KONDA

June 7 Election and Electorate Analysis

18 June 2015



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1. INTRODUCTION

- At KONDA, in March of 2010, we began a series of monthly political and social surveys March 2010 and continued to do research and share the findings with our regular subscribers. With field work a week before the June 7 elections which constitute the June'15 Barometer, we have completed a total of 55 researches and interviewed over 150 thousand people all over Turkey.
- In scope of the Barometer surveys, at the beginning of each month we interview about 3000 people over 18 years old in their households who makes up a a sample representing the voter population in Turkey. At the end of the month, we send a report of our analyses to our Barometer subscribers.
- Barometer surveys, apart from the demographics and political preferences we continuously measure, includes questions to measure the reactions of people to current political events, social themes often in collaboration with academics that aim to understand the character of the society, and indeces on issues such as polarization, satisfaction and morale that aim to identify social changes over time.
- In the June'15 survey the findings on elections were close to the results of the General Elections on June 7. This provides the opportunity to analyze survey findings along with the election results and to identify electorate profiles and behaviors.

	June'15 Barometer (30 May)	7 June General Election Domestic Results
Ak Parti	41,0	40,7
CHP	27,8	25,1
MHP	14,8	16,5
HDP	12,6	13,0
Other parties	3,8	4,8
Total	100	100

This report analyzes polls results of the June 7 General Election from various different angles and polling results and also includes the voters' political preferences and changes in their profiles based on significant KONDA findings. Maps showing party performances on district level prepared by Prof. Murat Güvenç and Ebru Şener and an electoral shifts analysis performed by Çilek Ağacı based on ecological inference method are also included in the report.

For your attention,

KONDA Research and Consultancy

2. ELECTION RESULTS

In this section, we provide our analysis of results of the June 7th General Election. The analysis includes different parts such as comparison with previous elections, voter turnout rate, distribution by region, province and district, and by type of settlement.

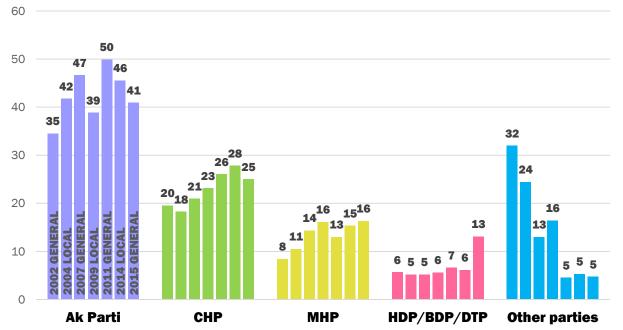
IMPORTANT NOTE: The analyses of the June 7th General Election presented in this section were carried out based on the data released by news agencies after the election. Therefore, the decimal places of some of the figures may vary slightly from the official results. However, such small variations do not make a significant impact on KONDA's analyses, which focus on overall trends.

The General Election held on June 2015 proved to be a quite complicated process, not only for ordinary citizens, but also for politicians. Although the discourse of politics was shaped by social polarization to a great degree in the build up to the elections, voters sent a message to the political parties for conciliation, by their political preferences at the ballot box. In other words, the social behavioral mechanism we call the wisdom of crowds, has revealed a distribution of seats in the parliament that necessitates collaboration and sharing of political power, rather than polarization and disproportionate use of political power for politicians. The most memorable take-aways from the run up to the election included the President's violation of his impartiality and the lack of coverage of this issue by a certain part of the media, the unequal conditions of competition for the political parties and the question of whether HDP would surpass the 10 percent election threshold or not, while speculations on a potential coalition, the likelihood of early elections and the question of to what extent votes lent by CHP voters played a role in HDP's success were the main topics of discussion in the aftermath of the election. In this section, we will elaborate on the election results and extrapolate on the above-mentioned issues based on the available data.

	2015 General Election*	2014 Local Elections	2011 General Election
Voters (million)	56.6	52.7	52.8
Total votes cast	47.5	46.9	43.9
Valid votes	46.2	45.1	42.9
Ak Parti	18.6	20.5	21.3
CHP	11.5	12.5	11.1
MHP	7.5	6.9	5.5
HDP/BDP	6	2.7	2
Other	2.3	2.4	2.4

The first table below shows the number of voters and the total votes received by the parties in the last three elections.

* Total number of registered voters abroad according to the provisional results announced by the Supreme Election Council Ak Parti came to power with the General Election in November 2002, and it has won all elections held since then by a landslide. The graph below presents the share of the vote political parties have received in each election over the past 13 years, including the 2002 General Elections.



Election results: 7 elections in 13 years

The results of the General Election June 7th, 2015 has led to intriguing questions. On the one hand, there has not been a major deviance from the general trend, where Turkish politics has been dominated by Ak Parti since its ascension to power in 2002, and the persistent lack of political competition continued to gnaw away at the small parties to render them politically ineffective. The political arena, which was previously shared by four parties, with BDP represented by its independent MPs, was consolidated between these parties as HDP entered the parliament as a party in its own right. Based on our previous general observations, and perhaps as we have stated before with hesitance, the argument that Turkish political playfield would mainly be maintained by the four parties, was confirmed by the election results.

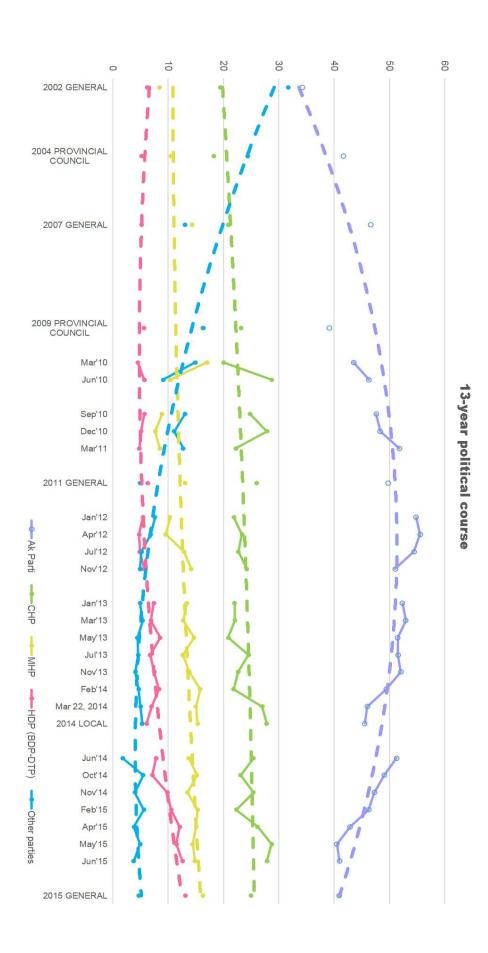
At this point, it would be useful to revisit one of our frequent findings from the KONDA Barometer reports, in light of this graph. Ak Parti has increased its votes during the 12 years before 2014, while the votes of the small parties that are not represented in the parliament have diminished dramatically during the same period. Suffice to say, the predominantly right-wing small parties have lost their votes to the ruling party between 2002-2014. This gradual trend has led to a decreased representation of alternative political movements and consequently, brought about a near extinction of political competition. The 10 percent election threshold that has entered our political system after the military coup in 1980 has played a significant role in this development. The results of the June 7th General Election demonstrate that the total rate of other right-wing parties has decreased again. However, it looks like this time this decrease was not counterbalanced by an increase in Ak Parti's votes. As we all know, AK Parti itself has lost a significant amount of votes.

The number of CHP voters has remained the same

- CHP entered the June 7th General Election as the main opposition party that was increasing its votes slightly, but consistently. In a political environment marked by the aforementioned lack of political competition. CHP is ranked as the second party. but by quite some distance after Ak Parti. CHP, which achieved its highest share of the vote in March 30th Local Elections, has received a lower share of the vote in the last General Election than its share of the vote in 2011 General Election. The interesting point here is that, although both the population in Turkey and the number of votes have increased in the meantime, the number of voters who have opted for CHP have remained more or less the same in the elections. Therefore, the decline in CHP's share of the vote is not caused by a loss of votes, but by its inability to capture new voters, despite the increase in population and number of voters. For example, as it will be emphasized in the following pages of this report, in comparison to 2011 General Election, CHP attracted only 8007 new voters in Ankara, and lost 6099 votes in Adana, a major city, and 79 voters in Konya. In short, CHP failed to make any progress in these three metropolitan areas. Likewise, in smaller but population-wise significant cities such as Hatay, Edirne and Çanakkale, CHP was not able to capture more than 5.000 new voters. Although CHP's share of the vote fluctuates, this observation confirms the argument that CHP has the most entrenched voters. The reason we preferred to make a comparison between the results of 2015 and 2011 General Elections - and ignored the results of 2014 Local Elections - is based on the fact that voter behavior in local elections and general elections tend to differ greatly from each other. In local settings, microdynamics come into play, and unexpected results can be observed, at least on a regional basis. Therefore, a comparison of the 2015 General Election with the 2011 General Election would provide a healthier dataset for identifying entrenched voters.
- When we take a look at the increase in CHP's and MHP's votes until the 2015 General Election, we can see that this increase does not arise from shifts between the first three parties, but more so from the dissolution of small parties' votes. However, it is difficult to see that other dynamics must have been at work in an election where AK Parti has actually lost votes, and CHP failed to make any progress. It appears that, while CHP failed to capture new voters in the recent General Election, AK Parti lost nationalist votes to MHP in Central Anatolia, and provincial votes to HDP in areas with a high ratio of voters with a Kurdish background. As it will be seen in the following pages, HDP benefited the most from AK Parti's loss of votes in metropolitan areas. On the other hand, there is no correlation between the increase in the actual number of MHP voters in metropolitan areas and its increased share of the vote.

Is there really such a thing as 'lent votes'?

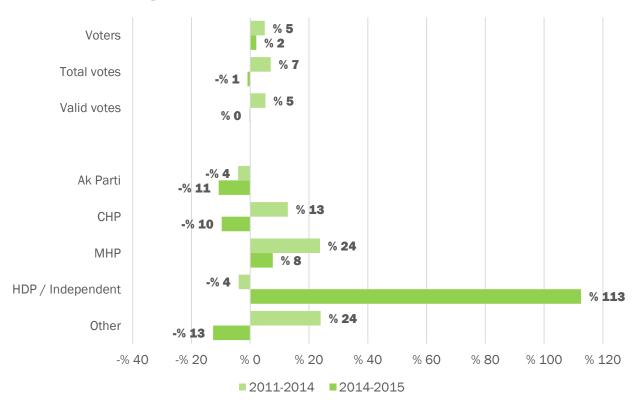
HDP was doubtless the party which achieved its expectations. One of the most written about topics after the election was whether strategic voting by CHP voters, where they "lent votes" to HDP, was instrumental in ensuring HDP to pass the threshold or not. However, it looks like the fact that a meaningful increase or decrease was not observed in CHP's votes, while the number of CHP voters remained more or less the same, nullifies this argument from the very outset. We will elaborate on HDP's share of the vote and its total number of votes in detail and evaluate this possibility in the following pages.



KONDA - June 7 Election and Electorate Analysis

- The graph on the previous page shows the results for the last 7 elections held since 2002, in juxtaposition to the respective KONDA Barometer results. The thick dashed lines in the graph show the average trend line (polynom) for each party. The 12-year average trend lines of Ak Parti and other small parties reveal a symmetrical relationship. Taking this into consideration with the average trend lines of CHP, MHP and BDP/HDP for the period of 2002-2014, which follow a straight course, it is more likely that the votes of small parties have shifted to Ak Parti during the respective period. We can also observe that the tide has turned clearly in favor of HDP and slightly in favor of MHP by 2014.
- The downward trend in Ak Parti's average trend line during the last two years is also quite noteworthy. The 2011 General Election can be identified as the peak for Ak Parti, which had increased its votes consistently between 2002-2011. The average trend line of a party can also be taken as the basis for predicting the future share of the vote for the party in question. In our election report published after the 2014 Local Elections, we underlined the need to think seriously about the likelihood of the downward trend in Ak Parti's share of the vote to continue. This year's General Election on June 7th has revealed that this downward trend has indeed accelerated.
- When we observe the course of CHP's trend line for the last 13 years, we can see occasional fluctuations, but we can also identify that it has stabilized into a straight line particularly during the last one year.
- Although HDP started increasing its votes and maintained its upward trend after their decision to enter the election as a party, we can also observe on this graph that its upward trend has indeed started after the 2011 General Election.
- The graph below shows the increase in the number of eligible voters, the number of votes cast and the number of valid votes, as well as the increase or decrease in each party's votes by percentage, separately for 2011-2014 and 2014-2015. For example, the number of voters rose from 100 in 2011 to 105 in 2014, corresponding to an increase of 5%. On the other hand, while the number of valid votes also increased by 5 percent from 2011 to 2014, it has remained the same from 2014 to 2015.
- When we take a look at the changes in party votes, Ak Parti lost 4 percent of its votes between 2011-2014, and 11 percent between 2014-2015. The respective rates for CHP were registered as a 13 percent increase between 2011-2014, and a decrease of 10 percent from 2014 to 2015, while MHP achieved a 24 percent and 8 percent increase in order.
- Although HDP has the lowest number of voters, it has lost 4 percent between 2011-2014, but increased its voters dramatically from 2014 to 2015 by 113 percent. It has received 2 million and 746 thousand votes in 2014, and 5 million 838 thousand votes in 2015. In other words, its number of voters increased from 100 in 2014 to 213 in 2015. The reason whether HDP, the party with the lowest share of the vote among the four parties, would be able to pass the electoral threshold or not was

debated so intensely before the elections may be explained by the bewilderment of the general public at HDP's likelihood to double its votes in the election, which has indeed become a reality with the election results.

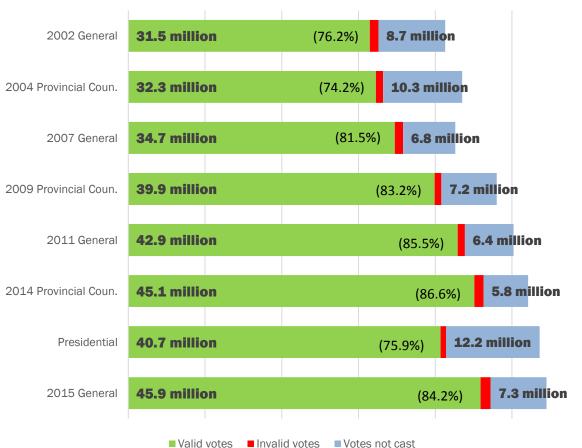


The change in the total number of voters between the elections

In the remaining part of the report, we will endeavor to present the reasons behind the election results we have outlined so far, by both examining the actual election results and KONDA data.

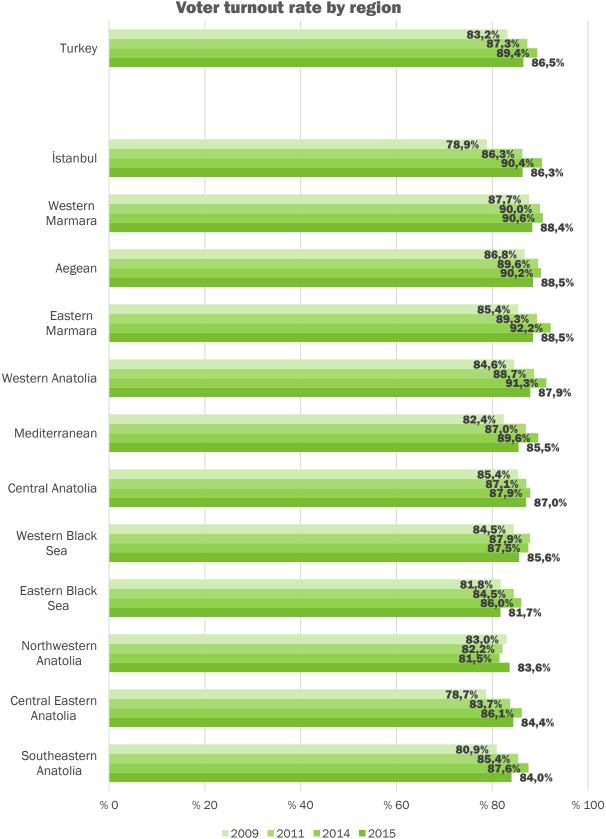
2.1. Voter Turnout Rates

- While voter turnout in Turkey has generally been above the global average, the voter turnout has reached its peak since 2002 with 86.6 percent in the March 30th Local Elections in 2014. In comparison to the previous election, the voter turnout on June 7th General Election in 2015 slightly decreased to go down to 84.2%.
- The graph below shows the total number of voters, the number of voters who went to the polls, the number of valid and invalid votes, and voter turnout rates together. The most striking figure on the graph is the increase in the number of voters that is directly proportional to population growth. We can also observe to what extent voters went to the polls by looking at the rate of valid votes with respect to the total number of voters.



Voter turnout rates

As it can be seen on the next graph which demonstrates voter turnout rates in detail by region, voter interest in general elections increased widely, regardless of regions, after 2009. However, the voter turnout rate in 2014 Local Elections was not matched in the recent General Election, in any region other than the Northern Anatolia region, where HDP and AK Parti had a very tight race (and received the same rate of votes).



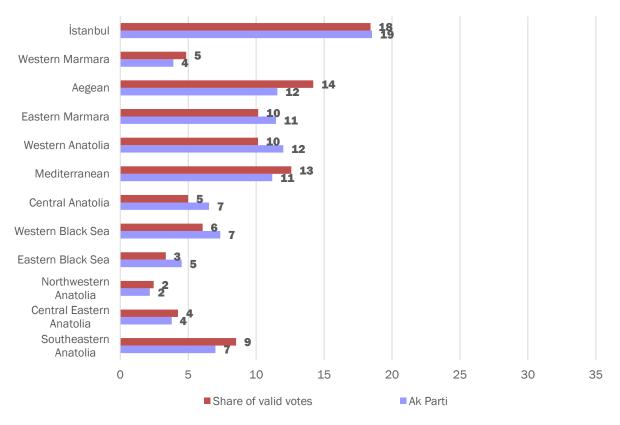
Voter turnout rate by region

2.2. Vote Distribution by Region

In this section, we first presented the distribution of party votes by population density. We will now move on to the observation of how party votes were distributed across the 12 geographical regions.

2.2.1. Distribution of Ak Parti's Votes By Region

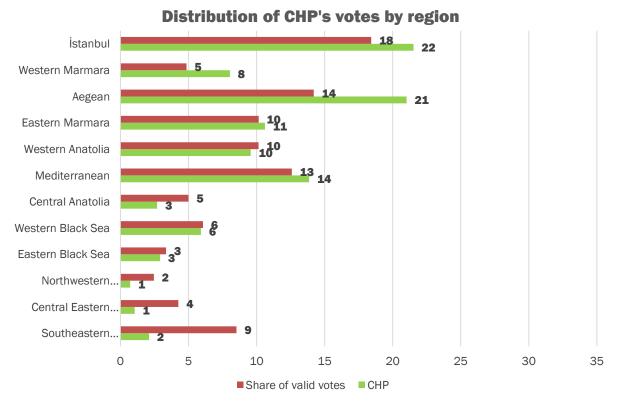
The graph below presents the distribution of Ak Parti's votes across 12 geographic regions. For example, while the rate of valid votes in the Aegean region was 14 percent, Ak Parti received 12 percent of its total vote from this region. Similarly, valid votes cast in İstanbul made up 18 percent of all valid votes in Turkey, and AK Parti received 19 percent of its total vote from İstanbul. The distribution of Ak Parti's votes by region makes it difficult to argue that its presence is not felt in any particular region. However, we can also observe that it has received below than its average rate of valid votes in Western Marmara, Aegean, Mediterranean, Middle Eastern Anatolia and Southeastern Anatolia regions. In other words, AK Parti has failed to achieve a level of representation in these regions that is compatible with its presence in the other regions. However, it has achieve a level of representation that is above the average in Eastern Marmara, Western Anatolia and Western Black Sea regions. Nevertheless, this trend does not present a big difference from the previous election results, as Ak Parti has come out of the elections as the party with the most even distribution of votes across all the regions in comparison to other parties.



Distribution of Ak Parti's votes by region

2.2.2. Distribution of CHP's Votes By Region

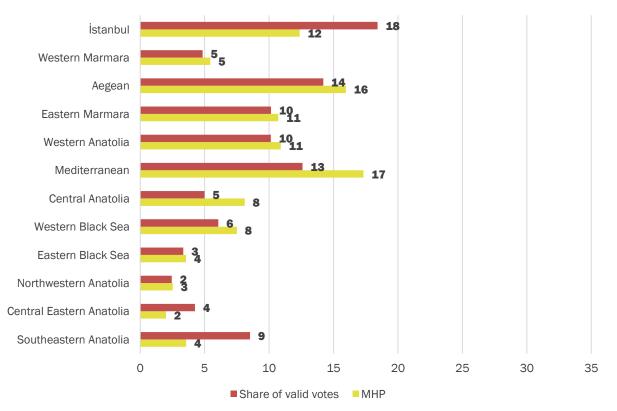
The graph below displays the distribution of CHP's votes by region. The number of valid votes in İstanbul represents 18 percent of all votes, and with 22 percent, CHP received one fifth of its votes from İstanbul. It has also received another one fifth from the Aegean region.



As shown in the graph, CHP's share of the vote was higher in the Aegean and the Western Marmara regions; however, it failed to establish a presence, particularly in the Eastern regions. While the votes cast in the Southeastern Anatolia region correspond to 9 percent of the total votes in Turkey, CHP received only 2 percent of its vote from this region. This predicament is in parallel to the results of 2014 Local Elections. Compared to its performance in 2014 Local Elections, the weight of CHP's votes in the Mediterranean region in its total votes has slightly increased, and the party was able to attain a higher level of representation in this region.

2.2.3. Distribution of MHP's Votes By Region

The graph below enables us to observe the distribution of MHP's votes by region. MHP stands out as a party whose regional presence is proportional to the population, with the exception of Istanbul and Eastern provinces.

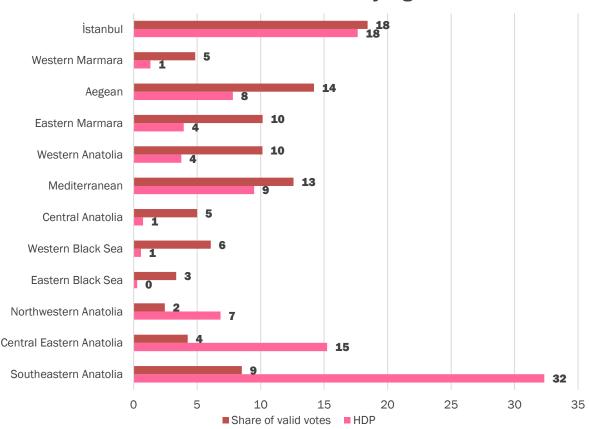


Distribution of MHP's votes by region

On the other hand, MHP attracts the most votes from the Aegean and the Western Black Sea regions, in proportion to population. While the voters in the Mediterranean region make up 13 percent of all voters, MHP garnered nearly one fifth (17 percent) of its votes from this region.

2.2.4. Distribution of HDP's Votes By Region

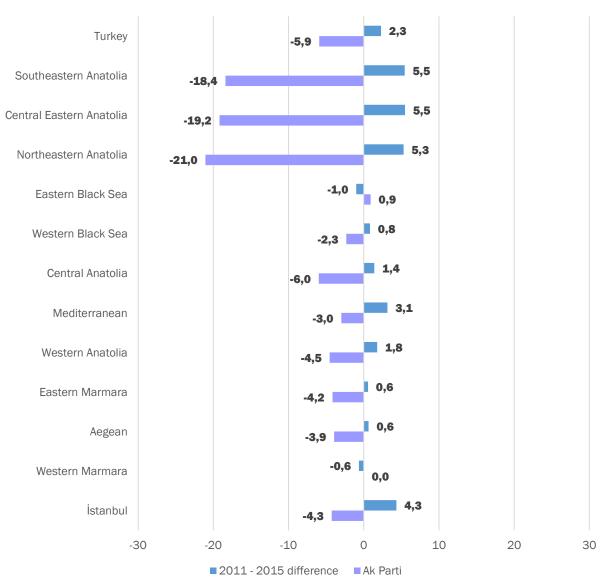
We can see that HDP, which has entered the recent General Election as a party on its own for the first time, has the most uneven vote distribution by region. HDP received 32.3 percent, or in other words, nearly one third of its votes from the Southeastern Anatolia region. This is followed by 17.6 percent in İstanbul, 15.2 percent in the Central Anatolia region and 9.5 percent in the Mediterranean region.



Distribution of HDP's votes by region

2.3. Turnout Rates by Region and the Relationship Between Vote Rates

So far, we have elaborated on the distribution of votes by region and the proportion of this distribution to voter turnout (whether the vote rates of political parties are above or below voter turnout rates) through the rate of valid votes in each region. Examining these rates on maps by district would naturally enable us to perform a deeper analysis. The maps that show the distribution of votes by province are provided in the 'Political Competition' section. For the moment, we will only take a closer look at the difference between the voter turnout rates in the 2011 and 2015 General Elections and provide further details on each party's share of the votes. In other words, we will analyze the increase and the decrease in each party's votes in parallel with the change in the voter turnout rate by regions.

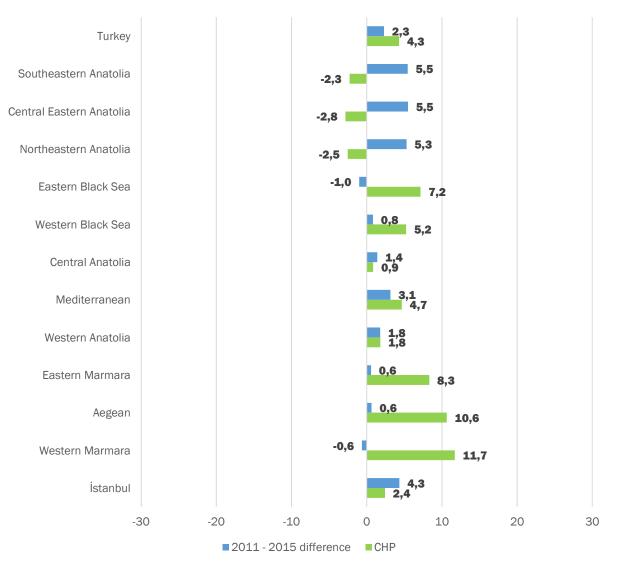


2.3.1. Change in Ak Parti's share of the vote by regions (2011-2015)

Difference in voter turnout rate and the change in Ak Parti's share of the vote

The graph above presents that, in comparison to the 2011 General Election, Ak Parti's share of the vote in the 2015 General Election decreased in regions where the voter turnout rate increased. There difference is quite high in Southeastern Anatolia, Central Anatolia and Northeastern Anatolia, where HDP overcame Ak Parti. Then, which parties did Ak Parti voters shift towards in these regions? The following graphs and the graphs in the section where a comparison of the metropolitan areas and other provinces is presented provides an answer to this question.

2.3.2. Change in CHP's share of the vote by regions (2011-2015)

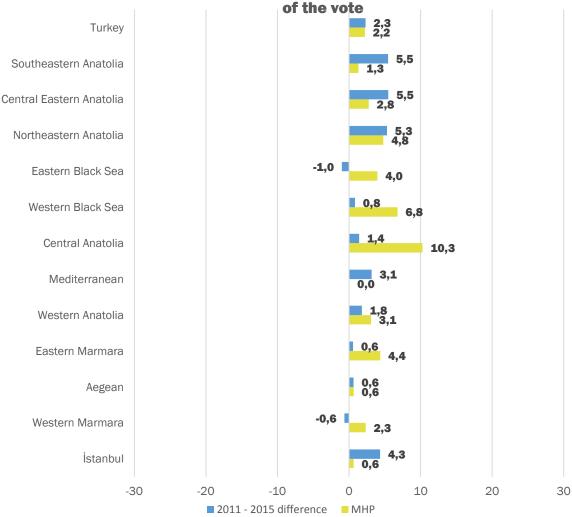


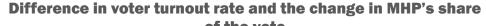
Difference in voter turnout rate and the change in CHP's share of the vote

When we analyze the difference between CHP's share of the vote in 2011 and in 2015, we can observe that the change in the voter turnout rate did not make a similar impact on CHP's share of the vote. Increase in the voter turnout rate did not yield similar outcomes in CHP votes in all regions. In İstanbul, the Mediterranean region and the Western Anatolia region, the increase in the voter turnout rate resulted in a higher share of the voter for CHP. However, in Eastern regions, the Eastern Black Sea region and the Western Marmara region, CHP's share of the vote declined despite the increase in the voter turnout rate.

CHP lost votes in the regions where HDP achieved a huge success (Southeastern Anatolia, Central Eastern Anatolia and Northeastern Anatolia), although the number of votes cast increased. A similar outlook also holds true for CHP votes in İstanbul. CHP increased its votes in the other regions. In the following sections of the report, we will elaborate on whether CHP's presence has been limited only to the metropolitan areas in the West, in more detail.

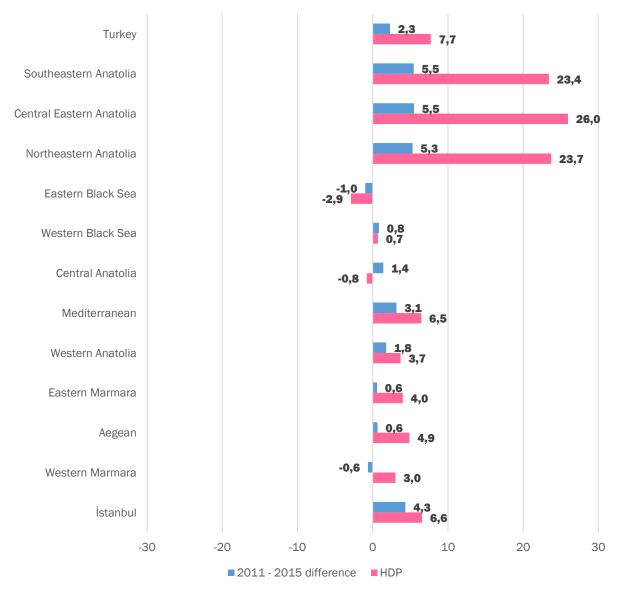
2.3.3. Change in MHP's share of the vote by regions (2011-2015)





First of all, it is notable that MHP gained votes in parallel to the increase in the voter turnout rate. The overall voter turnout rate in Turkey has increased by 2 percent, and MHP increased its votes at the same rate. Similar to CHP, MHP failed to increase its share of the vote in Eastern regions and in Istanbul where the voter turnout rate has increased. MHP also failed to attract first-time voters in the Mediterranean region, which accommodates 17 percent of MHP voters. In Eastern Marmara, Eastern Black Sea, Western Black Sea and particularly Central Anatolia, the increase in MHP's share of the vote exceeded the increase in the voter turnout rate.

2.3.4. Change in HDP's share of the vote by region (2011-2015)



Difference in voter turnout rate and the change in HDP's/independent candidates' share of the vote

HDP became the party to increase its votes at the highest rate in Turkey overall. A closer look at the relation between HDP's votes and the voter turnout rate reveals that HDP increased its share of the vote in Southeastern Anatolia, Eastern Central Anatolia and Northeastern Anatolia at quite significant rates, in parallel to the increase in the voter turnout rate. In summary, in these regions, increased voter turnout rate led to an increase in HDP's votes. Yet, it can be observed that such a trend is not only specific to these three regions, and HDP also gained votes in other regions where the voter turnout rate increased.

2.4. Metropolitan Areas and Other Provinces

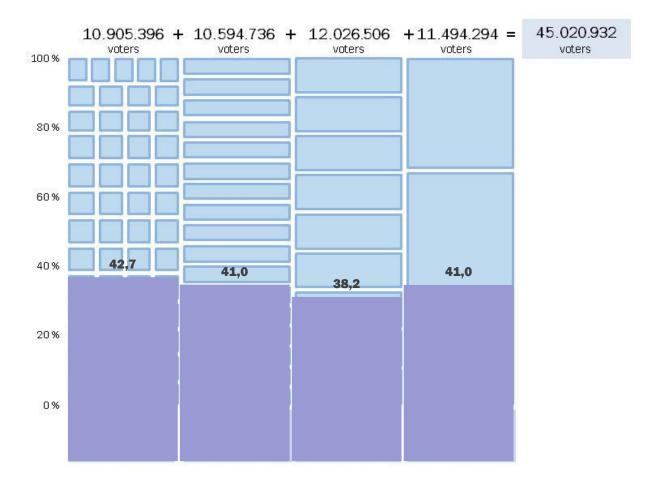
Currently, 30 metropolitan areas in Turkey accommodate 80 percent of the entire population in Turkey. The graph below presents the distribution of administrative units by the number of voters residing within their boundaries. Particularly, the fact that the number of voters who reside in Istanbul and Ankara is more than the total number of voters in 53 provinces indicates an uneven distribution of voters across the country. The first graph demonstrates that half of the voters in Turkey are concentrated in 11 metropolitan areas.¹



¹ What we mention as metropolitan areas are indeed provinces that accommodate a large population, and they do not necessarily represent the metropolitan areas pursuant to the official description.

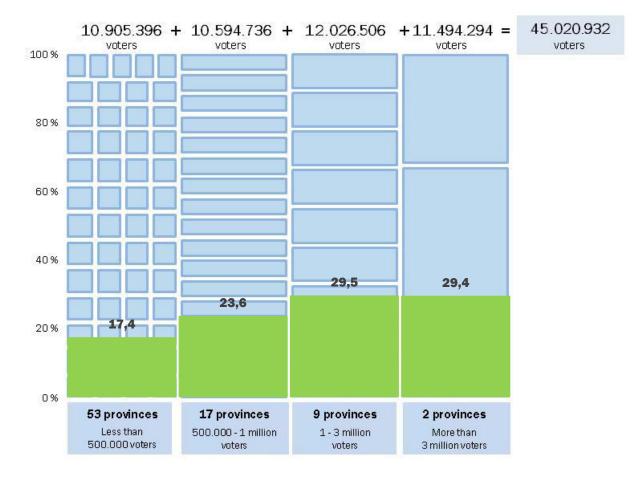


If we take the graph above as the basis for the distribution of voters in Turkey, we can observe important clues by juxtaposing the distribution of voters against the distribution of party votes. In the first graph below, it is possible to observe that Ak Parti's votes were evenly distributed among the four categories of administrative units. Ak Parti's preference rates do not differ greatly in provinces that inhabit a higher number of voters or lower number of voters. In summary, despite the fact that Ak Parti lost votes all over Turkey, Ak Parti's votes are still distributed quite evenly in provinces with a high population, as well as smaller provinces.



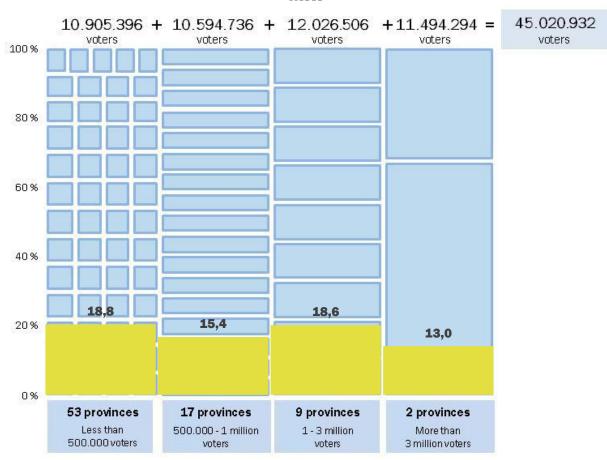
Ak Parti

A significant difference can be observed when we make the same comparison for CHP. CHP clearly receives more votes from comparatively more densely populated provinces. For example, CHP's share of the vote in the 53 provinces was 17 percent, while its share of the vote reached 30 percent in the metropolitan areas. At this point, we should also note that CHP had a more uneven distribution in the previous elections. In other words, CHP appears to be making up for this difference, although at a slow pace. However, the relatively more even distribution of CHP's votes does not originate from the fact that CHP attracts more voters in smaller provinces and in rural areas, and increases it votes. On the contrary, CHP's votes are more evenly distributed because it fails to attract new voters in large cities and metropolitan areas despite the increase in population.



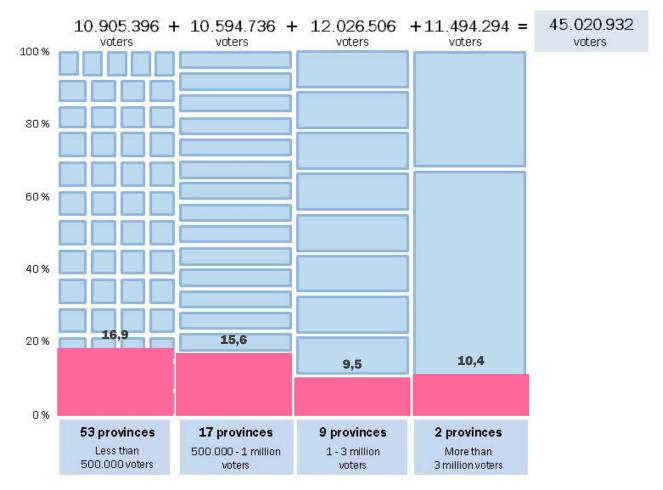
CHP

When we observe MHP's share of the votes in different types of settlements, we can observe that MHP received 13 percent of the votes in İstanbul and Ankara, while it received approximately 20 percent of the votes in 53 smaller provinces. However, MHP votes are unevenly distributed in a different way than the distribution of CHP votes. On the one hand, we can observe that MHP's share of the vote in İstanbul and Ankara is relatively lower than that in other provinces. On the other hand, it is quite difficult to claim that MHP's votes are unevenly distributed in the provinces other than İstanbul and Ankara. Indeed, MHP's votes were distributed evenly except for the two disproportionately large metropolitan areas. It looks like MHP is also making up the difference in comparison to previous elections.



MHP

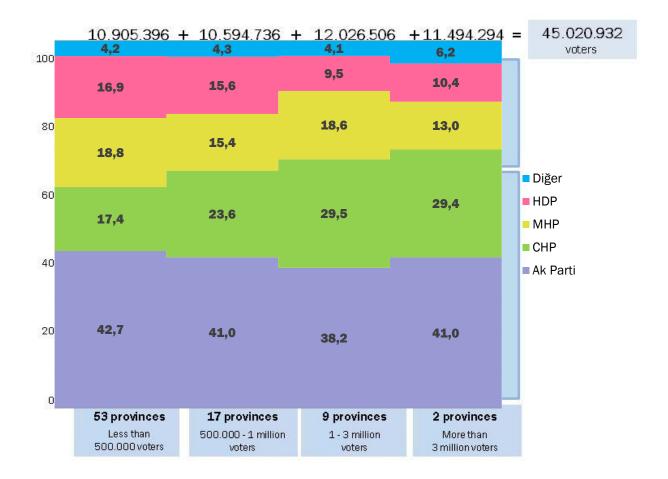
HDP's high vote rates in less populated provinces should be explained in a different way. This is due to the fact that the Eastern provinces where HDP shows presence have a provincial population less than one million. Although HDP received more votes in the metropolitan areas in the West, it is not possible to observe this difference in the overall distribution of its votes.



HDP

- The graph below presents the distribution of the votes received by all parties in different types of settlements. In this graph, the case for the small parties, which we mentioned several times previously, can be observed in a different way. It is evident that, in this election, parties that are not represented in the parliament showed more presence in provinces with lower population.
- It is necessary to analyze this distribution quite carefully in order to have an idea or to suggest estimations about the competition between Ak Parti and other parties. While parties present varying performances in administrative units of different demographic scales, Ak Parti has established a prevalent voter basis in all of the categories.

The graphs and maps in the section titled "Political Competition" will assist us in understanding how the votes of the parties were distributed by region and what has changed since the 2011 General Election.

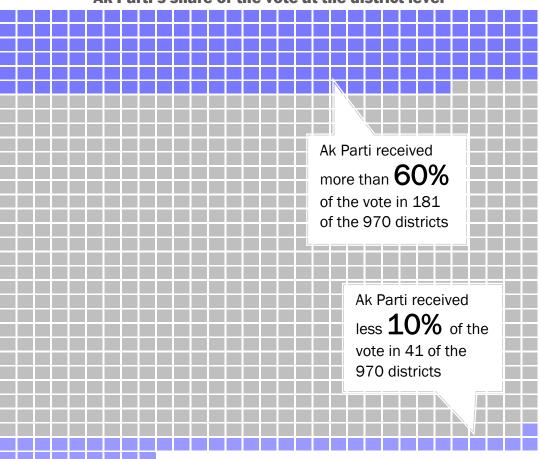


2.5. Distribution by District

- In this section, we will elaborate on the vote rates of the four parties in the 970 districts across Turkey. Each box below represents one of the 970 districts. Without delving into the each district in detail, we have presented the number of districts where each party has received more than 60 percent and less than 10 percent of the vote. The graphs are particularly noteworthy for demonstrating the reach of the parties. Districts where the parties have a strong presence are presented together with those where they have no presence at all.
- The distribution of votes by district confirms two of the three main findings we have come across in the previous graphs, where we compared metropolitan areas with provinces: Ak Parti remains to be the party with the most even distribution throughout Turkey, while CHP and MHP represent one end of the spectrum when different types of settlement are differentiated. In other words, CHP continue to be

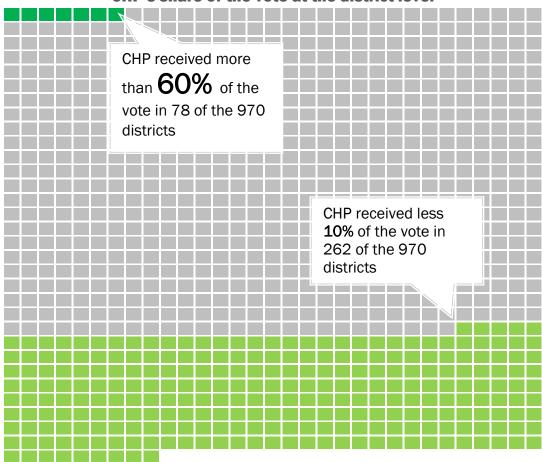
represented in larger settlements, as MHP does in small settlements, but there is a decreased representation for both parties.

- Furthermore, when we look at the distribution of votes by district, we observe that HDP is more similar to Ak Parti in its performance at the district level, that is to say, it has achieved a very high share of the vote in quite a few districts, but the number of districts where it has received few votes, i.e. less than 10 percent, is incomparably higher than other parties.
- As demonstrated by this graph, Ak Parti has received more than 60 percent of the vote in 181 of the 970 districts across the country, and received less than 10 percent of the vote in only 41 districts.



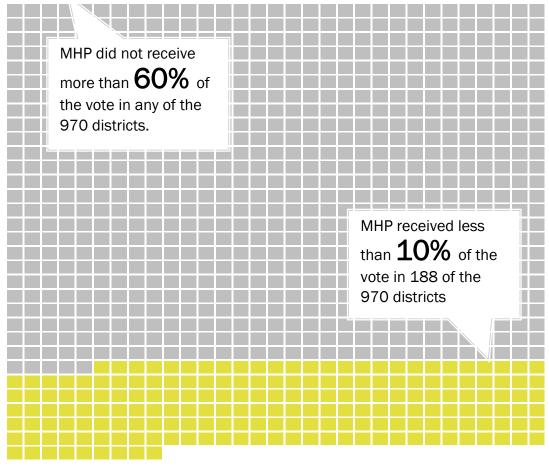
Ak Parti's share of the vote at the district level

CHP received more than 60 percent of the vote in only 7 of the 970 districts, and received less than 10 percent in 262 districts.



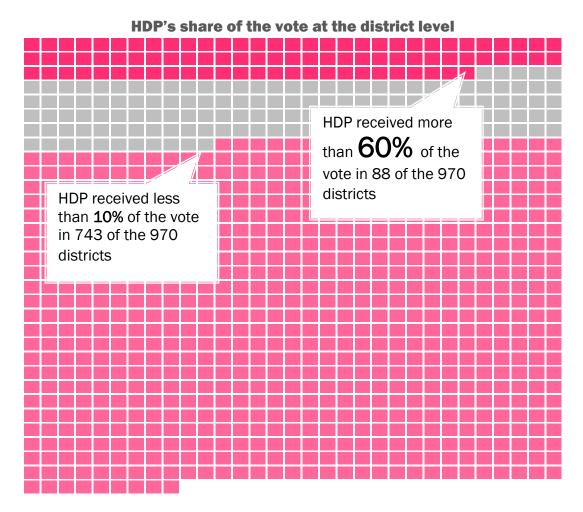
CHP's share of the vote at the district level

MHP failed to receive more than 60 percent of the vote in any of the 970 districts, and it received less than 10 percent in 188 districts.



MHP's share of the vote at the district level

HDP received more than 60 percent of the vote in 88 of the 970 districts, and it received less than 10 percent in 743 districts.



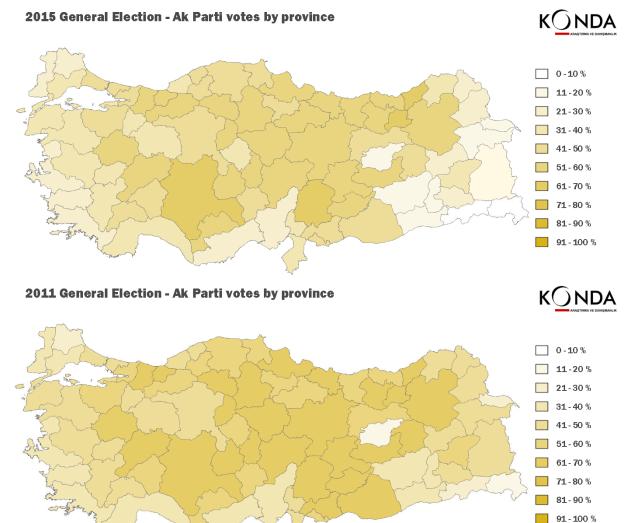
2.6. Political Competition

2.6.1. Differences Between Party Votes on Maps

The map below shows Ak Parti's share of the vote by province for the 2011 and the 2015 elections. As emphasized in the previous section;

- Ak Parti is represented throughout the entire geography of Turkey. However, it has suffered a significant loss of votes in the most recent elections in the Eastern and the Southeastern regions.
- The difference between its share of the vote in the West and that in the East, which was relatively smaller before, has become more pronounced.
- When we take a look at the general pattern of its vote distribution, we do not observe a distinct difference between the maps for 2011 and 2015.

AK Parti's share of the vote by province

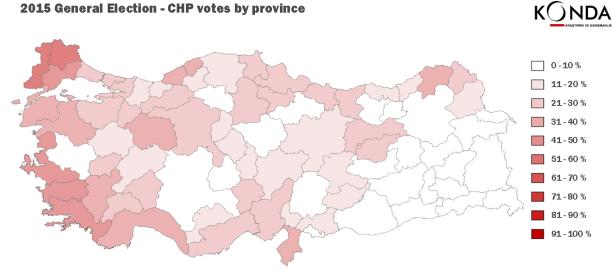


A mapping of CHP's share of the vote by province reveals the following findings:

- CHP is not represented evenly throughout the country. Preference for CHP is concentrated in certain regions, while it is next to non-existent in certain regions.
- The Western part of country and the coastline, where CHP has the strongest presence • in, is also the socio-economically developed part of the country.
- Between 2011 and 2015, CHP not only failed to spread out across the country, but it • has also suffered a loss of votes in the areas that it was most represented in.

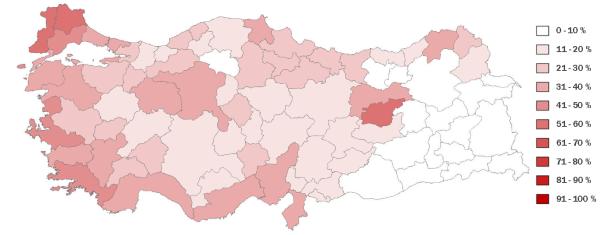
CHP's share of the vote by province

2015 General Election - CHP votes by province



2011 General Election - CHP votes by province

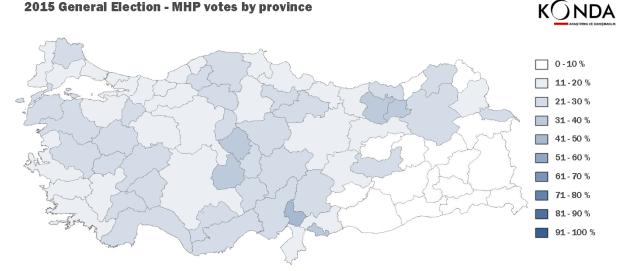




- When we observe the map that shows the distribution of MHP's votes, the following findings are notable:
 - MHP has widely increased its share of the vote in regions where it already had a presence.
 - MHP is well represented in the Central Anatolia region and the interior part of the Aegean region.
 - There appears to be no change from 2011 to 2015, in terms of MHP's absence in • mid-Eastern Anatolia and the Southeastern region.

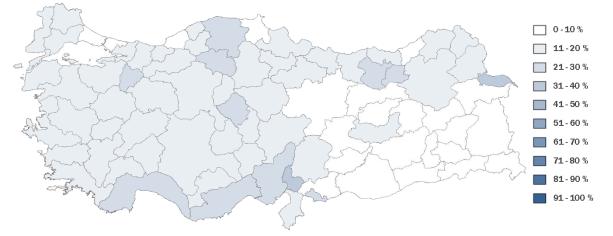
MHP's share of the vote by province

2015 General Election - MHP votes by province

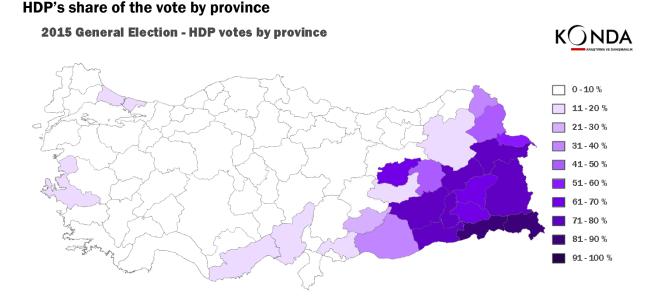


2011 General Election - MHP votes by province



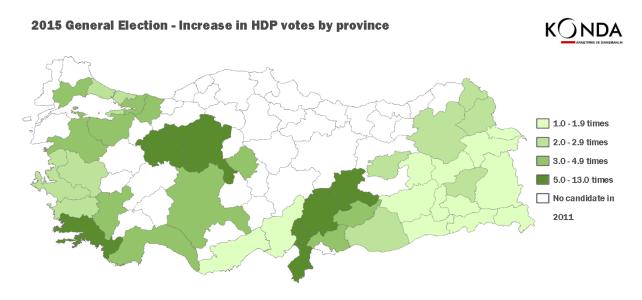


- Since it has participated in a general election as a party on its own for the very first time, we need to make use of other maps to assess the change in HDP's share of the vote after 2011. When we observe the map that shows the distribution of HDP's votes, the following findings are notable:
 - We observe that HDP's presence is still concentrated in specific geographical regions. However, we also see that it has a significant presence in four significant cities, that is İstanbul, İzmir, Mersin and Adana, in addition to the Southeastern region, mid-Eastern Anatolia and the Northeastern region.
 - Since HDP has entered the General Election as a party for the first time, it has nominated MP candidates in all provinces, as different from the 2011 elections. While its predecessor BDP used to nominate independent candidates in the provinces with a prevalently Kurdish population, since it would otherwise be absent from the parliament due to the election threshold, HDP was able to garner votes in many provinces BDP did not receive any votes in during the previous elections.
 - However, it is not possible to argue that HDP has achieved an even distribution across the county, despite the fact that it was able to increase its votes in many provinces. In other words, while HDP amplified its strength in areas where BDP had a strong presence, it failed to attain a sufficient vote density to ensure parliamentary representation by an MP in many provinces where BDP was absent as an organization.

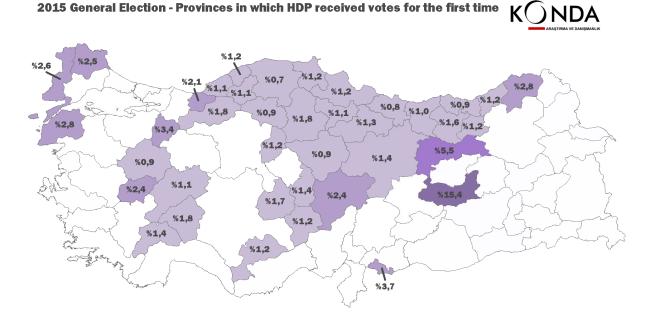


When we compare HDP's votes in 2015, as shown in the map below, with the vote BDP attained with independent candidates in 2011, we can see that HDP has increased its votes strongly, even in the provinces where it was not able to receive a significant number of votes. On the one hand, HDP's performance is remarkable in some important metropolitan provinces such as Muğla, Eskişehir and Ankara, as

well as some of the provinces where nationalist votes have been historically strong, such as Hatay, Osmaniye, Kahramanmaraş and Malatya.



It should also be emphasized for the graph above that provinces in white are not provinces where HDP failed to increase its votes, but places where BDP did not nominate any candidates in 2011. When we take a look at the graph below, which complement the one above, we can conclude that HDP has indeed garnered votes in places where it has never received any votes before.



As shown in the graph, HDP nominated candidates in 39 provinces where BDP did not nominate anyone before, and achieved a share of the vote between ranging from 0.7 percent to 15.4 percent. However, in 28 of these 39 provinces, it was unable to receive a share of the vote above 2 percent, and its average in these 28 provinces is 1.3 percent. HDP received approximately 155,000 votes in these provinces. This figure corresponds to 5 percent of the 3.3 million voters who voted for HDP for the first time. If we combine these votes with the 200,000 expatriate votes that were cast for HDP, we can see that 10 percent of HDP's votes were received from first-time voters. This may not make up a particularly important part of the total votes of the party, but it serves as a significant indicator of the extent HDP's votes had been pushed outside the realm of representation before 2015, due to the 10-percent election threshold.

- Another important observation that should be noted here comes out of a simple mathematical calculation: entering the election as a party was the main reason HDP was able to pass the election threshold. We will elaborate on this argument in further detail in the section on voter profiles, in the following pages. Nevertheless, it is apparent that the Kurdish political movement has been able to overcome the restrictive strategies directed against it by the state in Turkey, with increasing momentum since early 2000s. How else can we explain the fact that the 10-percent election threshold, which is itself a product of the 1980 military coup, is still embraced by the state, and that HDP has not only succeeded in overcoming the threshold, but it has completely changed the distribution of MPs among the parties in the parliament by passing the threshold.
- This bold move is reminiscent of The Practice of Everyday Life (L'Invention du Quotidien) by the famous French thinker, Michel de Certeau. In his work, de Certeau assessed the relations of power between the "powerful" and the "less powerful", and argued that it is indeed the tactics of the "less powerful" that shapes and transforms all strategies of the "powerful". In short, the difference between strategy and tactic becomes manifest. The strategy of the "powerful" is transformed so much by the tactical maneuvers of the "less powerful" that the "powerful" is defeated by its own strategy, and ends up having to change it. When we translate this theory into the state policy, we observe that the strategies set out by the state as absolute, are also changed in time by the state, due to various tactics, and this condition is not endemic to Turkey. The cooperation of the parties in the new parliament will decide whether the electoral threshold will be changed in the near future.

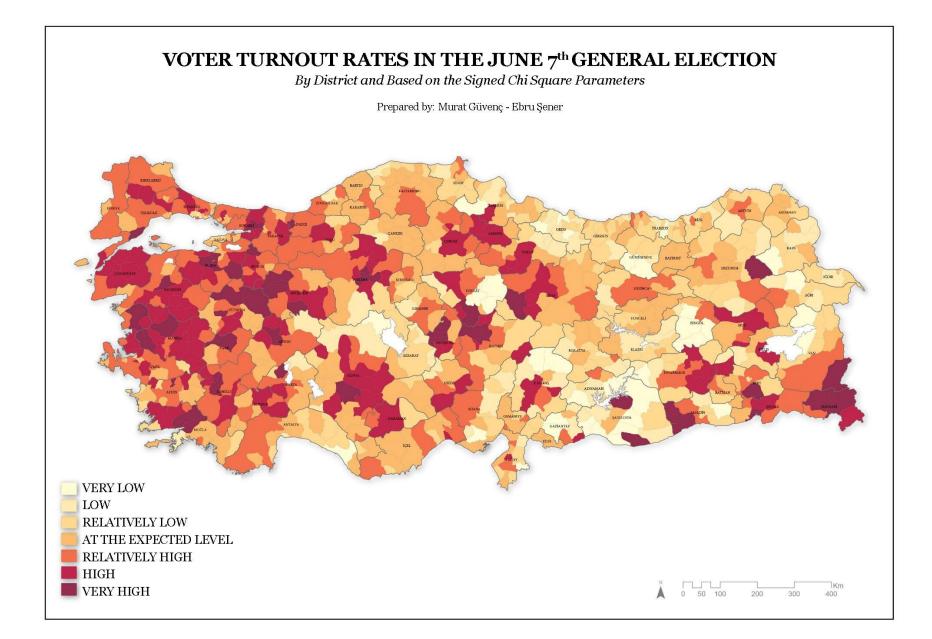
3. PARTIES' ELECTION PERFORMANCE IN DISTRICTS

This section of the KONDA Barometer report was prepared by Prof. Dr. Murat Güvenç² and Ebru Şener from Kadir Has University. We would like to express our gratitude to them for their contribution.

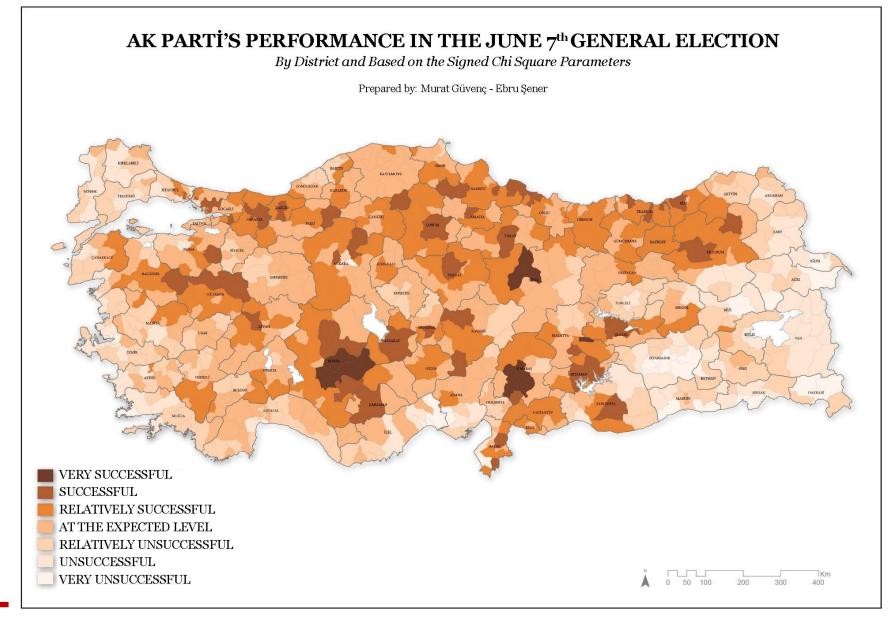
Note on the methodology:

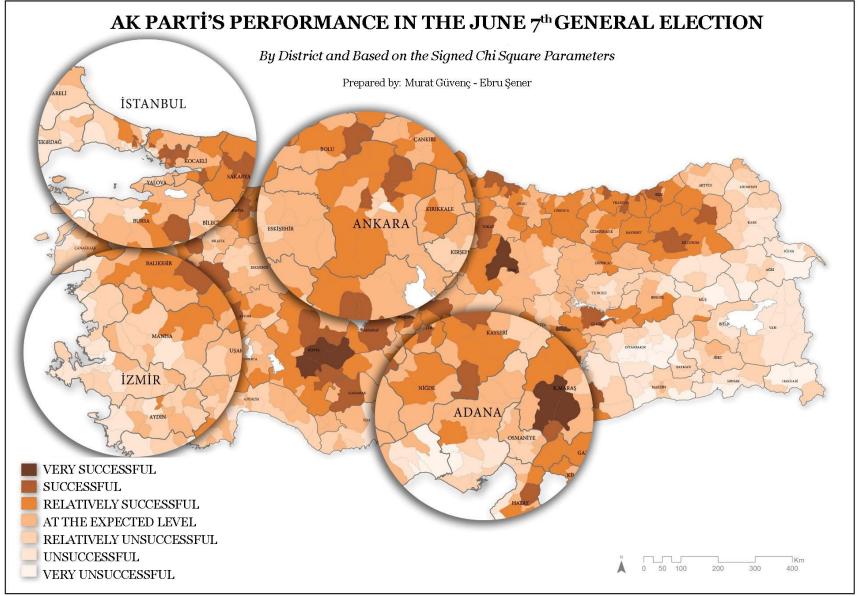
- The maps provided in this section present the election performance of the parties both in Turkey overall and in the vicinities of major metropolitan areas. The major characteristic of the maps is the 7-step density normalization parameter (Signed Chi Square index). Signed Chi Square parameters were categorized under 7 groups by using the k-means clustering.
- These parameters take into account the differences in the scale and agglomeration/density of settlements, and it enables the production of very legible maps.
- Rather than the actual distribution of the votes, the colors in the maps represent the positive or negative deviations from the statistically expected frequencies. Significant positive differences between the observed and expected frequencies signify (relative) *success*, and negative differences lower than the expected frequencies signify (relative) *failure*.

² Kadir Has University, Department of Political Science and Public Administration

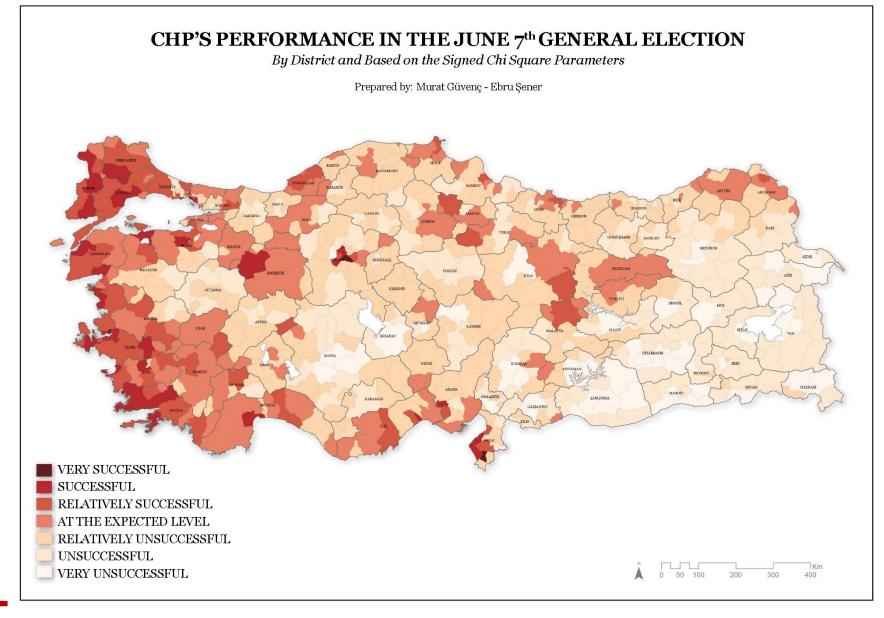


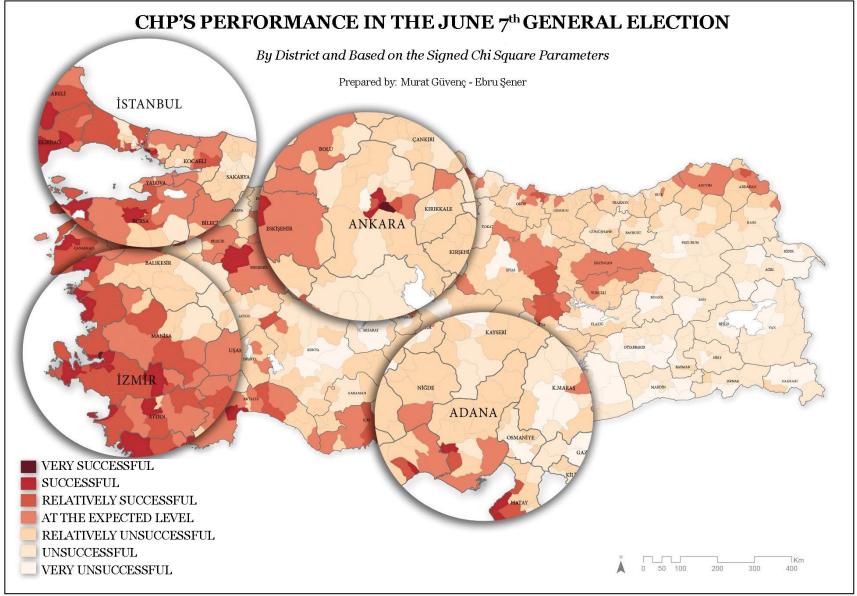
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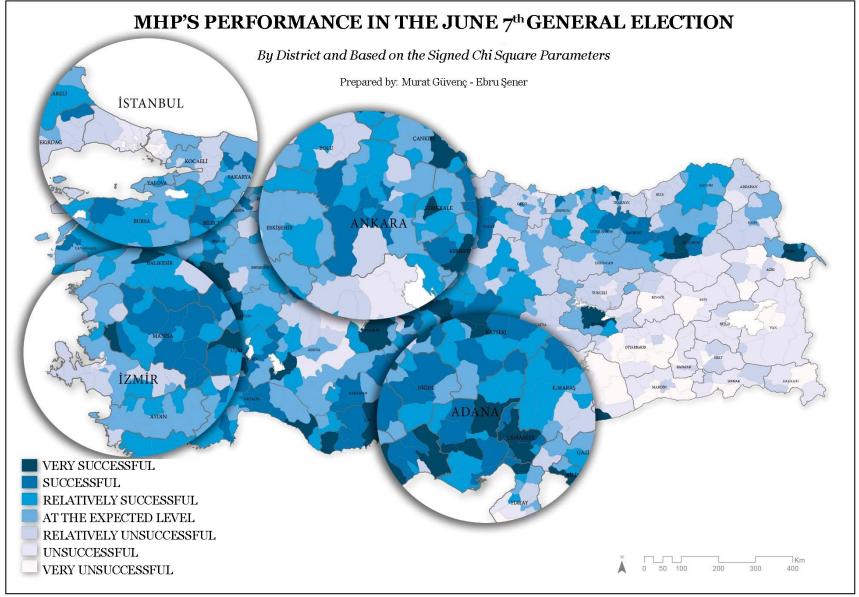


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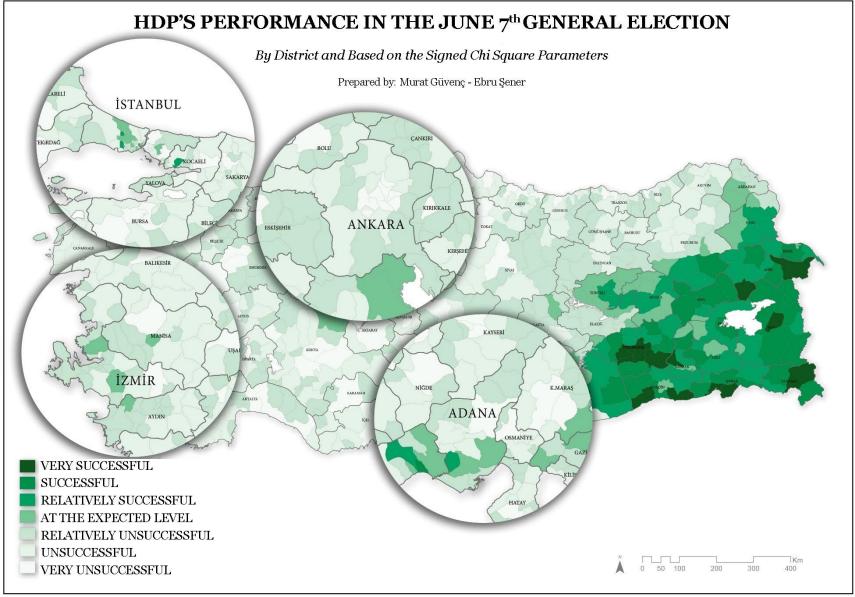




MHP'S PERFORMANCE IN THE JUNE 7th GENERAL ELECTION By District and Based on the Signed Chi Square Parameters Prepared by: Murat Güvenç - Ebru Şener IYARBAKIR VERY SUCCESSFUL SUCCESSFUL RELATIVELY SUCCESSFUL AT THE EXPECTED LEVEL RELATIVELY UNSUCCESSFUL UNSUCCESSFUL 1Km VERY UNSUCCESSFUL 50 100 200 300 400

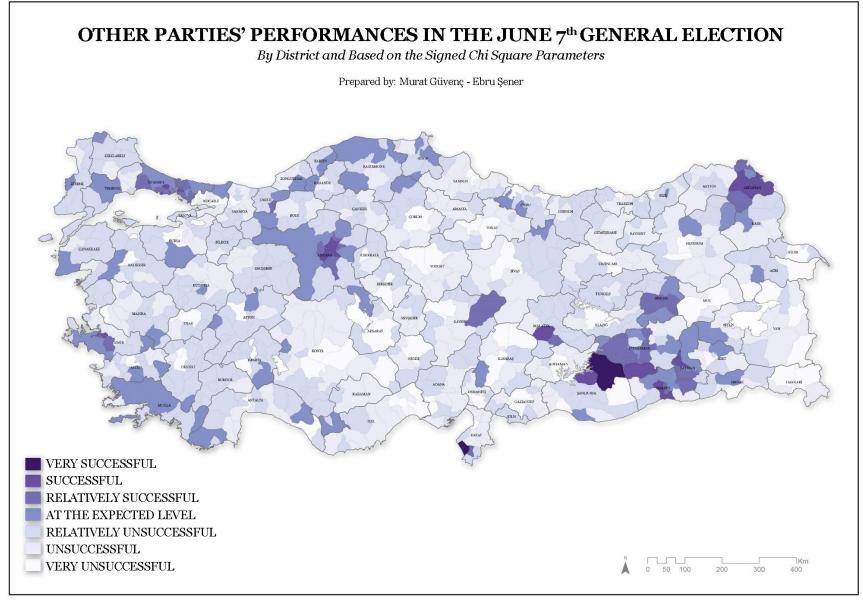


HDP'S PERFORMANCE IN THE JUNE 7th GENERAL ELECTION By District and Based on the Signed Chi Square Parameters Prepared by: Murat Güvenç - Ebru Şener VERY SUCCESSFUL **SUCCESSFUL** RELATIVELY SUCCESSFUL AT THE EXPECTED LEVEL RELATIVELY UNSUCCESSFUL UNSUCCESSFUL 1Km VERY UNSUCCESSFUL 50 100 200 300 400



SP'S PERFORMANCE IN THE JUNE 7th GENERAL ELECTION By District and Based on the Signed Chi Square Parameters Prepared by: Murat Güvenç - Ebru Şener VERY SUCCESSFUL SUCCESSFUL RELATIVELY SUCCESSFUL AT THE EXPECTED LEVEL RELATIVELY UNSUCCESSFUL UNSUCCESSFUL VERY UNSUCCESSFUL 50 100 200 300 400

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4. ELECTORAL SHIFTS BETWEEN 2011-2015

This section of the KONDA Barometer was prepared by Amaç Herdağdelen, Eser Aygün and Deniz Cem Önduygu, who are members of the Çilek Ağacı team, and Onur Altındağ, who collaborated with them in the preparation of this section. This young team has been producing eye-opening works in big data analysis and information architecture, and we would like to thank them for the valuable contribution they have made to our report.

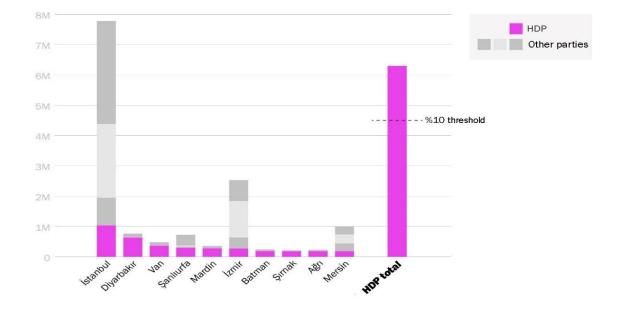
4.1. Summary

- In this analysis, we tried to make inferences on electoral shifts between 2011-2015 by using the ecological inference method that was <u>introduced</u> by researchers from Harvard, Pittsburgh and Northwestern universities in 1997 and utilized in a <u>study</u> conducted to analyze electoral shifts in the 2006-2008 elections in Italy.
- The results of the analysis indicate that vote shifts from Ak Parti and the voters who did not go to the polls in previous elections are the two major factors that carried HDP to success in the 2015 General Election. Accordingly, 53% of HDP's vote gain between 2011-2015 originated from the voters who voted for Ak Parti in the 2011 General Election (confidence interval 36%–67%). Voters who did not go to the polls in 2011 or who were not eligible to vote at the time account for 33% of the increase in HDP's votes (confidence interval 22%–39%).
- The support from CHP's core voters to HDP was limited. According to our analysis, 6% of HDP's vote gain originates from CHP voters (confidence interval 4%–18%).
- The shifts we summarized above are similar to those identified by the KONDA field survey. When we evaluate our results and the findings of the survey conducted by KONDA through face-to-face interviews, the following conclusions can be drawn:
 - The main factor that lies behind the increase in HDP votes is the votes cast by voters with a Kurdish ethnic identity,
 - The majority of these voters voted for Ak Parti in the 2011 General Election,
 - The rate of the "lent votes" that HDP received from CHP voters particularly among voters with a Turkish ethnic identity is limited.

You can visit <u>www.cilekagaci.com</u> to view the complete evaluation and images prepared by the Çilek Ağacı team in collaboration with Onur Altındağ (<u>onuraltindag.info</u>).

Results

In the 2011 General Elections, the Labor, Democracy and Freedom Block, which was formed primarily by BDP and various left-wing organizations, nominated independent candidates. In 2015, the Block was transformed into HDP and it succeeded to enter the parliament by increasing its votes from 6% up to 13%.



Provinces where HDP Received Its Highest Share of the Votes HDP's Total Share of the Vote

- The graph above presents HDP's total share of the vote and the number of its votes in the 10 provinces where the party received the highest share of the vote. In addition to the provinces where inhabitants with a Kurdish ethnic identity are the majority, HDP received a significant rate of the votes in Istanbul and Izmir, and it showed presence in provinces where its presence was not felt before. These development led to many speculations about the electoral shifts towards HDP and the impact of these shifts on the political arena in Turkey. The sources of the approximately 3.4 million new votes HDP received and whether some CHP voters "lent their votes" to HDP to ensure it passed the threshold or not, are among the hot topics of debates.
- In this analysis, we have made an inference on the electoral shifts between parties between the 2011 General Election and the 2015 General Election. For this purpose, we used the ecological inference method that was <u>introduced</u> by the researchers at Harvard, Pittsburgh and Northwestern universities in 1997, and utilized in a <u>study</u> conducted to analyze electoral shifts in the 2006-2008 elections in Italy. When conducting the analysis, we also evaluated first-time voters (voters who were not eligible to vote in the 2011 General Election) as a separate group and analyzed their political preferences. The table below provides the results of the analysis.

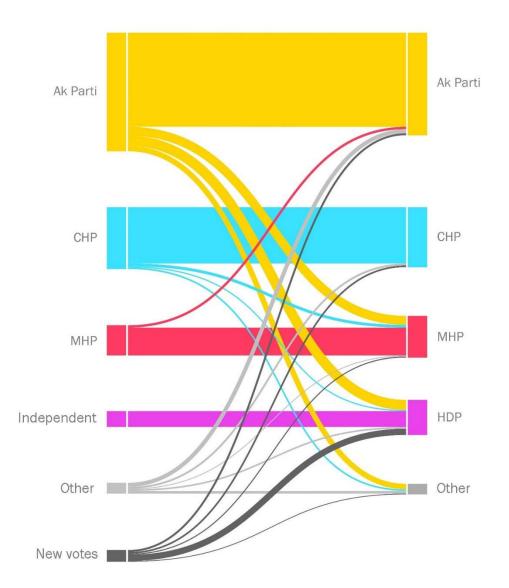
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	Ak Parti 2015	CHP 2015	MHP 2015	HDP 2015	Other 2015	Total
Ak Parti 2011	79.13%	0.36%	7.48%	8.49%	4.54%	100%
CHP 2011	0.39%	90.85%	4.40%	1.89%	2.47%	100%
MHP 2011	7.57%	1.66%	89.68%	0.08%	1.02%	100%
Independent 2011	0.01%	0.01%	0.01%	99.93%	0.04%	100%
Other 2011	36.61%	16.99%	7.66%	14.58%	24.17%	100%
First-time voter 2011	16.81%	13.94%	8.97%	53.51%	6.76%	100%

The rows show voters' political preferences in 2011, and the columns show voters' political preferences in 2015. Each cell shows the rate of voters who voted for the party specified in the row in 2011, but voted for the party specified in the column in 2015. For example, 8.49% of the voters who voted for Ak Parti in 2011, voted for HDP in 2015.



4.2. 2011-2015 Electoral Shifts



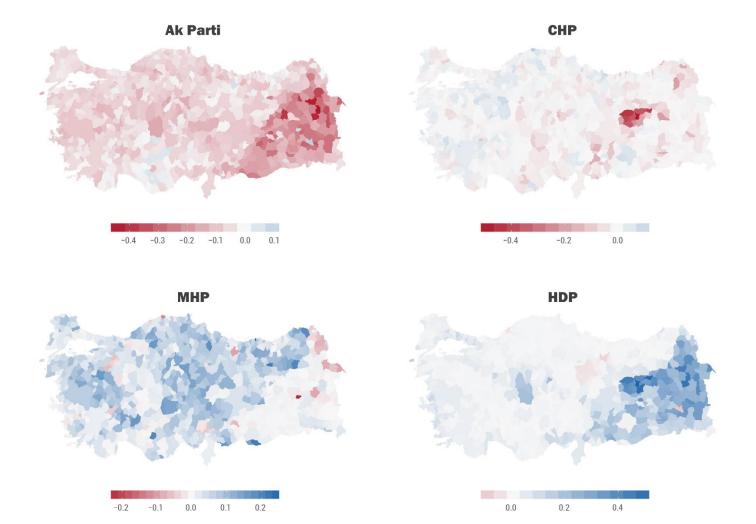
(Shifts less 100,000 votes are not shown in the table.)

According to these results, the perception that a significant rate of CHP voters shifted to HDP is misleading. Our inferences imply that the majority of the voters who shifted to HDP were previously Ak Parti voters. Ak Parti not only failed to prevent the shifting of 1.8 million votes (which account for 3.7% of the valid votes) to HDP, but also lost a similar amount of its votes to MHP. The share of CHP voters in HDP's share of the vote is only 0.4% of the total valid votes, and thus, it is quite limited. When we take into account the confidence intervals, our findings indicate that less than 1.3% of the valid votes (i.e. less than 6% of CHP voters) shifted from CHP to HDP.

- In addition, it is notable that the rate of CHP votes that shifted to MHP is twice the rate of the votes HDP attracted from CHP.
- KONDA researches provide us with insight on the origin of the votes that HDP attracted. According to the survey data, 72% of the voters that HDP attracted (confidence interval 68%–76%) have a Kurdish ethnic identity, while 28% (confidence interval 24%–32%) have a Turkish ethnic identity.
- These results appear to be in conformity with CHP's share of the vote in Tunceli and Ak Parti's share of the vote in the Eastern and the South Eastern regions.

4.3. Changes in the Shares of the Vote

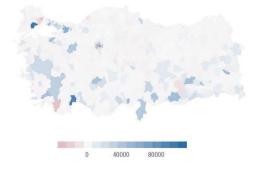
The comparison of the 2011 and the 2015 General Election results confirm the outcomes of the ecological inference. The maps below show the changes from 2011 to 2015 in the shares of the vote received by each of the four parties currently represented in the parliament. The districts colored in red indicate a vote loss, and the districts colored in blue represent a vote gain: the shade of the color is directly proportional to the amount of vote loss/gain. The maps reveal that Ak Parti lost votes throughout Turkey, and Ak Parti voters in the Eastern and the South Eastern regions shifted towards HDP, while Ak Parti voters in the Central Anatolia and the inner-Aegean regions were attracted by MHP. In Tunceli, there is a significant shift of votes from CHP to HDP. However, it is not possible to speak of a similar shift in other regions (there is even no correlation).



Ak Parti CHP 75000 -50000 -25000 25000 20000 20000 MHP HDP 25000 50000 100000 20000 40000 60000 75000

4.4. Changes in the Number of Votes

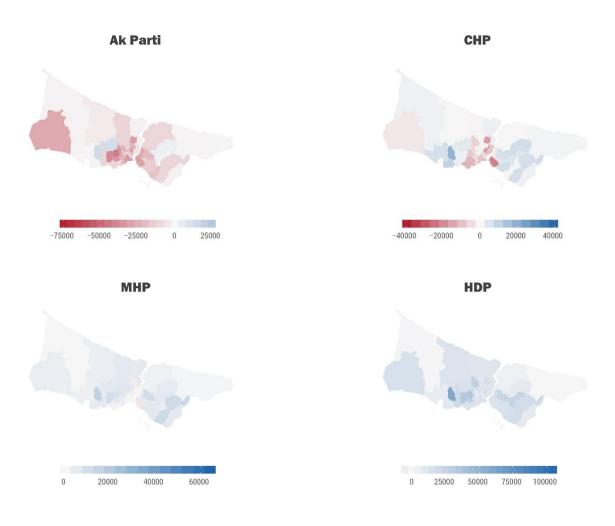
(Absolute) change in the total number of voters



The maps above present the absolute difference in the number of votes each party received in 2011 and 2015 by districts. In addition, we also included the change in the total number of voters in each district. The increase in the number of voters who went to the polls in the districts located along the Syrian border and the decrease in Ak Parti votes in these districts are particularly notable. The fact that HDP's votes increased in almost all of the districts along the Syrian border, where the absolute number of votes increased, may indicate reaction votes by Kurdish voters. It is

expected to observe a correlation between the change in the absolute number of votes, population density of settlements and the increase/decrease in the number of votes each party received. In the maps prepared for Ak Parti and HDP, it is possible to see dark shades in the Southern border districts with a relatively lower population density, and this provides verification to this argument. At this point, it is necessary to note that Manisa was analyzed in its entirety on account of the changes in the number of districts and their borders, and it was left out of the evaluation in the map that shows the absolute number of votes, due to the fact that it was an outlier.

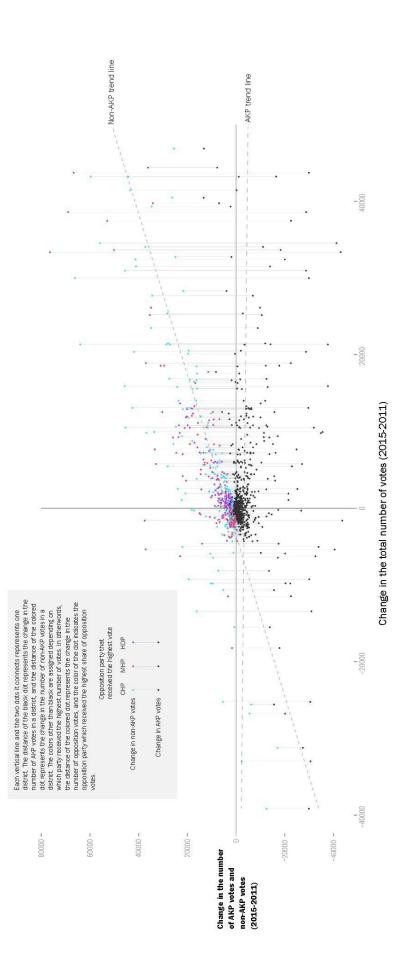
The maps below present the changes in the absolute number of votes in İstanbul by district. Regardless of whether voter turnout increased or decreased, HDP increased its votes in all of the districts in İstanbul. MHP also presented a relatively successful performance. On the other hand, the decrease in CHP's and Ak Parti's votes in the coastal districts and the fact that HDP is the only party that increased its absolute number of votes at a significant rate verify the solidarity between HDP and urban elites.



4.5. Changes in the Number of Votes (Ak Parti / Non-Ak Parti)

- Another notable result of the 2015 General Election is the increase in the voter turnout rate, particularly in the Eastern provinces. We used the scattergram below to analyze the voter turnout rate and the distribution of the votes by district. In the scattergram, the change in the number of valid votes between 2011-2015 by district is shown on the horizontal axis, and the change in Ak Parti's share of the votes and the change in the total share of the votes received by the other three parties in the parliament are shown on the vertical axis. The dots, which show the total number of opposition votes in districts, are assigned a color, based on the opposition party that received the highest share of the vote in the districts.
- It is possible to observe that an increase in the number of valid votes leads to an increase in the total number of votes received by the opposition parties, while it does not make a considerable change in Ak Parti's share of the vote. Neither the findings on electoral shifts nor these results are not sufficient to draw the conclusion that a lower rate of Ak Parti voters participated the 2015 General Election.

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4.6. Method

- Ecological inference is the process of drawing conclusions about individual-level behavior from clustered data. As discussed above, it is possible to reveal individual behaviors at a statistically significant level, by making some basic assumptions and by reducing the size of the clusters.
- In 2001, Rosen et al. suggested a globally accepted <u>method</u>, which made it possible to draw such conclusions. In order to analyze electoral shifts, we implemented the same method on the election results by districts. Although we believe that the results reflect the reality to a great extent, we would like to remind once again that ecological inference is inevitably based on assumptions, and it does not enable researchers to reach definite judgments.
- When analyzing electoral shifts, it should also be kept in mind that a shift does not necessarily have to be observed as an upward or downward trend. The numbers can only tell us the total number of the votes, but they cannot provide any information on who the votes were cast by. The fact that Ak Parti's share of the vote dropped to 85% of what it was in the previous election does not necessarily mean that the exact same 85% who voted for Ak Parti in the previous election, voted for Ak Parti again in this election. In theory, it is possible that voters who voted for Ak Parti in the previous election or it is likely that voters who voted for another party in the previous election voted for Ak Parti this time. We know that this usually is not the case, because we assume that voters present a consistent behavior to a certain extent. Although this is a reasonable assumption, it is nevertheless an assumption.
- The countrywide distribution of the votes provide us with only rough figures. If we were only provided with a piece of information that Ak Parti's share of the vote decreased by 7% and we were supposed to make a prediction based on this, we could have reached the conclusion that at least 7% (and probably more due to the shifts between Ak Parti and other parties) of Ak Parti voters were attracted by CHP, MHP and HDP. CHP may have also lost a certain amount of votes to other parties, but if this is the case, then it must have attracted the same amount of votes. It is not possible to identify the specific rates only on the basis of these rates. In addition, voters who cast a vote for the first time in the 2015 General Election should also be taken into account. Our naive approach does not indicate anything more than the fact that the votes cast by first-time voters are proportionally distributed between parties.
- We can gain a limited insight by looking at vote shifts at the national level. However, analyzing the shifts in a relatively smaller voting district can provide us with more details on the vote shifts between parties. It is possible to analyze vote shifts in different neighborhoods/districts cumulatively to make inferences about nationwide electoral shifts. For example, if we observe that only MHP increased its votes in some of the districts where Ak Parti lost votes and only HDP increased its votes in

others, we can have the opportunity to predict the amount of votes that shifted to MHP and to HDP.

The method suggested by Rosen et al. makes use of the hierarchical multinomial-Dirichlet model and identifies the rates of nationwide vote shifts which best explain the shifts in these smaller districts by making certain assumptions.

5. DEMOGRAPHIC PROFILE OF THE ELECTORATE

5.1. Political Preference Findings from the Barometer

- Every month, we ask the respondents who participate the KONDA Barometer field survey, 'Who would you vote for if there was an election today?' If there is an upcoming election in the near future, we ask the respondents which party they will vote for in the upcoming election. Therefore, during the field surveys we conducted in the last 2 months before the June 7th General Elections, we asked the respondents which party they will vote for in the upcoming election, and we also asked them to mark their preferences on the ballot we provided with the questionnaire.
- The respondents express their political preferences in different ways; some mention the name of the party they will vote for, while others indicate the name of a leader. All of the responses are classified accordingly based on the political party they refer to. In addition to the respondents who express their political preference, respondents who identify themselves as swing voters or non-voters are classified in separate groups.

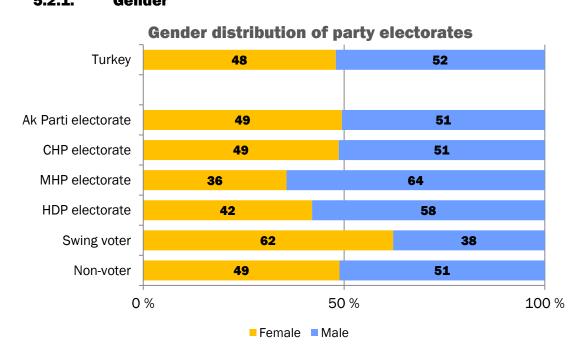
	April'15	2 May'15	23 May'15	30 May'15
Ak Parti	34.2	32.7	34.6	35.4
CHP	20.9	23.2	21.3	24.1
MHP	12.0	11.7	13.5	12.8
HDP	9.6	9.3	11.1	10.9
Other	3.0	4.0	4.5	3.3
Swing voter	17.1	16.4	12.5	11.7
Non-voter	3.2	2.7	2.6	1.8
Total	100.0	100.0	100.0	100.0

The table below presents the findings of the four field surveys we conducted prior to the June 7th Election as well as the actual elections results (excluding the expatriate votes).

	April'15	2 May'15	23 May'15	30 May'15	Election Results*
Ak Parti	42.9	40.5	40.7	41.0	40.7
CHP	26.2	28.7	25.1	27.8	25.1
MHP	15.1	14.4	15.9	14.8	16.5
HDP	12.1	11.5	13.1	12.6	13.0
Other parties	3.8	4.9	5.2	3.8	4.8

* Excluding expatriate votes

- The results we shared with our subscribers and the public on June 4, 2015 were calculated after swing voters and non-voters were distributed proportionally.
- As part of the Barometer research series, KONDA conducted two field surveys within one month. However, it became necessary to conduct a third field study due to the critical characteristic of the June 7th General Election and the necessity to ensure an accurate measurement. As a result, three different researches in Turkey were conducted in one month. 10 thousand respondents were interviewed on the weekends of May 2-3, May 23-24 and May 30-31.

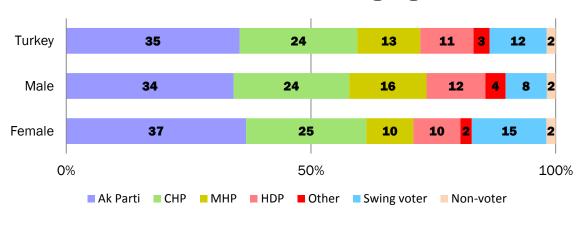


5.2. Basic Demographics

Among all parties, the party with the highest number of male voters is MHP. Further, 13 out of every 100 people in Turkey in general stated that they would vote for MHP whereas this rate occurred as 16 out of 100 among men and 10 out of 100 among women.

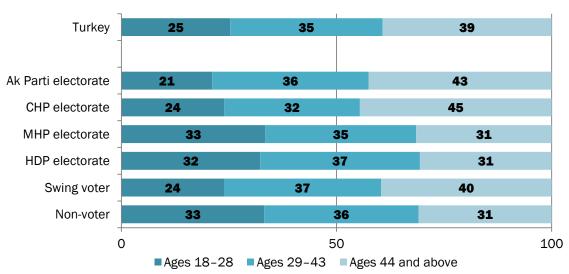
5.2.1. Gender

The three surveys conducted in the month before the election shows that women are undecided at higher rates. About one out of every ten men was undecided whereas 15 out of every 100 women were undecided.



General election vote according to gender

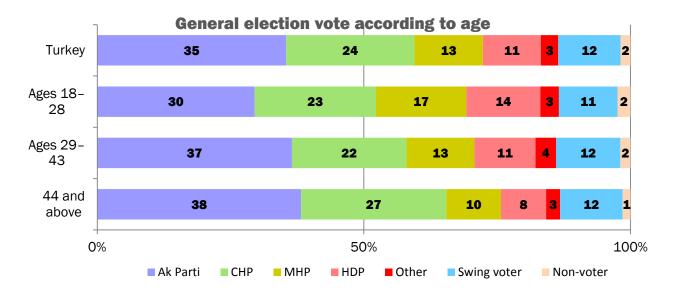




Age distribution of party electorates

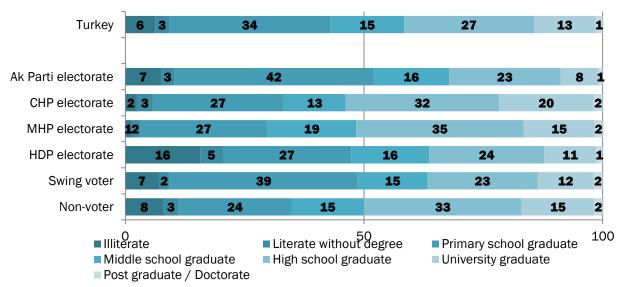
- Among the electorates of MHP and HDP, the rate of the young age group, i.e. the age group of 18-28 is higher than the national average of 25 percent. 45 out of every 100 CHP voters and 43 out of every 100 Ak Parti voters are above the age of 44 whereas this rate is 31 percent among the MHP and HDP electorates. Accordingly, MHP and HDP electorates are younger.
- MHP and HDP receive fewer votes as the age of the electorate increases. Within the average in Turkey, 13 out of every 100 people state that they will vote for MHP and 11 state that they will vote for HDP, whereas this rate occurs as 17 and 14, respectively within the electorate of age 18-24. On the other hand, among the electorate of age 44 and above, these two parties receive fewer votes than the average in Turkey.

The Ak Parti receives a 5-percent less voting rate than the average in Turkey within the age group of 18-28. The only age group that CHP increases its voting rate above the average in Turkey is age 44 and above. However, it is observed that CHP does not experience any dramatic decrease in other age groups such as the one the Ak Parti experiences in the age group of 18-28.



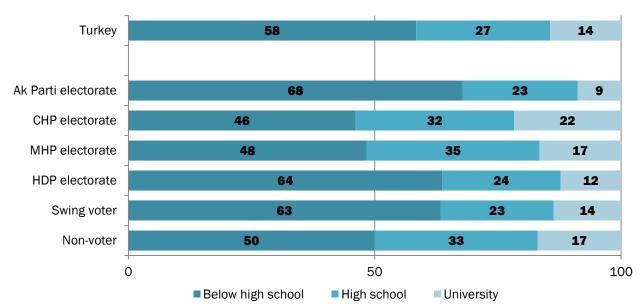
5.2.3. Educational status

The adult population above the age 18 in Turkey have an educational level consisting of 6 percent of illiterates, 34 percent of primary school graduates, 15 percent of middle school graduates, 27 percent of high school graduates and 13 percent of university graduates.



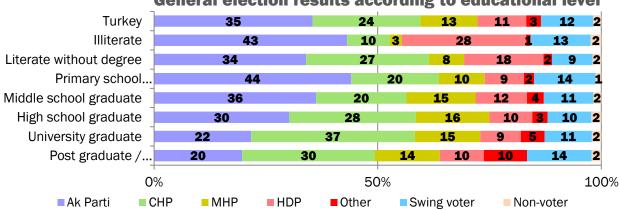
Educational level distribution of party electorates

- When we simplify the educational levels as shown in the graph below, the difference in the educational level among the electorates of different parties turn out to be very clear. 68 percent of those who vote for the Ak Parti consist of people with an educational level below high school degree, 23 percent high school graduates and 9 percent university graduates or higher.
- The educational profiles of the HDP electorate and the swing voters are similar in that they are a bit below the average. CHP and MHP electorates, on the other hand, have an educational level above the national average. 22 out of every 100 people who vote for CHP and 17 out of every 100 people who vote for MHP are university graduates.



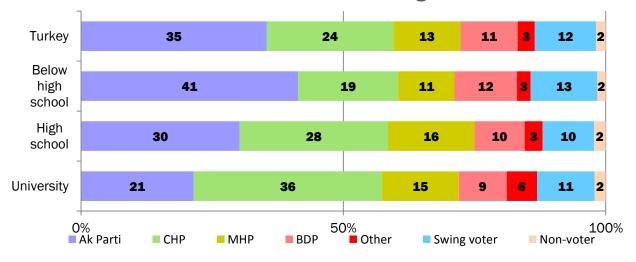
Educational level distribution of party electorates

- The two graphs below show the correlation between the educational level and the party for which the voters voted in the elections. As the educational level increases, the rate of the Ak Parti voters decrease and the rate of CHP voters and partially MHP voters increase.
- It is observed that HDP consists of an electorate who are very different from each other, in that the HDP electorate has an eclectic structure. 28 out of every 100 illiterate people state that they will vote for HDP. On the other hand, the sharp difference that occurs positively for CHP and negatively for the Ak Parti as the educational level increases is not experienced in HDP.
- Eleven out of every 100 voters state that they will vote for HDP whereas this rate becomes 9 percent among university graduates. In other words, illiterate voters and voters without a diploma intensively prefer HDP but as the educational level increases, the movement away from HDP is not experienced at a rate that will drag it below the average.



General election results according to educational level

General election votes according to educational level



This data shows that there is an inverse proportion between the Ak Parti preference and educational level. On the other hand, it is important to emphasize that one in every five university graduates vote for the Ak Parti.

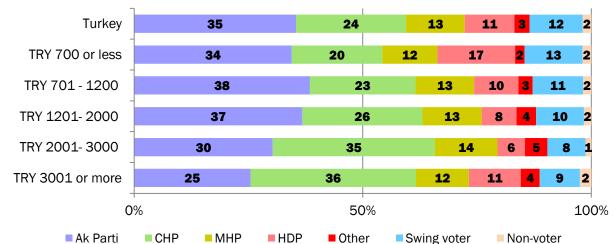
The tendency is directly the opposite for CHP. People with an educational level of university or above prefer CHP almost two times more than those with an educational level below high school degree.

Monthly household income distribution of party electorates Turkey Ak Parti electorate **CHP** electorate MHP electorate HDP electorate Swing voters Non-voters TRY 700 TL or less TRY 701 - 1200 TRY 1201- 2000 TRY 2001- 3000 TRY 3001 or more

5.2.4. Income Level

Among all voters, the household income of the CHP electorate is higher compared to other electorates whereas the HDP electorate has the lowest. Almost 40 percent of the CHP electorate have an household income of above TRY 2,000 whereas this rate is around 20 percent among the HDP electorate.

The income level of the Ak Parti electorate is also below the national average and the MHP electorate is the electorate which is closest to the national average in terms of income.

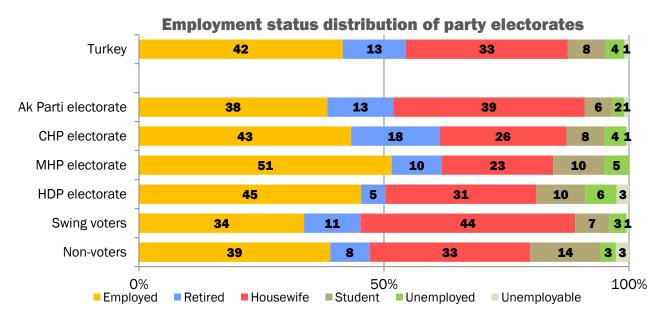


General election votes according to monthly household income

The party preference table of the household income groups shows that the most striking finding is the change in the Ak Parti and CHP voting rates. As the household income increases, the Ak Parti voting rate decreases and CHP voting rate increases so much so that among the electorate with an household income of TRY 3,001 and above, the CHP voting rate becomes almost equal to the national general voting

rate of the Ak Parti and the Ak Parti voting rate among this electorate becomes equal to CHP's voting rate in Turkey.

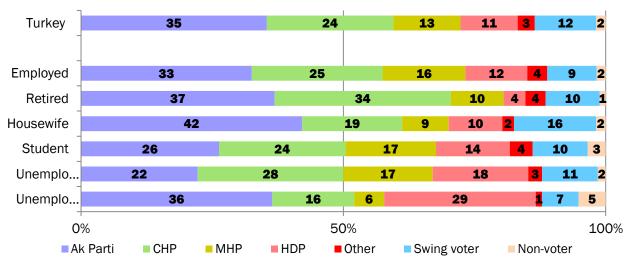
The household income level does not produce any significant advantage or disadvantage for MHP whereas HDP is mostly preferred among the lowest income group.



5.2.5. Employment Status

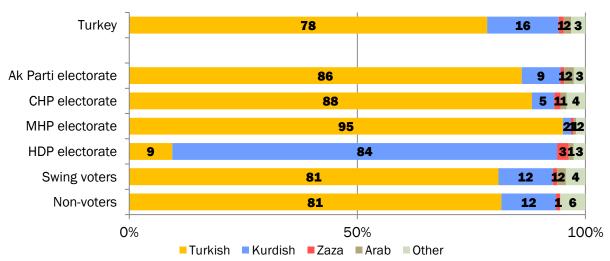
- In Turkey in general, 42 percent of the adult population work whereas 33 percent (68 percent in women) are housewives, 13 percent are retired people and 8 percent are students.
- It is remarkable that the Ak Parti electorate is quite close to this profile with only a small increase in the rate of housewives.
- It is notable that among the CHP electorate, the rate of retired people is higher than the national average and the rate of housewives is lower than the national average whereas almost half of the MHP voters are employed.
- The most remarkable feature among the HDP electorate is that the rate of retired people is low. Other than that, it is another interesting finding with regard to electorate profiles is that the rate of students, unemployed and unemployable people is higher than the average.
- Analyzing the distribution in voting preferences of each group in terms of employment status in the way shown in the graph below, again the closeness between the Ak Parti and housewives comes into attention. 42 percent of housewives state that they will vote for the Ak Parti.

- In this breakdown, the retired people are the cluster that prefers CHP at highest rates whereas the CHP voting rates are below the average among housewives and unemployable people. MHP is less supported by retired people, unemployable people and housewives whereas in all other groups it receives a voting rate above its average.
- HDP is preferred by retired people at rates much lower than its average whereas it receives voting rates higher than its average among unemployable people, unemployed people and students.



General election vote according to employment status

5.2.6. Ethnic Origin



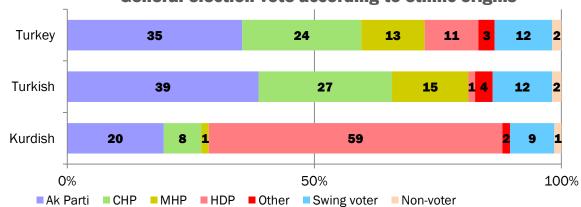
Ethnic origin distribution of party electorates

We asked the interviewees the question: "We are all citizens of the Republic of Turkey but may come from different ethnic origins. How do you know or feel yourself and your



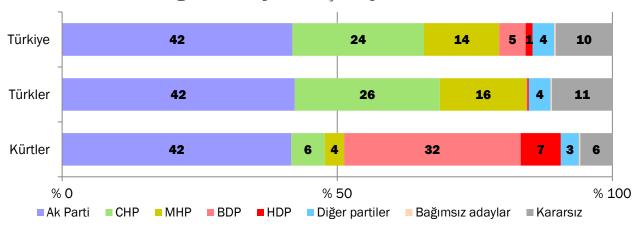
identity?" In response to this question, 78 percent stated that they are Turkish, 16 percent Kurdish, 1 percent Zaza, 2 percent Arab and 3 percent ethnic origins other than the above.

The majority of the electorates other than that of HDP consist of Turks similar to the average in Turkey. 9 percent of the Ak Parti electorate identify themselves as Kurds whereas this rate is 5 percent in CHP and 2 percent in MHP. 84 percent of those who vote for HDP identify themselves as Kurds and 3 percent as Zazas. Another interesting point is that 13 percent of the HDP voters, i.e. 1 out of every 8 HDP voters is not of Kurdish or Zaza origin.



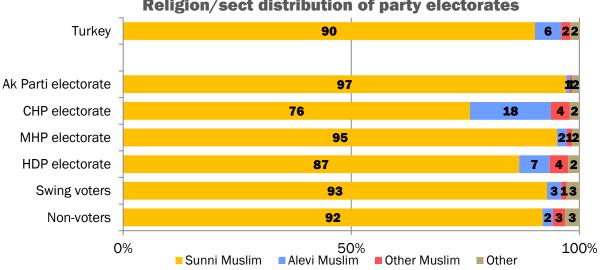
General election vote according to ethnic origins

- In our analysis of the voting preferences of ethnical groups, we could not include Zazas, Arabs and people of other ethnical origins as they are below the significant number necessary for forming a further breakdown. The finding that attacks initial attention is that 6 out of every 10 voters who identify themselves as Kurds vote for HDP.
- Among those who identify themselves as Turks, the total voting rates of the Ak Parti, CHP and MHP are above the national average. In addition, the increase in each party is almost equal. The main reason for this is that only 1 percent of those who identify themselves as Turks vote for HDP.
- Comparing this finding with the 2014 local election findings, we clearly observe the sharp change in the voting preference of those voters who identify themselves as Kurds and the vote swing from the Ak Parti to HDP.



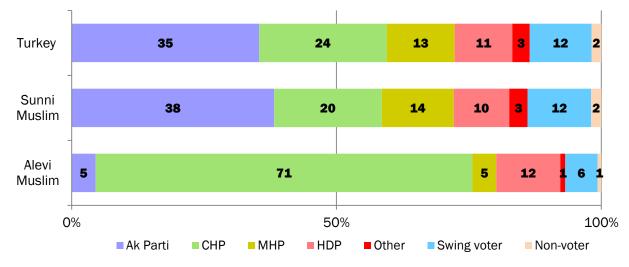
Etnik kökene göre 2014 yerel seçim oyu

5.2.7. **Religion / Sect**



Religion/sect distribution of party electorates

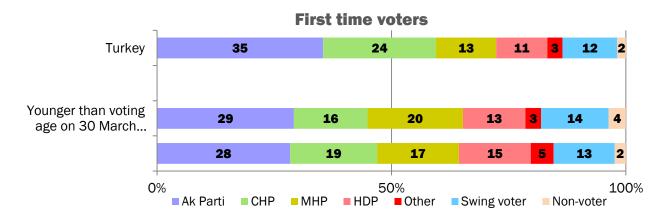
- The correlation between party preference and religion/sect basically shows the connection between CHP and the Alevis. CHP receives 18 percent, i.e. roughly one fifth of its votes from the Alevis and 71 percent of the Alevis state that they vote for CHP. It is remarkable that 12 percent of the Alevis, i.e. one eighth vote for HDP. It is also remarkable in the graph below that Sunnis vote for the Ak Parti 3 points more than the national average and they vote for CHP 4 points less than the national average.
- HDP is the party which has the closest preference rate to the national general in terms of sects. The preference rate for HDP in terms of sects changes only 2 points whereas this rate is much higher in other parties.



General election vote according to religion/sect

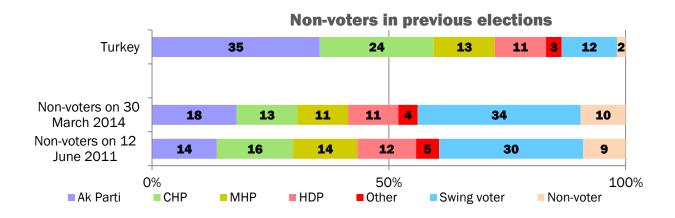
5.2.8. First Time Voters and Those Who Did Not Vote in the Previous Elections

- Another popular subject in this election was the first time voters. In our pre-election surveys, we made an analysis based on 265 individuals who were younger than the voting age in the 30 March 2014 local elections and 460 individuals who were younger than the voting age in the 12 June 2011 general elections which revealed that first time voters prefer HDP and MHP at higher rates than the remaining voters.
- Among those who were not eligible for voting in 2014, MHP is the second party and the voting rates of CHP and HDP are close. In addition, the Ak Parti receives significantly less votes than the national average among young and new voters.



In the surveys we conducted in the previous months, there are 532 people who state that they did not vote in the 2014 election and 355 people who state that they did not vote in the 2011 election. Checking the voting preferences of these people in the 2015 general election, we reach an important finding with respect to among whom HDP increased its voting rates.

- Our survey reveals the rate of swing voters and non-voters as 14 percent whereas this rate was 44 percent among those who did not vote in 2014 and 39 percent among those who did not vote in 2011. Despite the rate of swing voters and non-voters being above 40 percent, the voting rate of HDP among those who decided to vote in this election maintained the same rate as in the national general and even increased at a rate of 1 point among those who did not vote in 2011. It seems that MHP also attracted a previously non-voting cluster towards voting in this election.
- Yet, we observe that especially the Ak Parti and CHP could not sufficiently attract the previously non-voting cluster in the advantage of their own parties.
- Accordingly, we may conclude that rather than the vote transitivity among the parties, the voting vs. non-voting electorates influenced the election result. Namely, if a voter who voted for Party A in a particular election is not happy with Party A within the present political polarization, he/she cannot change his/her voting preference in favour of Party B but shows his/her discontent by refraining from voting. When those voters who do not vote for any party out of discontent find a party that they think will please them, they decide to vote. Our analysis especially with regard to the correlation between deciding to vote and voting for HDP is present in the following sections of this report.



Who are these non-voters?

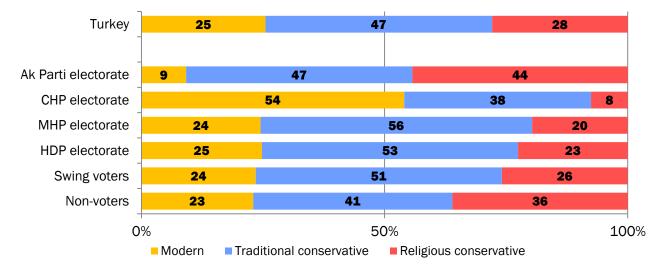
- Those who did not vote in the previous two elections make about 5.5 to 6 percent of the total electorate.
- The educational level is quite higher than the average in Turkey. About 20 percent have university degree or higher.
- Almost 40 percent are in the age group of 18-28 and about one fifth of this cluster identify themselves as Kurds in a way higher than the average in Turkey.

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 This cluster answer the question "Who do you want Turkey to govern?" as Selahattin Demirtaş at a rate of 15 percent. This makes Demirtaş the second most wanted leader to govern Turkey after Ahmet Davutoğlu in the cluster of non-voters. Although Davutoğlu is the first on the list, almost 39 percent in the average in Turkey want him to govern Turkey whereas only 22 percent of the non-voting cluster wish that Davutoğlu governs Turkey.

5.3. Lifestyle

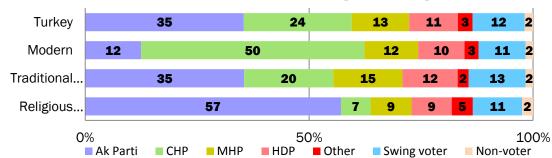
5.3.1. Lifestyle Clusters



Lifestyle cluster distribution of party electorates

Due to the descriptive nature of the lifestyle clusters that we presented in our survey dated 2008 titled "Who are we? Lifestyles" we have been posing one question "Which of the three groups do you consider yourself belong to in terms of lifestyle?" to the interviewees since the beginning of 2012 in our KONDA Barometer surveys in order to determine the lifestyle cluster in one question and offer the alternatives "modern," "traditional conservative" and "religious conservative." There may exist different views that find these three clusters questionable and claim that there must be other lifestyle clusters. However, only 1 to 3 percent of the interviewees have difficulty in identifying a lifestyle cluster that they feel they belong to.

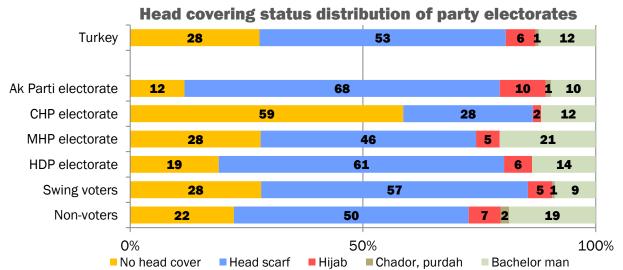
Within the society in total, 25 percent consider themselves modern, 47 percent traditional conservative and 28 percent religious conservative. Among the Ak Parti supporters, the rate of religious conservatives is 47 percent, among CHP supporters modern people are 54 percent whereas among MHP supporters traditional conservatives are 56 percent and among HDP supporters religious conservatives are 23 percent. It is remarkable that 51 percent of the swing voters are traditional conservatives. Still, we may conclude that among the party electorates, the lifestyle clusters are distributed very similarly to the national average except the Ak Parti and CHP.



General election vote according to lifestyle clusters

The correlation between lifestyle and party preferences is rather apparent. Half of those who identify themselves as modern vote for CHP whereas almost six of every ten people identifying themselves as religious conservatives vote for the Ak Parti. The voting preferences of traditional conservatives are quite close to the national general.

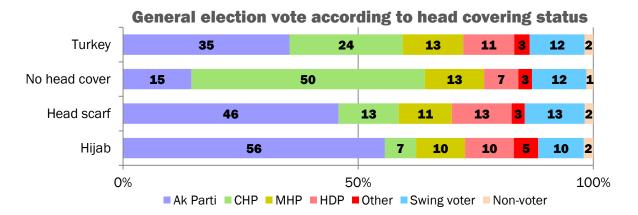
Among all parties, HDP is the one which is distributed in the most balanced way among the lifestyle clusters. In other words, HDP is preferred at very similar rates among those who identify themselves as modern and those who identify themselves as religious conservative.



5.3.2. Head cover

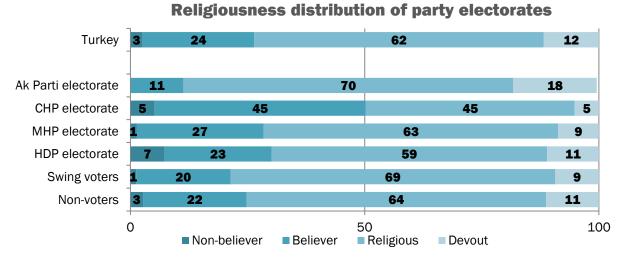
In order to understand the demographic situation of the society in Turkey, we pose another question, this time with regard to the head covering status. The data we collect concerning the type of head cover is solely based on the declaration of the interviewees.

The Ak Parti receives only 12 percent of its votes from those who do not cover their heads or if they are males, whose wives do not cover their heads whereas 59 percent of the CHP electorate consist of those who do not cover their heads. Another party that comes after the Ak Parti in terms of low rates of non-head covering electorate is HDP. Among the MHP electorate which, as we showed in the previous sections, mostly consists of young people and men, the rate of bachelor men is above the average.



- Fifty percent of those who do not cover their heads vote for CHP and 15 percent vote for the Ak Parti. In other words, those who do not cover their heads vote for CHP at rates two times above the average whereas they vote for the Ak Parti at rates almost half of the average.
- Among those who cover their heads with head scarves, the rate of votes for the Ak Parti is 46 percent and among those who cover their heads with hijabs, it is 56 percent which are quite higher than the national average. MHP shows a more balanced distribution than the other parties according to the head covering status.

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5.3.3. Religiousness Level

In order to determine the religiousness level of the public, we asked the question "In terms of religiousness, which of the following defines you?" to the interviewees and asked them to choose one of the alternatives shown in the table below. The terms nonbeliever, believer, religious and devout are defined by us.

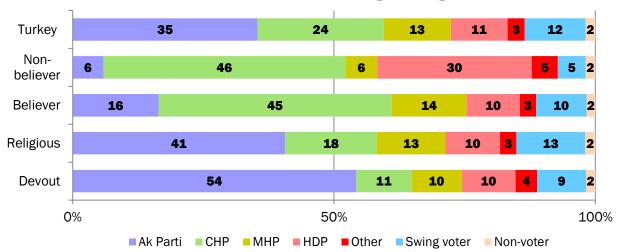
In terms of religiousness, which of the following defines you? Non-believer: One who does not really believe in the requirements of religion

Believer: One who believes but does not really fulfill the requirements of the religion

Religious: A religious person who tries to fulfill the requirements of religion

Devout: A religious person who completely fulfills the requirements of religion

Within the society, 24 percent identify themselves as believers, 62 as religious and 12 percent as devouts. The distribution of party electorates in terms of religiousness shows that the Ak Parti supporters are more religious than the national average and that among CHP supporters there are more people who have weaker connection with religion. However, it must be noted that half of CHP supporters identify themselves as religious people or devouts.

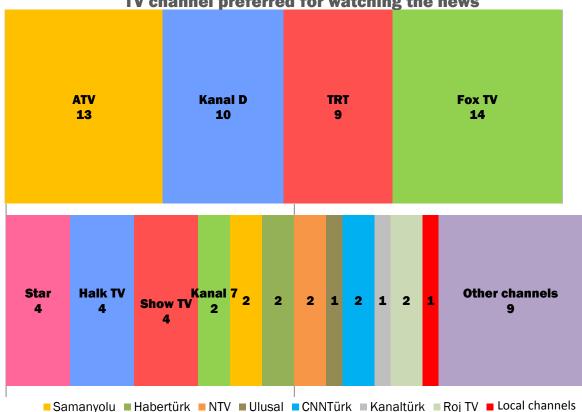


General election votes according to religiousness level

- The graph above clearly shows that as the connection of the public with religion grows stronger and as they identifies themselves as more religious, the number of Ak Parti voters rapidly increase and the number of those who vote for CHP rapidly decrease.
- Even though non-believers make the smallest cluster (246 people among 9803), the preference for HDP among them is remarkable. In addition, we observe that believers, religious people and devouts prefer HDP at equal rates. The rate for preference for MHP among these three religiousness clusters is quite close.

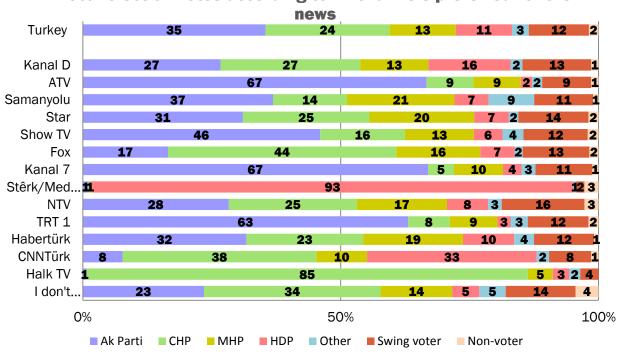
5.3.4. TV Channel Preferred for Obtaining the News

We regularly ask our interviewees in our surveys which TV channel they prefer for obtaining the news. The aim here is to determine which TV channel they feel close to in a political point of view rather than determining the ratings of TV channels.



TV channel preferred for watching the news

- The graph above shows that almost half of the public prefer ATV, Kanal D, TRT or Fox TV for obtaining the news. The other half prefers the remaining TV channels.
- The first and most striking finding that is revealed through the analysis of the party preferences of the viewers of the most preferred 12 TV channels in the graph below is that some TV channels are preferred by the electorate of almost a single party. Those who watch Kanal 7, ATV and TRT are mostly the Ak Parti electorate. Those who obtain news from Halk Tv, Fox and CNN Turk and those who state that they do not watch TV prefer CHP at a rate higher than the national average.
- MHP does not generate preference differences as sharp as that of the Ak Parti and CHP in terms of the TV channel preferred for obtaining the news whereas the preferences of the HDP electorate are more distinct. Almost everyone who obtain the news through TV channels which broadcast in Kurdish language such as Stêrk, Med Nûce or Ronahi TV are HDP voters. Next, those who prefer to obtain the news through CNNTürk and Kanal D prefer HDP at rates higher than the national average so much so that our findings obtained in our 3 surveys conducted in the month before the elections show that 1 out of every 3 CNNTürk viewers are HDP voters.



Local election votes according to TV channels preferred for the

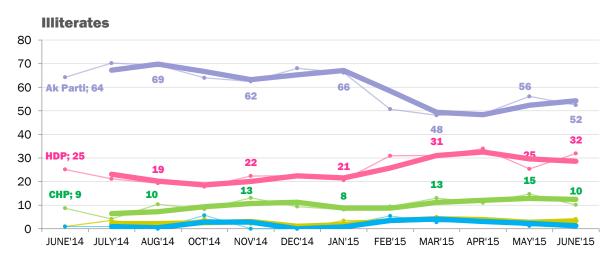
6. CHANGE OF POLITICAL PREFERENCES IN DIFFERENT PROFILES

In the previous section, we observed the general profile of the electorate and how political preferences change in different demographic clusters. In this section, we will see how political preferences have changed in different profiles in the past 1 year.

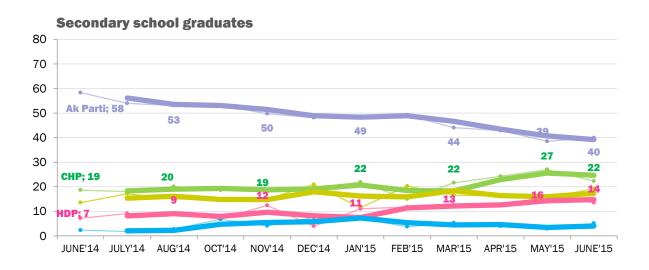
- We pose demographic questions in every survey to interviewees we meet within the KONDA Barometer Report. Measurements in each survey include general demographic parameters such as gender, age, educational level, income level and employment status and also religiousness level, head covering status, ethnical identity, religious sect and the lifestyle group one feels a belonging to. In addition, we also know the rates of TV channels regularly preferred for obtaining the news.
- It is very important as to how a given finding changes with respect to these demographic breakdowns. Similarly, the changes political preferences show with respect to different demographic profiles give way to very important clues.
- Especially considering that a great electoral mass moved, in other words changed political preference in the past 8 months, it is useful to understand the details of this movement. In order to determine in which demographic clusters the fall of the Ak Parti and the rise of HDP created change, the graphs below will be very useful.

6.1. Educational Level

Firstly, we analyze the political preference change in the 4 different educational level groups. The rates in the graph below show the voting rates of each party in the demographic cluster in the measurements of that month's Barometer. Since the quantitative size of some clusters are not sufficient for accurate data and may lead to insignificant movements, serial change has been shown through mobile average. In the mobile average shown in thick lines, averages were measured for every two data and used in series.

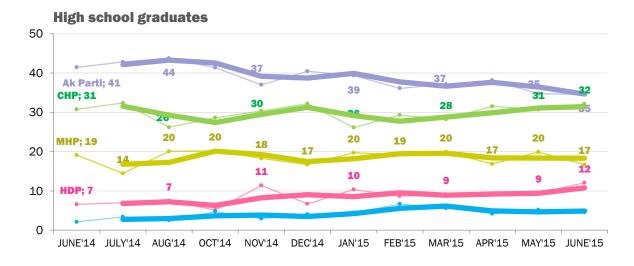


- Firstly, studying the illiterate cluster that make 6 percent of the national population, we can clearly follow the fall of the Ak Parti and the rise of HDP. The reason as to why the rise of HDP especially in the past four months is more apparent in this cluster is Kurds because the rate of Kurds which is about 15 percent in the national general increases to 42 percent within illiterate people.
- We have already repeatedly mentioned in many Barometer Reports that the voting rate of the Ak Parti increases as the educational level decreases. However, it seems that the Ak Parti voting rate has also radically dropped in the lowest educational cluster in which the Ak Parti used to receive a voting rate as much as 70 percent.
- It is observed that the Ak Parti continues to be the leading party among middle school graduates. However, we observed that the Ak Parti has lost one third of its voting rate in this cluster. We cannot conclude that within this educational level group, the Ak Parti votes which have been decreasing within the past 12 months have been directed to a particular party. Especially HDP increased its voting rates up to almost 5 points within the past 5 months.

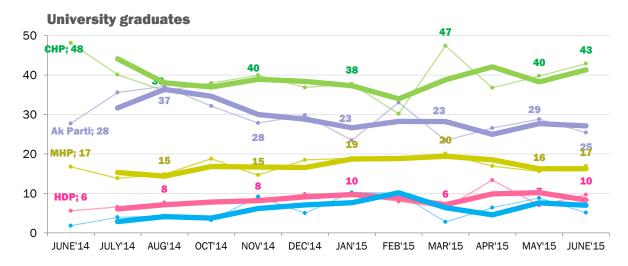


The most significant difference of the progress of the political preference of high school graduates who make one fourth of the national population from other groups is that the Ak Parti voting rates experienced a relatively milder decrease.

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University graduates make 13 percent of the adult population. We always determine according to survey data that in the educated clusters CHP voting rate is higher. However, as seen in the graph below, even at its lowest level, one fourth of the university graduates vote for the Ak Parti.

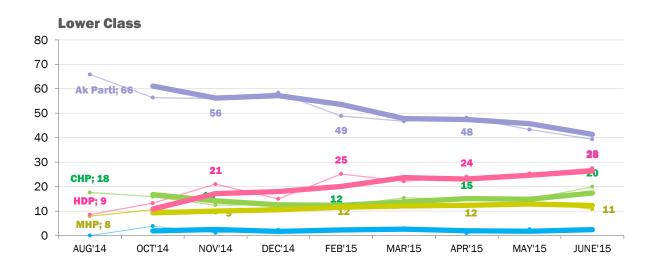


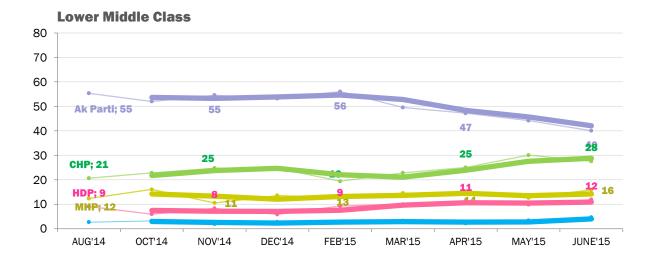
An important point to be emphasized with regard to the movement in the HDP voting rates within the university graduate group is that we know that a significant part of the votes HDP received especially in the non-Kurdish cluster comes from those with high level of education and urban metropolitan lifestyles. In the light of this assumption, we may conclude that the approach towards HDP was shaped in the period before the last 2 months, considering that the HDP voting rates experienced almost no change as of 6 months before the election.

6.2. Income Level

The progress of political preference in the income groups that may move in parallel to educational level clusters offer different clues.

The income groups we formed within the context of KONDA Barometer Reports are a structure we formed on the basis of not only monthly household income but also household population and ownership of the household. There is a significant difference within the four income groups in terms of preference for the Ak Parti or CHP. However, differently from the educational level, even though the CHP voting rate increases in the higher income groups, the Ak Parti is observed as the leading party in each income group.



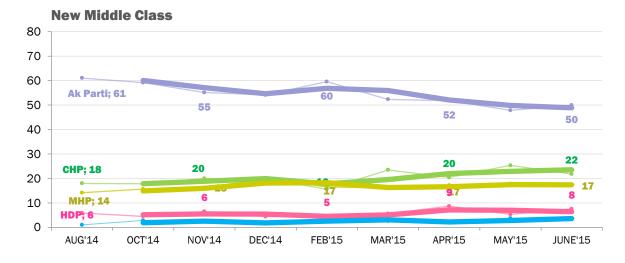


We observed in the lower and middle income groups that the main change happens in these groups. In the lower income group which we think makes about 21 percent of the society, HDP increased its voting rate at a level of 19 points within 10 months whereas the Ak Parti voting rate decreased by 27 points. We may consider that at least 2.5 million people in approximately the same income level changed their political positions gradually within 10 months.

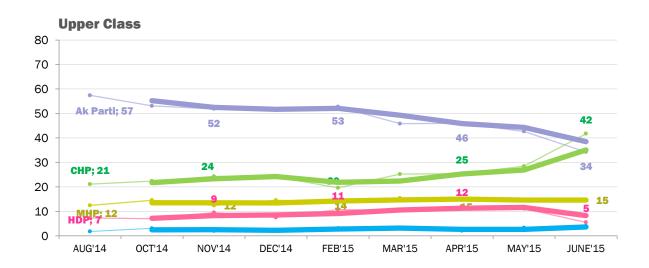


The movement in the lower middle income group that makes about 34 percent seems to be as sharp as that in the lowest income group. In addition, this cluster shows an 8-point increase in the CHP voting rate.

The new middle class who may be defined as the lower middle income group who own automobiles make one fourth of the society. As shown in the graph below, this group does not seem to have a political position as dynamic as other clusters.

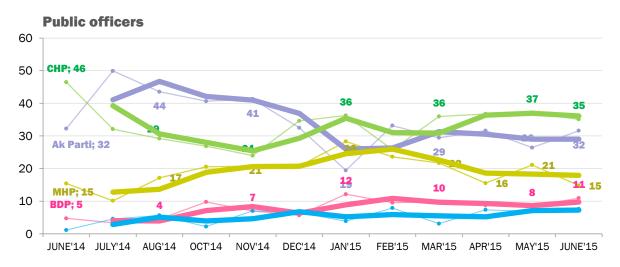


One fifth of the society belongs to the upper income group. In this group, within the 10month term, the Ak Parti voting rate dropped from 57 percent to 34 percent whereas CHP voting rate increased from 21 percent to 42 percent. The most outstanding general characteristic of this demographic cluster is that the significant change in political preference was experienced within the past 4 months. Based on this finding, we may relate the fact that the political preferences of those people who have higher income and belonging may change in the term closer to the election partly to their taking political positions by calculating material gains.



6.3. Employed and Unemployed People

- One One of the significant demographic definitions within the society is employment status. We get the opportunity to determine as to how the political preferences of private sector employees, public officers, retired people, students, farmers or housewives change over time.
- Firstly, when we observe the 6 percent who identify themselves as public officers, we see a significant loss of votes for the Ak Parti. The radical changes among monthly calculations result from the fact that we observe the rates within a cluster as small as 6 percent. However, it is possible to observe the general tendency through the progress that occurred on the averages of 2 months. Over 12 months, the similar progress of the Ak Parti and CHP among public officers transformed into an increasing trend for CHP in the past 4-month term.
- Another important finding is with regard to HDP. As of August'14, only 5 percent of the public officers stated that they will vote for HDP whereas this rate climbed up to 10 percent within 10 months.

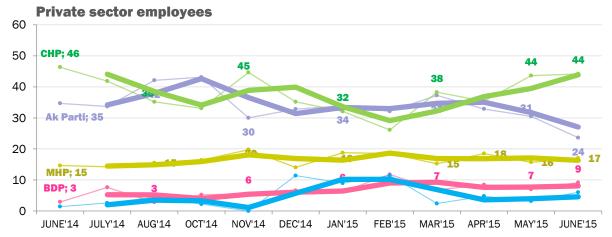


Another progress similar to that of public officers is observed among those who work as officers or managers in the private sector. Until two months to the elections, the voting rates of the Ak Parti and CHP among white collar workers were at the same level. However, according to the data of the surveys, in the last two months, CHP voting rates took an upwards turn and the Ak Parti voting rates took a downwards turn. In other words, as the rate of the swing voters decreased within the private sector employees, CHP increased its voting rates.

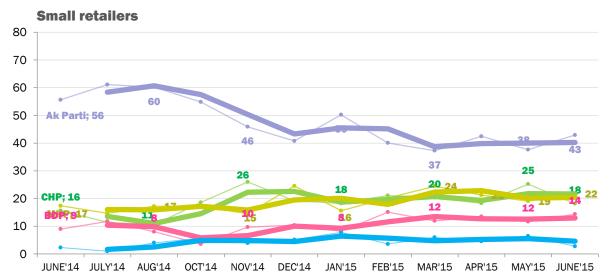
It is not the white collar workers who made HDP pass the electoral threshold.

Even though HDP voting rates seem to have increased within the private sector employees as well, it is observed that HDP never passed the electoral threshold within this white collar worker group.

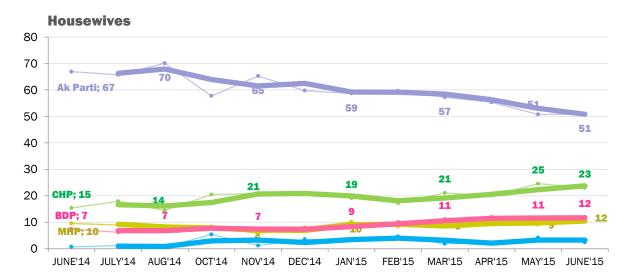
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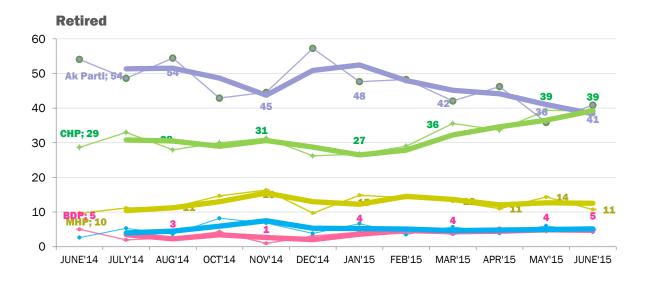
- Within small retailers who make about 6 percent of the society, it is also observed that the Ak Parti voting rates radically decreased as from August when Erdoğan became the president until December. It is observed that the voting rates of other parties moved in a stable manner as of December within the small retailers group.
- On the other hand, HDP passes the electoral threshold among small retailers in the past three month term in the upward curve.



In terms of employment status, the largest cluster in Turkey is housewives making one third of the society. We know that one third of the society and two third of women are housewives. In addition, we have been repeating in various Barometer reports that housewives have always been the fortress of the Ak Parti. Even in the survey conducted only one week before the election, at least half of housewives stated that they would vote for the Ak Parti. However, considering that this rate was 70 percent exactly one year ago, we may claim that a significant decrease has occurred. On the other hand, we observe that CHP increased its voting rates by 8 points within housewives. It is remarkable that HDP and MHP also increased their voting rates within a cluster as big as housewives. Housewives also attract attention as a cluster that carried HDP from below the threshold to above it within the past 3 months.



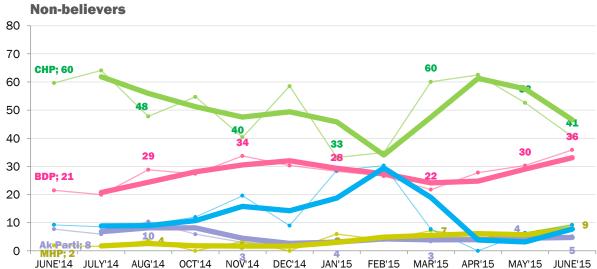
About 12 percent of the adults in Turkey state that they are retired. Accordingly, this is a rather large demographic cluster. Within the retired people, the Ak Parti voting rate again dropped and came to the same level with CHP. The Ak Parti voting rate which had been above 50 percent dropped to 40 percent and the CHP voting rate which had been 30 percent climbed up to 40 percent. Although the causes cannot be precisely determined through the data, we may consider that CHP's promises for the retired people might have been influential. Among the retired people, it seems that the HDP voting rate never exceeded 5 percent.



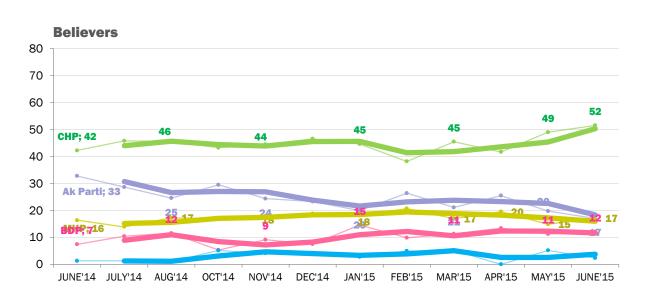


6.4. Religiousness Level

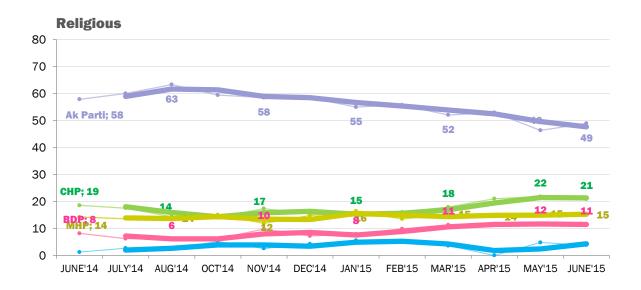
- We already determined in the previous section on party electorate profiles that religiousness level which we have been measuring every month in the context of Konda Barometer Reports is an extremely effective parameter. We take it as a fact that as the religiousness level increases, the probability of being an Ak Parti voter increases and the probability of being a CHP voter decreases. In this regard, we must analyze as to how the Ak Parti voting rate moves in different religiousness levels.
- The main reason behind the fluctuation in the voting preferences of non-believers is the fact that this cluster is even smaller than 3 percent. In such a small cluster, it is necessary to check the general tendency rather than fluctuations. We may assert that in this small cluster, the voting rate of CHP decreased and the voting rate of HDP increased. Yet, it should be kept in mind that this is merely a group of 1.5 million people.



The believers cluster who define themselves as people who believe but do not really fulfill the requirements of religion make about one fourth of the society.



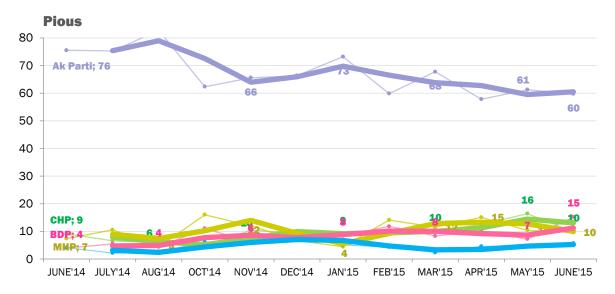
- Within this cluster, 12 months ago, the Ak Parti electorate was at a rate of one third whereas this rate decreased to 17 percent. On the other hand, the rate of those who state that they will vote for CHP increased by 10 points making more than half of the cluster. This cluster is also one of those who brought HDP above the electoral threshold.
- The rate of those who define themselves as religious (who try to fulfill the requirements of religion) is 61 percent. Among the religious people, the preference rates for the Ak Parti decreased just like the national general. However still, half of the 60-percent religious cluster stated one week before the election that they would vote for the Ak Parti.



Even among devouts who are defined as people who fulfill all requirements of religion, we observe a decrease in the Ak Parti voting rate. However, despite the decrease of 16

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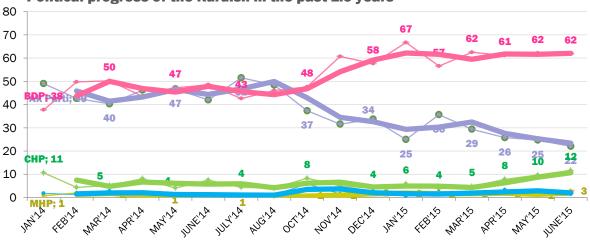
points, 60 percent of the 12-percent devout cluster stated that they would vote for the Ak Parti.



6.5. Ethnic Identity

In the context of KONDA Barometer Reports, we have been constantly making calculations on ethnic identity and also we have been trying to determine the political preferences of especially the Kurds as well as their perceptions and expectations. However, the fact that HDP will undertake an extremely important role with regard to exceeding the electoral threshold in the 2015 parliamentary elections and on the other hand the fact that the electoral base of HDP is based on Kurdish politics, brought even greater importance to the political preferences of Kurdish citizens.

The graph below shows the progress in the political preference of the 14-16-percent electorate group who state that they are Kurdish since the beginning of 2014.

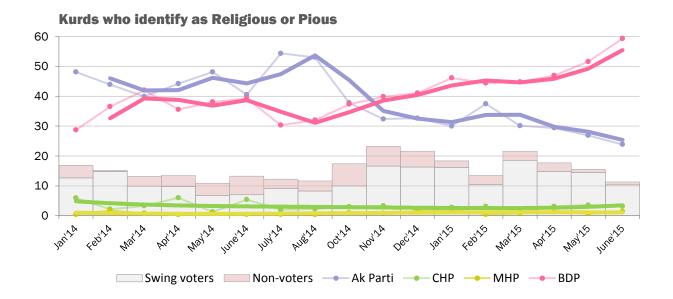


Political progress of the Kurdish in the past 1.5 years

Until August'14 when Erdoğan became the president, the Ak Parti and HDP (or BDP before that) received equal rate of votes from the Kurds. However, by Demirtaş's obtaining

almost 10 percent of votes in the presidential elections which is close to the electoral threshold, the gap between the Ak Parti and HDP among the Kurds started to widen. While the two parties used to share the 14-percent Kurdish vote almost equally, now HDP climbed up to around 60 percent and the Ak Parti dropped to around 20 percent.

- It is difficult to presume as to how much return the Kurdish electorate votes that make more than 80 percent of the HDP voting potential will bring in future elections. However, looking at the graph, we believe that this is a general political change of attitude rather than a mere voting attitude.
- As the election date approached and political competition discourse heated, especially the religiousness of the Kurds and the preferences of religious Kurds became a hot debate. Such debates were triggered especially by the opening speeches made by Erdoğan in the Eastern provinces with a Kurdish language Koran in hand, and there were assumptions that the political preference of religious Kurds would be dominated by the Ak Parti.
- On the other hand, the graph below shows the political preference of only those Kurds who define themselves as religious or devout. This graph, differently from the ones above, shows the direct preference rates before the swing voters were distributed.

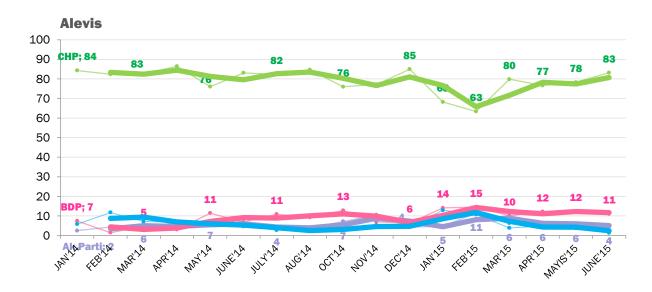


Although in the last months before the election, the rate of swing voters decreased, the decrease in the Ak Parti continued. In other words, religious Kurds also showed a significant gap between the Ak Parti and HDP just like the situation among the Kurds in general. Among them the situation was the same in that the Ak Parti voting rate decreased and HDP voting rate increased. Even the swing voters who transformed into decided voters in the last months did not lend any votes to the Ak Parti leading to a continuous decrease in the Ak Parti among religious Kurds.

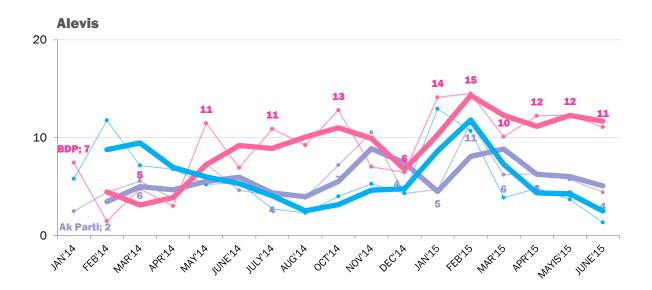
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6.6. Sect

There are various claims as to the percentage of Alevi citizens within the society. However, according to the surveys conducted by KONDA in different scales, the rate of the Alevi population within the adult population is 5-6 percent. The four fifth of Alevis who have a general political tendency towards CHP stated before this election that they would vote for CHP. We also observed that the HDP voting rates slightly increased in exchange of the downwards trend around February.



It is possible to detect a changing attitude towards HDP also among Alevis as the situation in Tunceli where there is an intensive Alevi population, proves with HDP becoming the first party. Accordingly, it is necessary to narrow down the vertical axis of the graph above and check the parties distributed within the 20 percent.

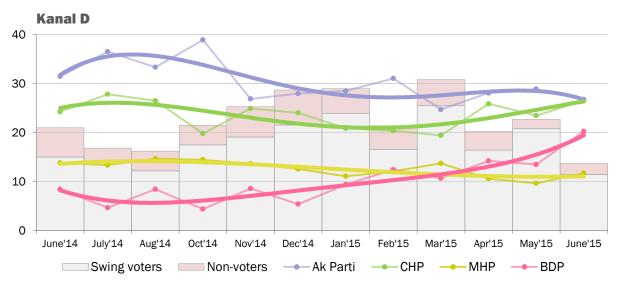


The pink line of HDP in this graph shows a general upwards trend.

We may see this increase of HDP as 12 percent within a cluster of 6 percent. However, as we emphasized in various sections of this report, the additional votes obtained by HDP in the past 8 months other than the Kurdish votes were contributed by almost all clusters at small rates.

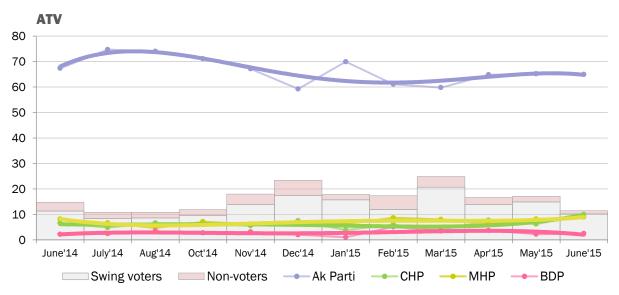
6.7. TV Channel Preferred for Obtaining the News

- The TV channel preferred for obtaining the news is a parameter that we constantly use in order to define political preference. Especially in the recent years where polarization affected not only the individuals but also the institutions, the preference for a particular TV channel becomes descriptive in many ways. On the other hand, as shall be seen in the graphs below, the broadcasting policy of a TV channel may partly change the political preference of the viewers. At this point, it is difficult to decide as to whether the viewers change their opinions by the influence of the broadcasts of propaganda nature or whether individuals prefer to watch TV channels that broadcast in parallel to their political preferences. However, we may claim through our deep analyses in this regard that what changes are not the opinions of the viewers but rather the preferred TV channels.
- In the graphs below where we showed the progress of political preferences on the basis of preference for a TV channel, we maintained the swing voter rates because we wanted to see at which point the opinions of the viewers of a particular channel move away from undecidedness. In addition, we formed the tendency lines in accordance with the polynomial method which helps us smooth the projecting points. In conclusion, it will be more accurate to analyze these graphs on the basis of tendencies rather than rates.

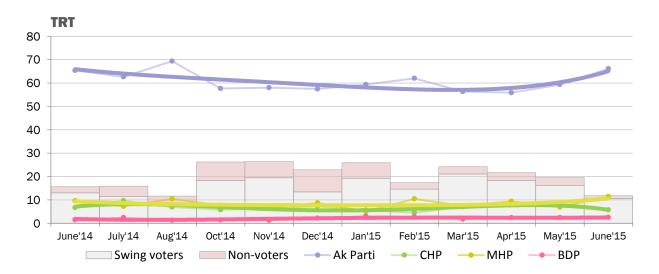


We may claim that the Kanal D viewers show a structure that is close to the general profile of Turkey according to the general Barometer data. Checking the 12-month progress of those who obtain the news through Kanal D, we observed that especially the voting rate of HDP radically increased. It seems that the swing voters that decreased in the last months were canalized towards HDP and partly CHP, leaving almost no votes to the Ak Parti.

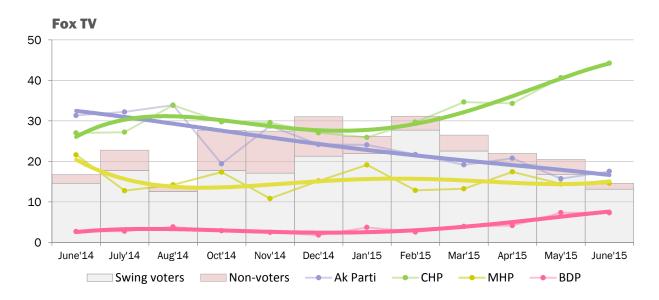
The ATV viewers, on the other hand, are completely supporters of the Ak Parti. The Ak Parti voting rate which decreased in all other clusters, remained intact only among the ATV viewers. We may claim that for a year or more ATV has followed a broadcasting policy which clearly supported the government and especially Recep Tayyip Erdoğan, hence the Ak Parti voting rate continued at a constant line of 65-70 percent.



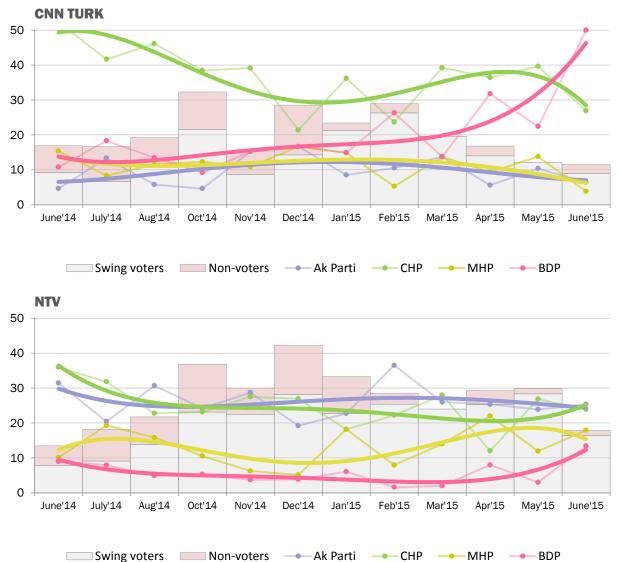
The political preference of TRT viewers show a steady support for the government differently from the national general.



- Checking the graphs above, we observe that the Ak Parti voting rates remained intact only among the ATV and TRT viewers within all components of the society which makes us think once more the power of the media and propaganda.
- As for the Fox TV viewers, according to the graph below, it is difficult to presume a clear political side last year. Only, especially in the last 8-month term, they showed a slightly stronger stand against the government and the presidential system. The graph below also supports this assumption. As of June 2014, the Ak Parti voting rates gradually decreased within the Fox TV viewers. In other words, both the political preferences of the Fox TV viewers have changed and the Ak Parti supporters stated at reduced rates viewership for Fox TV.



- However, the main party that had an upwards trend among Fox TV viewers was CHP. As the rate of swing voters decreased closer to the elections, the HDP voting rates but mainly CHP voting rates increased.
- Finally, we shall analyze the political preference profiles of two news channels, CNNTurk and NTV. As the rate of those who prefer both is rather low in terms of number of subjects, it is more useful to evaluate only the general tendency line.



- The change that occurred in the political preference of CNNTurk viewers as the rate of swing voters decreased is very remarkable. Checking the calculations of previous periods, we could determine that the CNNTurk viewers were opposed to the Ak Parti. It is remarkable that within the CNNTurk viewers who are dominantly CHP electorate, HDP clearly replaced CHP.
- The NTV viewers showed a tendency towards HDP in the last month. However, for the past year, it is not possible to claim that the NTV viewers were dominantly CHP or the Ak Parti electorates.
- We analyzed as to how political preferences change over time in different demographic clusters. The one clear finding that results from this section is that the Ak Parti lost votes in all clusters. The decrease was quite sharp in some clusters whereas it was slighter in others. Accordingly, the fall of the governing party cannot be explained through the reaction of a particular community or group. The two clusters that show no decrease in the Ak Parti voting rates are the TRT and ATV viewers. Other than

these two TV channels, some other TV channels also showed no decrease in the Ak Parti voting rates, however these TV channels are the ones that are pro-government by broadcasting policies. All in all, the Ak parti prevented a loss of votes only in those people who could be reached through propaganda.

Another interesting change in political preferences belongs to HDP. Although not as sharp as the fall of the Ak Parti, the rise of HDP is also quite widespread. In majority of demographic clusters we observe a rising curve for HDP at varying rates. In addition, most clusters show that HDP passed the electoral threshold a few months before the elections. When we bring together the analyses in this section, we once again comprehend the social reality that no political dynamic changes with the influence of only one community or group however large as they may be. At the very least, it would not be sufficient to change the political panorama the way it happened in the June 7 election. The change can only happen only if all components of the society come together. Even if the society is separated into two, no progress can be made with only one side of it.



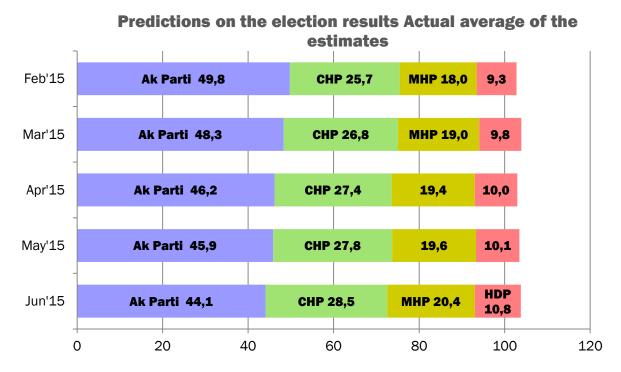
6.8. Wisdom of Crowds

- Over the past 5 months since February up to June, we have been asking the respondents about their predictions on the election results, as well as which party they will be voting for. We asked the respondents to share their predictions on the percentage of the votes each of the four parties represented in the parliament would receive in the General Election in June. This question not only reveals the average public expectation regarding the election results, but also helps to test a theory in statistics.
- In his work published in *Nature* in 1907, the English statistician Francis Galton discussed a concept he coined as "the wisdom of crowds". In a contest to estimate the weight of an ox in a fair, the predictions of the 800 participants were all off the mark, but the average of their responses was almost equal to the actual weight of the ox. When preparing to write his article, Galton's intention was to argue that the general public was not qualified to vote, and the accuracy of the average of the responses was also a source of surprise to him. .³
- Similar studies conducted afterwards revealed that, under normal conditions, the collective opinion of a group of individuals is more illustrative than that of a single individual or expert. In another example, after extensive research to locate a lost submarine failed, the submarine was found 200 meters away from the average of the estimates by group of individuals, with and without the relevant expertise on the subject matter. Moreover, the method based on the wisdom of crowds is used by the CIA to complement its conventional methods to predict the timing of events that have the potential to influence the prospective U.S. foreign policy. ⁴

³ http://galton.org/essays/1900-1911/galton-1907-vox-populi.pdf

⁴ http://www.npr.org/blogs/parallels/2014/04/02/297839429/-so-you-think-youre-smarter-than-a-cia-

agent?utm_campaign=storyshare&utm_source=share&utm_medium=twitter



- When we take a look at the predictions on the share of the votes each party will receive, we can observe that the responses are quite different from each other, with a range of 0 to 100 percent. The rates in the graph above were calculated by taking the cumulative average of the respondents' predictions. Despite the presence of irrational predictions such as 0 percent, 1 percent or 95 percent, the average of the individual predictions is quite close to 100, verifying the wisdom of crowds theory.
- According to the results of the field survey conducted for the June'15 Barometer, the cumulative predictions indicated that Ak Parti would receive 44.1 percent, CHP would receive 28.5 percent, MHP would receive 20.4 percent and HDP would receive 10.8 percent of the votes. Even when the parties which are not represented in the parliament are excluded, these rates add up to 104 percent. Thus, it is not possible to speak of fine-tuned predictions. The respondents, however, were not obliged to provide their predictions so as to add up to 100.
- As the wisdom of crowd theory suggests, very few of the respondents were able to make accurate predictions that were close to the findings presented in the section on political preferences. For example, in February, 44 respondents out of 2722 achieved to make a prediction with an error of 2 points.

Accurate predictions made by the wisdom of crowds

The graph above shows the results of the wisdom of crowds for each month. It is striking in the graph that, akin to the findings of the research, the cumulative prediction on Ak Parti's share of the vote has a downward trend, while the cumulative prediction on HDP's votes has an upward trend. These trends indicate that while some voters were abandoning Ak Parti, the entire voter group anticipated such a shift and reflected this on their predictions. The graph below clearly reveals the relation between the respondents' predictions on the election results and the distribution of votes. In order to provide a meaningful outcome, the other parties' share of the vote calculated by KONDA was added to the average of the respondents' estimates, i.e. 'the wisdom of crowds,' and the average of the estimates was adjusted so as to add up to 100. In other words, the cumulative predictions - which adds up to 104 percent - was recalculated such that it would add up to 96.2 percent after taking into account the rate of other parties' votes (3.8 percent).

	Feb'15	45,9		23,7	16,6	8,6	5,6
spwo.	Mar'15	44,7		24,7	17,6	9,1	4,2
Wisdom of crowds	Apr'15	43,2		25,7	18,2	9,3	3,8
	May'15	42,3		25,7	18,1	9,4	4,9
	Jun'15	40,8		26,4	18,9	10,0	3,8
KONDA calculation	Feb'15	46,2		22,3	15,3	10,5	5,6
	Mar'15	42,7		26,7	15,1	11,3	4,2
	Apr'15	42,9		26,2	15,1	12,1	3,8
	May'15	40,5		28,7	14,4	11,5	4,9
	Jun'15	41,0		27,8	14,8	12,6	3,8
L5 eral ion							
2015 General Election		40,9		25,0	16,3	13,1	4,8
	%	0		50			% 1
		🗖 Ak Parti 🛛 CHP 🗖 N	/HP	HDP Other			

Parties' share of the vote (Comparison of the wisdom of crowds and KONDA calculation)

As shown in the graph, Ak Parti votes reflect a downward trend according to the wisdom of crowds, in parallel with the KONDA findings. Similarly, the increase in CHP's share of the vote can also be observed in the cumulative predictions. According to the findings of the field surveys, HDP's share of the vote has been above the electoral threshold since February. Yet, the cumulative predictions indicated this in June.

L

When we compare the cumulative predictions with the official results of the June 7th General Election, we can observe that the wisdom of crowds method yielded a quite accurate prediction on Ak Parti's share of the vote, predicted CHP's and MHP's votes higher than the actual election results, and provided a lower prediction for HDP. The average expectation for HDP was that its share of the vote would be slightly higher or lower than the electoral threshold. Therefore, many were surprised that HDP exceeded the threshold by receiving 13 percent of the votes.

- When we analyze the political preferences and the predictions on the election results together (please refer to the graph on the next page), we can observe that in their predictions, voters are biased towards the party they intend to vote for. It is quite expected for voters to believe their party will receive slightly more votes than their actual share of the vote.
- The cumulative prediction of Ak Parti voters on their party's share of the vote was 4-6 points higher than the average. However, within 5 months, their cumulative prediction decreased in parallel with the overall average.
- When compared against the actual results of the survey, the cumulative prediction of HDP voters presents the highest difference. On the other hand, MHP voters have made the best prediction. Moreover, the cumulative prediction of MHP voters changed the least on a monthly basis.
- As a result, we can conclude that the general public behaves with a collective consciousness and adopts a rational approach. When elections are held, and thus, the actual outlook becomes clear, it becomes possible to evaluate whether the wisdom of crowds theory works or not. In other words, given that we test whether the election results can be predicted or not, by conducting face-to-face interviews and by asking the respondents to make predictions on the election results, we can analyze whether the theory applies to this specific context or not. In the graph above, we provided the comparison of the cumulative predictions of the respondents in the June'15 Barometer, the findings of the June'15 Barometer and the official results of the recent election. It is evident in the graph that the findings of the research are more accurate than the cumulative predictions. Even so, it is striking that the cumulative predictions are quite close to the actual results, despite the fact that individuals tend to make guite off-the-mark predictions. Such accuracy hints that the method can be employed to support the field surveys in predicting election results or similar distribution of rates. It could even become an alternative. with improvement of the method.

E S	May'15		36,3				31,2			18,9		8,7	4,9
CHP VOTERS	Apr'15		36,8				31,7			18,7		9,0	3,8
ر												8,7	
	Jun'15	-	35,3				32,3			18,8		9,8	3,8
0	Feb'15		39				23,4			24,3		7,2	5,6
~~~~	Mar'15		40	),3			23,4			25,2		6,8	4,2
	Apr'15		39	,1		2	24,4			24,3		8,3	3,8
-	May'15		39	,0		2	24,8			23,8		7,4	4,9
	Jun'15		37,	9		2	5,2			25,0		8,1	3,8
2	Feb'15		4	1,4			20,9		14,0		18,1		5,6
- 	Mar'15		39	,5		20	),8	12	2,8		22,6		4,2
	Apr'15		40	0,9			23,3		15	,3	16	,6	3,8
	May'15		39	,3		2	3,0		14,6		18,2		4,9
	Jun'15		38,	,6		2	.4,6		16	.4	16	.7	3,8
)	Feb'15			45,3			24,	5		16,8		7,8	5,6
Swing voters	Mar'15			44,3			24,5			18,3		8,7	4,2
0													
	Apr'15			43,8			26,0			17,6		8,8	3,8
	May'15			13,1			24,8			17,9		9,3	4,9
	Jun'15		40	),4			26,3			19,0		10,5	3,8

### Cumulative predictions of voters per month

### 7. RESEARCH ID

### 7.1. Sample Used for Electorate Profile

In the section on the Demographic Profile of Voters of this report, a different sample was used. In this section and in the sections where it is particularly noted, the following data were combined: data collected in the field survey on May 2-3 for the May'15 Barometer, data collected in the field survey on May 23-24 which was sponsored by KONDA and for which a report was not prepared, and data collected in the field survey on May 30-31 for the June'15 Barometer. Therefore, a sample of 9803 respondents was attained, with the aim to provide more accurate information on the political preferences of even small demographic groups among society.

The Sample	Field Survey							
The Sample	May 2-3	May 23-24	May 30-31	Total				
Provinces visited	27	30	30	30				
Districts visited	109	131	126	211				
Neighborhoods/villages visited	154	197	200	516				
Number of respondents	2691	3569	3543	9803				

The findings on political preferences and demographics in these three surveys reveal that the voter preferences did not change significantly during this period and that the data can consolidated.

The distribution of respondents by region and place of residence is shown in the table below.

	Survey location	Rural	Urban	Metropolitan	Total
1	İstanbul			18.9	18.9
2	Western Marmara	2.1	3.1		5.2
3	Aegean	4.0	5.7	5.2	14.8
4	Eastern Marmara	1.5	2.9	5.2	9.6
5	Western Anatolia	0.5		9.0	9.5
6	Mediterranean	3.5	3.0	6.0	12.5
7	Central Anatolia	1.5	2.0	1.5	5.0
8	Western Black Sea	2.5	3.8		6.3
9	Eastern Black Sea	1.5	1.7		3.2
10	Northeastern Anatolia	1.1	0.4		1.5
11	Middle Eastern Anatolia	1.4	3.1		4.5
12	Southeastern Anatolia	2.2	3.5	3.2	8.9
	Total	21.8	29.2	49.0	100.0

### 8. 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	Explanation
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 wears a headscarf or a man whose spouse wears 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
Ideological:	A person who states a party as the closest to his/her political view
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
Leader follower:	A person who states that he/she trusts in or favors the leader of a certain party

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
Non-partisan:	A person who states that none of the parties represent him/her
Pious:	A person who fulfills the requirements of the religion completely
Late decider:	A person who states that he/she makes a decision based on the election campaigns
Sunni Muslim:	A person who identifies his/her religion/sect as Sunni Muslim
Partisan:	A person who states that he/she/they always vote for that party
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

### 8.1. Questions and response options which establish the basis for the terms

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

Single 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 class

New middle class

Upper class