

Understanding Election Dynamics

Reading of Opinion Polls, Alternative
Outcomes and Facts



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"This brief is prepared to contribute better understanding of the opinion polls, ongoing election dynamics, facts and possible alternative outcomes in the upcoming presidential and general elections."

Analysis is based on public survey that was conducted by trusted public survey companies. Kapsam projections are based on simulation model. Data was collected from open source information.

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Reading of Opinion Polls

Opinion polls are not readily available for the public. Different from the previous elections, opinion polls are not readily available for the mass public in the mainstream media outlets and online platforms. In the previous elections, pollsters were comparably more open-handed in sharing their research outcomes. In this cycle, a specific effort for data mining is necessary to pull out different opinion poll results.

Wide-ranging disparities are present in different polls. It is hard to say differences are in the margins considering the different opinion polls. For sure, some outcomes were distributed to the media for a pragmatic cause to affect voter-tendencies and motivations regardless of their being supportive of the incumbent President or his rivals.

No single method is credible on its own. Opinion polls are gathered through phone call, face to face surveys, e-mails, online surveys. Due to the difference responding motivations depending on the method information gathered there is no single method with highest credibility.

Hesitant and undecided voters are high. Hesitant and undecided voters are comparably high on the basis of the various polls included in this brief. Total share of hesitant and undecided voters is ranging between 10 to 15 percent considering different polls.

Distribution of undecided voters in line with the rest might be misleading. As a method, surveys distribute undecided voter in line with the shares emerged in the opinion polling. Since responding as "hesitant (undecided)" might be resulted due to the fears in the existing conjecture under highly politically polarized environment, pure mathematical distribution of the undecided category in line with the rest of the survey might be misleading.

Non-response rate is high. Non-response rates (rejection for being surveyed) are high in this election cycle. Existence of State of Emergency and current political conjuncture in Turkey might well be the core reasons behind non-response.

Considering above mentioned facts, there are so much statistical **"noise"** in the existing opinion polls.

Critical issues that will determine election outcomes

Since there is no lopsided balance among the rivals, political outcome would be attained in a slight margin. Some critical factors will determine outcome of the upcoming Presidential and general elections. Those are:

- Reel distribution of the undecided and hesitant category in the elections
- Voter turnout: Voter turnout below 80 percent would help incumbent President and government, and vice versa
- Kurdish voter motivations and strategic (deposited) votes for HDP from the left-leaning parties in the general elections: HDP's being above the 10 percent national election threshold quite possibly prevent People's Alliance (AKP+MHP) to get majority of the seats in the Parliament
- Kurdish voter motivations in a possible second round of the Presidential elections (whether those voter group would support incumbent President or his rival)

Table 1. Opinion Polls for the First Round of Presidential Elections

Date	Pollster	Sample	Erdoğan	İnce	Akşener	Demirtaş	Karamollaoğlu	Perinçek
May 28 - Jun 01 2018	ORC	3.410	53,4	23,8	11,5	8,7	2,1	0,5
May 01 - May 28 2018	Konsensus	2.000	47,9	26,8	14,8	9,7	0,7	0,1
May 22 - May 23 2018	Mediar	4.268	43,5	22,2	19,3	12,8	1,6	0,6
May 17 - May 23 2018	Remres	4.276	42,2	24,6	16,9	12,3	3,8	0,2
May 13 - May 20 2018	MAK	5.000	51,4	23,9	12,3	9,6	2,2	0,6
May 07 - May 17 2018	Sonar	3.000	42,0	21,9	21,0	11,0	2,1	2,0
Apr 25 - May 13 2018	Politic's	2.650	52,2	25,5	12,3	8,5	1,1	0,4
May 06 - May 09 2018	Remres	3.653	42,1	24,1	17,1	12,6	3,9	0,2
May 02 2018	Remres	2.586	41,2	21,7	20,5	12,5	3,9	0,1
May 01 2018	Piar	-	41,1	20,2	24,6	11,4	2,5	0,2
Apr 24 - Apr 25 2018	Konsensus	1.000	47,6	20,5	21,9	7,8	2,1	0,1
Apr 26 - Apr 29 2018	Mediar	2.660	42,1	20,1	19,7	13,4	3,1	1,6
Feb 04 - Feb 14 2018	Piar	2.440	43,2	24,0	18,2	13,1	1,4	0,1
Jan 14 2018	Sonar	3.000	46,4	22,5	18,2	9,5	1,5	1,9
Jan 10 2018	Konsensus	-	48,1	25,1	14,8	9,6	1,4	1,0
Previous Election (Aug 10 2014)	-	-	51,7	38,6*	-	9,8	-	-

* E. İhsanoğlu run as a joint Presidential candidate for CHP and MHP in the previous elections.

Table 1. Opinion Polls for a Possible Second Round (Erdoğan vs. Akşener)

Date	Pollster	Sample	Erdoğan	Akşener
May 17 - May 23 2018	Remres	4.276	51,2	48,8
May 06 - May 09 2019	Remres	3.653	50,8	49,2
May 2 2018	Remres	2.586	50,1	49,9
May 1 2018	Piar	-	49,5	50,5
Apr 24 - Apr 25 2018	Konsensus	1.000	52,4	47,6
Apr 14 - Apr 15 2018	Gezici	3.864	52,2	47,8
Mar 22 - Mar 26 2018	ORC	5.620	59,6	40,4
Mar 06 - Mar 18 2018	Piar	5.620	50,5	49,5
Dec 02 - Dec 17 2017	Gezici	4.238	51,4	48,6

Table 1. Opinion Polls for a Possible Second Round (Erdoğan vs. İnce)

Date	Pollster	Sample	Erdoğan	İnce
May 17 - May 23, 2018	Remres	4.276	50,2	49,8
May 06 - May 09, 2019	Remres	3.653	50,3	49,7
Apr 24 - Apr 25, 2018	Konsensus	1.000	55,1	44,9

What we read from the polls?

There are some inferences based on opinion polls that have high chances of realization even though the presence of wide-ranging disparities in the opinion polls (statistical noise). Those are:

Presidential Elections

- *İnce's being named as CHP's Presidential candidate helped CHP to consolidate its voters and prevented a shift of its voters to Akşener's İyi Party*
- *İnce would possibly get a higher vote as a Presidential candidate than his political Party (CHP) in the upcoming general elections. Therefore, leadership of Kılıçdaroğlu to CHP would possibly be questioned after the elections are completed*
- *New President will be elected with a very slight margin, which is making catching of median voter's attraction quite important*
- *Incumbent President, Erdoğan, now, has a lower chance to be elected in the first round*
- *If Presidential elections go to the second round, İnce has a higher chance over Akşener to run as against Erdoğan*
- *Erdoğan has still a slightly higher chance to be elected as a President in the second round. If the Presidential elections go to the second round, there would be a neck-and-neck race*
- *Kurdish voter motivations and their choice will be quite important to determine election results in a possible second round*

General (Parliamentary) Elections

- *Ruling AKP would possibly get a lower vote than its Presidential candidate Erdoğan -gets in Presidential elections- in the general elections*
- *HDP's performance in the general elections will determine the shape and formation of the new legislative arm*
- *In the case that HDP exceeds 10 percent national election threshold, it becomes almost impossible for the AKP and MHP block (People's Alliance) to get the majority of seats in the Parliament (>300) meaning loss of legislative power for that block*
- *Recent opinion polls show the fact that HDP's being above the national election threshold has a higher chance than for its being below it*
- *Due to the new system and electoral distribution structure of the seats, MHP gets at most 32 seats (ranging between 5 to 32) in the best case scenario depending on different polls in the new Turkish Parliament making it as a less strategic and useless partner and ally for AKP in the new setting*
- *In case general elections is resulted with the loss of legislative power for the People's Alliance, it may result a loss of motivation and enthusiasm for the AKP and Erdoğan in a possible second round in the Presidential elections*
- *On the other side of the coin, People's Alliance's loss of legislative power will increase motivation of the opposition block, which will, in turn, increase their enthusiasm for the campaigning for the second round*

Table 4. Opinion Polls for General (Parliamentary) Elections

Date	Pollster	Sample	AKP	MHP	CHP	İyi Party	HDP	SP	Others	Alliance	
										Cumhur	Millet
May 01 - May 28, 2018	Konsensus	2.000	43,8	7,4	27,4	11,2	9,7	0,3	0,2	51,2	38,9
Seat Distribution	Konsensus	2.000	342	24	181	53	0	0	0	366	234
May 23 - May 26, 2018	IEA	1.500	40,7	3,8	22,7	15,7	12,1	2,5	2,5	44,5	40,9
Seat Distribution	IEA	1.500	277	5	135	100	79	4	0	282	239
May 22 - May 23, 2018	Mediar	4.268	39,6	5,3	22,6	17,6	11,4	2,3	1,2	44,9	42,5
Seat Distribution	Mediar	4.269	266	10	139	112	70	3	0	276	254
May 17 - May 23, 2018	Remres	4.276	40,0	5,3	23,3	15,1	10,4	4,2	1,7	45,3	42,6
Seat Distribution	Remres	4.276	273	10	149	97	63	8	0	283	254
May 13 - May 20, 2018	MAK	5.000	45,0	9,0	23,5	8,5	9,0	2,2	2,8	54,0	34,2
Seat Distribution	MAK	5.000	366	32	161	38	0	3	0	398	202
May 06 - May 09, 2018	Remres	3.653	40,3	5,3	23,2	15,5	10,3	4,2	1,2	45,6	42,9
Seat Distribution	Remres	3.653	274	10	147	98	63	8	0	284	253
May 2, 2018	Remres	2.586	40,5	5,6	22,7	15,2	10,4	4,2	1,3	46,1	42,1
Seat Distribution	Remres	2.586	279	11	140	98	64	8	0	290	246
May 1, 2018	Piar	-	40,2	4,0	23,4	15,2	12,1	2,5	2,6	44,2	41,1
Seat Distribution	Piar	-	276	5	144	93	78	4	0	281	241
Apr 26 - Apr 29, 2018	Mediar	2.660	38,0	4,5	22,9	17,1	13,2	3,1	1,2	42,5	43,1
Seat Distribution	Mediar	2.660	259	7	139	110	80	5	0	266	254
Apr 16, 2018	Metropoll	5.417	48,0	6,0	21,0	12,0	10,0	1,5	1,5	54,0	34,5
Seat Distribution	Metropoll	5.417	327	15	137	59	62	0	0	342	196
Nov 1, 2015 Elections	Reel	47.840.231	49,5	11,9	25,3	-	10,8	0,68	1,8		
Seat Distribution	Reel	47.840.231	317	40	134	-	59	0	0		

Note: Distribution of the seats are prepared by KAPSAM's election model depending on the vote shares in different opinion polls

Alternative Scenarios and Scenario Likelihood*

Scenario 1. Existing Path

Erdoğan wins Presidential elections and AKP+MHP block (People's Alliance) gets majority of the seats in the Parliament

Likelihood
44%

What will happen?

- Existing policy path in domestic and international politics would continue as it was in the past
- Last step for the switching to the Presidential system would be completed
- Erdoğan would continue to be utmost important figure in Turkish politics
- Institutional structure of the government would completely be revised
- There would be no need for MHP and People's Alliance would gradually fade out since if HDP get a vote below the national election (in the case that) threshold AKP's seats in the Parliament would exceed 300 giving AKP a comfortable majority in the Parliament
- State of Emergency would possibly continue for some time to come
- İnce and Akşener would disappear from the political arena since these two no more be lawmakers in the Parliament

Scenario 2. Political Deadlock (1)

Erdoğan wins Presidential elections and AKP+MHP block (People's Alliance) loses majority of the seats in the Parliament

Likelihood
51%

What will happen?

- There would be vital conflicts and clashes between executive and legislative arm due to the duality in the regime
- Majority in the legislative arm (CHP+İyi Party+SP) + HDP will try to find a medium ground to abolish State of Emergency and Statutory Decrees under this domain
- Try to prevent a complete wipe out, MHP may make a tactical move to leave People's Alliance leaving AKP alone
- Bahçeli may face further pressure to leave the chair
- In case, current opposition block comes together they may declare a new roadmap to re-switch and restore Parliamentary democracy
- In this case, President Erdoğan will try renewing general elections and introduce the very necessity "as a requirement to open up deadlock and ensure stability in government management" as we experience in the previous election cycle in 2015
- Based on the requirements of the new system, renewal of the general elections necessitates renewal of the Presidential election as well resulting a burdensome election cycle for the economy
- Critical issue in this scenario would be how Akşener's nationalist-originate İyi Party would find a common ground with leftist-Kurdish HDP

Scenario 3. Search for A Common Ground (2)

Erdoğan loses Presidential elections (quite possibly to İnce) and AKP+MHP block (People's Alliance) gets majority of the seats in the Parliament

Likelihood
32%

What will happen?

- Erdoğan's leadership in the AKP might be questioned for the first time in its political history
- There might be divisions in the AKP and offended founders of the ruling Party may get on the stage
- MHP may make a tactical move to leave the People's Alliance
- İnce would possibly disclose a roadmap to restore Parliamentary democracy and would try to find a common ground with AKP's resentful members to form an alliance
- This scenario might not require a renewed election cycle if executive and legislative arm could find a medium ground

Scenario 4. New Era

Erdoğan loses Presidential elections (quite possibly to İnce) and AKP+MHP block (People's Alliance) loses majority of the seats in the Parliament

Likelihood
49%

What will happen?

- There would a new era ahead of Turkey
- State of Emergency would be lifted
- Akşener may serve as vice President and she would possibly lose control in her political Party due to her not being in the Parliament
- There might be important changes in domestic and international politics
- İnce will face hardships to set up a new management structure after 16 years of AKP rule
- İnce would possibly disclose a new roadmap to restore Parliamentary democracy with a specified timeframe
- Erdoğan would gradually fade out from Turkish politics and there is quite a big chance that AKP would divide due to the actions of its resentful members
- New political parties may emerge in the center right
- There would be important changes in the MHP and Bahçeli would possibly fade out from Turkish politics

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