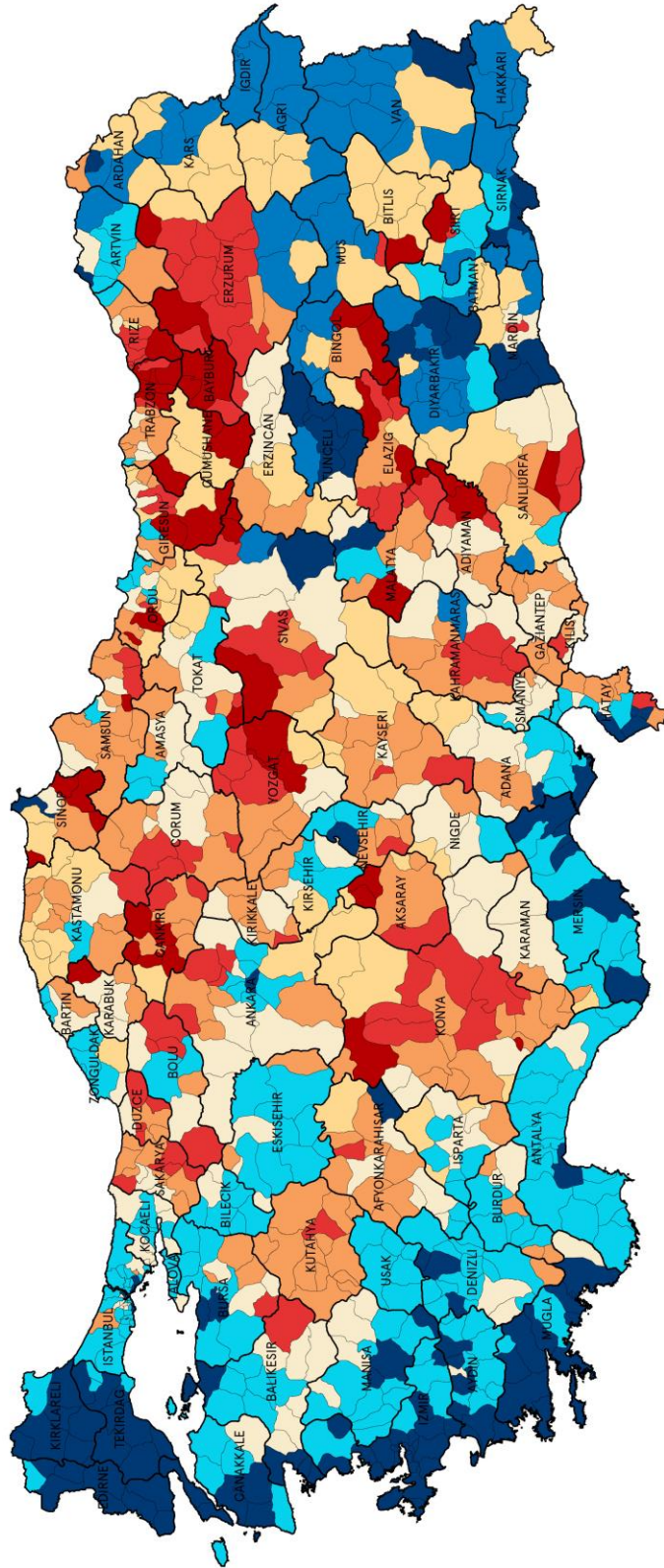
The legend shows the electoral shares of the clusters as well as the referendum results.

According to this map, in both “yes” and “no” clusters, as the voting rates decreased, the turnout decreased below the national average and also invalid votes increased. The districts with the most intense “yes” and “no” rates are not adjacent and there are transitory regions between these districts. These regions are represented by degrading color transitions on the map.

² Istanbul Studies Center (ISC), Kadir Has University

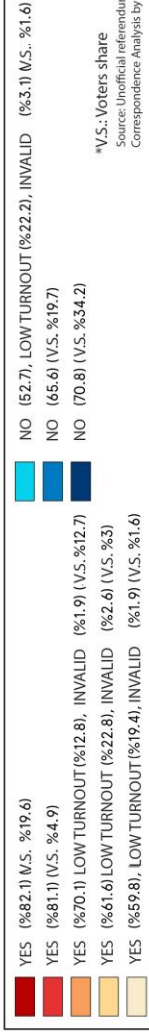


APRIL 16TH, 2017 REFERENDUM RESULTS UNOFFICIAL RESULTS BY DISTRICTS



Data Analysis
Prof. Dr. Murat Güvenç

Mapping
Murat Tülek
MSGSÜ, PHP candidate



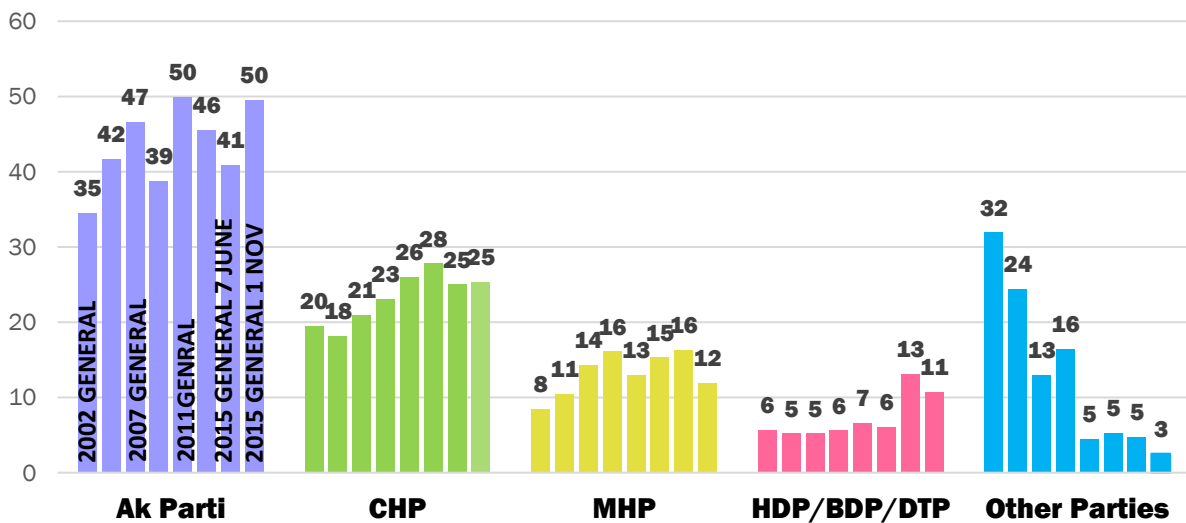


2.2. Evaluation

2.2.1. Political Consolidation

In the time that passed from the introduction of the referendum for presidential system into the agenda to the actual referendum, the national politics has shaped around the Ak Parti and the others. Of course, the MHP is one of the main actors since the actual process started with the MHP's political move. However, due to the intra-party discussions and internal dynamics which will be mentioned below, the MHP needs further assessment. Yet, the political consolidation and separation that may be summarized as "the Ak Parti and the others" reveal different dynamics.

Election results: 8 ballots in 15 years



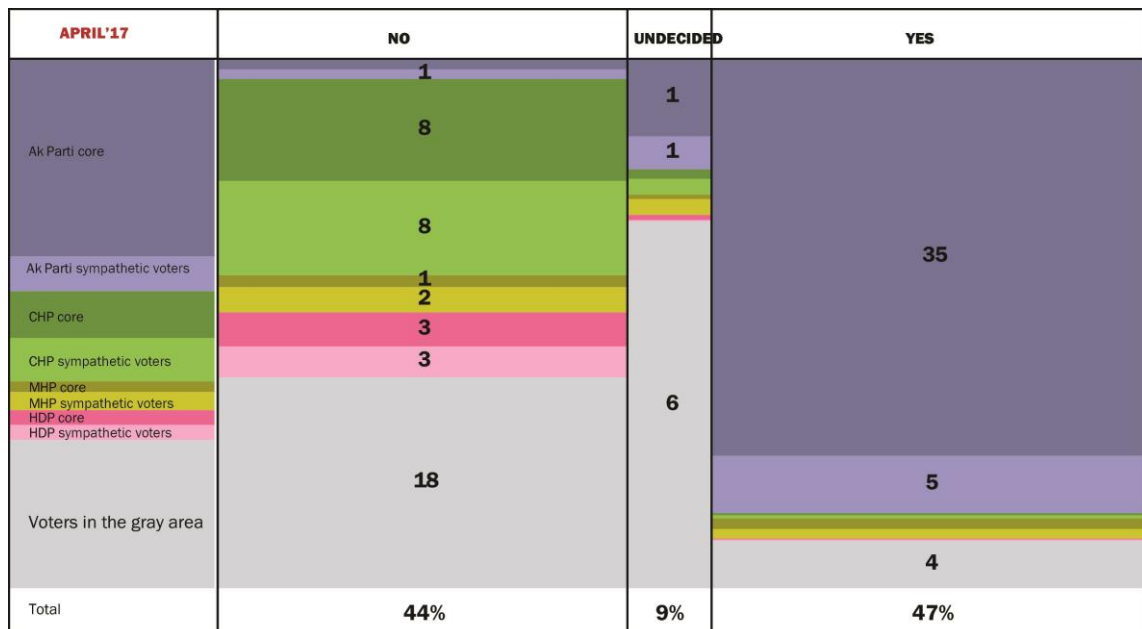
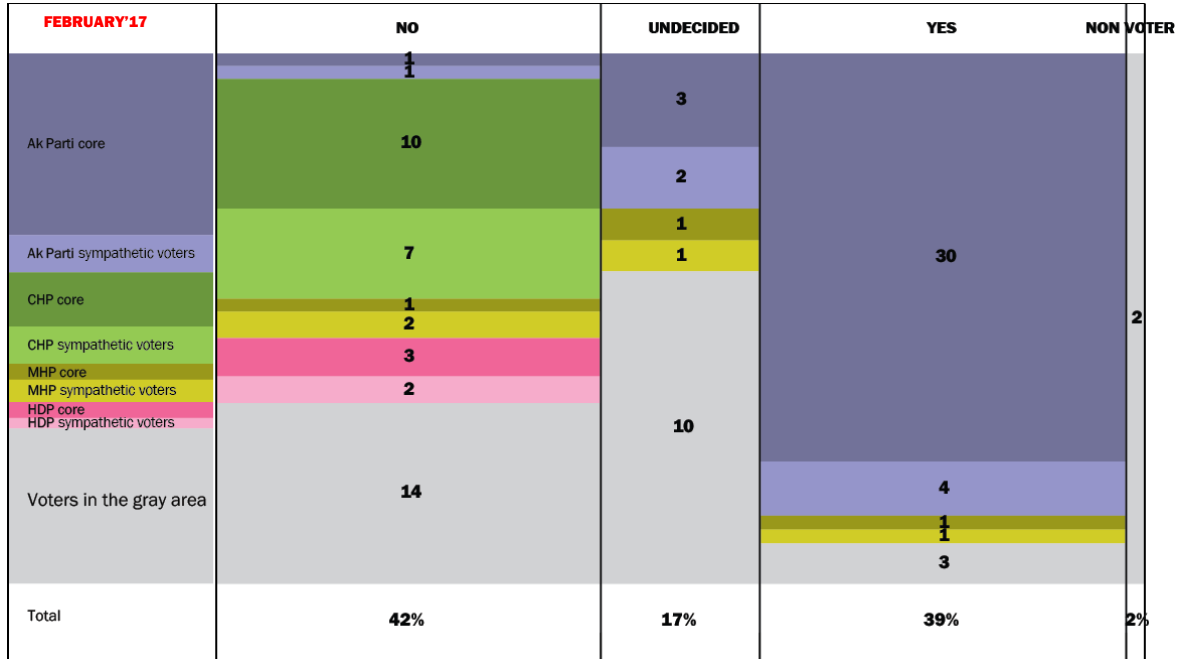
In the political period that started with the Ak Parti's coming to power in the 2002 General Elections, the smaller parties outside of the parliament have almost disappeared, substantially consolidating with the Ak Parti or resolving inside the Ak Parti. In the course of time, many political dynamics such as the effective and hegemonic political style of the Ak Parti and the political polarizations led to a consolidation of the right-wing, conservative electorate by the Ak Parti, rendering these parties dysfunctional.

It might be considered that parties such as the BBP which stood beside the constitutional change in the referendum process and the SP which was against it will be increasingly more ineffective due to the intensifying polarization because the new system voted through the referendum, the new positions of the parliament and the president and in consequence of this, the dual structuring to be formed in any case by the presidential elections bring us to the conclusion that the smaller parties will become even smaller. It is observed that this process entails a political consolidation that is beyond the yes and no division in the referendum. Thus, the process we will analyse in the next section provides clues as to this assessment.



2.2.2. Campaign process and the political consequence it created

When we analyze the transition into presidential system and the campaign process based on the 24-month findings of KONDA in which the referendum preferences were followed, we clearly observe Erdoğan’s influence and the result generated by the Ak Parti machine. However, this process should not be interpreted only through the increase in the “yes” votes.



In the last three months, the “yes” votes increased but which electorate is the source of the “yes” votes? The electorate type modeling we created through the February’17, March’17 and April’17 Barometers conducted throughout this period reveals that the



cluster which would not be considered as the electoral base of any party defined as the “electorate in the gray area” makes one third of the total constituency. A certain group within this cluster shifted towards the Ak Parti- sympathizer attitude. That is, if there had been a general election on 16 April, these voters would have voted for the Ak Parti. Again, we may conclude that these voters preferred “yes” in the referendum.

The second mobilization observed in the campaign process was that a certain part of the MHP electorate shifted towards the Ak Parti core electorate or sympathizers. That is, if there had been a general election on 16 April, these voters would have voted for the Ak Parti instead of the MHP.

The third mobilization was the shift of those Ak Parti and MHP voters who had been supporting “no” at the beginning towards a swing voter status and the swing voters towards “yes” preference.

It is necessary to differentiate and analyze these mobilizations because they bear clues as to the future of the MHP as shall be explained in the following sections.

2.2.3. Three Different Depictions of Turkey

The results of the referendum bring forward as the main pattern a trilateral structure: 1) Western and Mediterranean coasts from Thrace to Hatay, 2) at another corner, Eastern and Southeastern regions dominated by the Kurds, and 3) the region that covers Central Anatolia, Middle Anatolia and the Black Sea.

It is necessary to note that these three parts each have different cultural, sociological and demographic characteristics.

In the first section covering the Western and Mediterranean coastline, the achievements of Turkey’s 150-year development and modernization process are more apparent. As to the differences of this part from the other two regions, this region is relatively more advanced with a developed private sector where economic dynamics properly function. Further, this region is relatively more developed in the socioeconomic sense and has been receiving domestic migration for a long time, a trend that will likely continue in the future. There is intense urbanization and even metropolization, and these cities predominantly have a western lifestyle. In this region, “no” votes dominate.

The geographical area of the Kurds stands out not only due to the domination of the “no” votes but also for having the socioeconomically most underdeveloped provinces in Turkey where Kurds make up the majority of the population. This region struggled with the political Kurdish problem for centuries and even in the referendum process, was directly subject to the daily implementation of security policies.

The third region covering the Central and Middle Anatolia as well as the Black Sea Region where the “yes” votes dominate, is still quite behind in the development and modernization process, and perceives development as growth rather than equality in



the distribution of income and indeed demands so, with relatively weak economic dynamics and actors therefore still in need of the state's moves towards development and service. There is emigration from this region and the society has conservative values dominating the daily life.

The traits summarized above show that although the positions in the referendum were divided into yes and no axes, in fact these three regions are different in terms of asymmetrical cultural and sociological dynamics. The difference stems from identity in the Kurdish region, a demand for development and service in the Anatolian region and lifestyle and metropolization in the coastline.

Considering political distribution in terms of not only the preferences in the referendum but also the political preferences in general, it is observed that these three depictions of Turkey are also fueled by other social and political dynamics. Nationalism and even other chauvinistic emotions are stronger in the Central and Middle Anatolia as well as the Black Sea Region and foreign policies based on tension including the relations with the EU and the Syrian problem are positively regarded whereas the same policies and discourses create concern in the Western and Mediterranean coastline. On the other hand, the Syrian issue instigates completely different emotions in the Kurdish region.

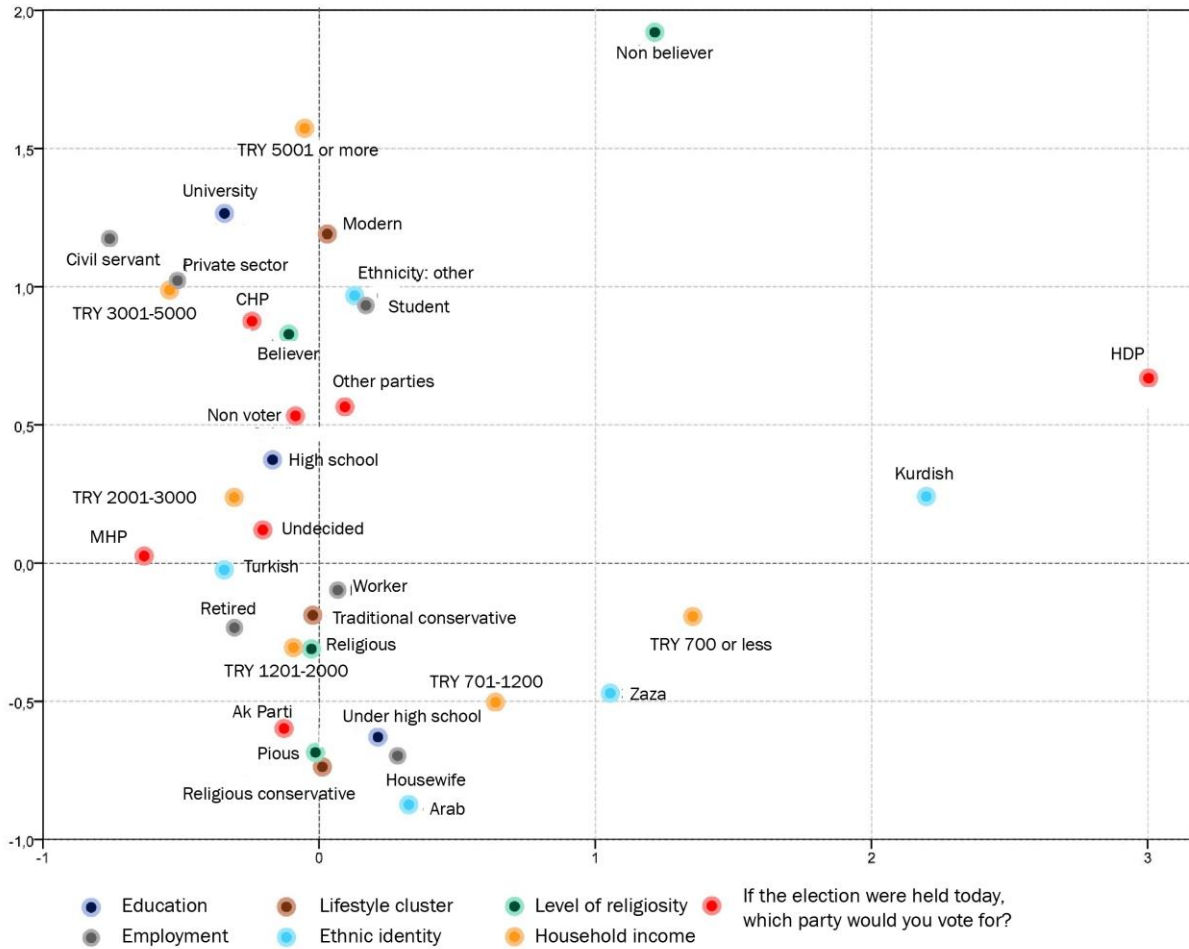
These visible difference of emotions and political positions among these three regions weaken hope and belief in a common life and a common future in view of the current issues and polarization in Turkey.

This depiction of Turkey consisting of three sections was generated upon the referendum choices of the provinces. Actually, the district-level map shows another striking situation that confirms our abovementioned observations. Namely, analyzing the coastline in terms of districts where "no" votes preside, it is observed that the central districts of provinces such as Adana, Mersin, Manisa, Balıkesir, Eskişehir and Ankara or those central districts that comply with the definition of metropolises in the KONDA sampling prefer "no" whereas in districts other than the central ones, the preference is towards "yes."

These detections confirm the difference of political preference between those regions that have reached a certain stage of socioeconomic development and those that are underdeveloped. Central and metropolitan districts where the daily rhythm and practices have changed revealed a domination of "no" votes whereas the peripheral districts where the daily rhythm and practices are fueled by conservative values revealed a domination of "yes" votes.



Topographic Map of the Society in Turkey



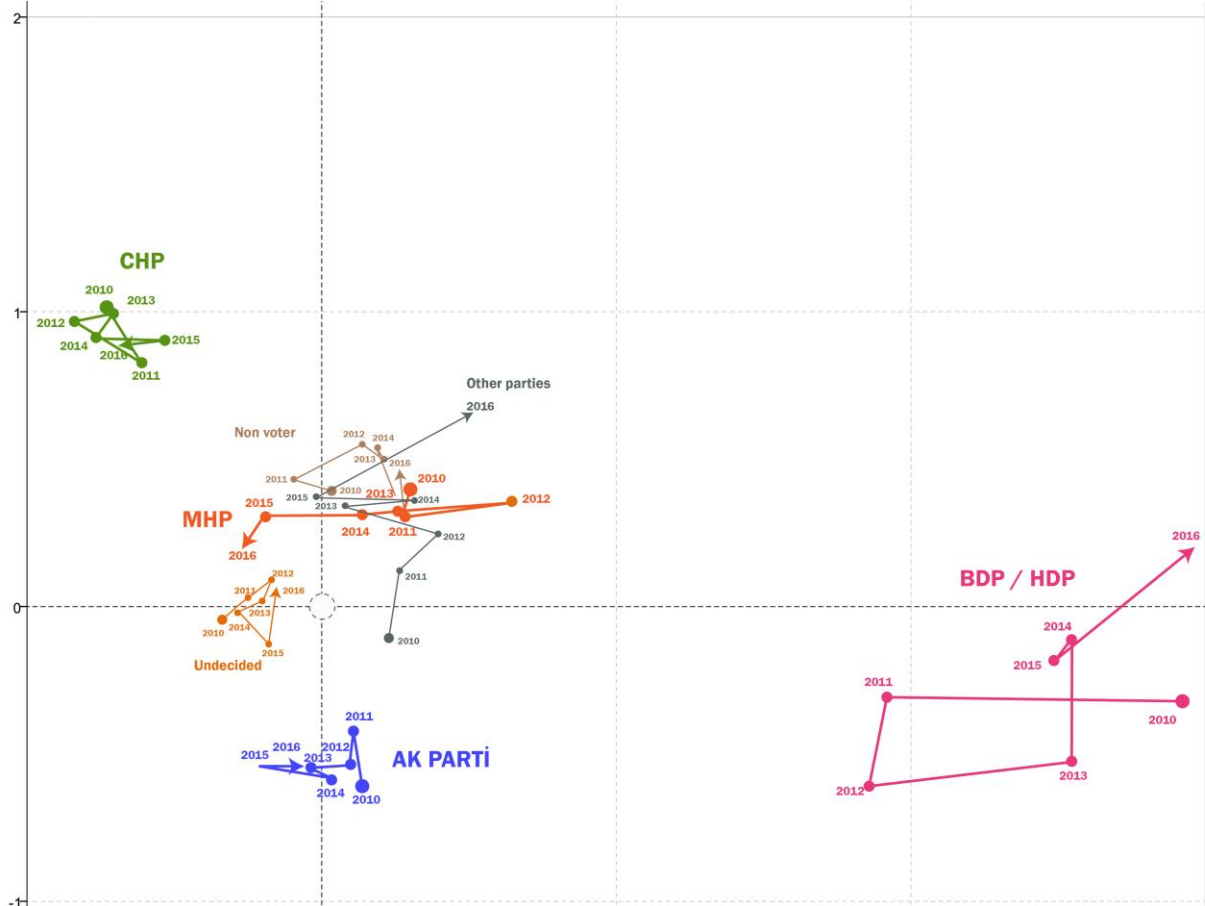
The graph above which we call the topographic map of the society in Turkey, has been created through multiple correspondence analysis that reduces the multi dimensional analysis of the correlation between the basic demographic characteristics and the political preferences of the society to visually two dimensions. This map has been generated by using the 7-year Barometer survey data and provides a quite simplified idea as to the distance among different clusters of the society.

The next map shows the change throughout the years in the position of the answers to question “If there was an election today, who would you vote for?”, i.e. political preferences in this social map. In other words, it shows the change in the characteristics of the electorates of each party and the correlation with the basic demographic characteristics. Despite certain shifts, the Ak Parti and the CHP have been stable in certain social clusters and are stuck there, whereas the BDP/HDP have gone through changes but have been far away from the area that consists of the majority of the society. The MHP is mobilized close to an area that may be considered as the middle point of the society. This positioning of the MHP must be considered



illuminating about the fact that the MHP electorate was divided into two as “yes” voters and “no” voters.

Party Electorates Through the Years in the Topographic Map of the Society in Turkey



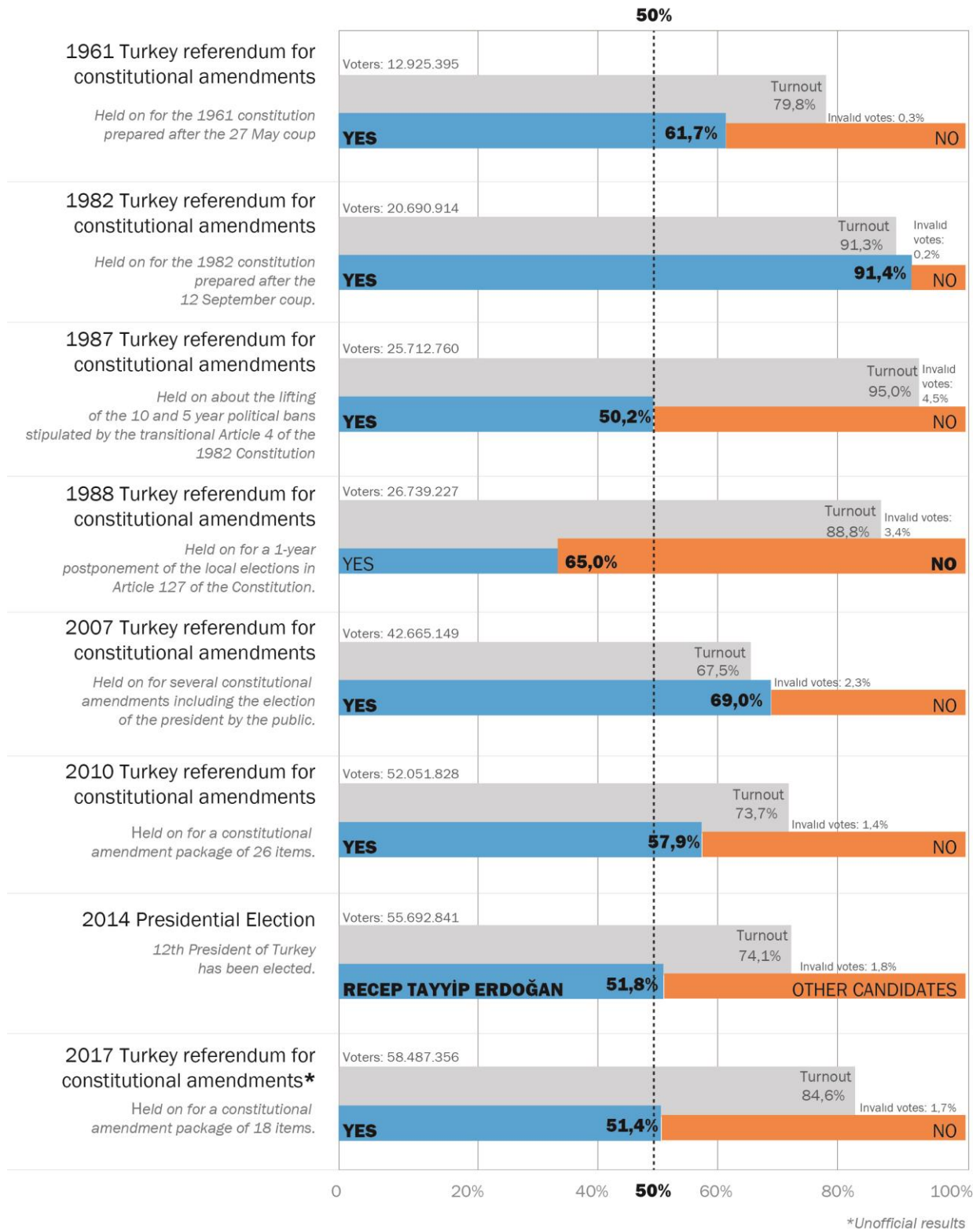
The positions of the party electorates on the map confirm our analysis above based on the provincial results of the 1 November General Election and the referendum. Further, the trilateral depiction of Turkey overlaps with the demographic data.

2.2.4. Referendum turnout

The turnout in the referendum was 86 percent (on the basis of domestic votes) similar to all elections held in the past five years. In fact, excluding the turnout lower than the average between 1961 and 1977, the election turnouts in the history of elections in Turkey have always been high whereas referendum turnouts have been relatively lower. It must also be noted that the reason for the extraordinarily high turnout in the 1982 and 1987 referendums might be the first-time implementation of penalties for not voting. Still, due to the political tension and the increasing polarization in Turkey, each side of the polarity design campaign for convincing their voters to cast votes. These campaigns and related discussions increase turnout.



History of Referendums





General elections and referendums	Turnout %	General elections and referendums	Turnout %
1950 General election	89.3	1988 Referendum	88.8
1954 General election	88.6	1991 General election	83.9
1957 General election	76.6	1995 General election	85.2
1961 General election	81.0	1999 General election	87.1
1961 Referendum	79.9	2002 General election	79.1
1965 General election	71.3	2007 General election	84.3
1969 General election	64.3	2007 Referendum	67.5
1973 General election	66.8	2010 Referendum	73.7
1977 General election	72.4	2011 General election	87.3
1982 Referendum	91.3	2015. 7 June General election	86.4
1983 General election	92.3	2015. 1 November General election	87.4
1987 Referendum	95.0	2017 Referendum	87.3
1987 General election	93.3		

With respect to the discussions mentioned below, the analysis of the provinces with the lowest and highest turnout as well as the regional maps reveal a pattern. It is observed that the first 10 provinces with the lowest turnout are all Eastern and Southeastern provinces. Again, an analysis of the maps on turnout as well as the maps comparing the turnouts of 7 June 2015 and 1 November 2015 elections show that the turnout in the Eastern and Southeastern provinces have significantly decreased in the 16 April referendum compared to that of 7 June.

Cities with the lowest turnout	Turnout %	Cities with the highest turnout	Turnout %
Ağrı	71.1	Ankara	89.8
Gümüşhane	73.1	Kırklareli	90.0
Van	75.4	Düzce	90.1
İğdır	76.8	Kütahya	90.2
Kars	78.0	Uşak	90.2
Bingöl	78.1	Amasya	90.3
Bitlis	78.5	Denizli	90.3
Muş	79.0	Çanakkale	90.3
Ardahan	79.9	Manisa	90.4
Diyarbakır	80.7	Bilecik	90.5

On the other hand, the provinces with the highest turnout are mainly the Western provinces. As shown in the turnout maps according to provinces and districts, high turnout rates are observed in the coastline and especially in the Marmara region, which is a socioeconomically more developed area focused on policies aiming to protect their lifestyle. It seems that the intense campaigns of the past few years conducted in these regions and provinces targeting these socioeconomic clusters have been fruitful.



2.2.5. Invalid votes

It is necessary to closely examine the invalid votes as they caused intense discussions in this referendum.

General elections and referendums	Invalid %	General elections and referendums	Invalid %
1950 General election	3.1	1988 Referendum	3.4
1954 General election	1.6	1991 General election	3.0
1957 General election	1.4	1995 General election	3.3
1961 General election	3.7	1999 General election	4.3
1961 Referendum	0.3	2002 General election	3.9
1965 General election	4.5	2007 General election	2.9
1969 General election	4.5	2007 Referendum	2.3
1973 General election	4.5	2010 Referendum	1.4
1977 General election	3.5	2011 General election	2.2
1982 Referendum	0.2	2015. 7 June General election	2.9
1983 General election	4.9	2015. 1 November General election	1.4
1987 Referendum	4.3	2017 Referendum	1.8
1987 General election	2.6		

In the 16 April referendum, the rate of domestic invalid votes has been 1.8 percent. Firstly, it must be noted that in our history of elections and referendums, invalid votes have not followed a pattern which, contrary to what is thought, is not due to lack of education of the electorate or the voters' confusion of votes, parties or candidates. If the alleged direct correlation between lack of education of the electorate and invalid votes had really existed, then the rate of invalid votes should have systematically decreased over the years as the educational level in Turkey gradually and significantly increased. However, there is no such systematic change in the rate of invalid votes. Instead, such rates fluctuate somehow inconsistently.

In contrast, it might be possible to claim that at least a large proportion of the invalid votes are "protest votes" deliberately cast in an invalid way, or some other interpretation of such lack of pattern may be made.

However, an analysis of the distribution of invalid votes in the 16 April referendum reveals an interesting situation in that the lowest rate of invalid votes is observed in the western provinces whereas the entirety of the provinces with the highest rates of invalid votes are those with high Kurdish population. It is significant that these provinces are under security measures and a state of emergency and they also have experienced terrorist acts in the past year. It is difficult to determine the exact reasons for the invalid votes in these provinces as to whether they result from deliberate protest or the initiative of the ballot box boards. Still, it is clear that these provinces require specific consideration.



Cities with the lowest rate of invalid votes	Invalid %	Cities with the highest rate of invalid votes	Invalid %
Tunceli	1.1	Ağrı	3.0
Kayseri	1.4	Diyarbakır	3.0
İstanbul	1.4	Siirt	3.1
Hatay	1.4	Muş	3.1
Erzincan	1.4	Bartın	3.1
Malatya	1.5	Hakkari	3.2
Maraş	1.5	Van	3.2
Ankara	1.5	Batman	3.2
Tekirdağ	1.5	Bingöl	3.5
Bursa	1.5	Şırnak	3.7

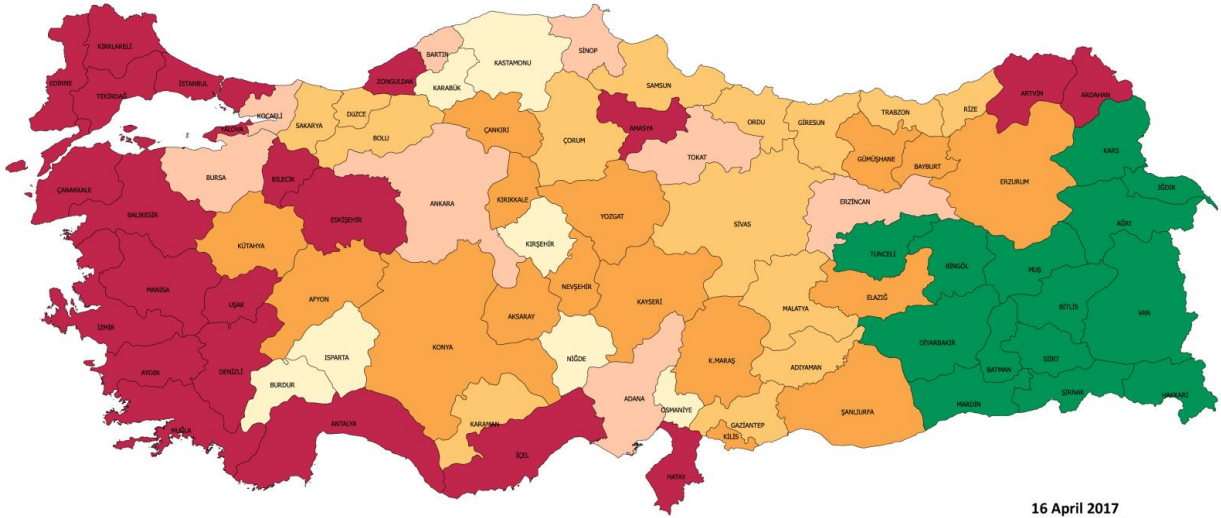
Moreover, the district-based distribution and pattern of the invalid votes reveal an even more striking aspect in that in all districts of a region in the Middle Anatolia/Black Sea, the invalid voting rates are the lowest compared to the national average. The “yes” votes are extremely dominating in these district. This leads to a situation that we are unable to explain. On the other hand, in the majority of the Eastern and Southeastern districts, the invalid voting rates are above the national average and these districts have predominantly produced “no” votes.

2.2.6. Political Clustering

In order to understand the situation revealed by the referendum and especially whether the Ak Parti-MHP collaboration was fruitful or not, it is necessary to return back to the situation revealed by the 1 November 2015 General Elections for comparison. A clustering analysis of the situation in the 1 November elections reveals 6 different provincial clusters in terms of voting intensity. The provinces in the first four clusters are mainly dominated by the Ak Parti but the MHP also has certain presence. In the first cluster, the Ak Parti and MHP voting rates reach 81 percent, in the second cluster 75 percent, in the third cluster 76 percent and in the fourth cluster 65 percent. The fifth cluster shows a voting pattern in favour of the CHP whereas the sixth is in favour of the HDP. The map below demonstrates the provinces in terms of these clusters. The first table shows these clusters and the voting rates in detail while the second table lists the provinces in each cluster.



November 1st, 2015 General Election Results
Political Preference by Province



Political Preferences in Clusters	Clusters	Ak Parti	CHP	MHP	HDP	Other	Total
Ak Parti, MHP, Other Parties	1	67.9	9.1	13.3	6.7	2.9	100
Ak Parti, Other Parties	2	65.0	17.5	10.5	4.0	2.9	100
Ak Parti, MHP, Other Parties	3	53.8	18.3	22.6	1.9	3.4	100
Ak Parti, CHP, MHP	4	50.1	27.9	13.9	5.6	2.5	100
CHP	5	42.8	34.8	11.9	8.0	2.4	100
HDP	6	28.8	2.8	2.0	64.2	2.2	100
Turkey (%)		49.5	25.4	11.9	10.8	2.5	100

16 April 2017
Distribution of
"Yes" votes

71,1%
66,5%
57,7%
54,7%
42,1%
42,3%

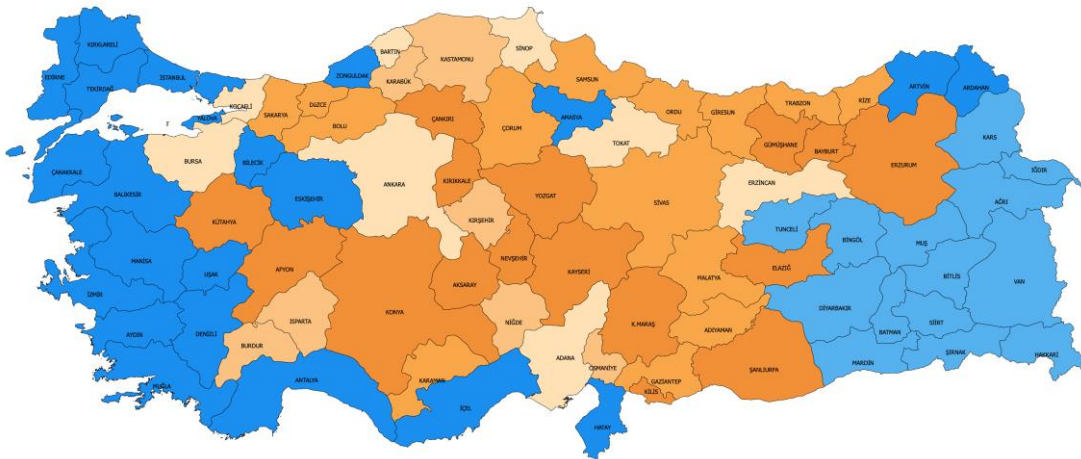
Political Cluster	1 November votes %					16 April preferences %	
	Ak Parti	CHP	MHP	HDP	Other	YES	NO
1	67.9	9.1	13.3	6.7	2.9	71.1	28.9
2	65.0	17.5	10.5	4	2.9	66.5	33.5
3	53.8	18.3	22.6	1.9	3.4	57.7	42.3
4	50.1	27.9	13.9	5.6	2.5	54.7	45.3
5	42.8	34.8	11.9	8	2.4	42.1	57.9
6	28.8	2.8	2	64.2	2.2	42.3	57.7



Political cluster	Provinces
1	Afyon, Aksaray, Bayburt, Çankırı, Elazığ, Erzurum, Gümüşhane, Maraş, Kayseri, Kırıkkale, Kilis, Konya, Kütahya, Nevşehir, Urfa, Yozgat
2	Adıyaman, Bolu, Çorum, Düzce, Gaziantep, Giresun, Karaman, Malatya, Ordu, Rize, Sakarya, Samsun, Sivas, Trabzon
3	Burdur, Isparta, Karabük, Kastamonu, Kırşehir, Niğde, Osmaniye
4	Adana, Ankara, Bartın, Bursa, Erzincan, Kocaeli, Sinop, Tokat
5	Amasya, Antalya, Ardahan, Artvin, Aydın, Balıkesir, Bilecik, Çanakkale, Denizli, Edirne, Eskişehir, Hatay, İstanbul, İzmir, Kırklareli, Manisa, Mersin, Muğla, Tekirdağ, Uşak, Yalova, Zonguldak
6	Ağrı, Batman, Bingöl, Bitlis, Diyarbakır, Hakkari, Iğdır, Kars, Mardin, Muş, Siirt, Şırnak, Tunceli, Van

The following map shows the mapping of different provincial clusters according to the 1 November voting distribution, in terms of the average yes/no rates in these provinces by coloring them pursuant to the preference rates in the 16 April referendum. This map confirms our assessment above on the trilateral depiction of Turkey and reveals that this trilateral situation may be considered as the continuation of the situation revealed in 1 November: the coastline where the CHP has a strong presence and now the “no” rates are high; Central and Middle Anatolia as well as the Black Sea region mainly dominated by the Ak Parti but also the MHP has a presence and now the “yes” rates are high and finally the region where the HDP has a presence and now the “no” rates are high.

April 16th, 2017 Referandum Results
Distribution of “yes” votes by Province



This political clustering analysis also shows whether the Ak Parti- MHP collaboration was successful or not.

It is observed that the Ak Parti was able to secure a high rate of “yes” votes in the regions under its domination. Among those Ak Parti voters who would have voted for the Ak Parti if there had been a general election on 16 April instead of a referendum, the



loss we calculated in the KONDA findings might have been compensated by the MHP electorate. In the clusters which are dominated by the CHP and HDP, the “no” votes are again high. The provinces of the third cluster (Burdur, Isparta, Karabük, Kastamonu, Kırşehir, Niğde, Osmaniye) where the MHP reaches its peak next to the Ak Parti and in the provinces of the fourth cluster (Adana, Ankara, Bartın, Bursa, Erzincan, Kocaeli, Sinop, Tokat) where again the MHP is strong, there are significant losses in the potential “yes” votes which adds to the complexity of the issue. Especially metropolises such as Ankara and Adana have converted towards “no.”

Political cluster	Ak Parti+MHP	YES	Difference	CHP+HDP+Other	NO	Difference
1	81.2	71.1	-10.1	18.7	28.9	10.2
2	75.5	66.5	-9.0	24.4	33.5	9.1
3	76.4	57.7	-18.7	23.6	42.3	18.7
4	64.0	54.7	-9.3	36	45.3	9.3
5	54.7	42.1	-12.6	45.2	57.9	12.7
6	30.8	42.3	11.5	69.2	57.7	-11.5

In terms of party positions, it is observed that the potential “yes” votes went through a loss of 10.1 percent in the first cluster, 9 percent in the second cluster, 18.7 percent in the third cluster and 9.3 percent in the fourth cluster.

In those parts of the coastline and metropolises where the CHP has a presence but the Ak Parti goes beyond 40 percent and MHP 12 percent, the “yes” rate has become 12.6 points less than the potential voting rate that the Ak Parti-MHP bloc could potentially bring. The only cluster in which this bloc received more than its potential has been the sixth cluster consisting of the HDP provinces where the “yes” voting rates have become 11.5 percent higher than the potential revealed on 1 November.

The numbers and the map once again show that in those provinces where urbanization and metropolization as well as the socioeconomic development are high, especially the MHP but both the Ak Parti and the MHP failed to convince a part of their potential electorate to cast “yes” votes.

2.2.7. Any changes in the preferences of the Kurds?

As calculated in the previous section, the only cluster in which the Ak Parti-MHP bloc reached a “yes” voting rate higher than its potential has been the cluster involving the provinces dominated by the HDP. Naturally, this assessment creates a discussion about the Ak Parti and HDP voting rates which are the two parties that are able to have a presence in this region. The greatest interest is on the question as to whether the return back to terror and armed conflict in the past two years created a change in the voting preferences of the Kurdish citizens or not.

Therefore, it is necessary to closely examine the preferences of the 12 provinces in which the HDP received the highest voting rates. The table below involves two columns titled “correction” expressing a projection based on the increase in the total number of

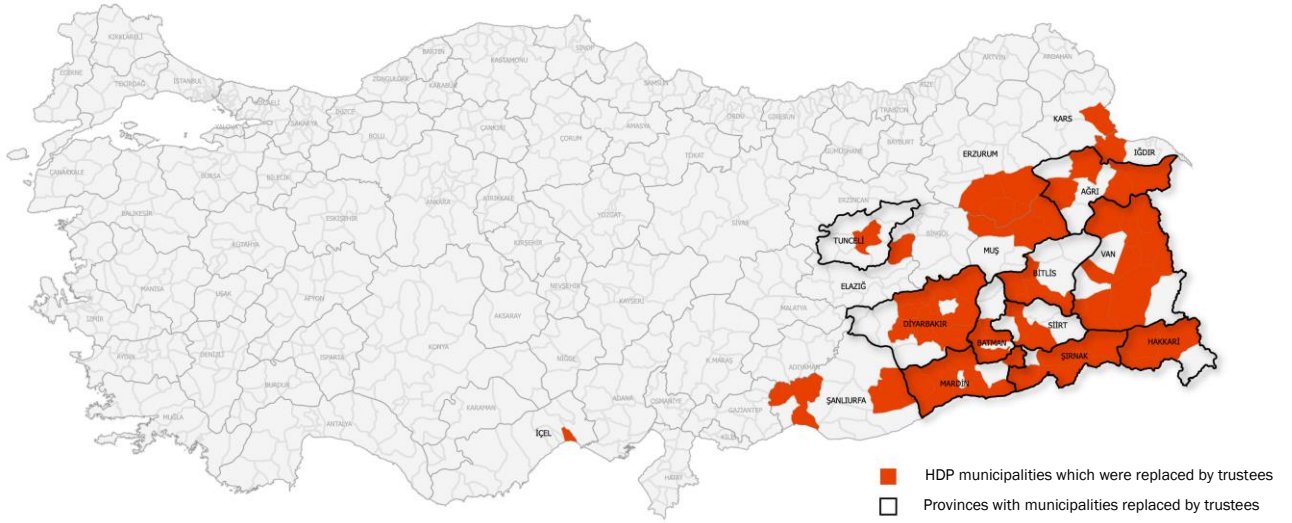


voters between 1 November and 16 April. If the increase in the number of voters had influenced the voting rates of the two parties at the same rates according to the voting preferences in 1 November, then the estimated voting rates for the two parties would have been as indicated in these columns.

Province	16 April 2017 Referendum					Correction (projection from 1 November)		Difference from 1 November		Invalid
	Total electorate	Inv. %	Turn. %	Yes	No	Ak Parti	HDP	Ak Parti	HDP	
Şırnak	255,760	3.7	84.1	58,828	148,213	25,009	192,451	33,819	-44,238	8,060
Hakkari	162,006	3.2	80.7	41,174	85,410	17,722	117,579	23,452	-32,169	4,149
Diyarbakır	992,819	3	80.7	251,740	524,827	175,117	596,593	76,623	-71,766	24,371
Mardin	455,288	2.3	82.1	149,558	215,581	110,184	264,088	39,374	-48,507	8,768
Batman	329,509	3.2	82.9	96,424	167,917	77,773	186,727	18,651	-18,810	8,875
Ağrı	293,340	3	71.1	87,144	115,225	58,556	147,645	28,588	-32,420	6,159
Van	619,947	3.2	75.4	193,667	258,800	147,048	320,857	46,619	-62,057	15,146
Muş	225,416	3.1	79	87,318	85,262	63,038	115,044	24,280	-29,782	5,526
Siirt	176,845	3.1	83.1	68,241	74,143	53,798	85,498	14,443	-11,355	4,482
Tunceli	60,801	1.1	83.6	9,844	40,429	5,668	27,074	4,176	13,355	563
Iğdır	117,904	2.3	76.8	30,844	57,629	29,425	50,010	1,419	7,619	2,104
Bitlis	194,243	2.9	78.5	87,871	60,163	66,758	75,352	21,113	-15,189	4,499
Kars	181,880	2	78	70,893	68,131	50,004	48,371	20,889	19,760	2,813
Bingöl	175,142	3.5	78.1	95,959	36,087	85,386	38,928	10,573	-2,841	4,732
Şanlıurfa	1,029,644	1.8	83.7	599,092	246,812	546,233	240,892	52,859	5,920	15,574
Toplam	5,270,544			1,928,597	2,184,629	1,511,717	2,507,111	416,880	-322,482	115,821

This table brings us to the conclusion that in these 12 provinces, the number of the “no” votes have been 322 thousand lower than the potential votes of the HDP compared to 1 November, that the number of the “yes” votes have been 417 thousand higher than the potential votes of the Ak Parti and that 116 thousand votes have been invalid. The 417 thousand additional “yes” votes on top of the potential votes of the Ak Parti makes 8 per thousand votes within the valid votes counted in the referendum.

In view of the exceptional problems prevailing in this area such as the state of emergency conditions, the psychology produced by terror and armed conflict in the past two years, the arrest of the HDP executives and the frail campaign that it caused, it would not be accurate to conclude that there has been a significant change in the political preferences of the region and the Kurds.



The map above shows the provinces and districts the municipalities of which had been won by the HDP and DBP but were replaced by trustees in the recent months. As noted in the previous sections of the report, these provinces and districts also showed lower turnout and higher rate of invalid votes.

Still, the 7-year time series of the KONDA Barometer surveys provide a sounder observation in that when they are analyzed by distributing the undecided lot, it is observed that in 2010 more than half of the Kurds, i.e. those who indicate their ethnicity as Kurdish, supported the Ak Parti and one third supported the BDP whereas as of 2013 and especially 2014, the preferences changed towards the HDP. Despite a slight mobilization upon the start of armed conflict and terror, the main pattern is still intact.

Kurds	AK Parti	BDP/ HDP	Other
April 2010	54	33	13
April 2011	52	35	13
April 2012	47	38	15
April 2013	46	44	10
April 2014	48	43	10
April 2015	28	60	11
April 2016	32	54	14
April 2017	33	58	8

In our view, the reason for this transformation was not simply a political preference change or transformation from conservatism to a secular lifestyle or the charm of certain policies of the HDP's on the electorate such as the ecological one. This is a tendency towards the HDP as a party of an identity and the representative of identities. If this observation and assessment is correct, then it will be more difficult than assumed for the Kurds to change their political preferences again towards the Ak Parti.



2.2.8. Conclusion

1. It seems that the preferences in the referendum were shaped on the basis of political polarization and identities rather than the content of the constitutional amendment. According to both KONDA surveys and the ballot analyses, the result of the referendum is nothing more than a repetition of the situation formed in the past five years and of the political polarization.
Therefore, the imminent problem of our society is whether the politics stuck within the social polarization and identities will be sustainable rather than questioning whether the constitutional amendments are sustainable and applicable in terms of content.
2. Especially in the metropolises and at the coastline, the Ak Parti-MHP bloc experienced significant losses in their potential voting rates. Even though the Ak Parti seems to be maintaining its voting rate according to the April'17 Barometer survey, it is now faced with a serious risk of narrowing in local administrations which have been under its control for a long time, especially through local elections, due to both the polarization and the new consolidation in the politics as “the Ak Parti and the others.” Again, in reference to the political findings of the August'16 and September'16 Barometer surveys, it is to be noted that the Ak Parti has been mobilized at the upper limit of its potential voting rate. Thus, in the referendum, the Ak Parti-MHP bloc did not reach its total potential but remained at the 51-52 percent range.
3. In view of the discussions going on in the Ak Parti electoral base and especially among its intellectual circles and supporters with respect to the policies and strategies of the party, it is expected that such discussion shall continue, and even re-structuring and change in the party and the organizational staff might be on the way.
4. For the MHP, this referendum process and its results have been a lot more significant. On the one hand, it is observed in the ballot analyses and KONDA findings that about one third of the MHP electoral base was at the “yes” side and two third was at the “no” side. The estimation not backed by actual data is that especially those MHP voters in Anatolia and peripheral districts were at the “yes” side whereas those MHP voters in the metropolises whose conservatism is fueled by traditions acted together with the cluster with secular lifestyle and opted for a “no” position. On the other hand, the party structure of the MHP clearly involves contradicting stances. Despite the tough times the party has gone through in the past two years, as the party congress could not be convened and disciplinary penalties were issued, the intra-party opposition is extremely visible both in the media and among the electoral base. This is an indication of the fact that the intra-party debates and pursuits can no longer be postponed.

On the one hand the MHP lost a certain part of its supporters to the Ak Parti and on the other hand two third of the remaining electorate rejected the decision of the party and supported the “no” stance. Therefore, the MHP faces an ideological separation combined with a rupture in the actors, opponents and the electoral base.

Another process that will directly affect the MHP is the hegemonic and consolidating political style of the Ak Parti as well as its increasingly more nationalistic discourse based on holy concepts that has been developing in the past five years. Even though the Ak Parti and the MHP look like the actors of the same alliance, such political style



of the Ak Parti may involve other risks for the MHP as much as the intra-party opposition does. All these aspects and dimensions show that in the upcoming term, the MHP will stand out as the party which is likely to go through internal debates and ruptures.

5. The situation is different for the CHP. The CHP administration may consider the “no” rate achieved in the referendum as a success. In the regions where the CHP is strong, the “no” rates and the turnout rates were high. Therefore, unlike the MHP, the result of the referendum does not point to loss or disaccord with the electoral base for the CHP. Yet, according to KONDA surveys, the CHP electorate has low trust in their party for solving the problems of Turkey. Further, the CHP electorate has been critical of the decisions and attitude of the CHP administration both during the campaign process and on and after the referendum.

On the other hand, at a time when almost all the issues of the country are coming to a junction point, the CHP has no majority or influence in the decision-making staff formed by the four elections held in the past two years. On top of this, the definitions of the administrative processes and the decision-making bodies as well as the related rules have now changed.

However, an electorate of 48.6 percent as revealed by the referendum have been acting under the perception of a threat on their lifestyle, identity and future through the lens of political polarization. Therefore, if the CHP fails to form a new politics, claim and staff for the 48.6 percent who cast “no” votes and to whom the CHP may readily appeal and for the other 51.4 percent to appeal to whom the CHP will need to create reformist policies, it will be under the risk of turning into an actor with no claim for power as of the 2019 elections.

6. Although there are limits as to what the HDP can do with its own ability and capacity, it seems that the Turkey-ization project that started in 2013 and reached its potential peak on 7 June seems to have dissolved. Of course, many factors directly affect the HDP such as the security policies of the state, the state of emergency, appointment of trustees to HDP municipalities, arrest of HDP executives, the PKK’s return back to terror, the events in Syria, the tensions in the region and the attitudes and choices of the actors other than Turkey. Therefore, the HDP could come out of this chaos by reinforcing its influence. Instead, it has lost power and capacity.
7. The four parties and all the other political actors have one main problem: Will they utilize the results of the referendum and all the dynamics, lessons and discussions it produced in order to renew themselves and get out of the limited area and identities they are currently stuck in for the sake of more inclusive policies? Or will they continue with their current policies based on identities and polarizations?

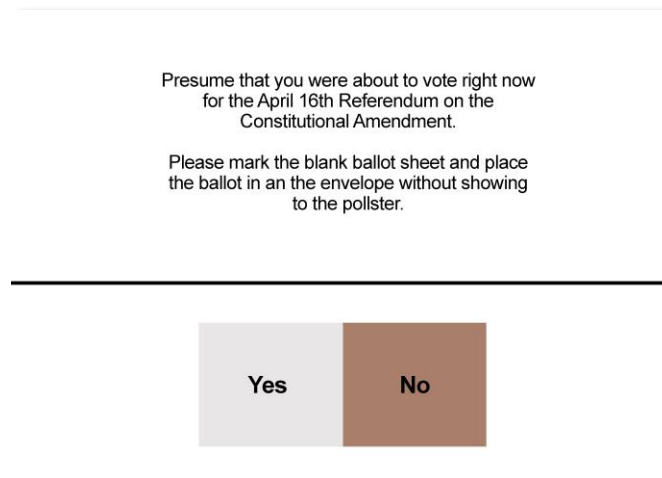
How can a political platform that can surpass polarization, produce social reconciliation, reinforce the feeling of “us” and increase the desire for a common life be formed? Through the love and loyalty of all four parties to their own positions or through transformation into inclusive mass parties? Our future will be determined by the political platform and the answers to be given by the main actors to this question rather than the world dynamics.



3. REFERENDUM ON THE CONSTITUTIONAL AMENDMENT

3.1. If There Were a Referendum Today

We made use of two methods in the field study for the April'17 Barometer, with the aim to understand the preference of the voters in the referendum, where the pollster asked the respondents two questions. The first question was, *“If you were to go to the polls for the referendum that will be held on April 16th, what would you vote be?”* While the second question was, *“Presume that you were about to vote right now for the April 16th Referendum on the Constitutional Amendment. What would your vote be?”* For this second question, the respondents were asked to mark the blank ballot sheet and to place it in an envelope.



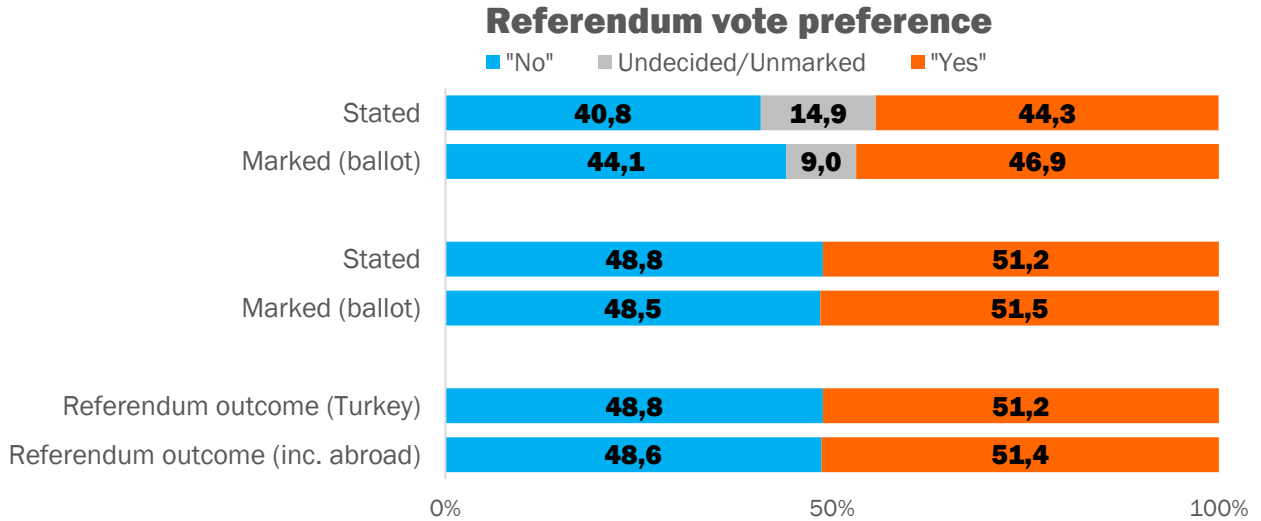
One week before the referendum, 44.3 percent of the respondents answered that they would vote “yes”, while 40.8 percent stated that they would vote “no”. However, on the ballot, 46.9 percent marked the “yes” option, and 44.1 percent the “no” option. While 14.9 told to the pollsters that they were undecided and that they would not go to the polls or would not go the polls, the ballot method yielded a lower rate of undecided voters and 9 percent either did not mark the ballot or made an invalid entry.

In earlier reports, we had examined the undecided/swing voters in detail and found out that this group presented a profile that is closer to the profile of the ‘yes’ voters. However, the approaching referendum led to a change in the profile of the swing voters, and resulted in a lower degree of similarity to the ‘yes’ voters in terms of their profile. The main reason for this is that part of the swing voters have shifted to the ‘yes’ camp towards the referendum.

Due to this rapid shift, we were not able to ensure that the profile of the swing voters is the same as the overall profile of the voters in Turkey, and thus, we performed our analysis without distributing the swing voters or leaving them out of the calculation, including them as a separate group alongside the “yes” and the “no” voters. In the note based on the findings of the field survey conducted on April 8th-9th that we have



sent to our subscribers on April 13th,³ we underlined that “we have not come across any findings indicating that the swing voters may shift towards any of the other preferences”, and stated that when we distributed swing voters equally between the “yes” (46.9 percent) and the “no” votes (44.1 percent), the outcome was 51.5 percent for the “yes” vote and 48.5 percent for the “no” vote.



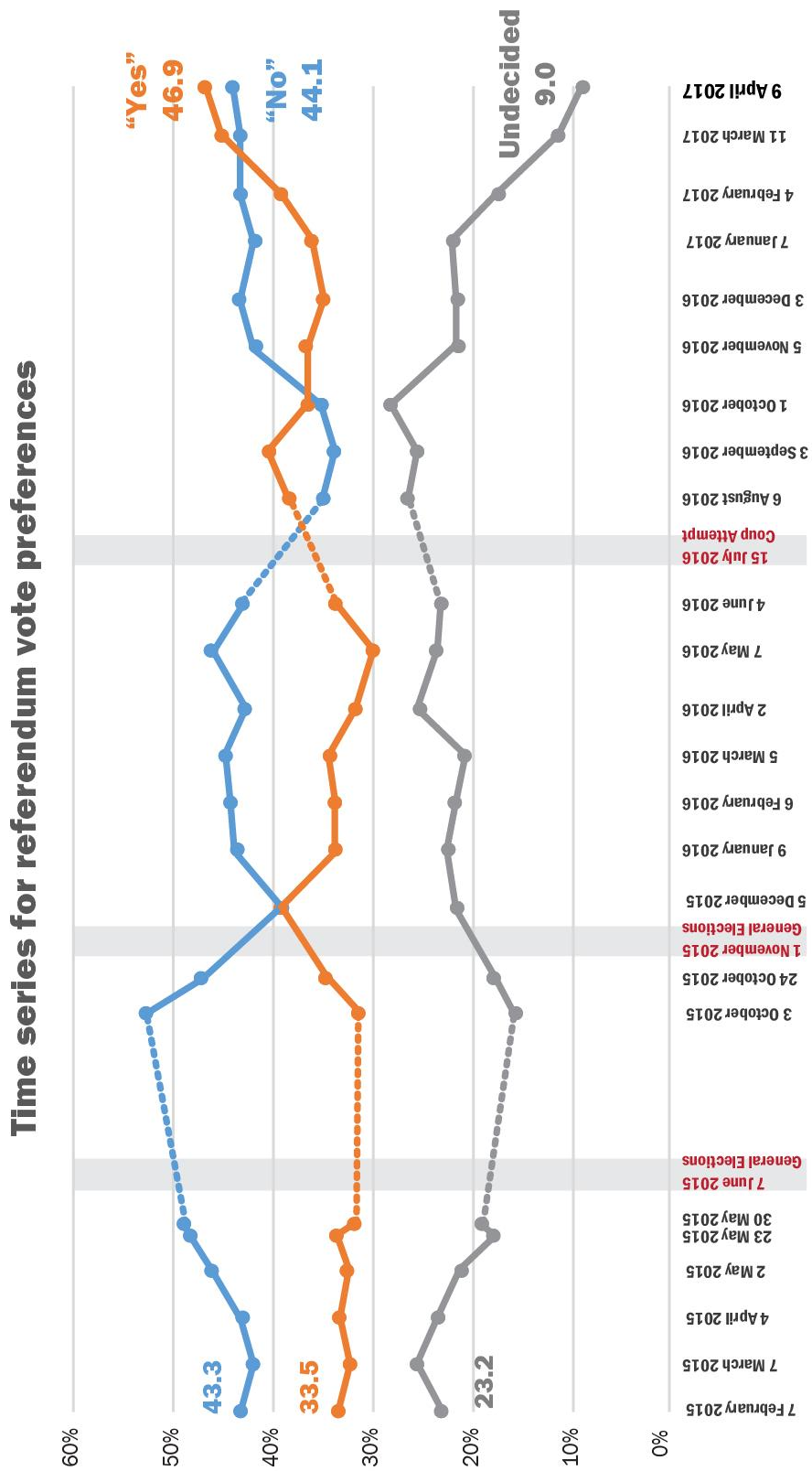
According to the survey results, when swing voters are distributed, 51.2 percent are in favor of the “yes” vote and 48.8 percent in favor of the “no” vote, while the ballot results indicate that 51.5 percent are in favor of the “yes” vote and 48.5 percent are in favor of the “no” vote. According to the unofficial results of the referendum, 51.41 percent voted “yes” and 48.59 percent voted “no”⁴. Therefore, our April’17 research results, which was conducted within the confidence interval of 99 percent, and had a margin of error of 2.2 percent, coincided with the actual referendum results, with a margin of error of a thousandth.

When we evaluate the findings for April over a time series, we observe that swing voters have been in decline since the beginning of the year, with preference for the “yes” vote following an upward trend, and continuing to slightly increase after catching up with the “no” vote in March. In our analyses for the March’17 Barometer report, we had used the preferences stated by the respondents to the pollster. However, in the note sent out to our subscribers on April 13th, and in the time series below, we have used the preferences marked on the ballot in the field survey for March, since the decrease in the rate of swing voters is more distinct in these figures. In the other sections of this report, we continue to use the preferences provided orally by the respondents, which were used for the analyses in the March’17 Barometer.

We will be evaluating the findings from this month’s survey in the following sections in more detail, and we will be examining the profiles of the “yes” and the “no” voters, as well as the rates of preference for “yes” and “no” among different demographic clusters, and the changes in preference among these groups over time.

³ http://konda.com.tr/tr/duyuru/halkoylamasinadair_bilginotu/

⁴ The Speaker of the Grand National Assembly, İsmail Kahraman’s statement on 24.04.2017





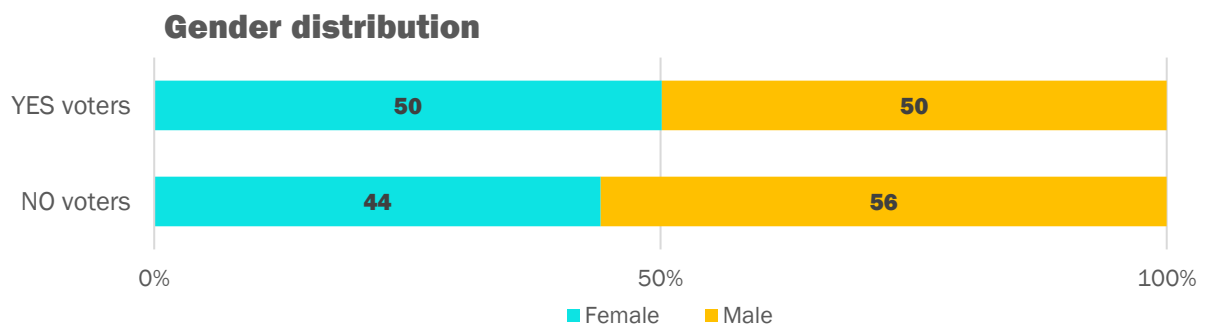
3.2. Profiles of the ‘Yes’ and the ‘No’ Voters

In light of the April 16th 2017 referendum results, we may state that we come across two clusters that are more or less equal to each other in terms of quantity. It is quite difficult to arrive at a definite conclusion about the extent to which the “yes” voters and the “no” voters are different from each other. Ballot box results by province, district and neighborhoods provide us with only a limited means of prediction. However, data from our research conducted one week before the referendum, which enabled us to provide a prediction with a margin of error of a mere 2 thousandth with respect to the actual referendum results, would also provide us with the most accurate profile for the “yes” and the “no” voters.

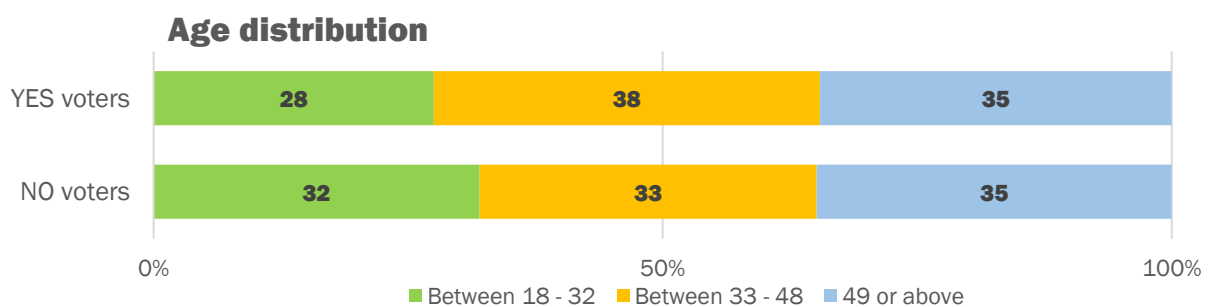
3.2.1. Basic demographic profiles

The “yes” and the “no” voters are not demographically different from each other

When we separately examine the profiles of those who voted “yes” and “no”, we can observe that these two clusters are not very different from each other indeed.



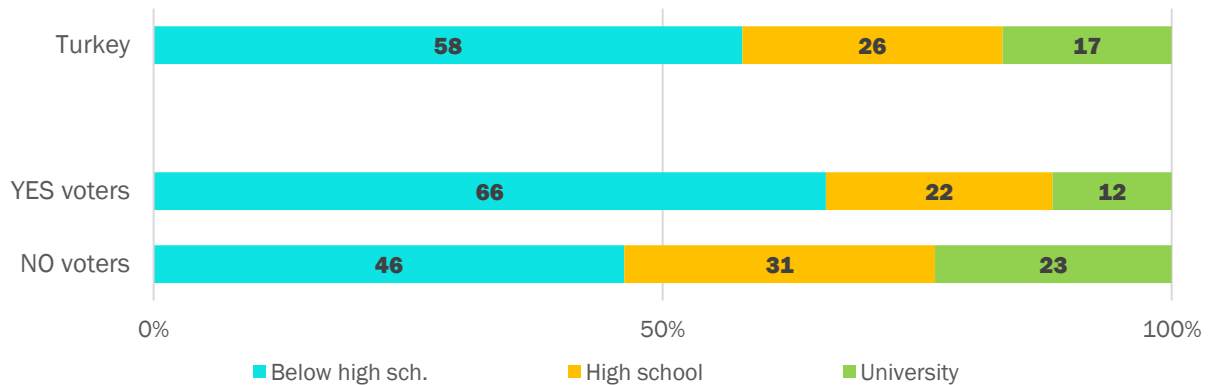
We are able to determine that those in favor of the “yes” vote in the referendum reflect a gender distribution that is closer to the actual distribution in Turkey. The rate of men among the ‘no’ voters is slightly higher than on average. We will see in the following analyses that the high percentage of housewives in the population is influential on this distribution.



In terms of age distribution, we are able to observe that young people are slightly more likely to vote “no”. Among the “no” voters, 32 percent are below the age of 32, while the corresponding rate for “yes” voters is 28 percent.



Distribution by educational attainment



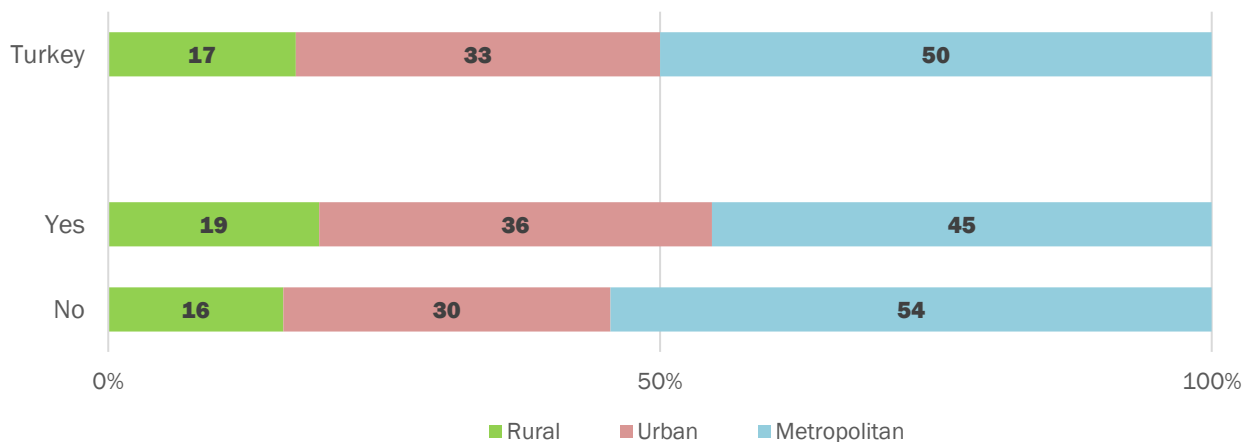
Educational attainment appears to be one of the key differentiators between the “no” and the “yes” voters.

The ‘no’ voters are better educated, but 12 percent of the “yes” voters are university graduates

The first finding that we come across in observing educational attainment is that the “yes” voters are less educated than the “no” voters, and even less educated than on average in Turkey. However, it would still be wrong to define one group as uneducated, and the other as educated. Indeed, 12 percent of the “yes” voters are university graduates, while nearly half of the “no” voters have an educational attainment level of less than high school. Therefore, it would not be correct to argue that the “no” voters are better educated than the “yes” voters, or that the two groups have completely different profiles in terms of educational attainment.

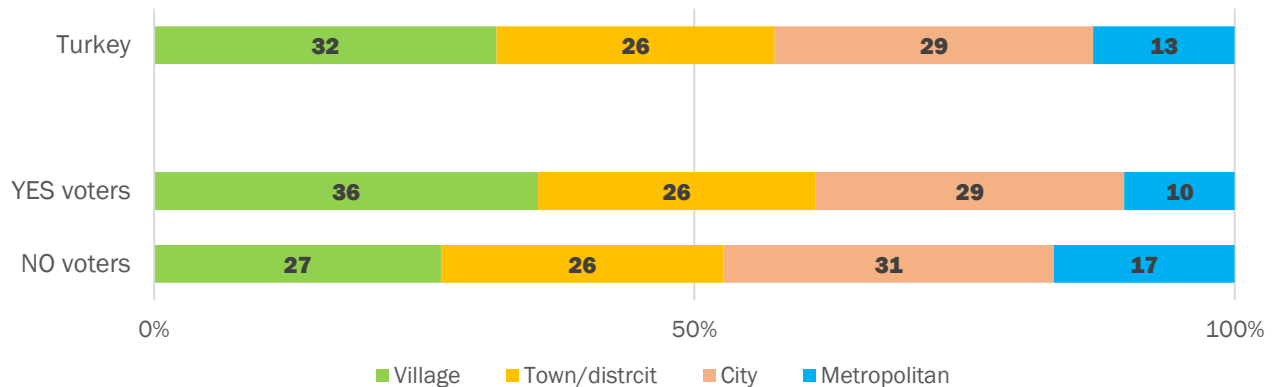
When we evaluate the “yes” and the “no” voters in terms of the size of their place of residence (i.e. rural/urban/metropolitan), we do not come across a particular difference between the two groups. We may only state that the “no” voters are slightly more likely to be metropolitan residents than the “yes” voters.

Distribution by settlement unit





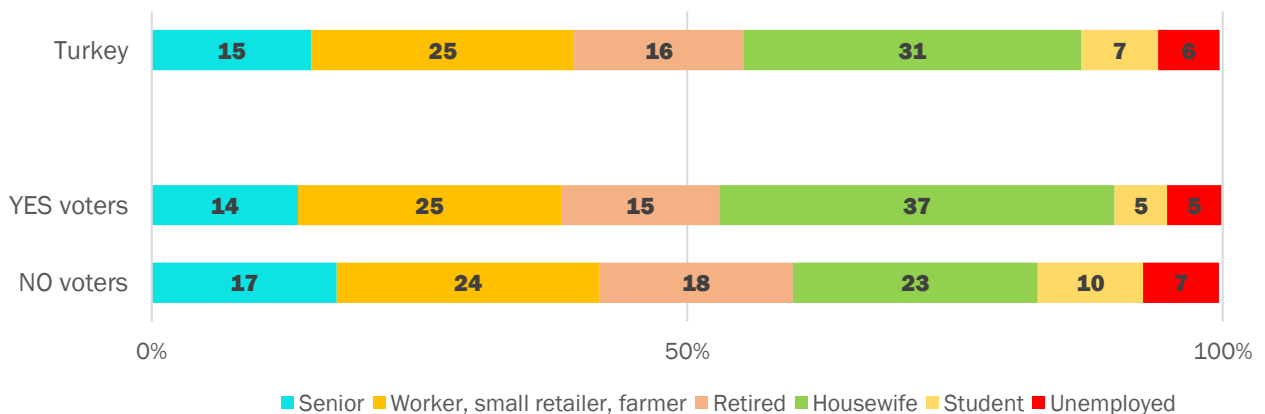
Where did you grow up?



We often ask the respondents where they grew up, for the purposes of KONDA Barometer researches. The answers do not necessarily coincide with the official definitions of place of residence, but they may indeed be quite illustrative. Nearly one third of the public states that they grew up in a village. Only 13 percent says that they grew up in a metropolitan area. At this point, it should be reminded that 77 percent lives in metropolitan areas, according to the local administration law enacted in 2013.

Place of origin does not yield a significant differentiation in the profiles of the “yes” and the “no” voters. The “yes” voters are slightly more likely to have grown up in a village. However, a quarter of the “no” voters state that they grew up in a village.

Employment status



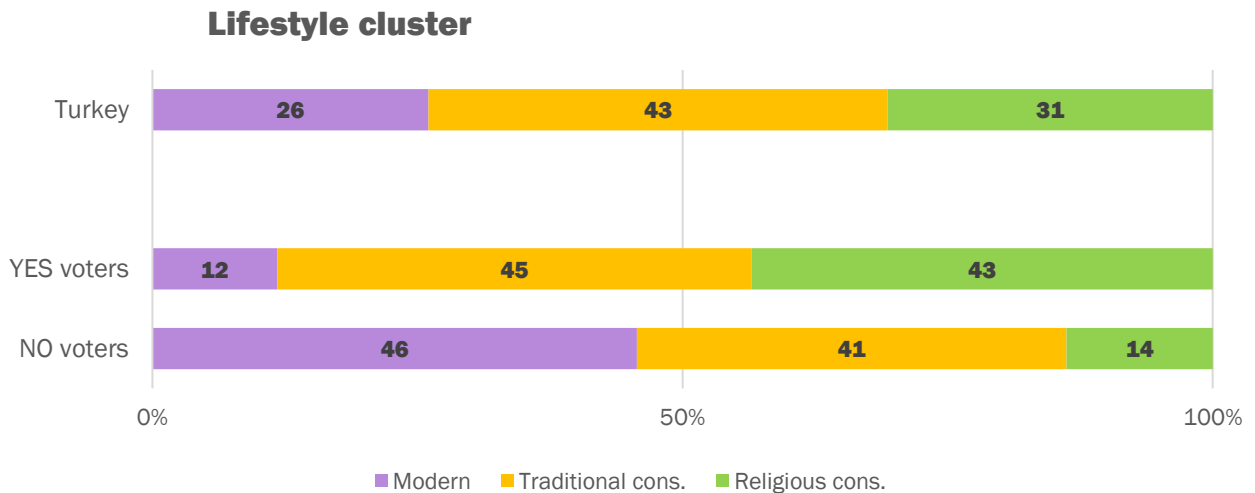
Employment status emerges as a differentiating factor among the “yes” and the “no” voters. Senior employees, who are made up of civil servants, private sector employees and managers and self-employed professionals are more concentrated among the “no” voters, directly proportional to educational attainment. Furthermore, the rate of students among the “no” voters is twice among the “no” voters than the corresponding rate among the “yes” voters. However, the most significant difference is observed in the rate of housewives. When people are inquired about their employment status, the rate of housewives is 32 percent for overall Turkey, while the



corresponding rate is 23 percent among the “no” voters. On the other hand, 37 percent of the “yes” voters, or roughly one third of them are housewives.

3.2.2. Lifestyle, religiosity and head cover status profiles

As our subscribers would be familiar with, for the last 5 years, we have been asking the respondents whom we interview for the purposes of KONDA Barometers to identify their lifestyle among the provided options of Modern, Traditional Conservative and Religious Conservative. The rate of the respondents who do not want to provide an answer to any of the 3 response options is less than 5 percent. The responses indicate that lifestyle is the most significant factor that differentiates the “yes” voters from the “no” voters.



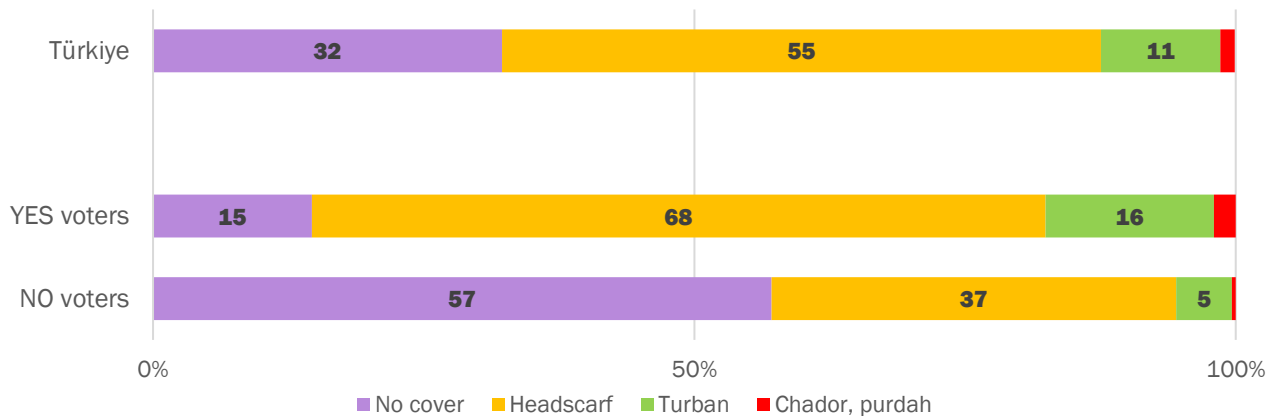
The difference between “No”/ “Yes” is most distinct by lifestyle and religiosity

More than one fourth of the public in Turkey identify themselves as “no” voters and nearly half identify themselves as Modern, while only one tenth of those who indicated that they would be voting “yes” in the referendum identify themselves as Modern. On the other hand, 14 percent of the “no” voters identify themselves as Religious Conservative, but 43 percent of the “yes” voters describe their lifestyle as Religious Conservative.

Another interesting finding about this analysis is that the rate of Traditional Conservatives is nearly the same among both groups.



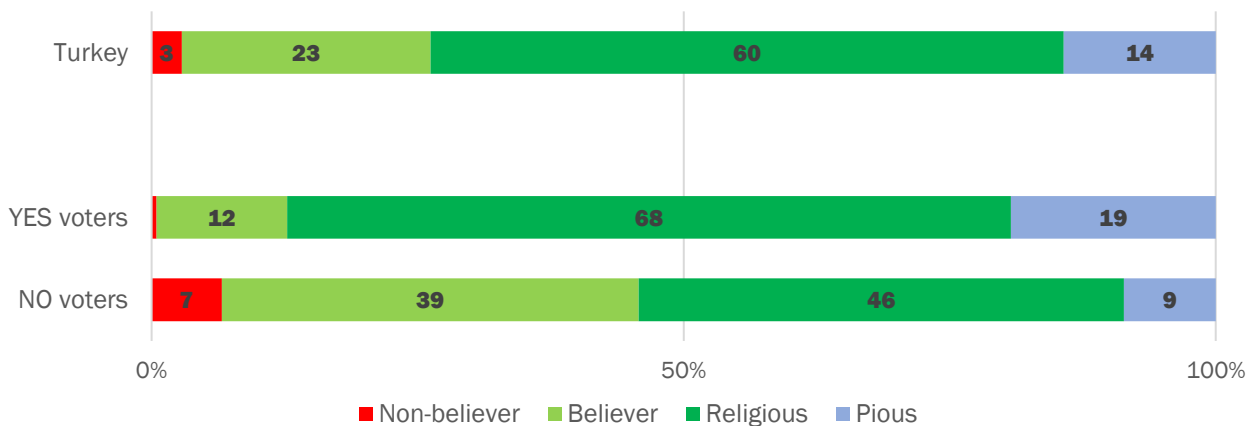
Head cover status



Within the scope of the KONDA Barometer, we ask the respondents about their head cover status. This question is asked to women about themselves, and for their spouse, if they are married. In addition, we take the statements of the respondents into consideration for this question, and not the observation of the pollster. Similar to the lifestyle, the head cover status of the “yes” and the “no” voters is an important parameter that leads to a difference in the profiles of these voter groups.

One third of the public in Turkey state that they do not cover their head, while only 15 percent of those who say “yes” are comprised of women who (or men whose spouses) cover their heads. On the other hand, more than half of the “no” voters do not cover their heads.

Level of religiosity



A third factor that complements lifestyle and head cover status is people’s self-identification of their level of religiosity. For the purposes of our research, we provide the 4 options shown below to the respondents and ask them with which option defines their own level of religiosity. These 4 definitions are grouped as ‘non-believer’, ‘believer’, ‘religious’ and ‘pious’.

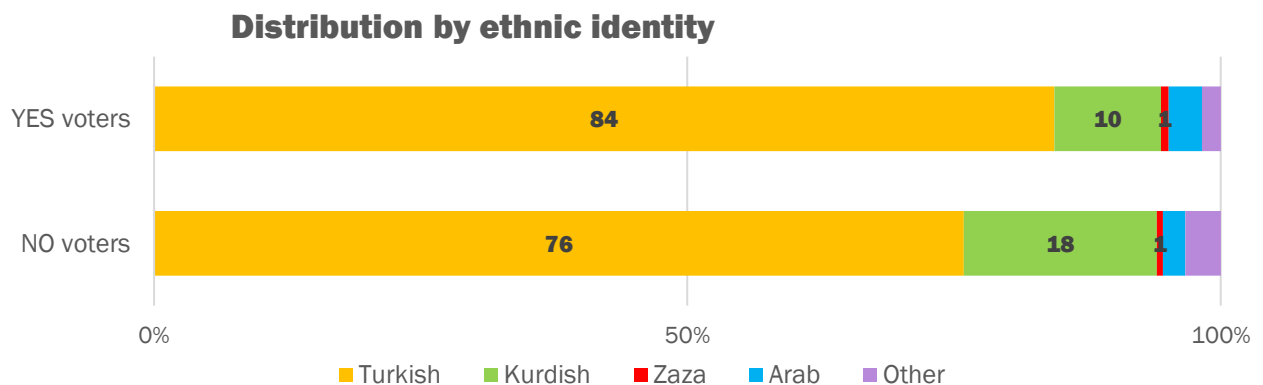
As it can be seen in the graph above, three fourths of Turkey identify themselves as religious or pious. However, the corresponding rate among the “yes” voters reaches the level



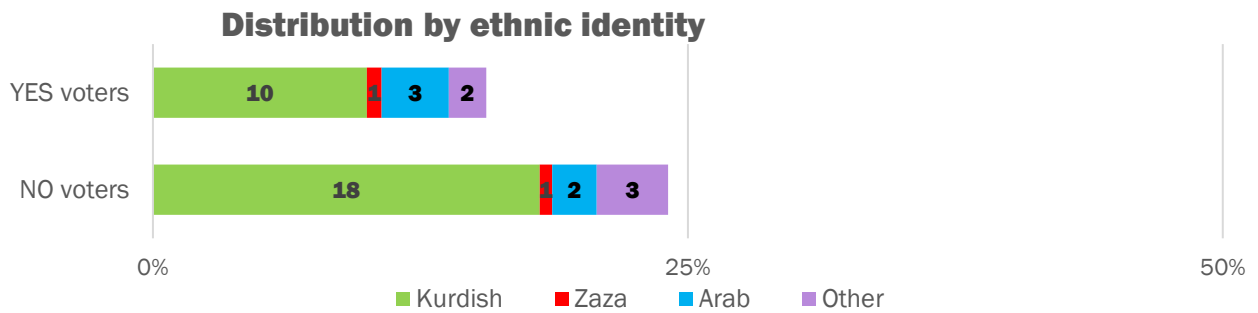
of 90 percent. On the other hand, the same rate declines to around 55 percent among the “no” voters. Furthermore, it is also interesting that all of the non-believers across the country indicate that they would be voting “no”.

As a result, when we screen the profiles of the “yes/no” voters by religiosity, head cover status and lifestyle, we come across the real difference between these two voter groups. The “yes” voters are more religious and more conservative in comparison the “no” voters. However, it should be noted once again that this does not necessarily make the two groups completely different from each other. Although we are able to determine that those who vote “yes” are more religious and are more conservative, we also observe that 5 percent of the “no” voters cover their heads with a turban, 15 percent identify themselves as Religious Conservative and around 10 percent think of themselves as pious. Therefore, it would be more correct to think of these figures as not indications about the profiles of the “yes” voters and the “no” voters, but as a clue about their world.

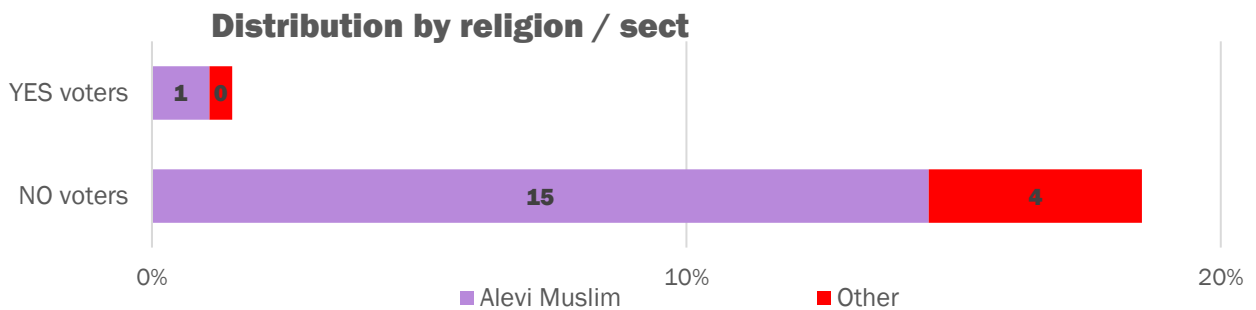
3.2.3. Ethnic identity and sect profiles



Before and after the April 16th referendum, one of the main questions for the majority of the public was the direction that the votes of Kurdish and HDP voters would shift towards. However, as well known by Barometer subscribers, there are very few people among HDP voters who were likely to shift towards the “yes” vote. On the other hand, we had underlined repeatedly that the Kurdish is divided into two groups, as HDP voters and Ak Parti voters, and that this division was getting more pronounced. We will also be evaluating the preferences of the Kurdish in a different section. However, when we concentrate on the ethnic groups other than the Turkish, we observe that among the Kurdish, who correspond to 14 percent of the adult population in Turkey, preference for the “no” vote is above average, and preference for the “yes” vote is below average. On the other hand, we come across a different outlook among Arabs. Arabs make up approximately 3 percent of the adult population, and their preference for the “yes” vote is higher than their preference for the “no” vote.



Ethnic groups other than the Kurdish, Zaza or Arabs, are more likely to vote “no”. It should be noted that none of the ethnic groups have shifted completely to either the “yes” of the “no” vote.



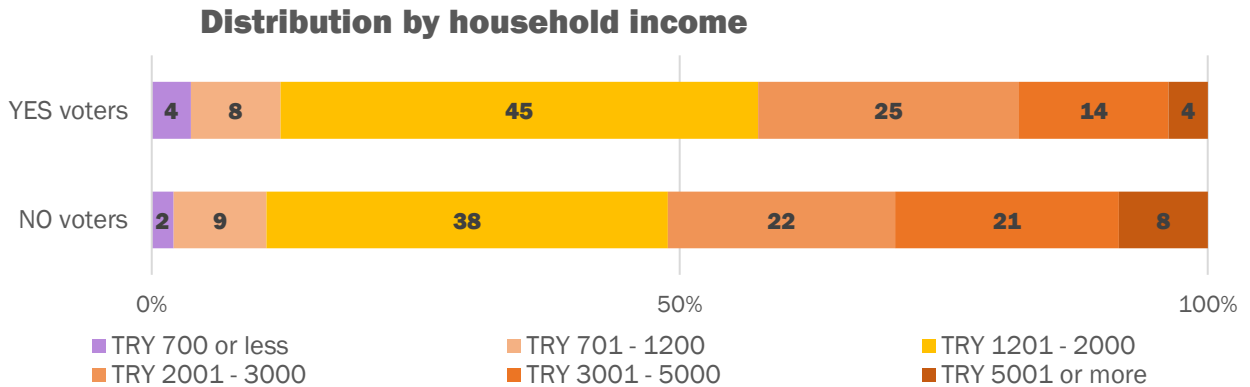
Alevis are in consensus on voting “no”

When we examine referendum vote preference by religion / sect, we find out that Alevis have a clear preference. In the Barometer data, we observe that Alevis tend to behave collectively in political decisions. Nearly all of Alevis, the great majority of whom are CHP voters, have preferred the “no” vote. Only slightly more than one percent of those who stated that they would be voting “yes” are Alevi. Therefore, we may deduce that only 0.5 percent of Alevis preferred the “yes” vote.



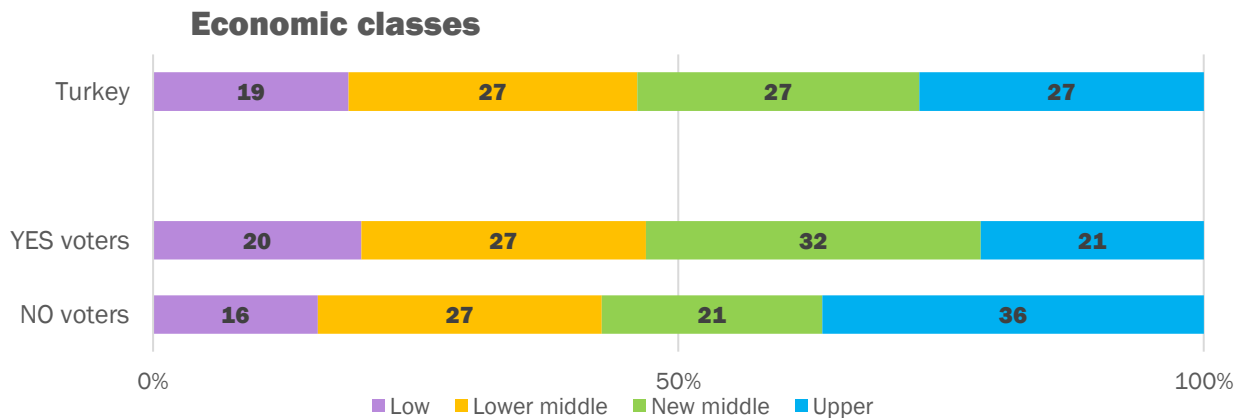
3.2.4. Income group profiles

An examination of the “yes” and the “no” vote demographically should also take income level into account. We have pointed out that the “no” voters have a higher educational attainment level than the “yes” voters. We come across a similar outlook with respect to the level of income. The income level of those in favor of the “yes” vote is lower than the income level of those in favor of the “no” vote. For example, 18 percent of the “yes” voters have a monthly household income of 3 thousand TRY, while the corresponding rate among the “no” voters is as high as 30 percent.



When we examine educational attainment and income level profiles, we observe that the “no” voters have a higher socioeconomic status than the “yes” voters. However, these voter groups do not represent the two opposite ends of the socioeconomic spectrum, and they are merely two slightly different clusters.

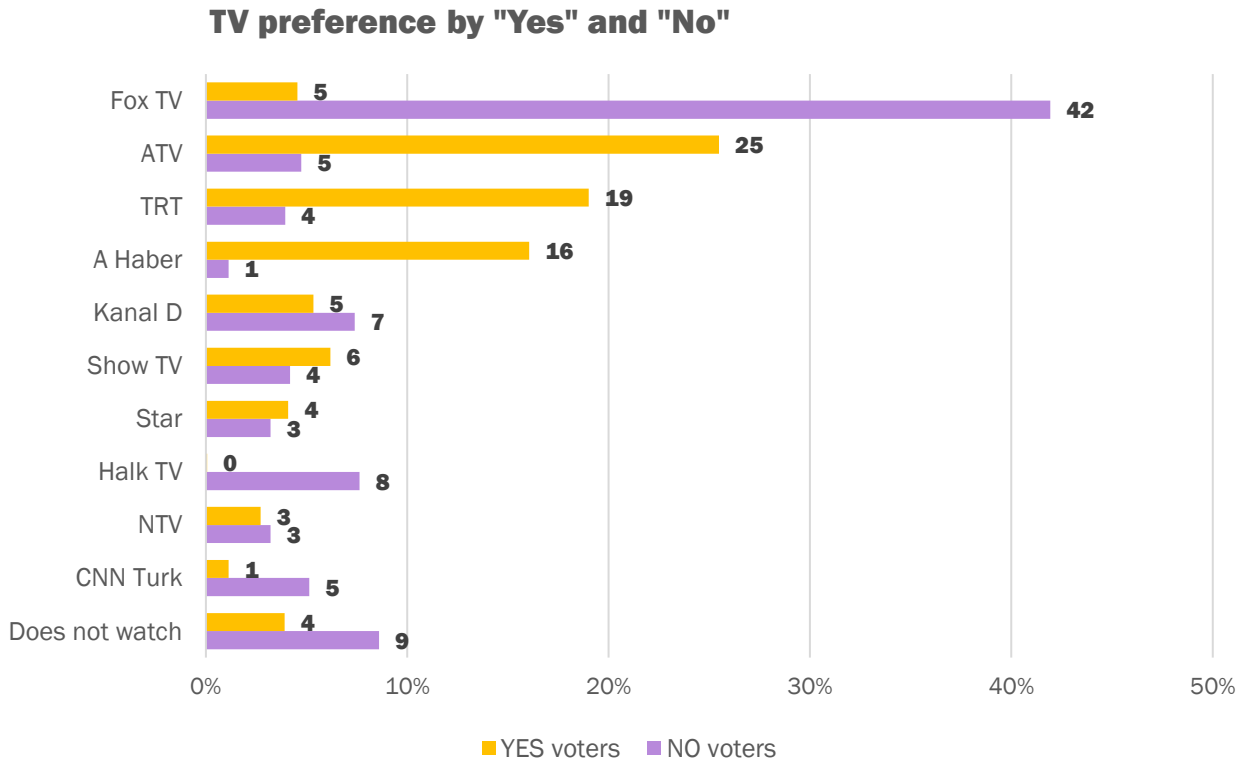
When we look at the “economic class” groups, which we have formed by including income level, car ownership and household size, we come across a different outlook.



The biggest difference is observed among the “new middle class”. As we have noted many times before in earlier Barometer reports, the new middle class is more likely to support Ak Parti and the status quo, independent of its other socioeconomic characteristics. Therefore, it should be expected that the new middle class is represented more strongly among the “yes” voters.



3.2.5. Television channel preference and social media profiles



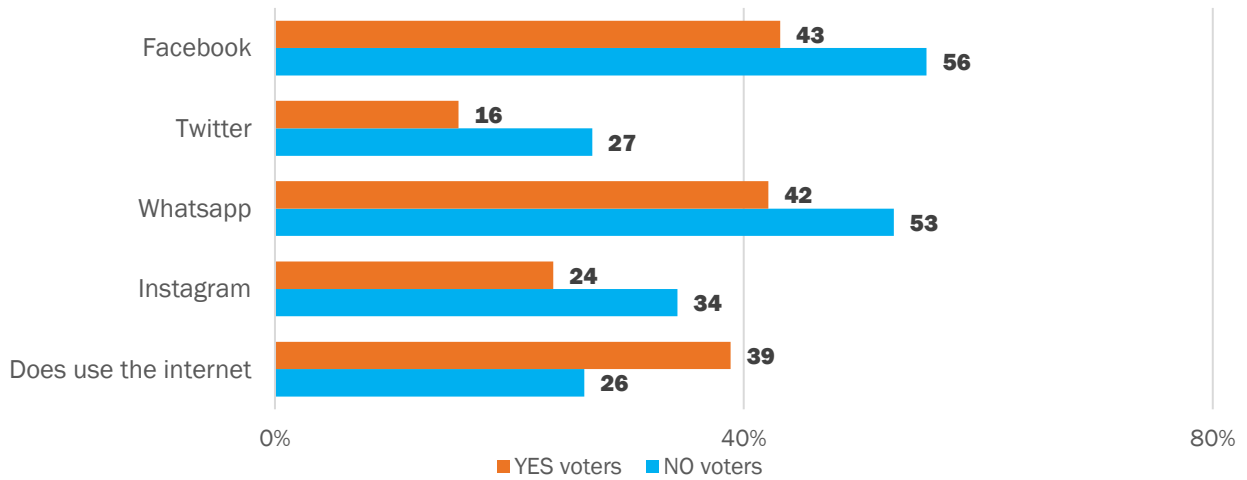
When we talk about the profile of a group, it is no longer possible to ignore traditional and social media preferences. Particularly, television channel preference plays an important role in determining profiles, as the media is more likely to become more rapidly polarized than the public. Within the scope of the KONDA Barometer, we ask the respondents the question, “Which TV channel do you prefer to watch the news?”

FOX TV is nearly the only TV channel for the No camp

As noted above, TV channel preference works as the strongest differentiator when it comes to political preference. According to this graph, only 25 percent of those in favor of voting “yes” prefer ATV, 19 percent prefer TRT, and 16 percent prefer A Haber to watch the news. Among the “yes” voters, about 15 percent are viewers of the other 3 main TV channels. However, it looks like a very great segment of the “no” voters have come seem to have united around Fox TV. If we exclude Halk TV, whose broadcasting tone is completely in opposition to the government, no other TV channel appears to be prevalent among the “no” voters. In other words, preference for the “yes” vote is dominant among the viewers of the state TV channel TRT, first and foremost, while Fox TV is the sole TV channel that the “no” voters are clustered around.



Internet ve Social Media Use



When we review the use of social media, we come across a similar outlook portrayed by educational attainment. The “no” voters use social media more heavily than the “yes” voters and there are fewer “no” voters who do not access the internet.

However, this should not be taken to mean that the “yes” voters do not have a relationship with social media. For example, 27 percent of the “no” voters use Twitter, whereas the corresponding rate among the “yes” voters is 16 percent. There is a difference of 11 points between the two rates, but still there is a considerable group of “yes” voters who use Twitter.

The “yes” and the “no” voters are not really that much different from each other

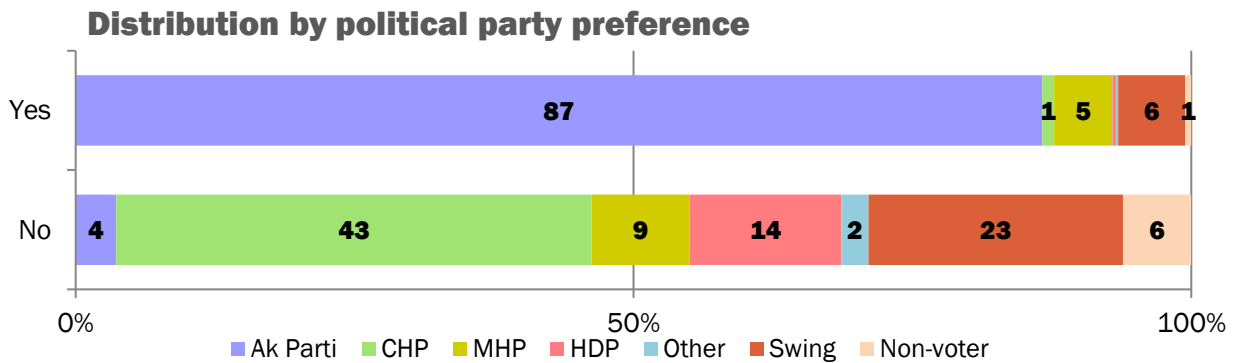
As a result, when we examine the “yes” and the “no” voters within certain perspectives, we need to emphasize two significant findings.

- ✓ We observe partial differences between the “yes” and the “no” voters in terms of socioeconomic status and other general demographic characteristics, while we do not come across an important difference in terms of religiosity, head cover status and lifestyle. The “yes” voters are much more likely than the “no” voters to be religious, to cover their heads and to identify themselves as Religious Conservative.
- ✓ We do not observe a significant enough difference between the “yes” and the “no” voters to portray opposing profiles. In other words, these are two clusters with different average values. For example, there are Alevis who are in favor of the “yes” vote, albeit at a very low rate, as there are pious and turban-wearing people who opt for the “no” vote. Alternatively, difference in educational attainment is noteworthy between the two groups, but still, more than 10 percent of the “yes” voters are university graduates. Therefore, an analysis of these two groups of voters shows that they are not as different from each other than it might be expected.



3.3. Relationship Between Political Party Preference and Referendum Vote Preference

Expectedly, political preference is the most decisive factor in shaping the referendum vote preference. In this sense, we observe the “yes” voters as a much well-defined group in terms of their profile.



The “yes” voters are more uniform and the “no” voters are more heterogeneous

The “no” voters in the referendum area more coalition-like, in other words a more heterogeneous group. Although 43 percent of the “no” voters are CHP voters, there is a certain segment of Ak Parti voters who have opted for the “no” vote.

We may state that 9 out of every 10 people who indicated their decision to vote “yes” are Ak Parti voters. Only 5 percent of the “yes” voters are MHP voters. In other words, 5 percent state that they would vote for MHP if there were an election today.

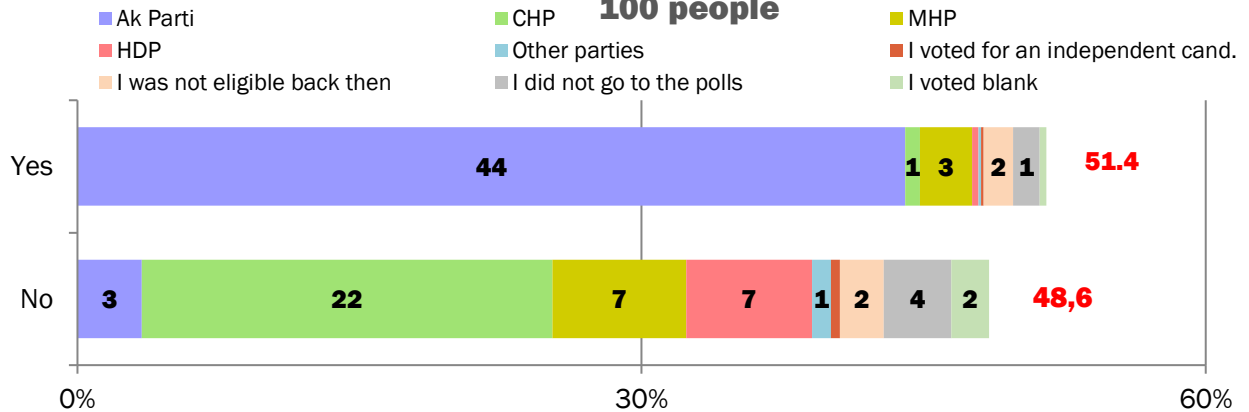
Swing voters make up nearly one third of the No voters

It is also noteworthy that the “no” voters include swing voters and non-voters to a much greater degree than the “yes” voters. As this point, we may think that the “yes” voters are more determined about their vote due to the dominance of Ak Parti voters among this group, as we may imagine the “no” voters as a more flexible group of voters due to the fact that swing voters make up one fourth of the “no” voters.

When we aggregate all voters to see how the distribution of votes based on 100 voters would come out, we obtain the outlook portrayed in the two following graphs:



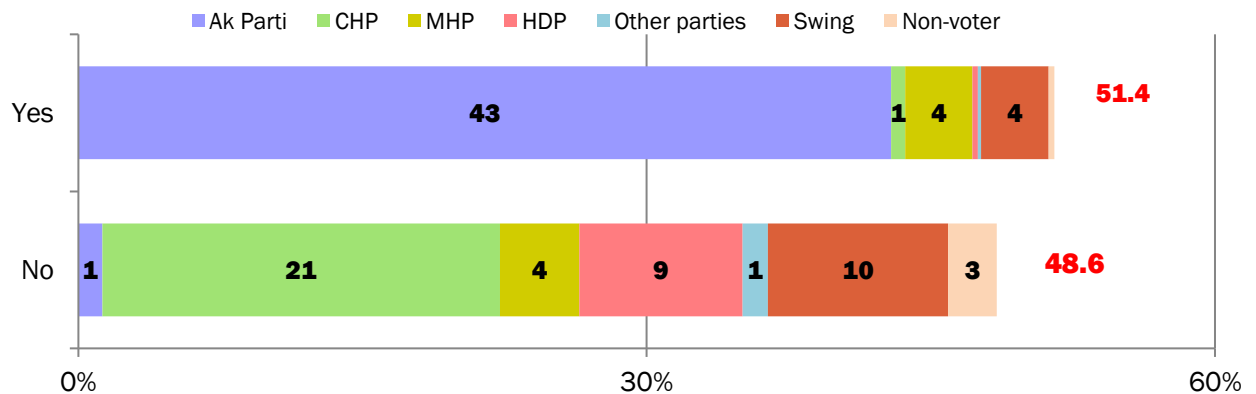
Referendum vote preference and Nov. 1st 2015 vote among 100 people



44 of the 51.5 percent who voted “yes” in the referendum, voted for Ak Parti in the November 1st 2015 General Election, which shows that Ak Parti voters make up the great majority of the “yes” voters.

On the other hand, out of every 100 people, 22 people voted for CHP, 7 people voted for MHP, and another 7 voted for HDP, while 3 people voted for Ak Parti in the previous general election.

Distribution of referendum vote preference and party preference among 100 people



When we review the responses to the question, “Which party would you vote for if there were an election today?” by referendum vote preference, we are able to see that nearly all of those who stated that they would vote for Ak Parti also said that they would “yes” in the referendum, while MHP voters were divided into the two preferences, and those who stated that they would vote for CHP or HDP are inclined to vote “no” in general. 10 out of the 14 people who are undecided about their vote in the general election stated that they would vote “no”, while 4 people stated that they would vote “yes”.



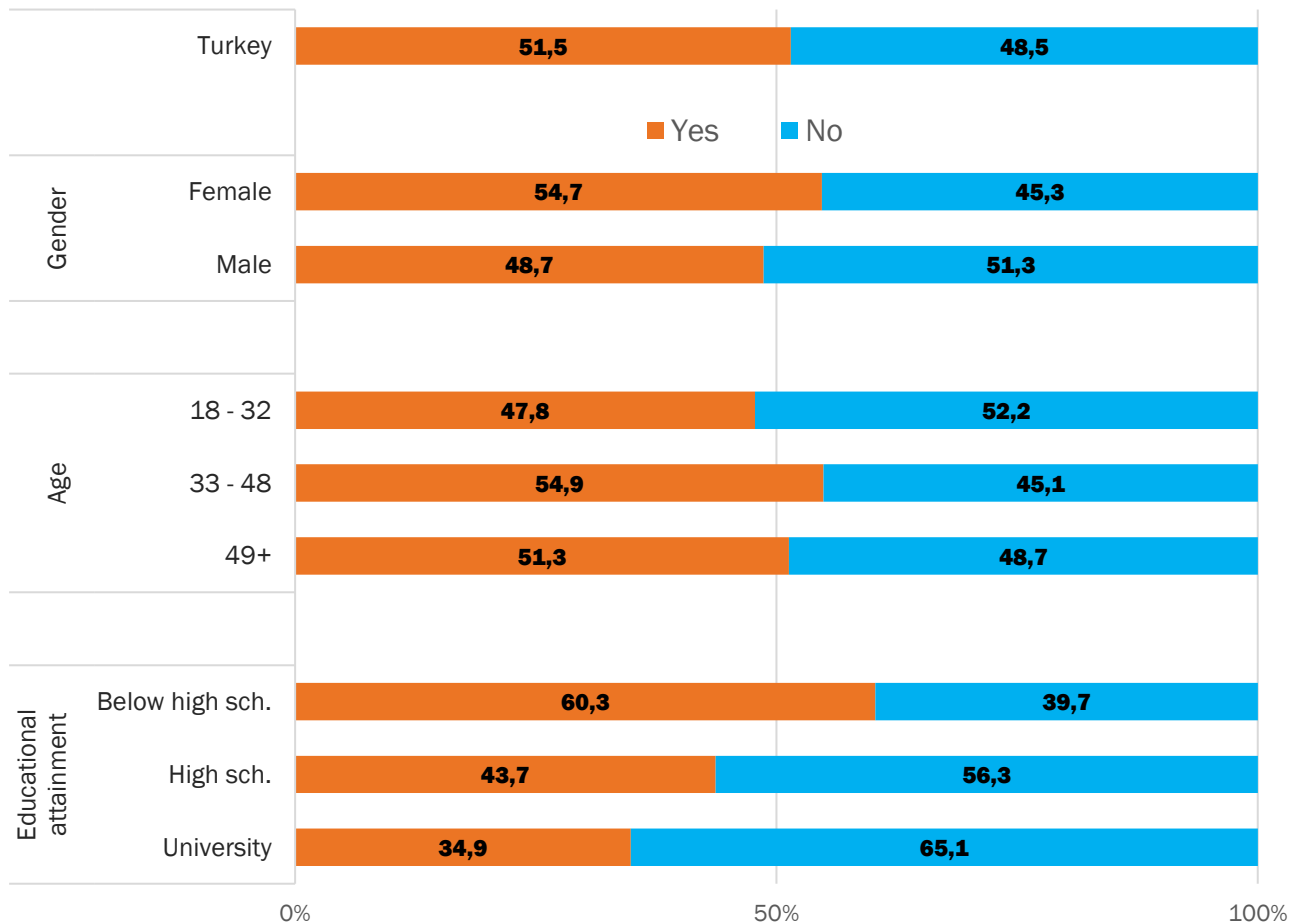
3.4. Distribution of Yes / No Among Demographic Groups

After the review of the profiles of the “yes” and the “no” voters, examining the distribution of the “yes” and the “no” vote among different demographic and cultural groups would provide a different dimension to our analysis.

3.4.1. Distribution of Yes / No by basic demographics

First of all, we do not encounter dramatic differences, when we observe the distribution of the “yes” and the “no” vote among basic demographic groups of gender, age and educational attainment.

Distribution of “yes”/“no” by basic demographics



There is an inverse relationship between educational attainment and preference for the “yes” vote

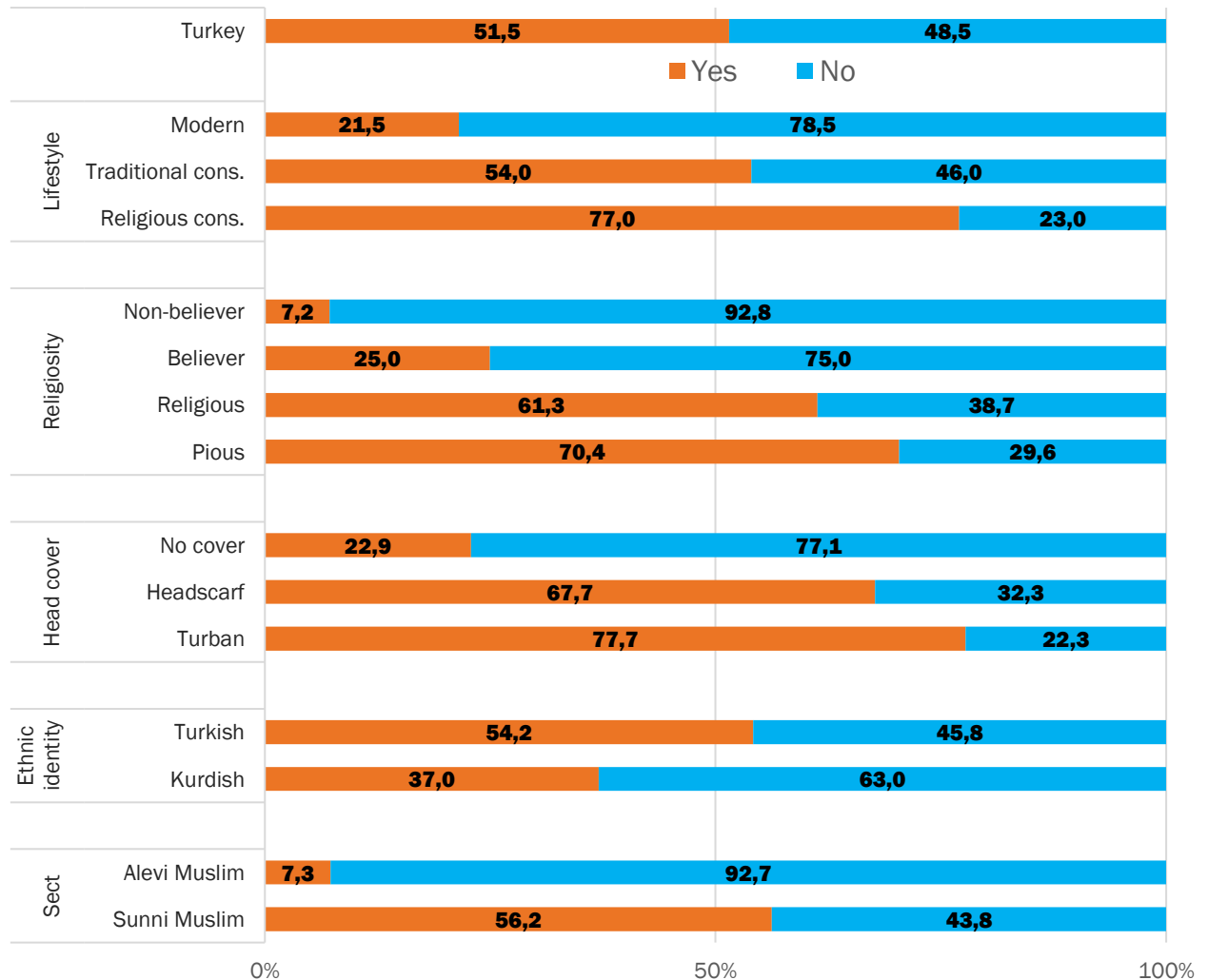
We are only able to observe a concrete relation between educational attainment and referendum vote preference. Higher educational attainment level leads to an increased likelihood to vote “no”.



We are also able to determine that women are slightly more likely to vote “yes”, as young people are more likely to vote “no”.

3.4.2. Distribution of Yes / No by religiosity and lifestyle

Distribution of "yes"/"no" by religiosity and lifestyle



Referendum vote preference by lifestyle and religiosity presents findings that are in parallel with the findings mentioned above.

Nearly 80 percent of those who identify their own lifestyle as Modern are in favor of the “no” vote, while the corresponding rate among Religious Conservatives is just the opposite of this figure. Among Traditional Conservatives, who make up nearly half of the country, preference for the “yes” vote is 4 points higher.



We come across a significant correlation between level of religiosity and the likelihood of being in favor of voting “yes”. As the level of religiosity increases, so does the tendency of voting “yes”.

The rate of the “no” vote is higher than the rate of HDP voters among the Kurdish

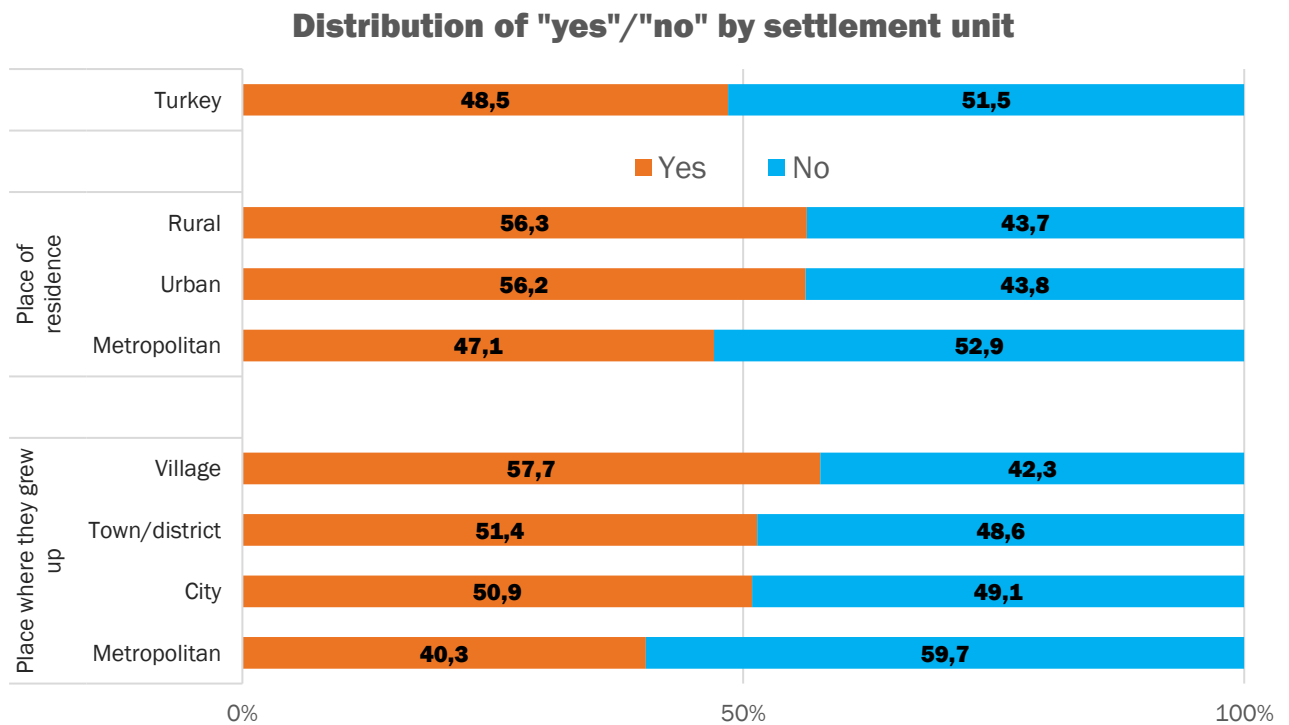
It looks like nearly two thirds of the Kurdish have stated that they would vote “no”. This rate is even higher than the corresponding rate among HDP voters who have a Kurdish ethnic background. According to data from April’17, 58 percent of the Kurdish also stated that they voted for HDP. However, preference for the “no” vote is 63 percent among the same group, which is 5 points higher than this.

On the other hand, nearly all of Alevis have indicated that they would be voting “no”. We know that there are some Ak Parti voters among Alevis, albeit they correspond to less than 10 percent. Judging from the table, we may think that these voters make up for some of the Ak Parti voters who opted for voting “no”.

3.4.3. Distribution of Yes / No by settlement unit

There is a relation between living or having grown up in metropolitan areas and voting “no”

When we look at the distribution of “yes” and “no” by settlement unit that people grew up in and where they currently reside, we come across a relation between living/having grown up in urban or metropolitan areas and voting “no”.



The settlement unit where people have grown up appears to be an influential factor on the referendum vote preference. On the other hand, when we look at the area where people reside, we only notice a difference among those living in metropolitan areas. If we take it into consideration that 50 percent of the population resides in places



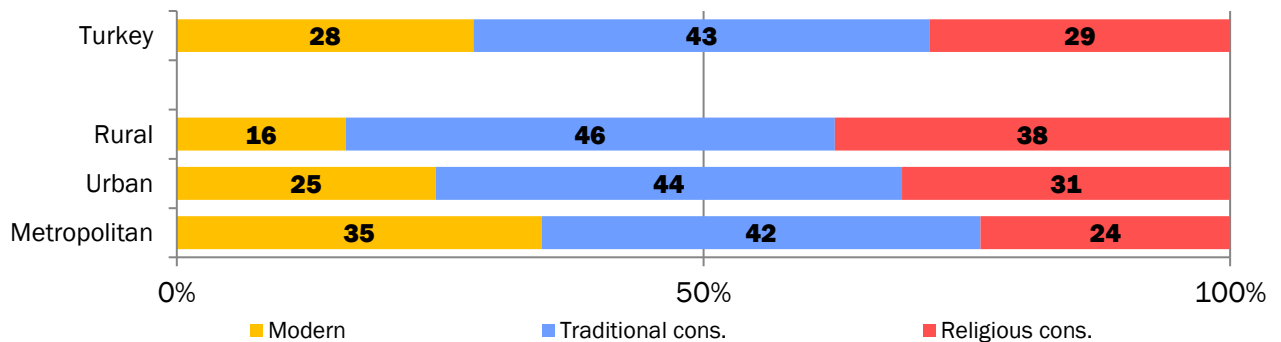
that fit the definition of metropolitan areas, we are able to see that the minor differences between the ballot box results for rural and urban areas are in parallel with this relation. The section on ballot box results shows that differences in preference for “yes” and “no” are in parallel with the size of the settlement one lives in.

3.4.4. How did urban conservatives vote?

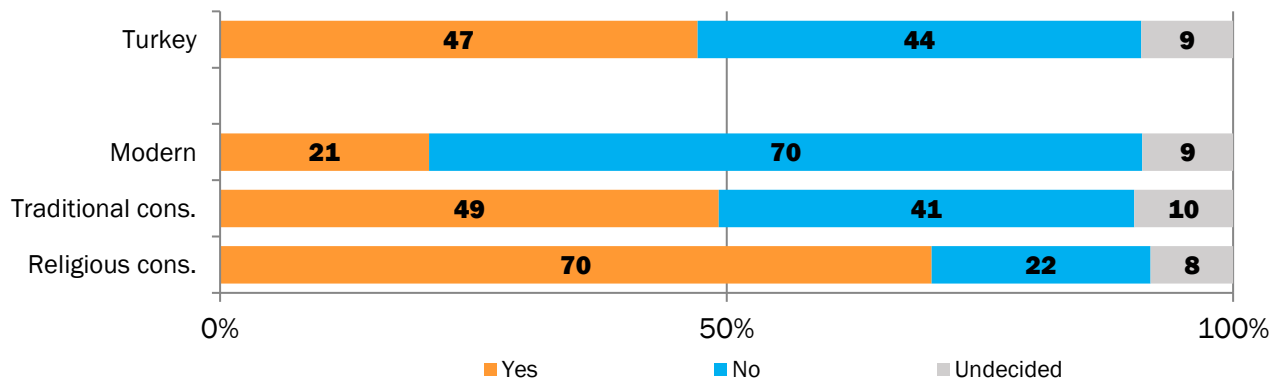
As KONDA, we are aware that the question on lifestyle and the categories we provide as response options that we have been using since 2012 does not fully explain the phenomenon of lifestyle, but we still think that this question is a practical and useful tool. In our field survey in April, 28 percent of the respondents identified themselves as Modern, 29 percent as Religious Conservative and 43 percent as Traditional Conservative.

Similarly, we provide the options of rural, urban and metropolitan for the question settlement unit. For the category of metropolitan, we base our definition on areas of settlement within the city center limits of the 15 cities with the highest population. As for the rural-urban demarcation, we define settlements with a population above 4.000 as urban, and below 4.000 as rural. In this light, 17 percent of the adult population resides in rural areas, while 33 percent lives in urban and 50 percent lives in metropolitan areas.

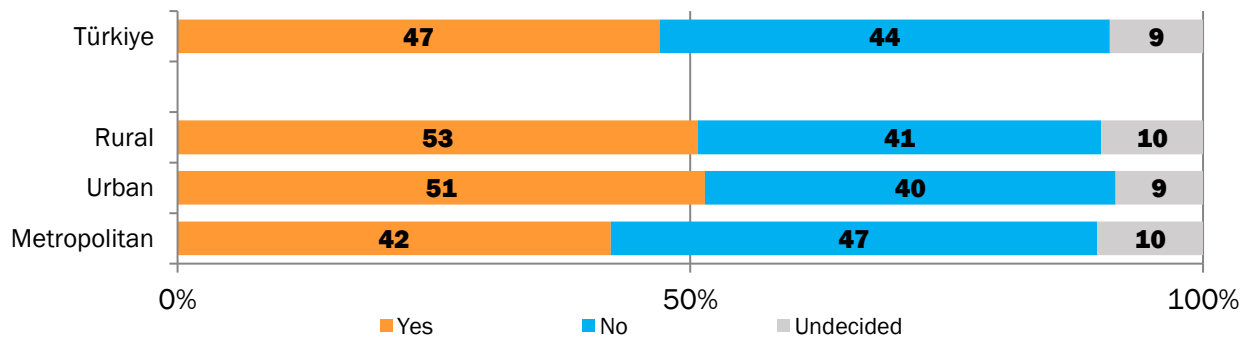
When we look at the distribution of lifestyle clusters by settlement unit, we observe that the rate of Religious Conservatives decreases and the rate of Moderns increases as we move from rural to metropolitan areas. We observe a slight decrease in the rate of Traditional Conservatives as we move from urban to metropolitan areas.



When we look at the responses by referendum vote decision, those with a Modern lifestyle and Religious Conservative lifestyle have completely different attitudes. Traditional Conservatives are divided into two. When we take it into consideration that Moderns and Religious Conservatives are represented at similar rates, we may claim that the referendum result was shaped by the Traditional Conservatives.



When we perform an analysis by place of residence, we are able to see that preference for the “no” vote is slightly ahead, while preference for the “yes” vote is ahead in rural and urban areas.

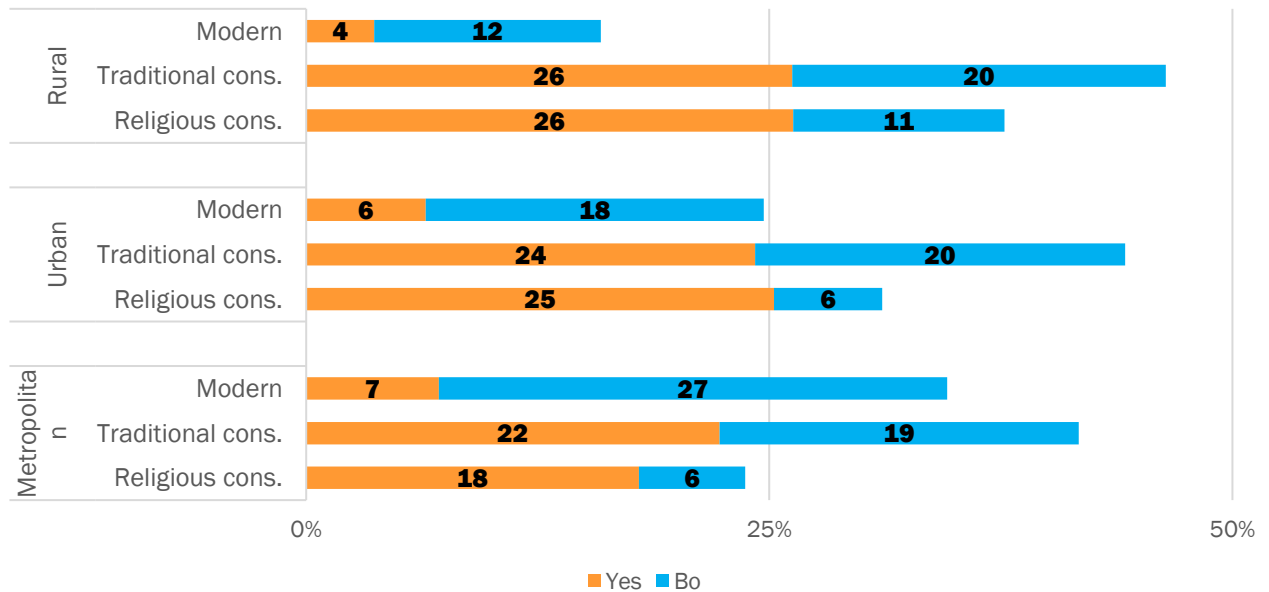


When we analyze these data together, we understand that those who define their lifestyle as Religious Conservative and live in urban areas are most likely to be “yes” voters.

Religious Conservatives who live in urban areas are more likely than metropolitan residing Religious Conservatives, and likewise, Religious conservatives who live in metropolitan areas are more likely than the rural-dwelling Religious Conservatives to vote “yes”. Among Traditional Conservatives, metropolitan residents are less likely to vote “yes” than those living in urban areas, as those residing in urban areas are more likely than rural Traditional Conservatives.



Distribution of "yes"/"no" by settlement unit and lifestyle cluster



“Yes” is stronger in rural areas, while “no” is stronger in metropolitan areas

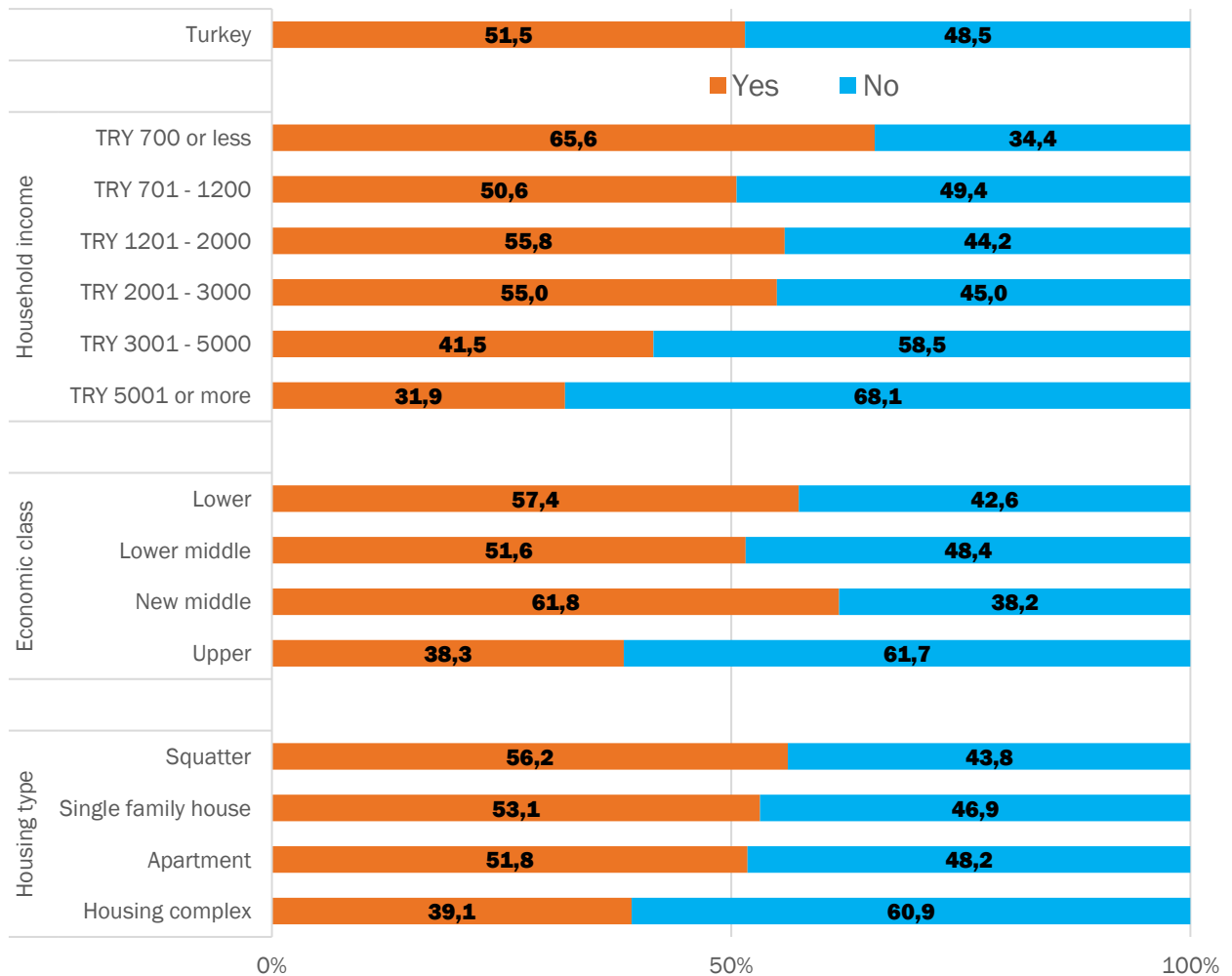
Although “urban conservatives” debate does not provide an exact answer, three fourths of metropolitan Religious Conservatives have voted “yes”, and preference for the “no” vote is very weak among this group in metropolitan areas. However, the reason for this deserves to be the topic of an entirely independent research study.

3.4.5. Distribution of Yes / No by income status

When we review the income groups, we can see that the “yes” vote is significantly above the average only in the lowest income group.



Distribution of "yes"/"no" by income status



The new middle class is as likely to vote “yes” as Ak Parti voters

An overview of the economic classes that we have formulated by aggregating various different data, we come across a picture portrayed by the previous Barometer analyses. “The new middle class”, whose members are most likely to be Ak Parti voters, are in favor of the “yes” vote in general. It is also noteworthy that two thirds of the two highest income groups are in favor of voting “no”.

3.4.6. Distribution of Yes / No by TV and social media preference

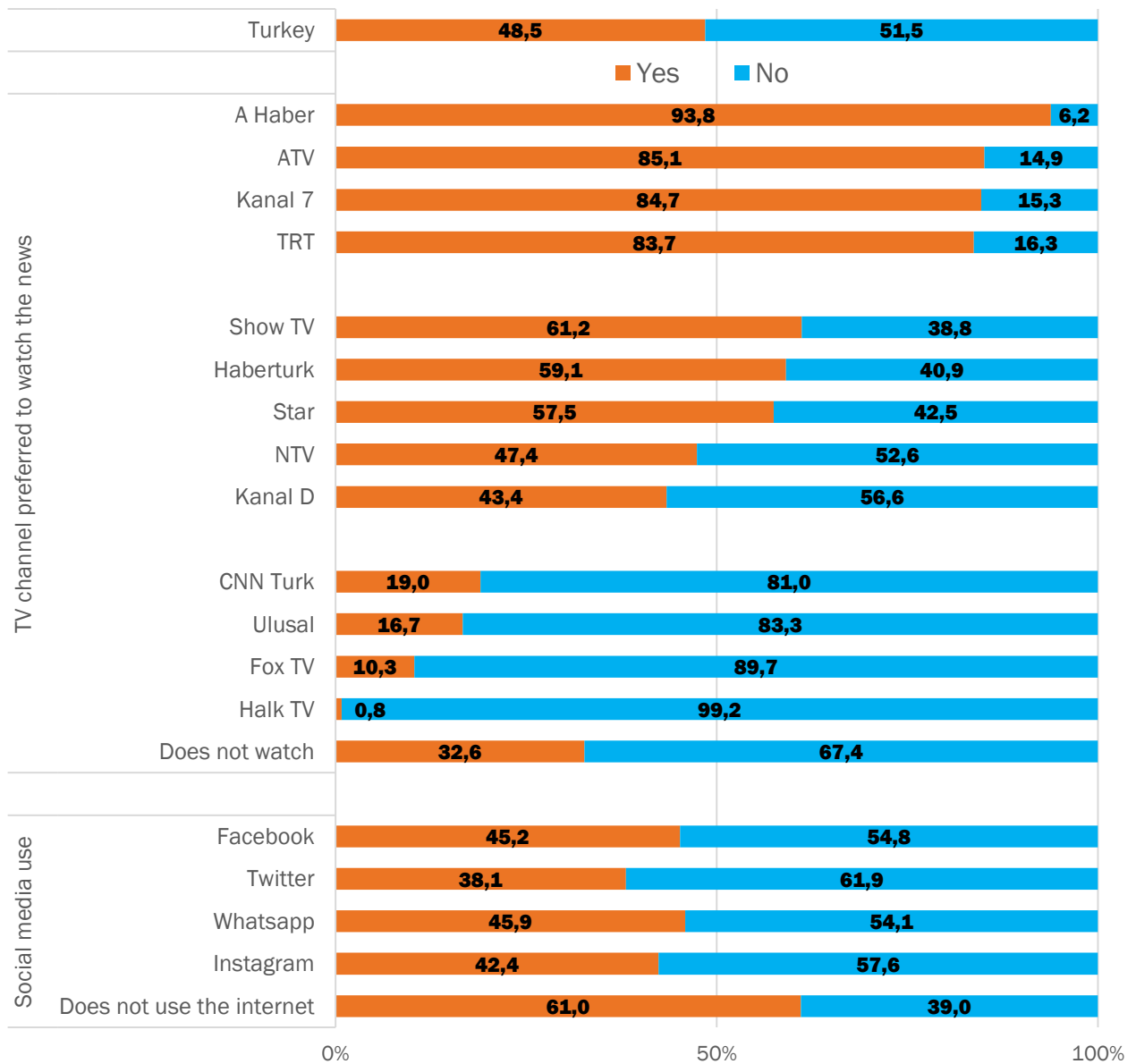
After political party preference, the TV channel preference for watching the news appears to be the most significant factor affecting the outcome of the distribution of the “yes/no” vote. We observe that those who watch the first four TV channels shown in the graph for following the news have a preference for the “yes” vote that is not below 80 percent. Judging from the table, we may claim that these TV channels have a clear political discourse.



The distribution of “yes/no” preference among the viewers of Show TV, Star and Kanal D, which thematically address everyone, varies. Preference for the “yes” vote among Show TV and Star viewers is above the Turkey average. On the other hand, Kanal D viewers are more likely to vote “no”.

When we examine the news networks, we can see that Habertürk viewers are not as likely as A Haber viewers to vote “yes”. Similarly, we can make a comparison between NTV and CNNTürk. Only one out of every five CNNTürk viewers prefer to vote “yes”. The viewers of NTV, which has the same socioeconomic target audience, have a distribution of “yes/no” that is similar to the overall distribution in the country.

Distribution of TV preference by "yes"/"no"





3.5. The Course of the Distribution of Yes / No Among Demographic Groups

The referendum on the presidential system was discussed widely among the public after Recep Tayyip Erdoğan was elected as the President in 2014, then brought to agenda of the Parliamentary Commission at the end of 2016, and finally ratified in the General Assembly of the Parliament in 2017. As KONDA, we have been asking the respondents from February 2015 until the beginning 2017, when the date of the referendum was determined, how would they vote in a “hypothetical” referendum. After the beginning of 2017, we started to inquire about their prospective vote in the upcoming referendum. As you may see in the following pages of the report, although preference for “yes” and “no” varies among different demographic and social groups over time, we observe significant changes in their responses after the actual date of the referendum was announced. In addition, we observe significant changes in the course of the referendum vote preferences during the period after the November 1st 2015 General Election, as well as the period after the July 15th 2016 Coup Attempt.

Similarly, we are able to observe a similar change in some graphs after November’16. This is mainly to the fact that the question about the referendum on the presidential system was directed to the respondents for the purpose of evaluating the general political outlook, and the findings were presented without any weighting, our preference to do so was based on our intention at the time, which was not to make an accurate prediction on the referendum results, but to observe the course of opinion on this issue over time. Therefore, starting with the November’16 Barometer, we have decided to calculate the findings on political preferences by utilizing the same KONDA methods used for calculating political preference rates.

In this section, we will be observing the distribution of referendum vote preferences, in respective order, by age, educational attainment, perceived welfare status, lifestyle cluster, ethnic identity and sect.

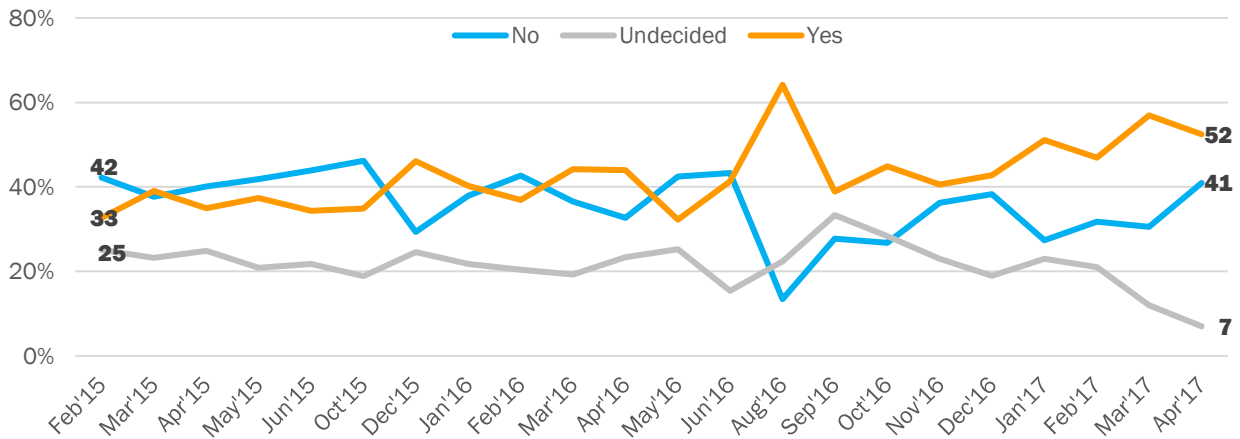
3.5.1. Referendum vote preference by settlement unit

The Coup Attempt led to the greatest change in vote preference among rural residents

Preference for the “yes” vote among rural residents started out 8-points ahead, but finished by 11-points behind. The rate of the “yes” vote, which we observed to fall from 40 percent before the Coup Attempt, to 30 percent in its aftermath, then recovered most of its losses after the campaigning process was launched, and finished the race above 50 percent.



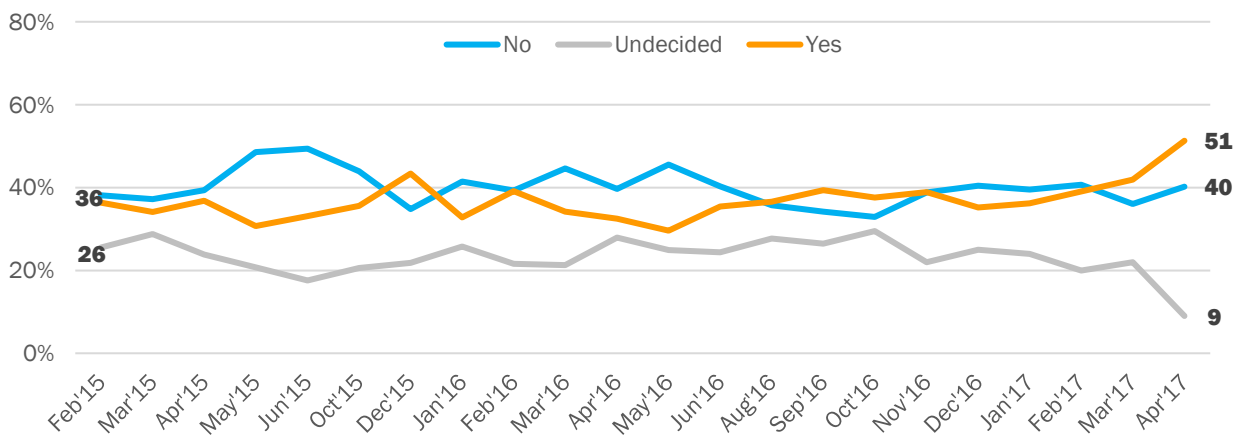
Course of referendum vote preference of rural residents



“Yes” and “no” started out from the same level in urban areas

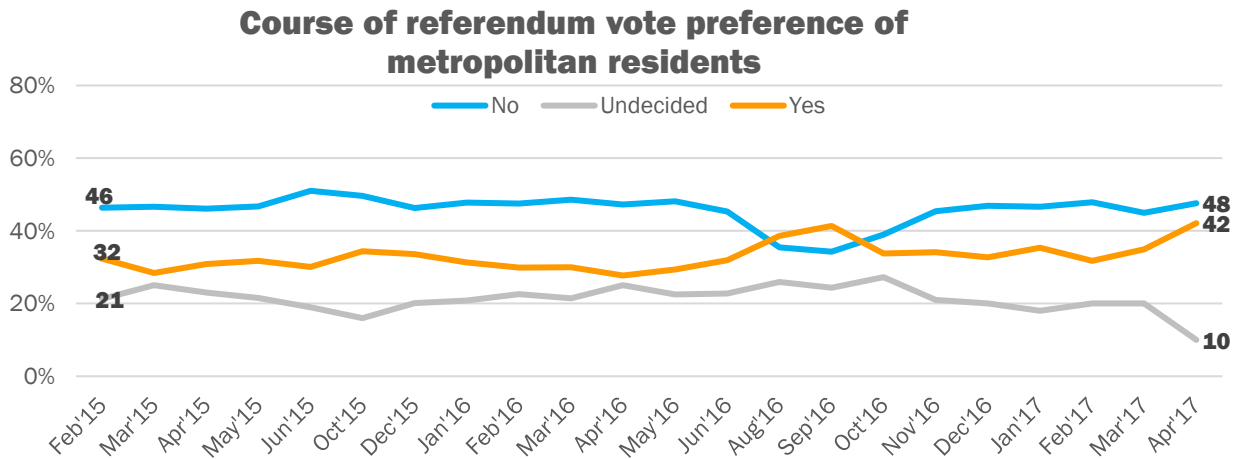
“Yes” and “no” started out from nearly the same level in urban areas. However, we observe the real change after the referendum date was announced. The balance between the “yes” and the “no” vote, which was head-to-head at the end of 2016, changed in favor of the “yes” vote, with the shift observed among swing voters, and led to a difference of 11 points.

Course of referendum vote preference of urban residents



“No” started out and finished in the lead in metropolitan areas “Yes” closed in on “No” towards the end

The “no” vote started out with a 14-point lead in metropolitan areas, and maintained the difference with the “yes” vote nearly consistently until the Coup Attempt. Then, we the “yes” vote to overtook the “no” for the first time in the aftermath of the Coup Attempt. However, with the dying out of the mood instilled by the Coup Attempt, the “no” vote regained its losses, and finished at the level it had started out. In the meantime, “yes” started out significantly behind, and finished the difference with “no” to single digits just before the referendum.



3.5.2. Referendum vote preference by age

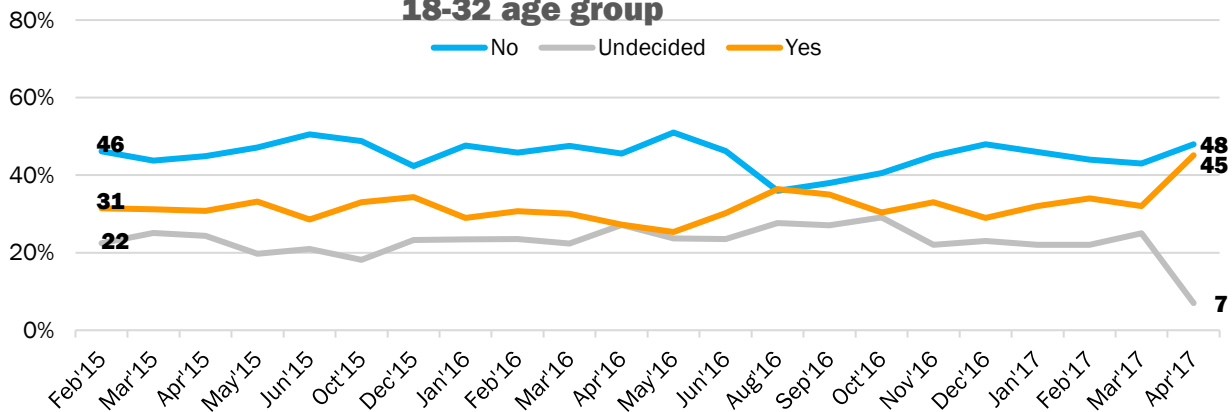
“Undecided” voters among young people shifted to “yes” before the referendum

When we first started to inquire about the referendum in February’15, preference for “yes” stood at 30 percent, while preference for “no” was around 50 percent among the 18-32 age group. While the rate of the “no” vote remained more or less the same until the Coup Attempt, it went through a sharp decline of 15 points after the Coup Attempt. However, the last research we have conducted before the referendum shows that preference for the “yes” vote and preference for the “no” vote finished off the referendum process at levels where they had started out from. Similarly, we observe that the rate of the “yes” vote increased significantly after the Coup Attempt, but the real increase took place just one month before the referendum, with the shifting of the undecided voters to the “yes” vote.

Although it is not included in the graph below, when we analyze the referendum vote preference among the young people, who were not eligible to vote in the November 1st 2015 General Election due to their age, and who voted in the referendum for the first time, we see 34 percent of these young people were in favor of “no” and 45 percent were in favor of “yes” just before the referendum. 21 percent stated that they were “undecided”.



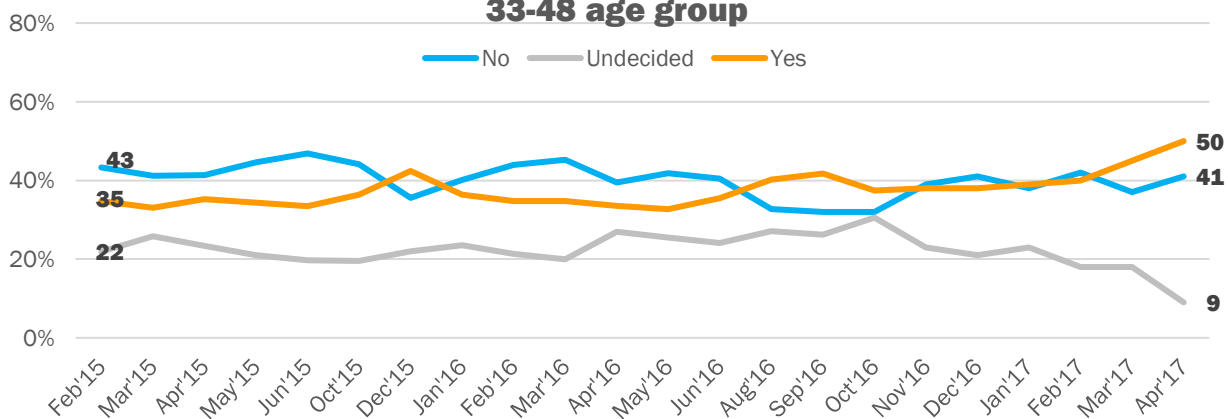
Course of referendum vote preference of the 18-32 age group



The middle-aged display a similar trend with the young people, but preference for “yes” surpassed preference for “no” among this age group

Preference for “no” started out in the lead among the 33-48 age group. We first observed a decline after the November 1st General Election, followed by a further decrease in preference for “no” after the Coup Attempt. However, after it became certain that the referendum would be held, preference for voting “no” recovered some of its losses, and finishing at a level that is close to where it was in February 2015. On the other hand, preference for “yes” came from behind to close the gap with preference for “no”, first after November 1st, and then, to a greater degree after the Coup Attempt. In 2017, the rate of “undecided” voters decreased from 20 percent to 10 percent, while preference for “yes” increased by 10 points.

Course of referendum vote preference of the 33-48 age group

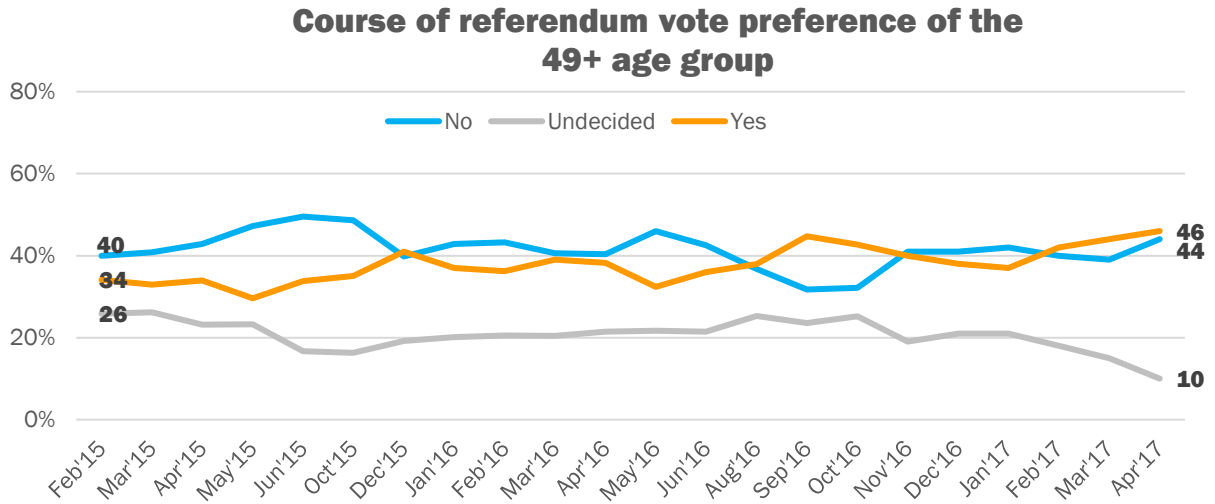


Preference for “yes” and “no” is head-to-head among the 49+ age group

Similar to the other age groups, preference for “no” was in the lead among the 49+ age group, but “yes” trailed from behind to close the gap. As it was the case with the other age groups, preference for “no” decreased after the November 1st General Election,



and then particularly after the Coup Attempt, while the rate of “undecided” voters increased in the meantime. After the referendum date was set, “undecided” voters shifted to the “yes” and the “no” vote at similar rates.



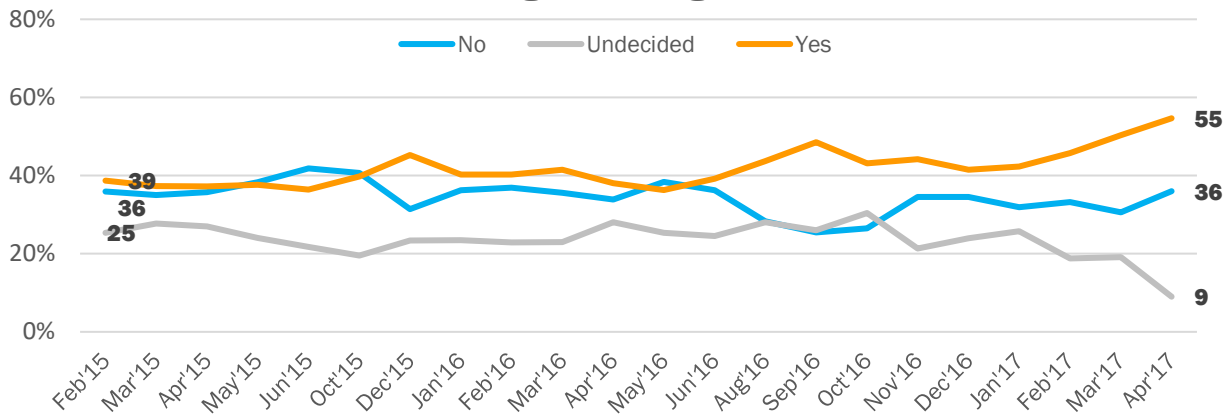
3.5.3. Referendum vote preference by educational attainment

Among less than high school graduates, preference turned towards “yes” after the Coup Attempt

When we analyze the course of referendum vote preference among those with an educational attainment of less than high school, we first notice that preference for voting “yes” increased rapidly after the date of the referendum was announced, while the rate of “undecided” voters diminished. Preference for the “yes” vote started out at within the 40-percent band and finished within the 50-percent band, while preference for the “no” vote finished where it had started out in February 2015, when we first started to ask respondents about their referendum vote preference. However, during the last quarter of 2016, preference for “yes” was in decline, while preference for “no” was on the rise. Therefore, we may claim that President Erdoğan was able to convince those with an educational attainment of less than high school about the transition to the presidential system.



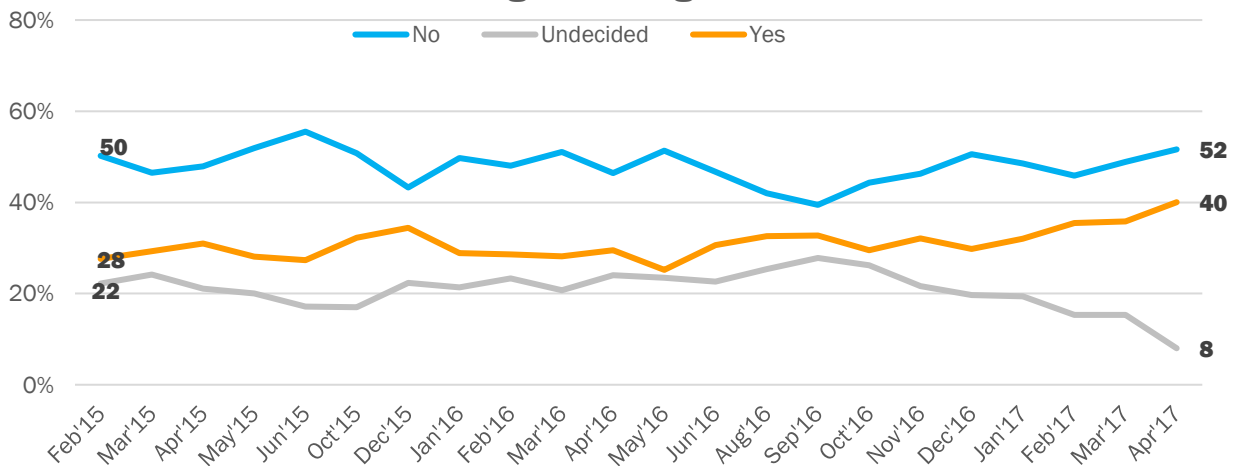
Course of referendum vote preference of less than high school graduates



Preference for “no” was always in the lead among high school graduates, but its overall rate did not change

When we observe the course of referendum vote preference among high school graduates, we again see that preference for “no” finished where it had started out in February 2015, when we first started to inquire about referendum vote preference. Again, preference for “yes” started to gain strength at the beginning of 2017, and at the end, it has increased by more than 10 points since when we first started to ask about the respondents’ vote preference in the referendum. Nevertheless, the “yes” camp was not able to close the gap with the “no” camp, which was nearly 10 points.

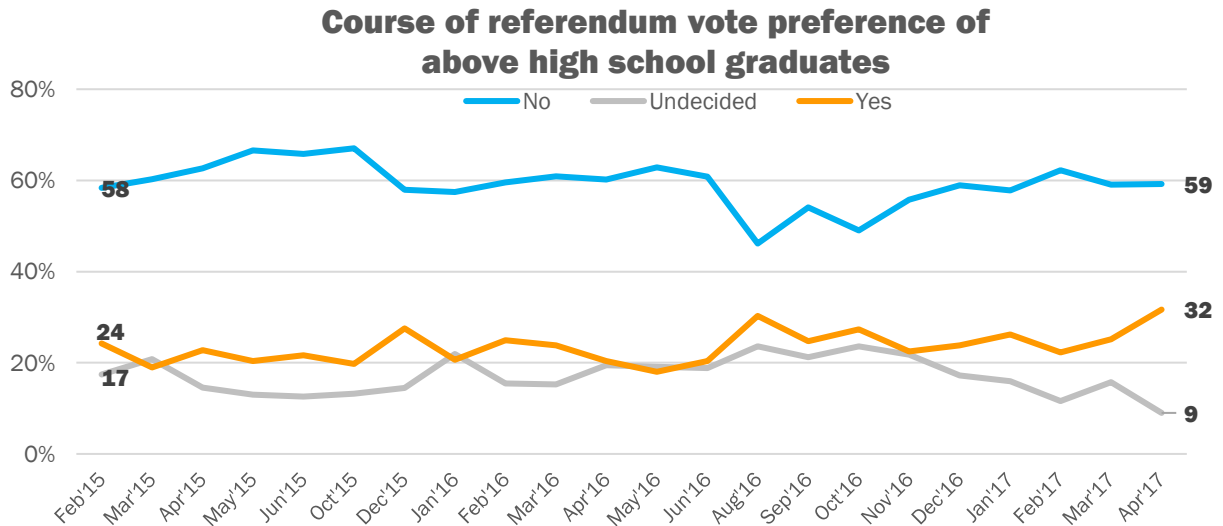
Course of referendum vote preference of high school graduates





Above high school graduates' preference for "no" has been in the lead by far from the very start

An examination of the course of referendum vote preference among above high school graduates shows that the difference between "no" and "yes" was too great to be closed from the very start. Preference for "no", which started out around 60 percent finished the referendum marathon at around the same level among this educational attainment group. The rate of the "yes" vote increased notably in the last two months, but it was barely able to exceed 30 percent.



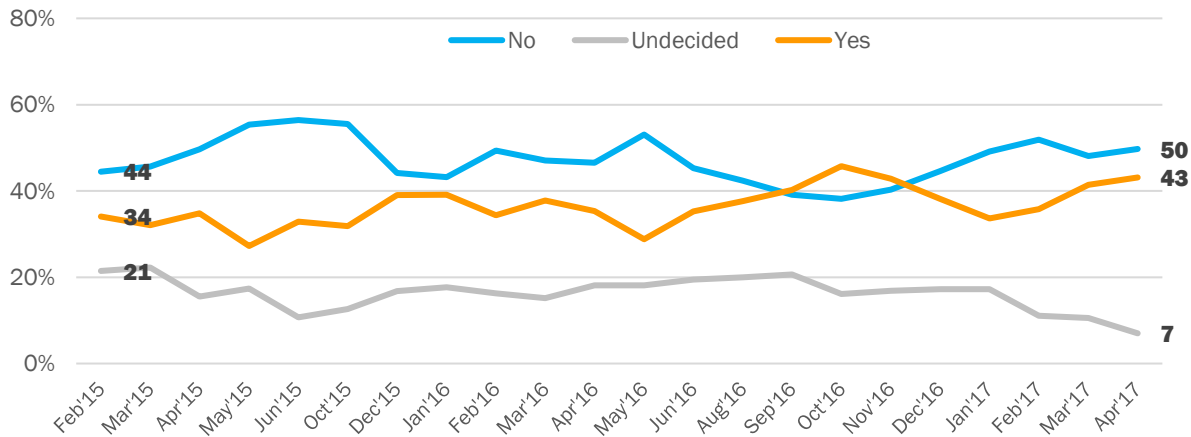


3.5.4. Referendum vote preference by employment status

Preference for both “yes” and “no” increased towards the referendum date

Preference for both “yes” and “no” followed a fluctuating course among the retired, but preference for “no” prevailed over preference for “yes” in general. Although preference for “yes” took the lead briefly after the Coup Attempt, it followed a downward trend towards the end of the year. With the impact of the referendum campaigns, preference for “yes” started to climb again in January’17, it was not able to catch up with “no” at the end.

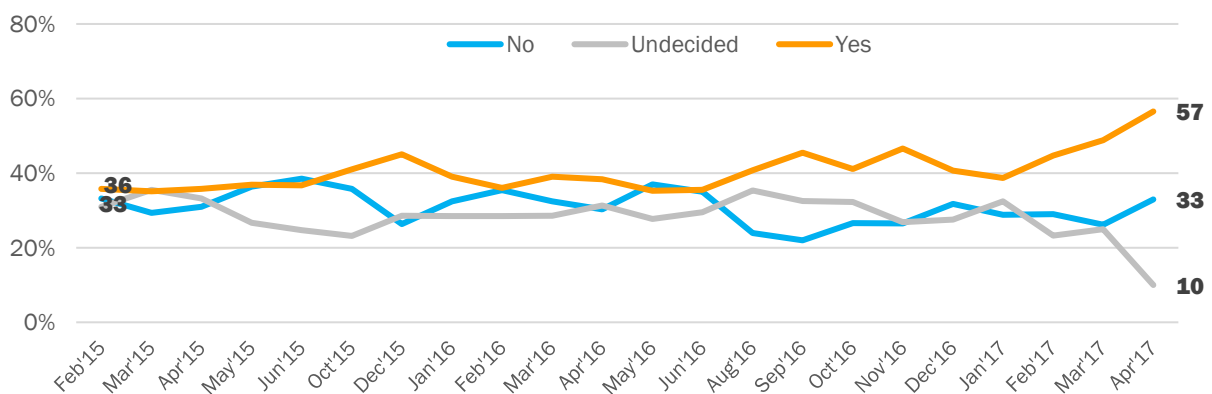
Course of referendum vote preference of the retired



Undecided housewives shifted to the “yes” camp

The preference of housewives, which is the largest employment group, making up for one third of the adult population, determines the tone and the course of politics in Turkey in a way. The graph below demonstrates that preference for “yes” and preference for “no” started the referendum marathon at around similar rates, while preference for “yes” increased sharply, first after the Coup Attempt, and then after the announcement of the referendum date. The rate of “undecided” housewives decreased as sharply, as they shifted to the “yes” camp.

Course of referendum vote preference of housewives

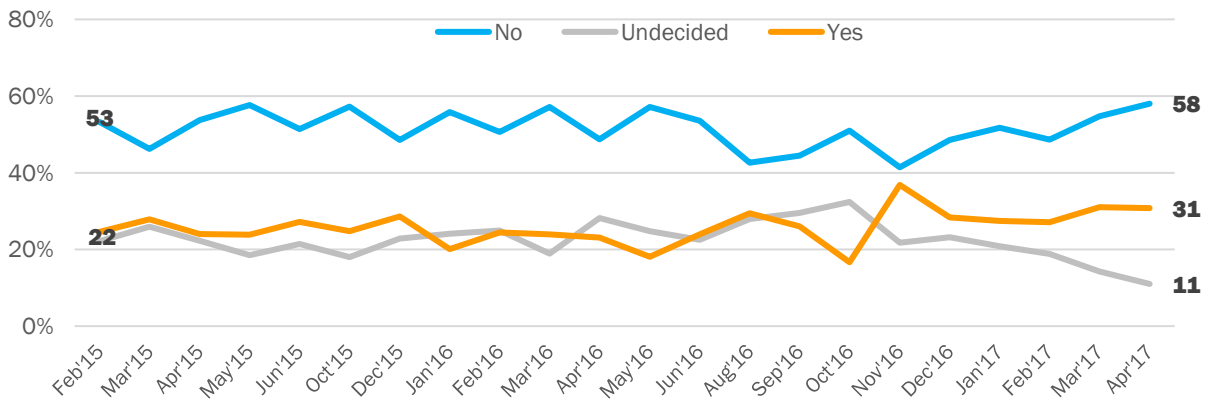




Preference for “yes” remained the same among students towards the referendum date

When we observe the course of referendum vote preference among students, we see that the rate of the “yes” vote remained more or less fixed after the date of the referendum was announced. Preference for both “yes” and “no” gained 5-6 points since we first started inquiring about referendum vote preference, but at the end, preference for “no” prevailed by finishing at a level close to 60 percent.

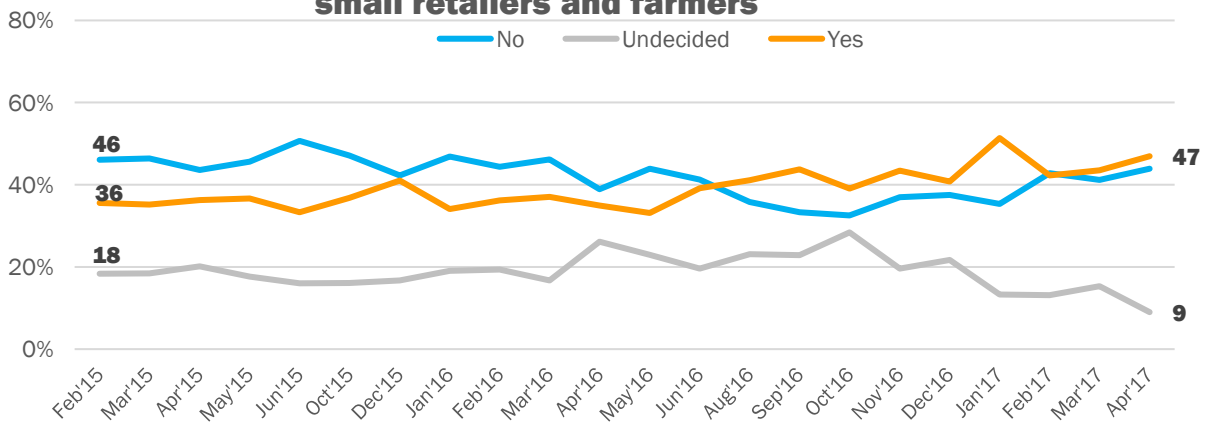
Course of referendum vote preference of students



Workers, retailers and farmers were divided

Workers, retailer and farmers started out by a stronger preference for “no”, and their final preference remained at the same level. Preference for “yes” trailed from behind among this employment group to catch up with the “no” vote after the Coup Attempt. Therefore, we would not be able to state that workers, retailers and farmers have a distinctly different referendum vote preference.

Course of referendum vote preference of workers, small retailers and farmers

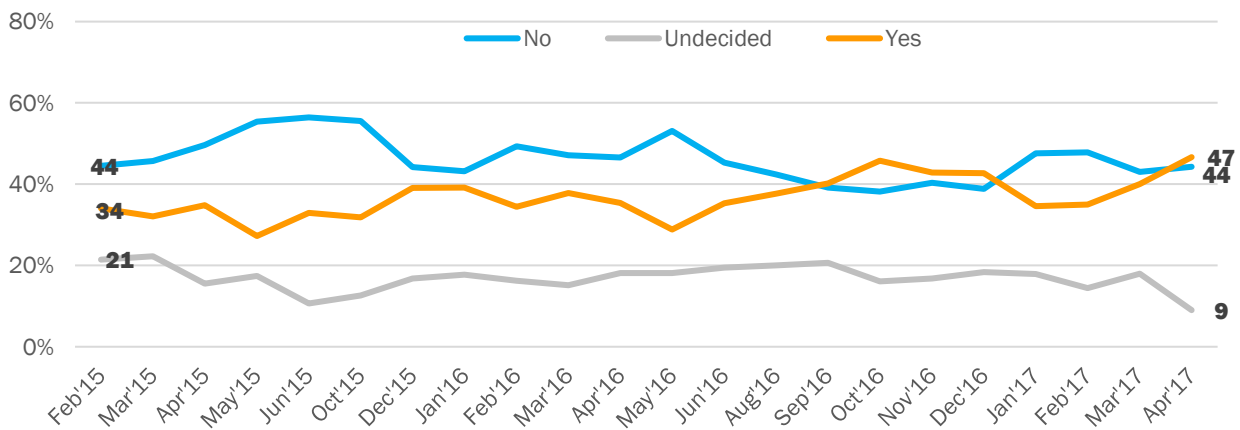




Preference for “yes” and “no” equalized towards the referendum

Whether civil servants were candid in revealing their referendum vote preference to the pollsters was a topic of debate before the referendum. As shown in our graph, preference for “no” started out in the lead among civil servants, but preference for “yes” gained a slow upward momentum in the aftermath of the Coup Attempt and caught up with preference for “no” by March 2017. We are able to observe that the greatest factor that shaped this outcome was the shift in the preference of “undecided” voters to “yes” towards the actual referendum date. The rate of “undecided” civil servants decreased in the last two months before the referendum, while the rate of “yes” voters increased and overtook the rate of “no” voters among this group.

Course of referendum vote preference of civil servants

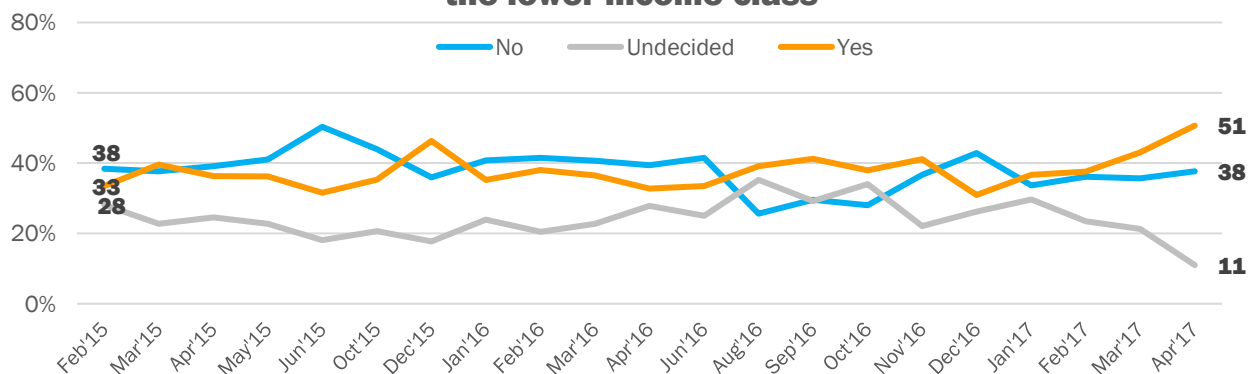


3.5.5. Referendum vote preference by income level

Lower income groups shifted to the “yes” vote after the referendum date was set

The graph below mainly shows the fluctuating course of the “yes” vote and the “no” vote among the lower income groups. The rate of “undecided” voters decreased by more than 20 points between January-April 2017, while preference for “yes” increased by 15 points during the same period.

Course of referendum vote preference of the lower income class

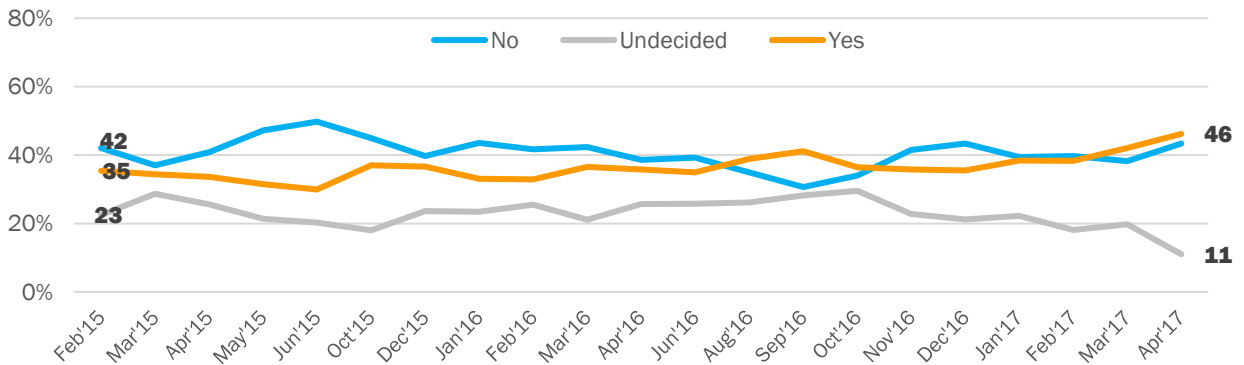




“Yes” and “no” followed a head-to-head course and “yes” won by a neck among the lower-middle class

We observe less fluctuation in the referendum vote preference of the lower middle class, in comparison to the lower income group. However, it should also be noted that the impact of the Coup Attempt on both the “yes” and the “no” camp is visible in the graph: the rate of “no” decreased, while the rate of “yes” increased. We see that the “yes” and the “no” vote became equal by January’17. “Undecided” voters were divided into nearly equally into the “yes” and the “no” camp, but at the end, the “yes” vote won by a neck.

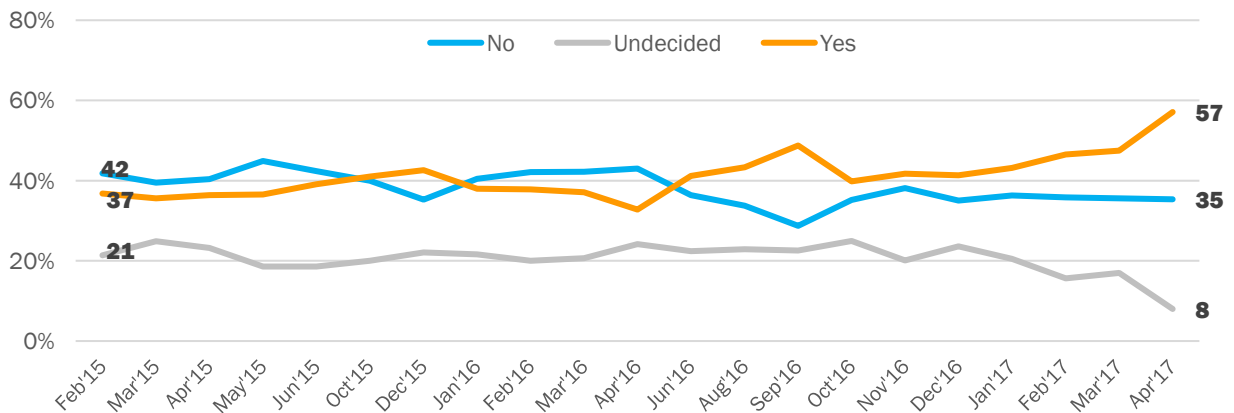
Course of referendum vote preference of the lower middle class



The new middle class made up its mind after the Coup Attempt

Until the Coup Attempt, preference for “yes” and “no” followed a parallel course, but the wind changed in favor of the “yes” vote in the summer of 2016. The fact that the rate of “undecided” voters remained more or less the same until four months before the referendum among the new middle class shows that the “yes” camp gained votes not from the “undecided” voters, but from the “no” voters. We also observe that after the date of the referendum was set, the “undecided” voters slowly became convinced of voting “yes”. On the other hand, the “no” camp finished the referendum marathon 7 points below where it started.

Course of referendum vote preference of the new middle class

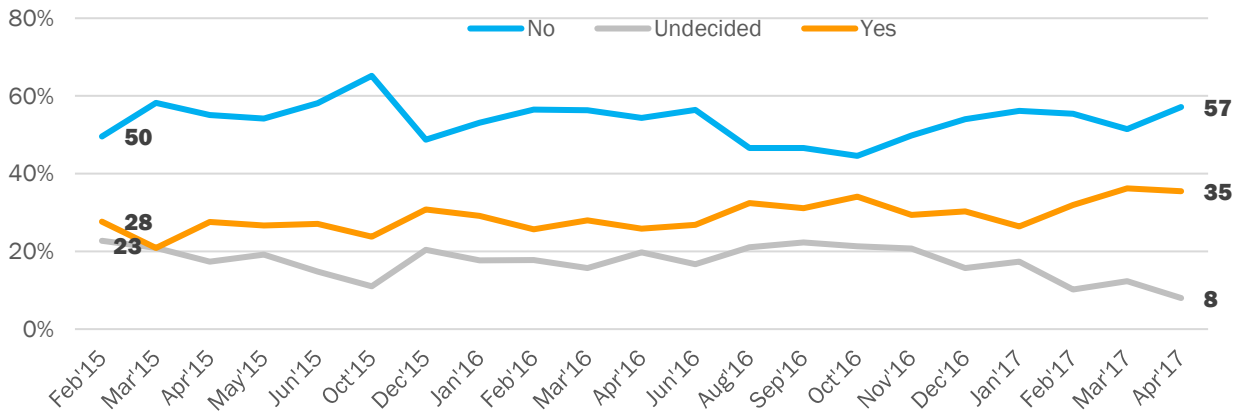




“No” won by a landslide among the higher class

Preference for “no” was always in the lead among the higher class. As it is case with other groups, there is an increase in preference for “yes” and a decrease in preference for “no” among this group, after the Coup Attempt. However, this change was more limited among this group in comparison to the other groups. As of the end of 2016, the “no” vote recovered back to its initial level, and appeared to have convinced “undecided” voters one month before the referendum. The fact that the “yes” vote did not fluctuate between March and April 2017 confirms this finding.

Course of referendum vote preference of the higher class

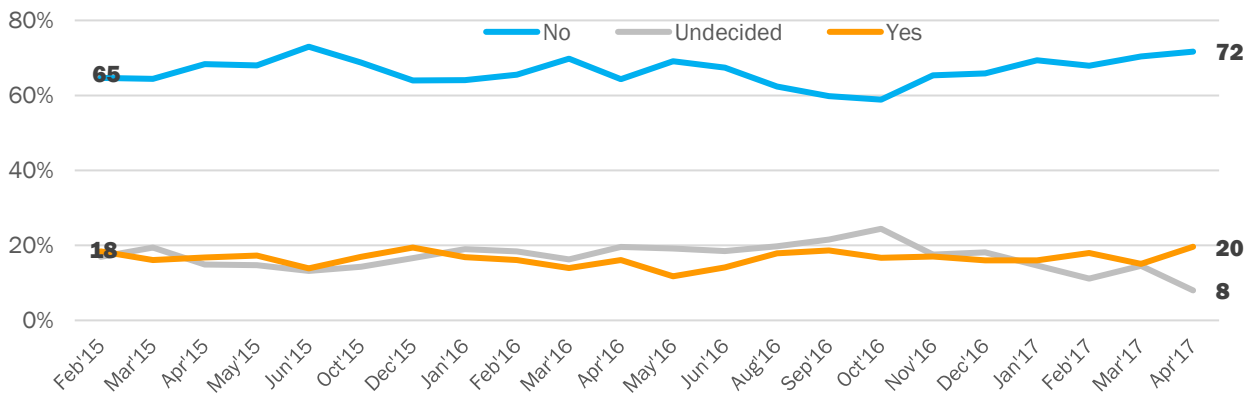


3.5.6. Referendum vote preferences by lifestyle clusters

Moderns did not change their referendum preferences

Referendum vote preference did not change at all for those in the Modern lifestyle cluster. As it is the case in all the other lifestyle clusters, preference for the “no” vote decreased by nearly 10 points after the Coup Attempt, but then regained its losses towards the end of 2016. On the other hand, the rate of “undecided” voters decreased in favor of the “yes” vote. Nevertheless, the “yes” vote did not exceed 20 percent among Moderns.

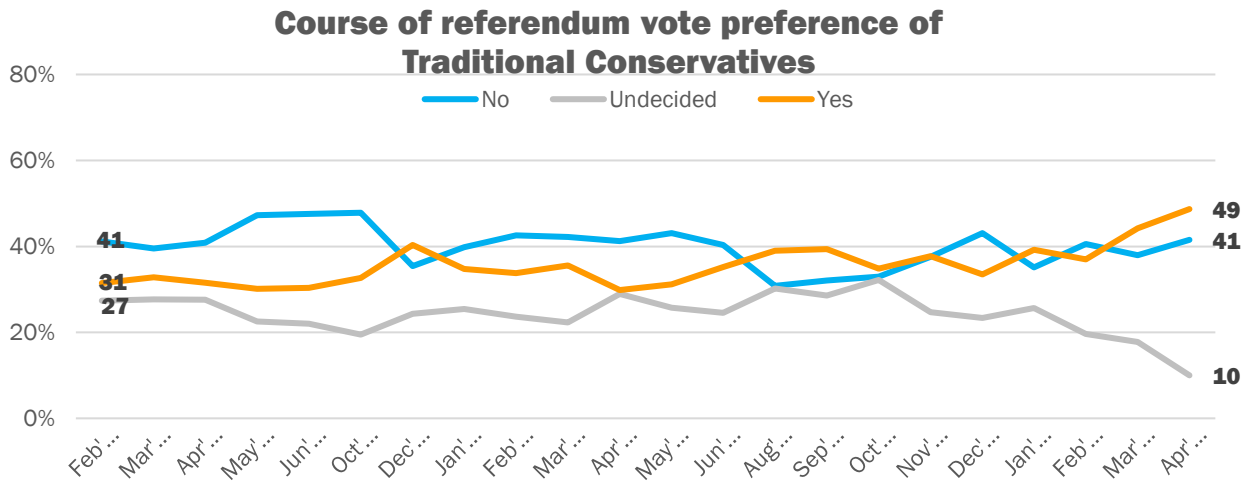
Course of referendum vote preference of Moderns





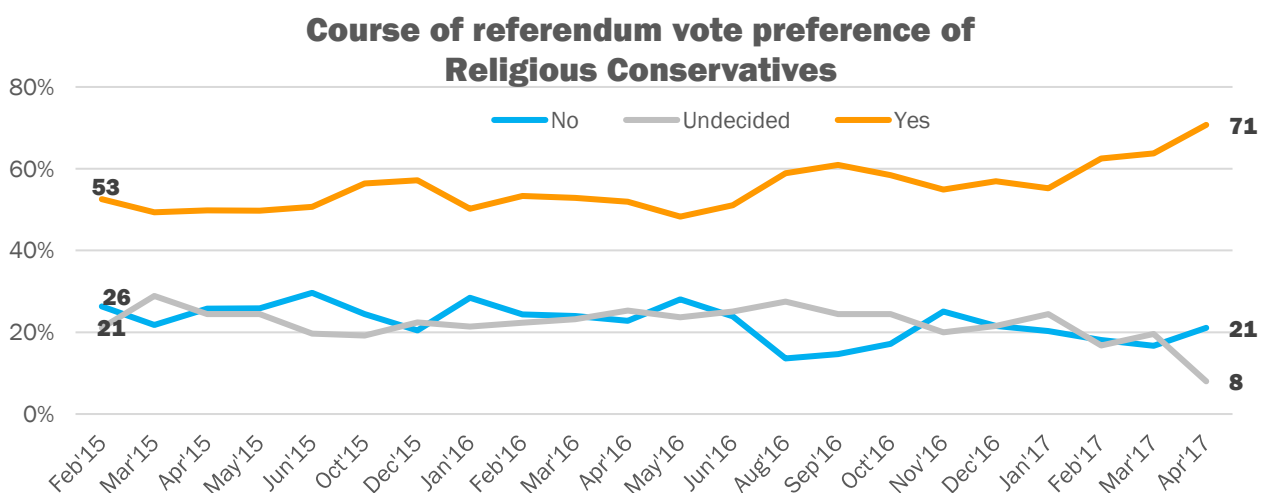
Traditional Conservatives made their decision at the very last moment

Referendum vote preference was the most ambiguous among Traditional Conservatives during the 2-year period. In this lifestyle cluster, whose members identify themselves as “moderate” in terms of their political views, the “no” vote was in the lead until the Coup Attempt, but the wind changed in favor of the “yes” vote after summer 2016. We may argue that the rapid decline in the rate of “undecided” voters towards the referendum led to an increase in the rate of preference for voting “yes”. The rate of the “yes” vote reached the 50-percent level for this lifestyle cluster, while preference for “no” remained suspended around 40 percent.



One out of every five Religious Conservatives made up their mind after the Coup attempt

We observe that one out of every two Religious Conservatives stated that they would vote “yes” since February’15, when we first started asking this question, and preference for the “yes” vote never fell below this level after this date. However, during the “10-month period between the Coup Attempt and the referendum, “undecided” voters, who accounted for 20 percent of all voters initially, gradually joined the “yes” camp.



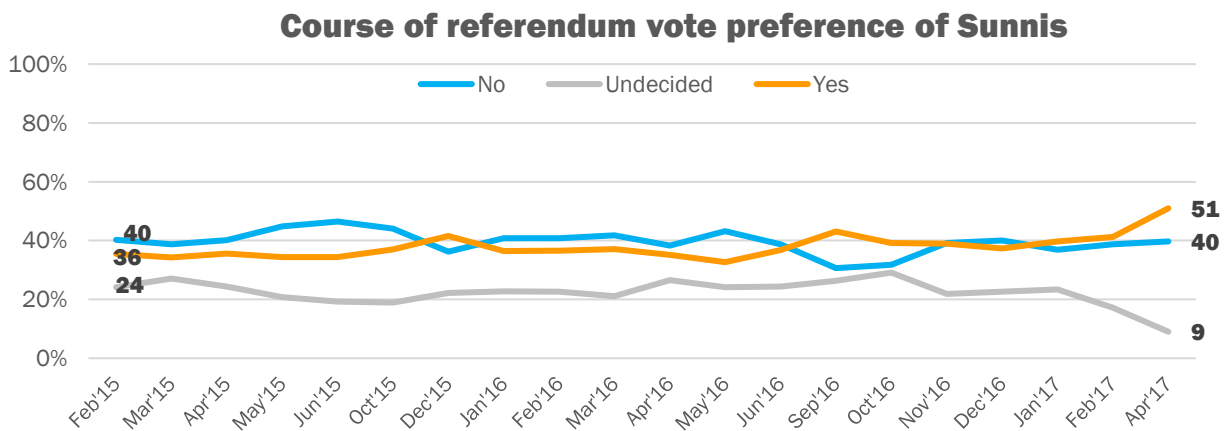


3.5.7. Referendum vote preference by sect

Preference for “yes” took the lead by a great distance among Sunnis in the last month

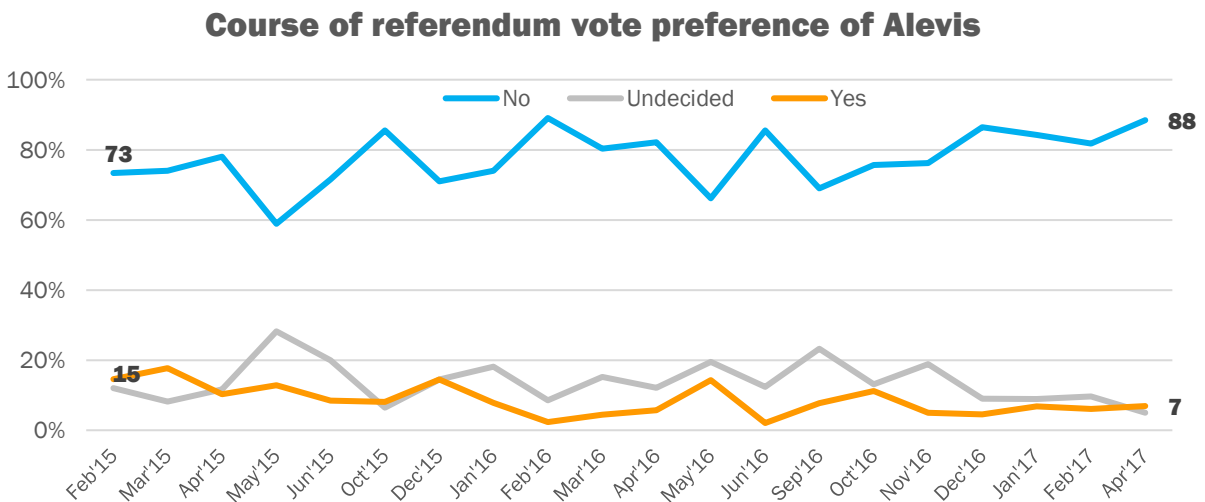
The fluctuation in preference for “yes” or “no” among Sunnis should not be taken into consideration independently of politics in Turkey. The rate of the “no” vote among this group increased until the November 1st 2015 General Election, and then followed a downward trend thereafter, but maintained its lead until the July 15th 2016 Coup Attempt. After the Coup Attempt, the rate of the “no” vote decreased, accompanied by an increase in the rate of the “yes” vote. By 2017, preference of “undecided” voters shifted in favor of the “yes” vote, while preference for the “no” vote stayed around 40 percent, which was its initial level.

Since we did not inquire about sect during the period between August 2016 and March 2017, the following graphs do not include data for these months.



Alevis remained resolute of their preference from the very start to the end

Alevis are the social group with the strongest support for the “no” vote, with a preference reaching 90 percent. Their opinions did not change since the beginning, and preference for “yes” remained around 10 percent.

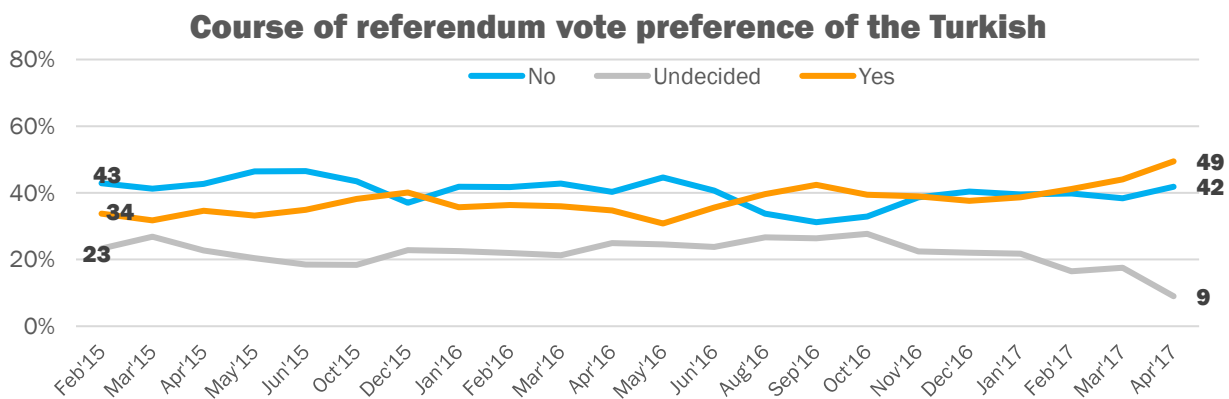




3.5.8. Referendum vote preference by ethnic identity

The Turkish and Sunnis are similar to each other in terms of their referendum vote preference: “yes” overtook “no” by a landslide in the last month

As it is the case with Sunnis, preference for “no” among the Turkish grew stronger until the November 1st General Election, and followed a downward trend thereafter, but maintained its lead until the July 15th Coup Attempt. Then, the rate of the “no” vote among the Turkish further declined, while the rate of the “yes” vote increased, the rate of “undecided” voters decreased in an inversely proportional manner. By 2017, preference of “undecided” voters shifted in favor of the “yes” vote, while preference for the “no” vote stayed around 40 percent, which was its initial level. It appears that preference for “Yes” climbed from around 30 percent to the 50-percent level during the two-year period.

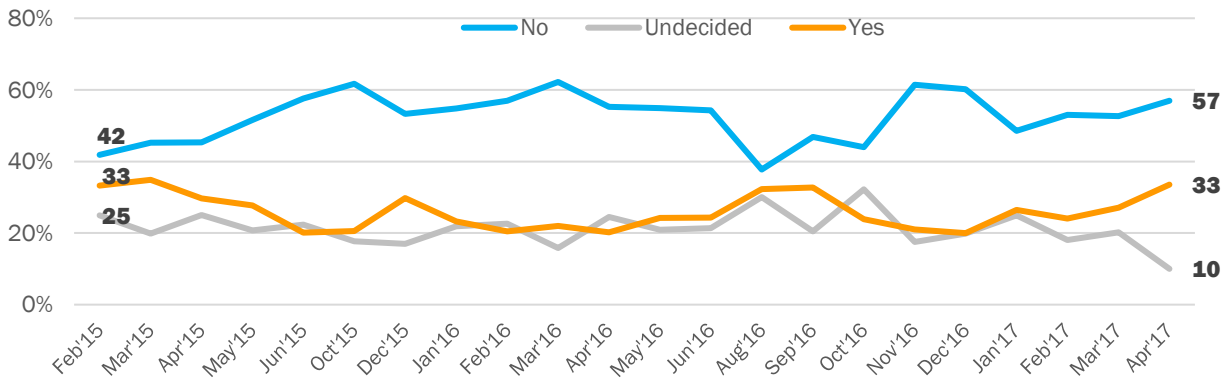


Preference for “yes” did not change among the Kurdish, while preference for the “no” vote reached 60 percent

Although preference for the “yes” vote presented a fluctuating course over the 2-year period since February’15 among the Kurdish, it returned to where it initially was by April’17. On the other hand, preference for the “no” vote increased from 40 percent to 60 percent during the same period. Similarly, as it is the case among all the other demographic and social clusters, there was a significant decline in the rate of the “no” vote after the Coup Attempt, which then recovered its losses by the end of 2016. After January’17, the rate of “undecided” voters decreased to a great extent in favor of the “yes” vote, and to a lesser extent in favor of the “no” vote.



Course of referendum vote preference of the Kurdish



Starting with the eve of the June 7th 2015 General Election, many developments, including the halting of the peace process, the June 7th and the November 1st General Elections, PKK's relaunching of its terror campaign, the lifting of parliamentary immunities, the persecution and the arrest of HDP MPs and members, and the developments in Syria, has led to a change in the basic characteristics of referendum vote preference among the Kurdish during the last two years.

3.6. The Course of the Distribution of Yes / No by Political Party Preference

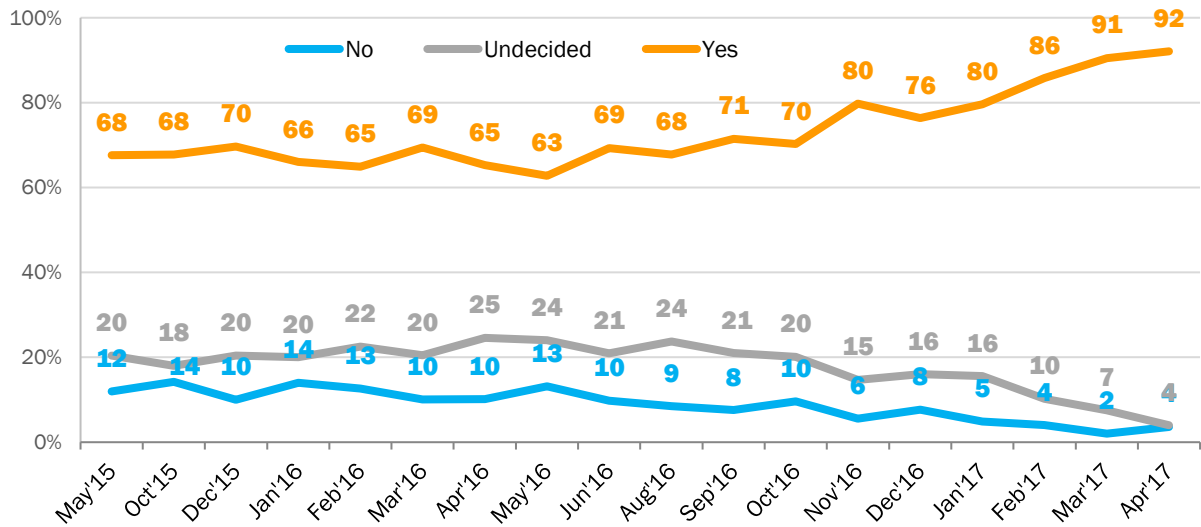
In this section, we will be analyzing the course of referendum vote preference by political party preference. As noted in the earlier section, we observe significant changes in the responses after the referendum date was announced. In addition, we also come across significant changes after the November 1st General Election and after the July 15th Coup Attempt. The most significant point we should emphasize in relation to political parties is that referendum vote preference was pretty much consolidated among Ak Parti, CHP and HDP voters on the eve of the referendum, as we observe that the overwhelming majority of these party voters have focused on one of the two vote options. On the other hand, we observe that MHP voters were divided into two before the referendum.

President Erdoğan's campaign worked: Undecided Ak Parti voters voted "yes"

The overwhelming majority of Ak Parti voters have been pointing out that they would vote "yes" since the very beginning. However, preference for the "yes" vote, which stood around 70 percent at the beginning of 2015, surpassed 90 percent just before the referendum. It should be noted that even in the aftermath of the Coup Attempt, one out of every four Ak Parti voters were saying that they were "undecided" about their referendum vote preference. We are able to observe that President Erdoğan's referendum campaign has been effective on his own base during the last 9 months. The rate of undecided Ak Parti voters decreased to as low as 4 percent before the referendum, while preference for "no" among the party voters diminished to near non-existence.



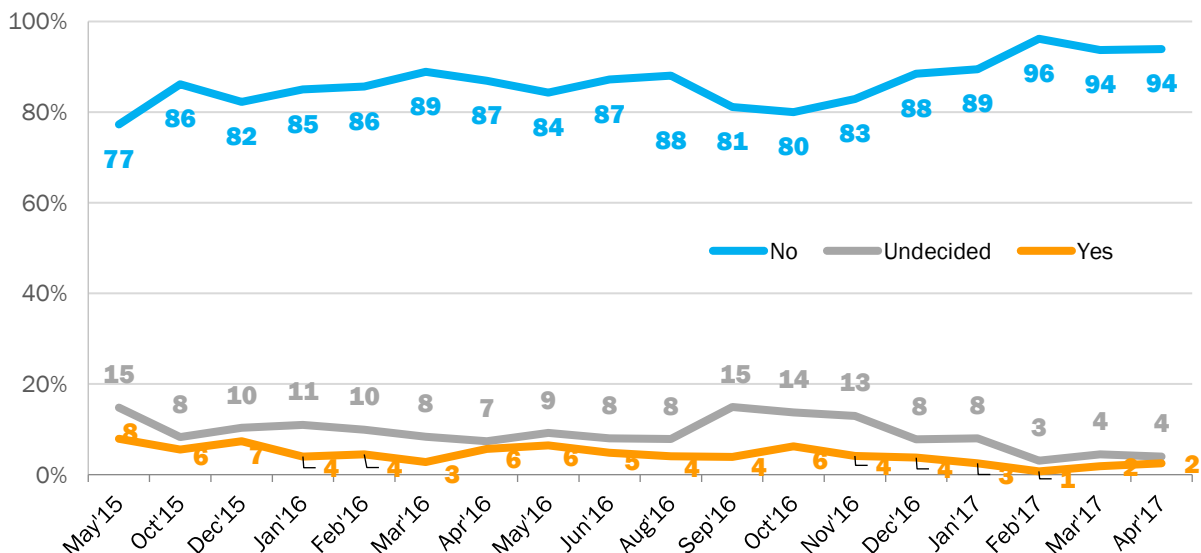
Course of referendum vote preference of Ak Parti voters



Around 90 percent of CHP voters opted for “no”

Similar to Ak Parti voters, CHP voters have also been determined about their vote preference since the very beginning. Although the rate of “undecided” voters increased to 15 percent after the Coup Attempt, this rate dwindled to 4 percent just before the referendum among CHP voters, in a similar fashion to Ak Parti voters. The rate of CHP voters stating that they would vote “yes” also decreased to a negligible level.

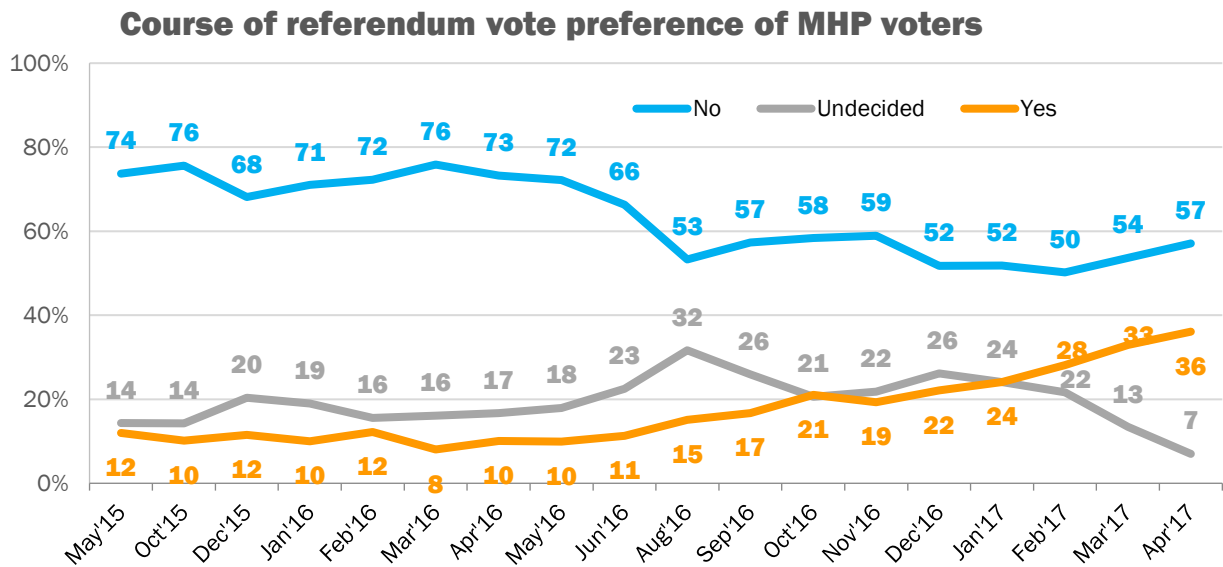
Course of referendum vote preference of CHP voters





“Undecided” MHP voters also shifted to “yes”

In the run-up to the referendum, how MHP voters would react was the main question on everyone’s mind. Approximately two years ago, 3 out of 4 MHP voters stated that they would vote “no”, but then there was a decline in this rate after the Coup Attempt. We also observe that the rate of the “yes” vote increased incrementally after the Coup Attempt, to climb from 15 percent to 30 percent. As a result, it is difficult to assert that the support provided to the “yes” camp by Devlet Bahçeli was directly reflected in the referendum vote preference of MHP voters, just by looking at this graph.

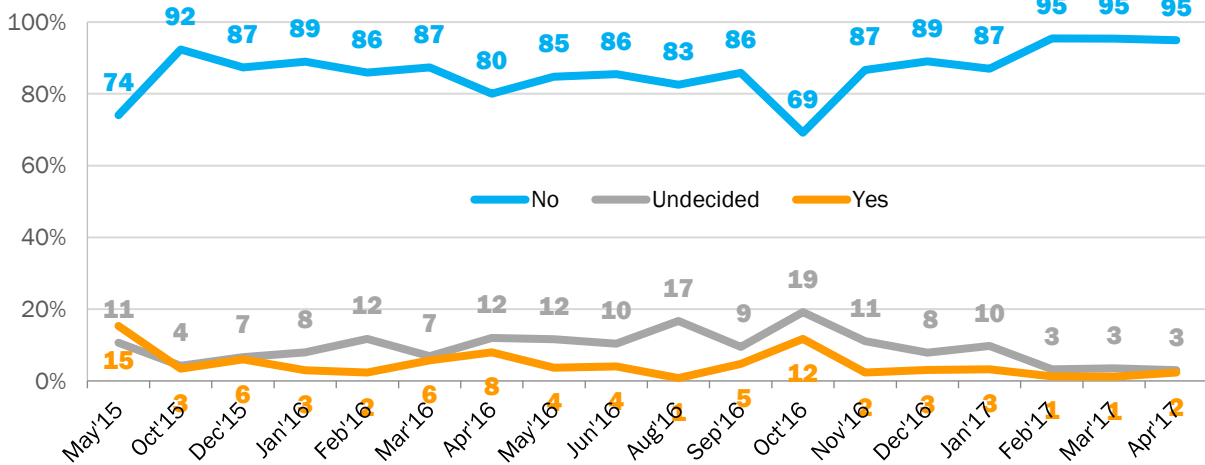


The overwhelming majority of HDP voters preferred to vote “yes”

Similar to MHP voters, how HDP voters would react at the ballot box was a main topic of debate before the referendum. However, the graph below clearly demonstrates that more than 90 percent of HDP voters were inclined to vote “no” just before the referendum. The rate of “undecided” HDP voters remained at 3 percent, and preference for “yes” stood at only 1 percent.



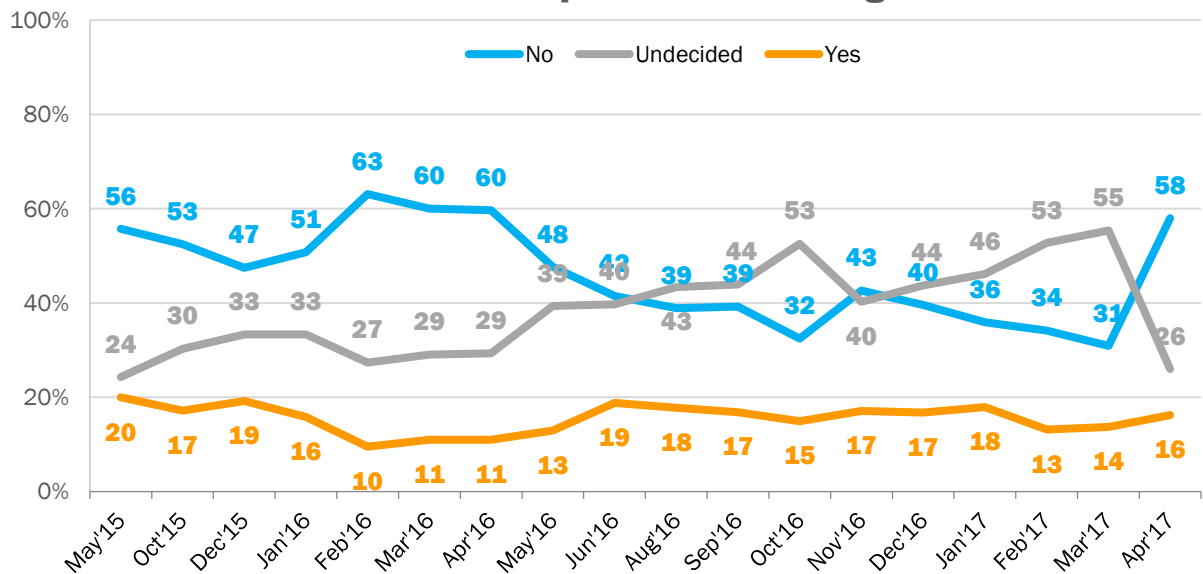
Course of referendum vote preference of HDP voters



One fourth of the swing voters changed their mind in favor of the “no” vote before the referendum

Although there have been slight fluctuations in the rate of swing voters in general elections who stated that they would vote “yes” in the referendum over time, we also observe that this rate did not change greatly, as attested by the time series. In March 2015, one out of every two swing voters was also undecided about their referendum vote decision, while we observe that half of these changed their mind in favor of the “no” vote, just one week before the referendum. This rate corresponds to the sharpest shift observed among all party voter groups.

Course of referendum vote preference of swing voters

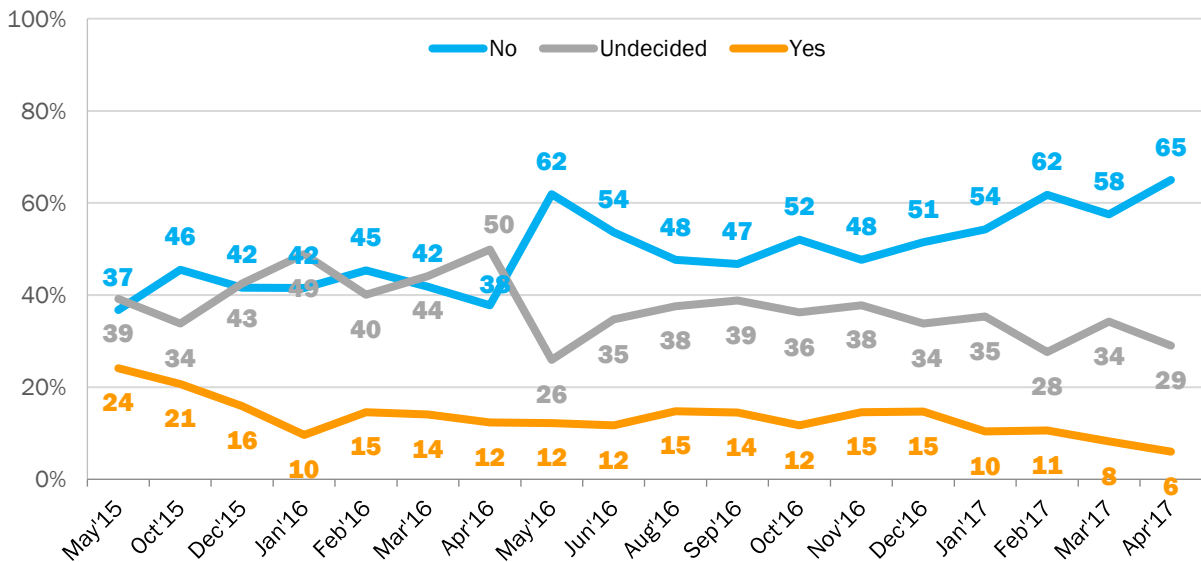




The majority of the voters who stated that they would not vote were inclined to vote “no” before the referendum

The rate of those who stated that they would be voting “yes” in the referendum among non-voters in general elections decreased particularly after November 1st, and then followed a gradual downward trend over 2016. We notice that the real change took place among non-voters in general elections who stated that they would be voting no in the referendum. Among those who stated that they would not be going to the polls in a hypothetical general election, the rate those who were considering of voting “no” in the referendum and the rate of those were “undecided” about their referendum vote preference were more or less the same at the beginning of 2015. Just before the referendum, the rate of these “undecided” voters fell by 5 points, while the rate of those considering of voting “no” increased by 7 points.

Course of referendum vote preference of non-voters





4. RESEARCH ID

4.1. Overall Description of the Survey

The surveys 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 April 8th-9th, 2017. This report presents the political trends, preferences and profiles of the adult population above the age of 18 in Turkey, as observed on the dates of the field survey.

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 18 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.

4.2. The Sample

The sample was selected through stratification of the data on population and educational attainment level of neighborhoods and villages based on the Address Based Population Registration System (ADNKS), and the results of the November 1st 2015 General Election in neighborhoods and villages.

First, the administrative units were grouped as rural/urban/metropolitan, and then the sample was created based on the 12 regions.

Within the scope of the survey, 3555 respondents were interviewed face-to-face in 199 neighborhoods and villages of 129 districts - including central districts - of 30 provinces.

Provinces visited	30
Districts visited	129
Neighborhoods/villages visited	199
Number of respondents	3555

Age and gender quotas were used in the 18 surveys conducted in each neighborhood.

Age group	Women	Men
Between 18-32	3 respondents	3 respondents
Between 33-48	3 respondents	3 respondents
49 or above	3 respondents	3 respondents



	Level 1 (12 regions)	Provinces visited
1	İstanbul	İstanbul
2	Western Marmara	Balıkesir, Edirne, Tekirdağ
3	Aegean	Denizli, İzmir, Kütahya, Uşak
4	Eastern Marmara	Bursa, Kocaeli, Eskişehir
5	Western Anatolia	Ankara, Konya
6	Mediterranean	Adana, Antalya, Hatay, Mersin
7	Central Anatolia	Kayseri, Sivas
8	Western Black Sea	Samsun, Tokat
9	Eastern Black Sea	Trabzon
10	Northeastern Anatolia	Erzincan, Erzurum
11	Middle Eastern Anatolia	Malatya, Van
12	Southeastern Anatolia	Diyarbakır, Gaziantep, Şanlıurfa, Mardin

The distribution of respondents according to the regions and place of residence is shown in the table below.

	Survey location	Rural	Urban	Metropolitan	Total
1	İstanbul			20.1%	20.1%
2	Western Marmara	1.5%	2.0%	1.0%	4.6%
3	Aegean	2.5%	7.1%	5.0%	14.6%
4	Eastern Marmara	1.5%	2.5%	5.6%	9.6%
5	Western Anatolia	0.5%	2.0%	7.0%	9.5%
6	Mediterranean	1.9%	5.6%	5.6%	13.0%
7	Central Anatolia	0.8%	2.0%	1.5%	4.2%
8	Western Black Sea	2.1%	3.0%	0.5%	5.6%
9	Eastern Black Sea	1.0%	2.0%		3.0%
10	Northeastern Anatolia	1.2%	0.8%		2.1%
11	Middle Eastern Anatolia	1.5%	2.6%	0.5%	4.6%
12	Southeastern Anatolia	2.6%	3.0%	3.5%	9.1%
	Total	17.1%	32.6%	50.3%	100.0%



5. FREQUENCY TABLES

5.1. Profile of the Respondents

Gender	Percent
Women	48.3
Men	51.7
Total	100.0

Age	Percent
Between 18-32	29.6
Between 33-48	35.8
49 or above	34.6
Total	100.0

Educational attainment	Percent
Illiterate	5.5
Literate without degree	2.4
Primary school graduate	34.7
Less than high school graduate	15.2
High school graduate	25.5
University graduate	14.8
Masters / PhD	1.9
Total	100.0

Paternal educational attainment level	Percent
Illiterate	16.7
Literate without degree	6.0
Primary school graduate	50.4
Less than high school graduate	11.3
High school graduate	10.6
University graduate	4.6
Masters / PhD	0.3
Total	100.0



Household size	Percent
1 - 2 person(s)	19.8
3 - 5 people	63.9
6 - 8 people	13.5
9 people or more	2.8
Total	100.0

Lifestyle cluster	Percent
Modern	26.0
Traditional conservative	43.3
Religious conservative	30.6
Total	100.0

Place of birth	Percent
Istanbul	7.0
Western Marmara	4.3
Aegean	11.7
Eastern Marmara	6.7
Western Anatolia	7.7
Mediterranean	12.3
Central Anatolia	8.2
Western Black Sea	9.2
Eastern Black Sea	5.7
Northeastern Anatolia	5.4
Middle Eastern Anatolia	8.3
Southeastern Anatolia	12.4
Abroad	1.1
Total	100.0

Place of origin	Percent
Village	31.9
Town / district	25.1
City	29.7
Metropolitan	13.2
Total	100.0



Employment status	Percent
Civil servant	5.6
Private sector	6.7
Worker	9.6
Small retailer	6.0
Merchant/businessman	1.0
Self-employed	1.7
Farmer, agriculturist, stock breeder	3.4
Employed, other	5.5
Retired	15.9
Housewife	31.7
Student	7.3
Unemployed	4.3
Disabled	1.4
Total	100.0

Ethnic identity	Percent
Turkish	80.3
Kurdish	13.6
Zaza	0.6
Arab	2.9
Other	2.5
Total	100.0

Level of religiosity	Percent
Non-believer	2.9
Believer	23.0
Religious	59.9
Pious	14.2
Total	100.0



Head cover status	Percent
No head cover	28.3
Headscarf	48.7
Turban	9.6
Chador, purdah	1.2
Single male	12.2
Total	100.0

Religion / sect	Percent
Sunni Muslim	91.6
Alevi Muslim	6.5
Other	2.0
Total	100.0

Economic classes	Percent
Lower income class	18.8
Lower middle class	27.4
New middle class	26.8
High income class	27.0
Total	100.0

Do you own a car in your household?	Percent
Yes	50.2
No	49.8
Total	100.0

Monthly household income	Percent
TRY 700 or less	3.0
TRY 701 - 1.200	9.0
TRY 1.201 - 2.000	42.7
TRY 2.001 - 3.000	23.1
TRY 3.001 - 5.000	16.8
TRY 5.001 or more	5.4
Total	100.0



Type of housing	Percent
Squatter / apartment without external plastering	3.2
Single family, traditional house	32.3
Apartment	59.0
Housing complex	5.2
Very luxurious apartment, villa	0.3
Total	100.0

TV channel preferred to watch the news	Percent
Does not watch	5.9
A Haber	10.8
ATV	16.6
CNN Turk	4.1
Fox TV	19.6
Haberturk	2.1
Halk TV	2.7
IMC TV	0.2
Kanal 7	1.4
Kanal D	5.4
Kanaltürk	0.1
NTV	3.0
Roj/Nuçe/Sterk	0.5
Show TV	4.9
Star	2.7
TRT	13.2
Ulusal	1.2
Local channels	5.4
Total	100.0



Social media use	Percent
Facebook	48.1
Twitter	20.5
WhatsApp	46.3
YouTube	26.4
Instagram	28.0
Other	0.8
I use the Internet, but I am not a social media user.	7.9
I do not access the Internet	33.9



6. 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.

Term	Definition
Alevi Muslim:	A person who identifies his/her religion/sect as Alevi Muslim
Lower middle class:	Households with an income per capita in the 60 percent segment but which do not own a car
Lower class:	Households whose income per capita is in the lowest 20 percent segment
Arab:	A person who identifies his/her ethnic origin as Arab
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
Chador:	A woman who wears chador or a man whose spouse wears a chador
Religious:	A person who tries to fulfill the requirements of the religion
Religious conservative:	A person who identifies his/her lifestyle as religious conservative
Traditional conservative:	A person who identifies his/her lifestyle as traditional conservative
Believer:	A person who believes in the requirements of the religion, but does not fulfill them completely
Non-believer:	A person who does not believe in the requirements of the religion
Urban area:	Settlements with a population of more than 4000 (differs from the official definition)
Rural area:	Settlements with a population of less than 4000 (differs from the official definition)
Kurdish:	A person who identifies his/her ethnic origin as Kurdish
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
No cover:	A woman who does not cover her head or a man whose spouse does not cover her head
Pious:	A person who fulfills the requirements of the religion completely
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
Upper class:	Households whose income per capita is in the highest 20 percent segment
New middle class:	Households whose income per capita is in the 60 percent segment and which own a car
Zaza:	A person who identifies his/her ethnic origin as Zaza
Multiple Correspondence Analysis (MCA)	It is a data analysis technique for nominal categorical data, used to detect and represent underlying structures in a data set. It is used for applying Correspondence Analysis (CA) to large data sets with more than two variables. MCA was shaped with the work of mathematician and linguist Jean-Paul Benzécri in 1960s, and MCA-related studies and publications proliferated after the translation of research on Jean-Paul Benzécri and MCA in the 1980s and the use of this method by the French sociologist Pierre Bourdieu.

6.1. Questions and Response Options

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

Modern

Traditional conservative

Religious conservative

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



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 religion or sect do you feel you belong to?

Sunni Muslim

Alevi Muslim

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 of the reasons below influence/determine your political preferences?

I/we always vote for that party.

It is the party closest to my political view.

I trust/favor its leader.

None of these parties represent me.

I make a decision based on the election campaigns.

Total

Settlement Code (Data obtained from the sample)

Rural

Urban

Metropolitan

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

Lower class

Lower middle

New middle

Upper class