

# **KONDA**

# **Barometer**

***THEMES***

**Leadership**  
***March 2013***



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# 1. EXECUTIVE SUMMARY

## DEFINITION OF THE SURVEY

The survey which forms the basis for this report was conducted on March 9 - 10, 2013 by face-to-face interviews with 2669 individuals in 150 neighborhoods and villages of 98 districts –including central districts- of 30 provinces.

## THEME OF THE MONTH: LEADERSHIP

The primary reason why we chose “Leadership” as our theme this month, is the fact that previous Barometer surveys showed that most voters in Turkey vote for the party with the leader of which they sympathize, i.e. they are leader-focused. The other reason was that Prime Minister Erdoğan recently broke the record of governing for the longest continual period of time. We aimed at understanding the reasons behind Erdoğan’s leadership success.

We studied the perception of leadership in society in Turkey in 2 stages, the first being 10 value questions in order to identify which characteristics a leader should have in general. Secondly, the area of leadership was restricted to politics and the interviewees were asked to evaluate the leaders of the three highest represented parties in the Parliament, namely Erdoğan, Kılıçdaroğlu and Bahçeli in view of the aforementioned value questions.

The four value questions for understanding the general perception of a leader were: Values that a leader has, having a vision, attitude towards the problems of Turkey and the leader’s relationship with his/her constituents.

All these values have been considered important by a large part of the society. The answer “Taking on the responsibility for solving problems” has emerged as the most important characteristic that a leader should have with a percentage of 97.3 followed by “Having the ability to find solutions to problems” with 97 percent. On the other hand, “Inspiring people” came out to be the least important characteristic compared to other characteristics, with a rate of 86.4 percent.

Following the value questions, the interviewees were asked to evaluate the leaders of three political parties on the basis of a list of characteristics on a scale of 1 to 5. This evaluation produced the results below:

- **Recep Tayyip Erdoğan** scored the highest with 3.6 points. A large part of the society found Erdoğan’s oratory skills his strongest trait, followed by the traits of being close to the public and having a vision for Turkey. The weakest traits of Erdoğan were considered as: being fair, being sincere and possessing values of equality and justice.
- **Kemal Kılıçdaroğlu** was the second most successful with 2.4 points. His strongest traits were considered as being close to public, being open to different ideas and having values of equality and justice; whereas, his weakest traits were considered as insightfulness towards the problems of Turkey and ability to solve problems and persuasiveness.



- **Devlet Bahçeli** ranked third with 2.1 points. His strongest traits are embracing values of equality and justice, being fair and being sincere. His weakest traits are his oratory skills, ability to solve problems and being open to different ideas.







## **2. THEME OF THE MONTH: LEADERSHIP**

### **2.1. Why the theme of Leadership?**

Many studies have been conducted in order to define the concept of “Leadership” in various fields by emphasizing various aspects. In general leadership can be defined as the ability to influence and motivate a community or a group and to direct individuals to take actions that may reinforce the said group or community. In other words, leadership may be defined as the process of social interaction in which the leader aims to gain the assistance and support of others in order to reach an objective. A leader who manages to motivate and activate the society in order to reach his objectives and who reaches his objectives in this way are considered successful, whereas a leader whose efforts for motivating and activating the society are fruitless or whose strategies do not yield the desired results are considered unsuccessful. Leadership emerges as the output of a two-sided relationship between the leader and his/her followers therefore the success of a leader depends not only on the leader himself but also how his/her followers perceive him. The aim in this month’s theme is to question the concept of successful leadership from the point of view of the society, namely to understand what characteristics a “successful leader” possess according to the society.

Intercultural differences, social structures and peculiarities of societies bring forward differences in leadership models, therefore the characteristics and the behaviors expected from a leader vary from culture to culture. Some cultures embrace democratic leaders whereas some accept authoritative leaders. The expectations of a society from a leader are parallel to the characteristics of a society. That is to say, the more compatible the personal characteristics of a leader are with the characteristics that the society expects from a good leader, the more successful s/he is considered by the society.

The first reason behind the choice of the theme of “Leadership” this month is the fact that upon the question “Which of the below reasons affects/determinates your voting preference in general?” which has been posed ever since the beginning of the survey reports, it has been answered by a sizeable part of the society in Turkey as “I admire and trust the leader/president.” Since “the identity of the leader” is one of the most important aspects that influence political preferences in the society of Turkey, in other words the society in Turkey is “leader-focused”, we found the perception of leadership in Turkey worth examining.

Prime Minister Recep Tayyip Erdoğan broke the previous record held by Adnan Menderes for the longest continuous governing period of 10 years and 5 days and became the longest governing Prime Minister of the multi-party era, which is one of the reasons behind the choice of theme for this month’s Barometer report. Accordingly, this survey aimed to find out which personal characteristics of Erdoğan makes him a successful leader and which leadership characteristics he possesses are considered important by the society in Turkey .





## 2.2. Introduction

In order to understand the perception of leadership by the society in Turkey, firstly general questions as to what characteristics a leader should have were asked. The aim was to identify which characteristics a person should have in order to act as a leader in business life, daily life or in politics. Afterwards, the area of leadership was restricted to politics and the interviewees were asked to evaluate the leaders of the three highest represented parties in the Parliament, namely Erdoğan, Kılıçdaroğlu and Bahçeli in view of these value questions.

As a first step 10 value questions were posed which were designed to identify the general opinion of the interviewees with regard to leadership. As a second step, the value questions were converted to practice questions, i.e. they were directed to the qualities of the current leaders. All in all, the interviewees were asked to evaluate the degree of overlap between the characteristics that a leader should have and the qualities of the current leaders.

| Characteristics of a Leader<br>Value Questions               | Evaluation of Leaders<br>Practice Questions        |
|--------------------------------------------------------------|----------------------------------------------------|
| Comprehending problems correctly                             | Insightful towards the problems of Turkey          |
| Ability to solve problems                                    | Able to solve problems                             |
| Having dreams, ideas and plans for the future                | Has dreams, ideas and plans for Turkey             |
| Inspiring people                                             |                                                    |
| Oratory skills, persuasiveness                               | Has strong oratory skills, persuasive              |
| Embracing values of equality and justice                     | Embraces values of equality and justice            |
| Being close to the people s/he rules, being approachable     | Close to public, together with public              |
| Taking into consideration the demands of the people he rules | Takes the demands of the public into consideration |
| Taking on the responsibility for solving problems            | Takes on the responsibility for solving problems   |
| Being open to different ideas                                | Open to different ideas                            |
|                                                              | Is fair                                            |
|                                                              | Is sincere, frank                                  |



Answers to value questions and practice questions were compared in order to identify the expected qualities of a political leader and to determine if the 3 major leaders in active political life possess these qualities. A further aim was to identify in which matters and to what extent Erdoğan differentiates from the other 2 leaders given that Erdoğan succeeded in becoming the leader that has been governing for the longest continuous period of time.

## 2.3. The qualities a leader in Turkey should have

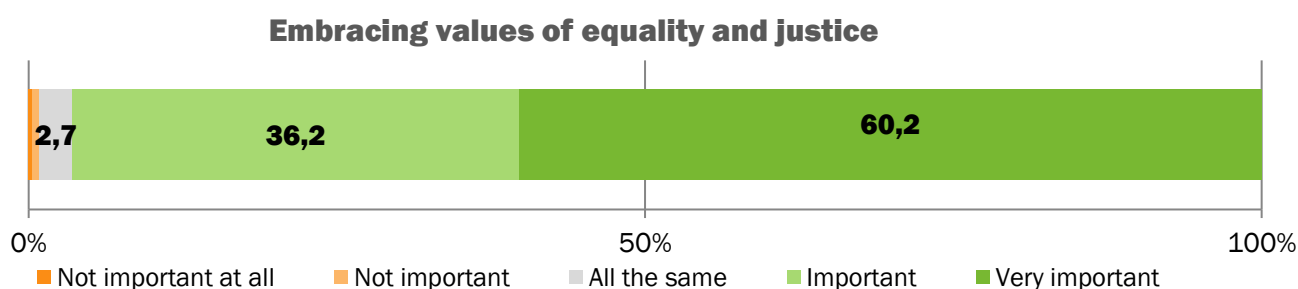
The first stage of the survey on leadership included a list consisting of 10 traits prepared in accordance with the results of previous surveys on leadership. The interviewees were asked to what extent each of these traits were vital for a leader to possess.

These 10 value questions can be grouped into 4: values that a leader has, having a specific vision, attitude towards the problems of Turkey and the relationship with his/her followers.

Gathering the responses of “Important” and “Very important” together, evaluation reveals that all values listed have been considered as important by the majority of the society. The answer “Taking on the responsibility for solving problems” has become the most important trait a leader should possess with a rate of 97.3 percent which is followed by “Ability to solve problems” by 97 percent. On the other hand, “Inspiring people” has come out as the least important trait in comparison to the other traits with a percentage of 86.4.

### 2.3.1. The values possessed

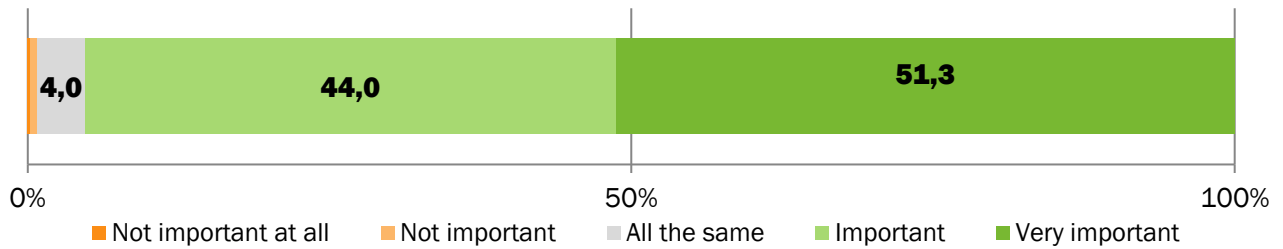
Interviewees responded to the question “To what extent do you think it is important for a leader to embrace values of equality and justice?” as important, with 96.4 percent, and this question brought the highest rate of the answer “very important” (60.2 percent) which is quite significant as it is an indication that for the society in Turkey, it is a prerequisite for a leader to embrace the values of equality and justice.



Another question was on the importance of a leader “Being open to different ideas.” The result of 95.3 percent viewing this trait as important reveals that the society in Turkey idealizes a leader who is sympathetic towards not only those who think parallel to him/her but also those who think differently.



### Being open to different ideas

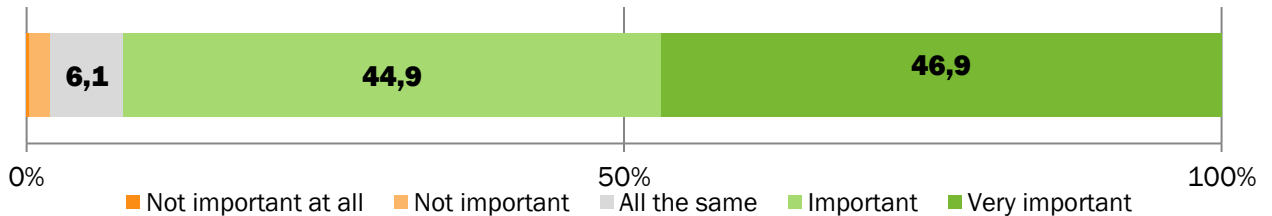


### 2.3.2. Having a specific vision

One of the most commonly expressed trait a leader should possess is having a vision, which may be defined as a leader's competency on international and national developments, planning for the future and taking necessary steps in achieving these plans instead of having short term plans. Having a vision is also important for directing the community towards future directions.

Accordingly a related question was introduced by reformulating the word "vision" in a more understandable way in order to find out to what extent having a vision is important for the society in Turkey for an individual to be considered as a good leader. This question was posed as "To what extent do you think it is important for a leader to have dreams, ideas and plans for the future?" upon which 91.9 percent indicated that it is important.

### Having dreams, ideas and plans for the future



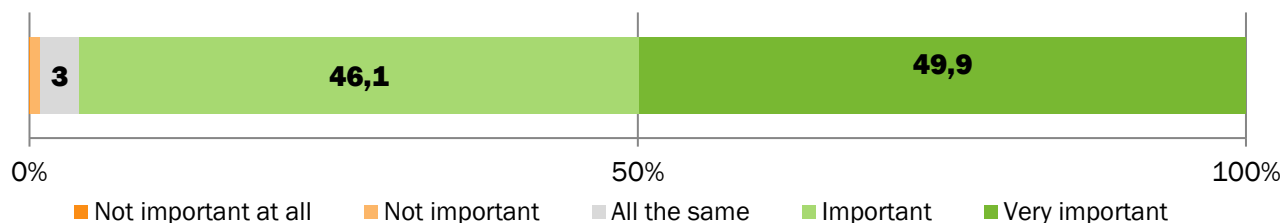
### 2.3.3. Attitude towards problems

One of the most important prerequisites for being a good leader is to be sensitive to current or new problems. In order to have a sustained leadership, a leader should have the ability to analyse problems correctly and have the skills and desire necessary to solve these problems. Our aim was to find out whether the society in Turkey shared this opinion; therefore, a question was posed as to what extent it is important for the leader to have an interest in the problems of Turkey. This has come out as the most important trait a leader should have in comparison to the answers given to other questions.



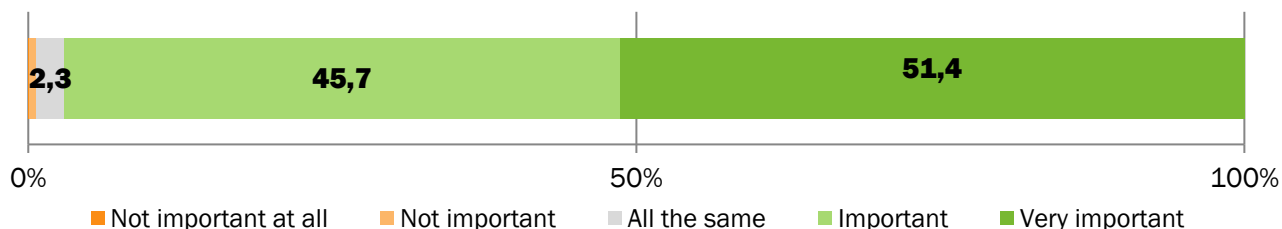
The first question relating to problem-solving was the importance of comprehending problems correctly. 95.9 percent of the society indicated that it is important for the leader to correctly analyze and comprehend problems.

### Comprehending problems correctly



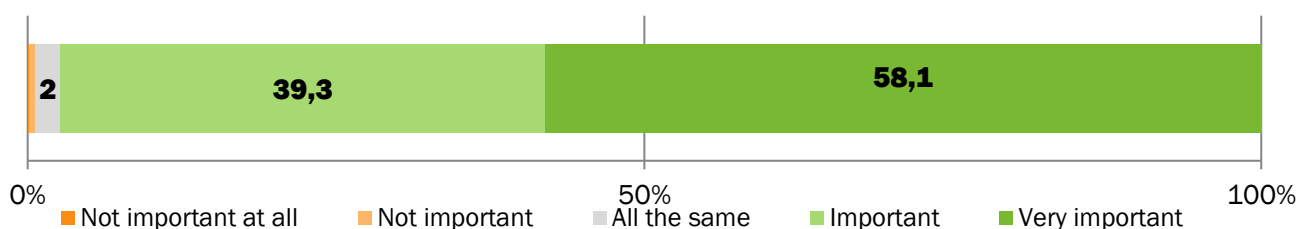
The second question was related to the ability of the leader to solve problems. 97 percent indicated that it was important, thereby making it the second most important trait of a leader for the society of Turkey.

### Ability to solve problems



One of the common traits of good leaders is their ability to risk their careers and to strive for a solution to a problem despite potential personal consequences. A simpler way to pose this as a question was whether it was important for a leader to take on the responsibility for solving problems. This has come out as the most important trait of a leader for the society in Turkey with a percentage of 97.3. This result clearly shows that the society wishes the leader to be responsible, laborous and progressive about solving problems more than anything else.

### Taking on the responsibility for solving problems

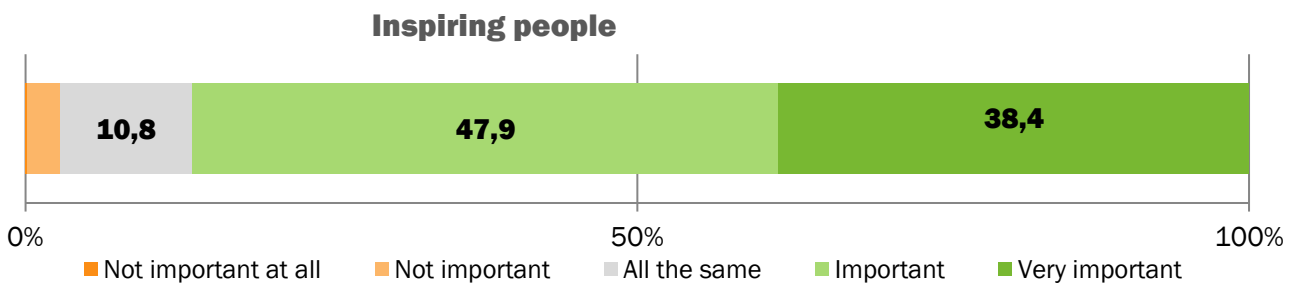




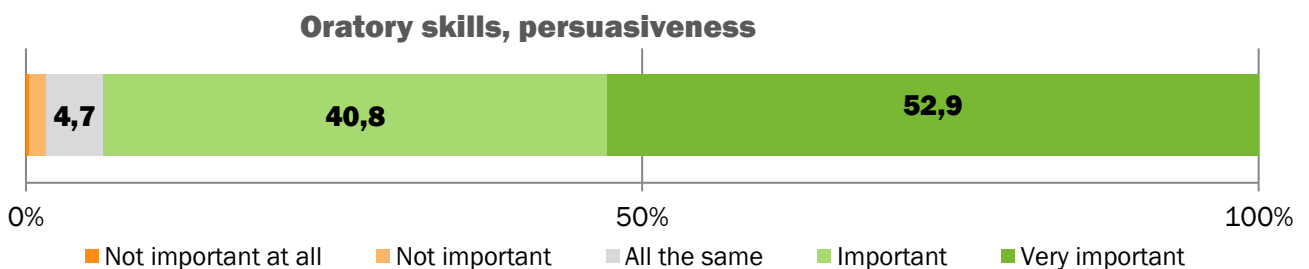
### 2.3.4. Relationship with followers

As mentioned above, leadership emerges as the output of a two-sided relationship between the leader and his/her followers. The continuation of leadership depends upon the continuation of this relationship. In order to find out what matters in the relationship of the leader with his/her followers, the interviewees were asked their opinions on 4 traits.

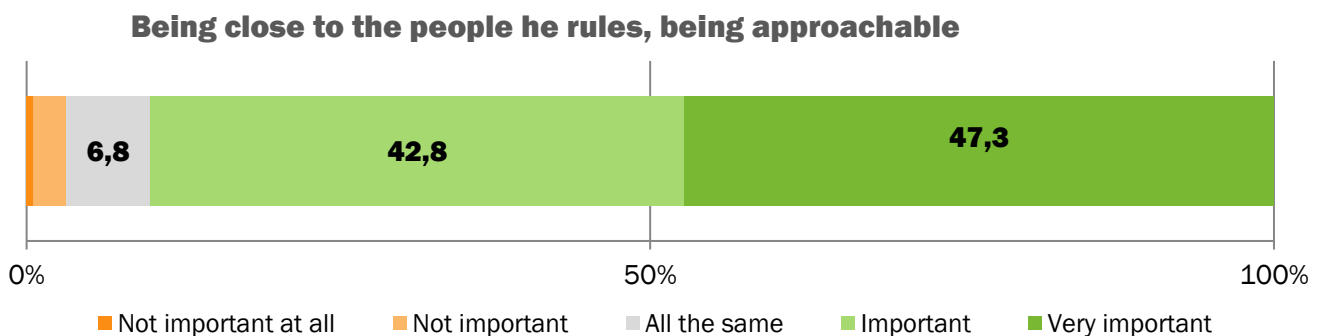
The question as to whether an inspiring personality was an important trait in a leader, revealed that 86.4 percent think that it is important. This rate, although a high one, is in fact the lowest among all other answers.



Secondly, it was asked whether it was important for a leader to have strong oratory and persuasive skills. 93.7 percent of the society indicated that it was important for a leader to be a good orator.



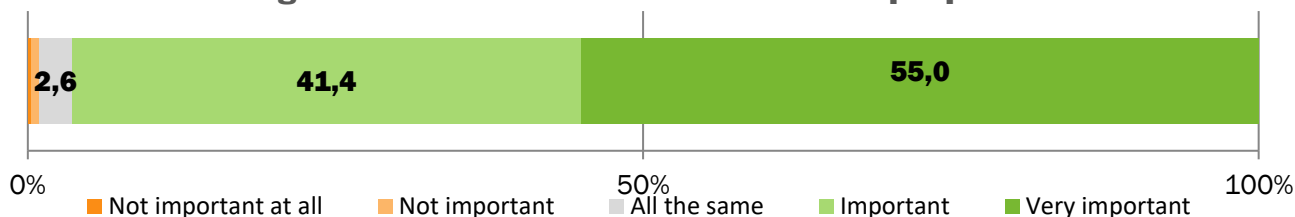
A sincere relationship between a leader and his/her followers were considered as "important" by 90 percent of the interviewees.



It was asked whether it was important for a leader to take into consideration the demands of the people s/he rules, upon which 96.4 percent responded that it was important.



### Taking into consideration the demands of the people he rules

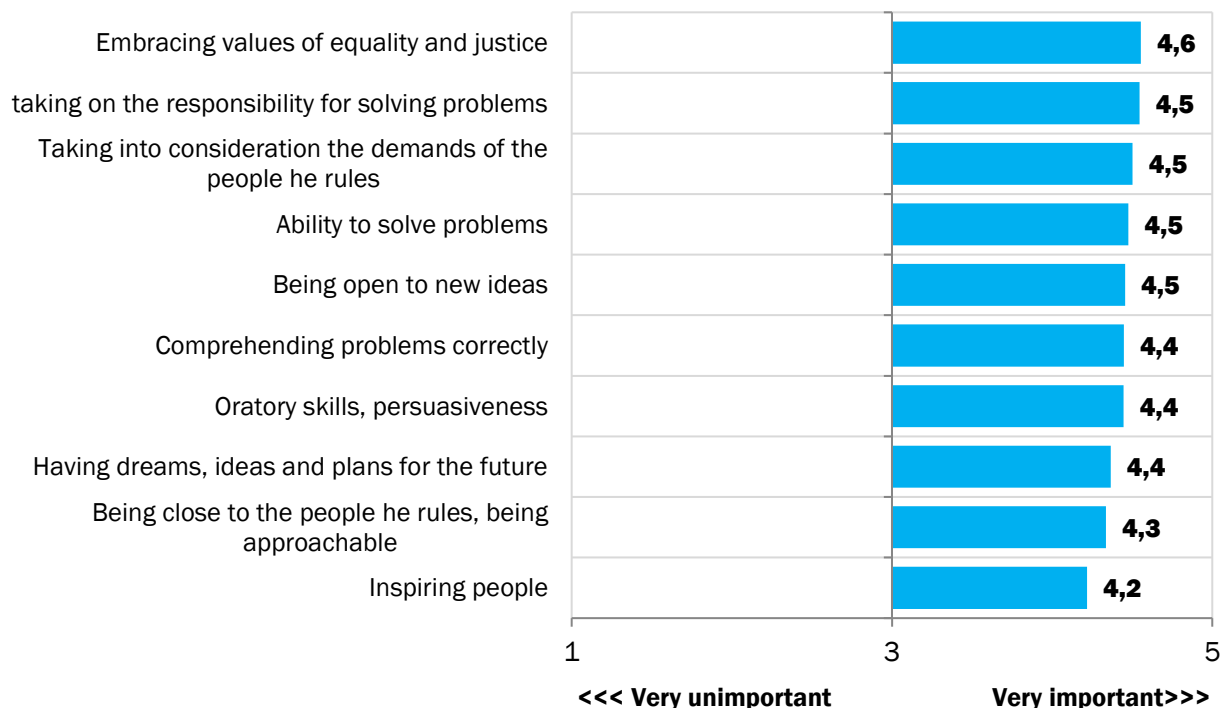


All questions pertaining to the relationship of a leader with his/her followers bring out the result that the society, almost as a whole, thinks that a leader should be close to the public, approachable, sympathetic with the society s/he rules and be on the same wavelength. This demonstrates that a leader that is disconnected from people will not be successful.

### 2.3.5. Society's definition of a leader

In summary, the society in Turkey finds all leader traits included in the survey, as important and therefore their evaluation is parallel to the definition of a good leader in the field. The answers when calculated on the range of 1 point for "very unimportant" and 5 points for "very important", are summarized in the graph below:

### Characteristics important in a leader



According to the ranking above, the society pays most attention to a leader's embracing values of equality and justice, taking on the responsibility for solving problems in spite of risking his/her own status and taking into consideration the demands of the people s/he rules.

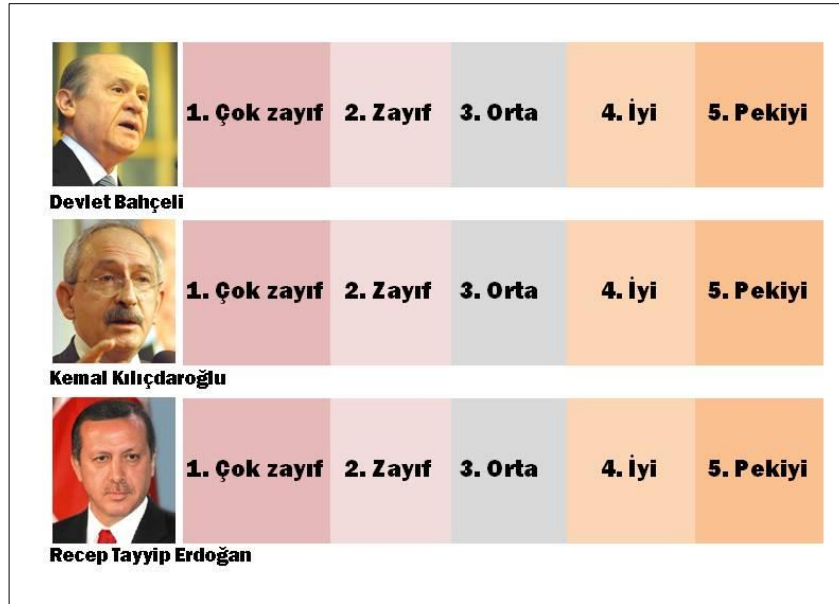


The traits of inspiring and motivating people, being approachable and having a vision are secondary yet still very important.

Through this ranking, we can reach the conclusion that the society in Turkey shall regard a leader as better if s/he takes risks in order to solve fundamental problems such as equality and justice by taking the demands of his/her followers into consideration rather than a leader who is close to the people s/he rules and who involves everyone in and inspires them with his/her dreams and solutions. The ultimate difference between these two profiles is the fine line between a person “who is commissioned to bring a solution” and a person “who is one of us and who directs us to solutions.”

## 2.4. Evaluation of Leaders

After the general characteristics of a leader was determined, it was time for the evaluation of the three current political leaders of Turkey by the interviewees. The interviewees were shown the card below and asked to evaluate Devlet Bahçeli, Kemal Kılıçdaroğlu and Recep Tayyip Erdoğan one by one considering 11 characteristics on a scale of 1 to 5.



The chart below shows the scores of all three leaders for each characteristic.

| Characteristics of a leader (1-5 points)         | Bahçeli | Kılıçdaroğlu | Erdoğan |
|--------------------------------------------------|---------|--------------|---------|
| Insightful towards the problems of Turkey        | 2.2     | 2.3          | 3.6     |
| Able to solve problems                           | 2.0     | 2.2          | 3.6     |
| Has dreams, ideas and plans for Turkey           | 2.1     | 2.3          | 3.7     |
| Has strong oratory skills, persuasive            | 2.0     | 2.2          | 4.1     |
| Close to public, together with public            | 2.2     | 2.5          | 3.7     |
| Embraces values of equality and justice          | 2.3     | 2.5          | 3.4     |
| Takes the demands of public into consideration   | 2.2     | 2.4          | 3.5     |
| Takes on the responsibility for solving problems | 2.1     | 2.3          | 3.5     |
| Open to different ideas                          | 2.1     | 2.5          | 3.4     |
| Fair                                             | 2.2     | 2.4          | 3.4     |
| Sincere, frank                                   | 2.2     | 2.4          | 3.4     |





The trait “inspiring people” was excluded from the list, whereas the traits of being “fair” and “sincere, frank” were added.

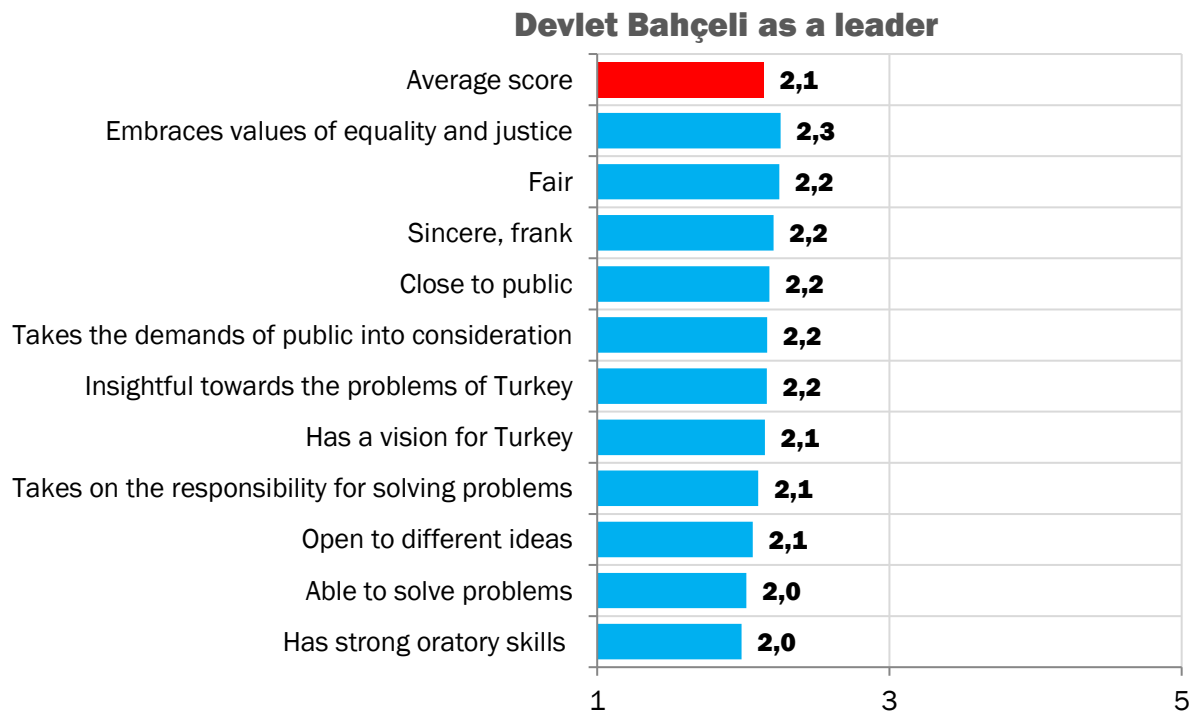
Interviewees gave between 2.0 to 2.3 points to Devlet Bahçeli, 2.2 to 2.5 points to Kemal Kılıçdaroğlu and 3.4 to 4.1 points to Tayyip Erdoğan for the 11 characteristics.

Society’s definition for these three leaders shall be discussed below, after which evaluations shall be made as to how different social clusters graded the leaders, which factors affected their evaluations and what the differences between the scores among the leaders mean.

#### **2.4.1. Devlet Bahçeli**

The society regards the strongest traits of Bahçeli as embracing values of equality and justice, being fair and sincere whereas his weakest traits are regarded as oratory skills, ability to solve problems and being open to different ideas. The values which are considered as the most important trait in a leader are considered the strongest traits of Bahçeli. Being close to public in general is of secondary importance for leadership whereas Bahçeli scored higher than others in this trait.

The first three characteristics leading the list show that the strongest trait of Bahçeli is his values. With regard to the relationship between his followers and his communicative skills, although he is considered as a leader who is open to reactions from followers and is sensitive, his communication skills seem to be stronger on the direction from follower to leader because his oratory and persuasive skills are weaker. His weakest point is his attitude toward the problems of Turkey.



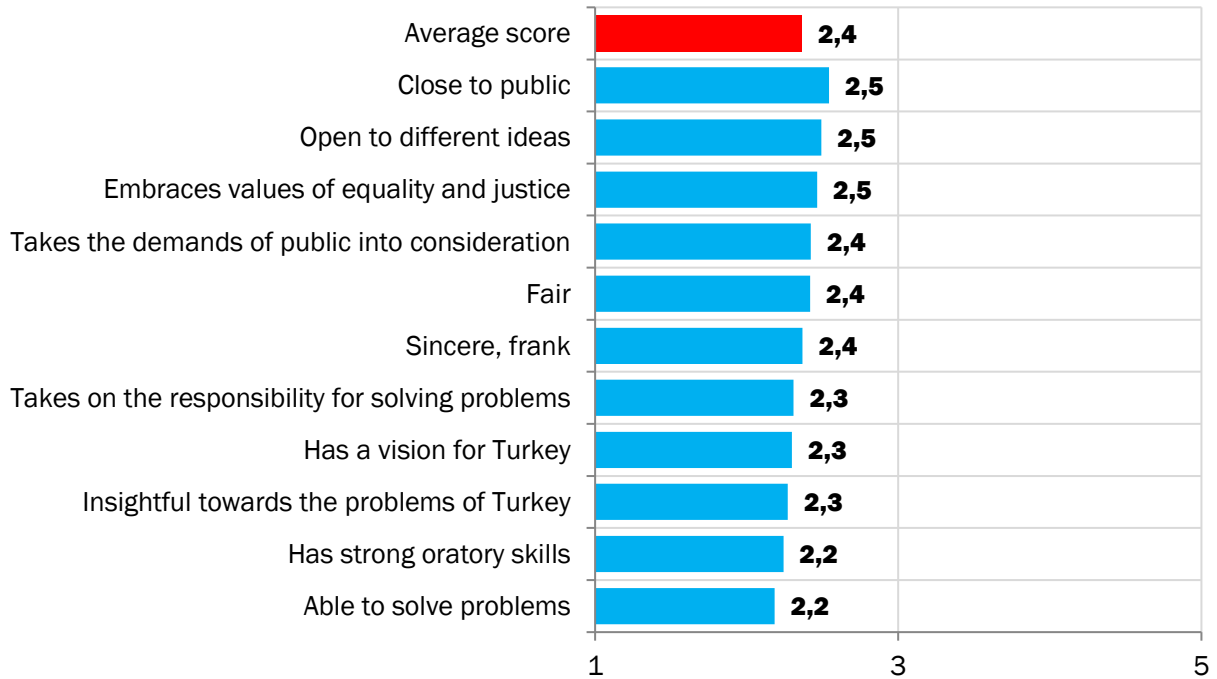


## 2.4.2. Kemal Kılıçdaroğlu

The society perceives Kemal Kılıçdaroğlu as strong in the traits of being close to public, open to different ideas and embracing values of equality and justice. His weakest traits, on the other hand, are insightful towards the problems of Turkey and ability to solve problems and persuasiveness. His strongest trait which is being close to public is the lowest grading general characteristic of a good leader. The most important characteristics of a leader are among Kılıçdaroğlu's strongest traits. Although oratory skills rank low for Kılıçdaroğlu, it does so in the general ranking as well.

Again, the society regards Kemal Kılıçdaroğlu as a leader of strong values just like Bahçeli. As for his relationship with followers, his oratory skills are graded low, however higher than that of Bahçeli. His weakest points can be determined as his vision and his skills regarding the analysis and solutions to the problems of Turkey.

### Kemal Kılıçdaroğlu as a leader





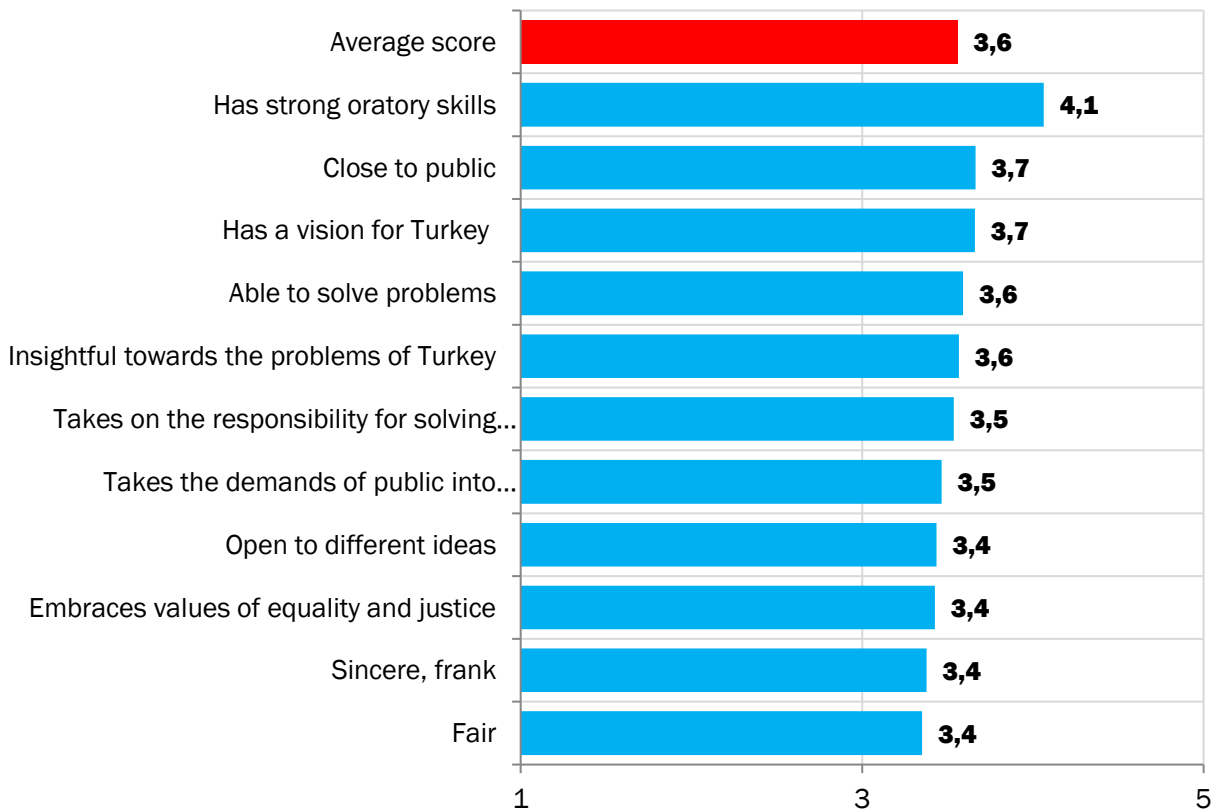
### 2.4.3. Tayyip Erdoğan

Tayyip Erdoğan's highest graded trait is his oratory skills. The second and third on the list are being close to the public and having a vision for Turkey, respectively. His lowest ranking traits are being fair, sincere and embracing values of equality and justice.

The importance of oratory and persuasive skills for the society are graded as 4.6 points, whereas Erdoğan scores 4.1 in this aspect. Erdoğan's oratory skills are the closest to perfection within the definition of a good leader among all the gradings the three leaders received.

His relationship with his followers is the strongest aspect of Erdoğan's leadership. However, unlike Bahçeli and Kılıçdaroğlu, the relationship from the leader to the follower is stronger and his grading for taking the demands of public into consideration is lower. Oratory skills and being close to public are followed by being insightful towards the problems of Turkey, ability to solve problems, vision and taking on the responsibility for solving problems. These results are indicative of the fact that he is regarded as a result-oriented leader and this is considered as his strongest trait after communication. Erdoğan's weak point is his values: being fair, sincere and frank and embracing the values of equality and justice are graded lowest, respectively.

#### Tayyip Erdoğan as a leader



The comparison of the characteristics of the three leaders with the definition of a perfect leader reveals that for all three leaders, being close to public rates high whereas this



characteristic is graded lower in the definition of an ideal leader. The second most important trait of “taking on the responsibility for solving problems” in the general definition which means risking his/her own career for the good of the country is not present in any of the leaders’ strongest traits.

## **2.5. Evaluation of leaders according to political preferences**

In the previous section, the society’s definition of each leader was determined. What about the comparison of the leaders with each other? What do the average scores of 2.1 for Bahçeli, 2.4 for Kılıçdaroğlu and 3.6 for Erdoğan stand for? Does the fact that Erdoğan scores higher than the others mean that he is a better leader? Or does it have anything to do with the fact that, as probably already estimated by the readers of Barometer, Erdoğan’s party has more voters whereas Bahçeli’s party has less?

One of the most striking findings of this month’s survey was exactly this point: Political preferences and polarization are the most prominently effective factor in the evaluation of leaders according to the 11 characteristics. Voters grade the leaders of their own party high in almost all areas whereas they grade the leaders of other parties low. This is a factor that cannot be ignored while evaluating the grade each leader received.

Starting with the grades given by the voters for the three largest parties and their leaders, the three graphs below show the general averages as well as the voters’ grades of the three parties and their respective leader in accordance with the 11 characteristics.

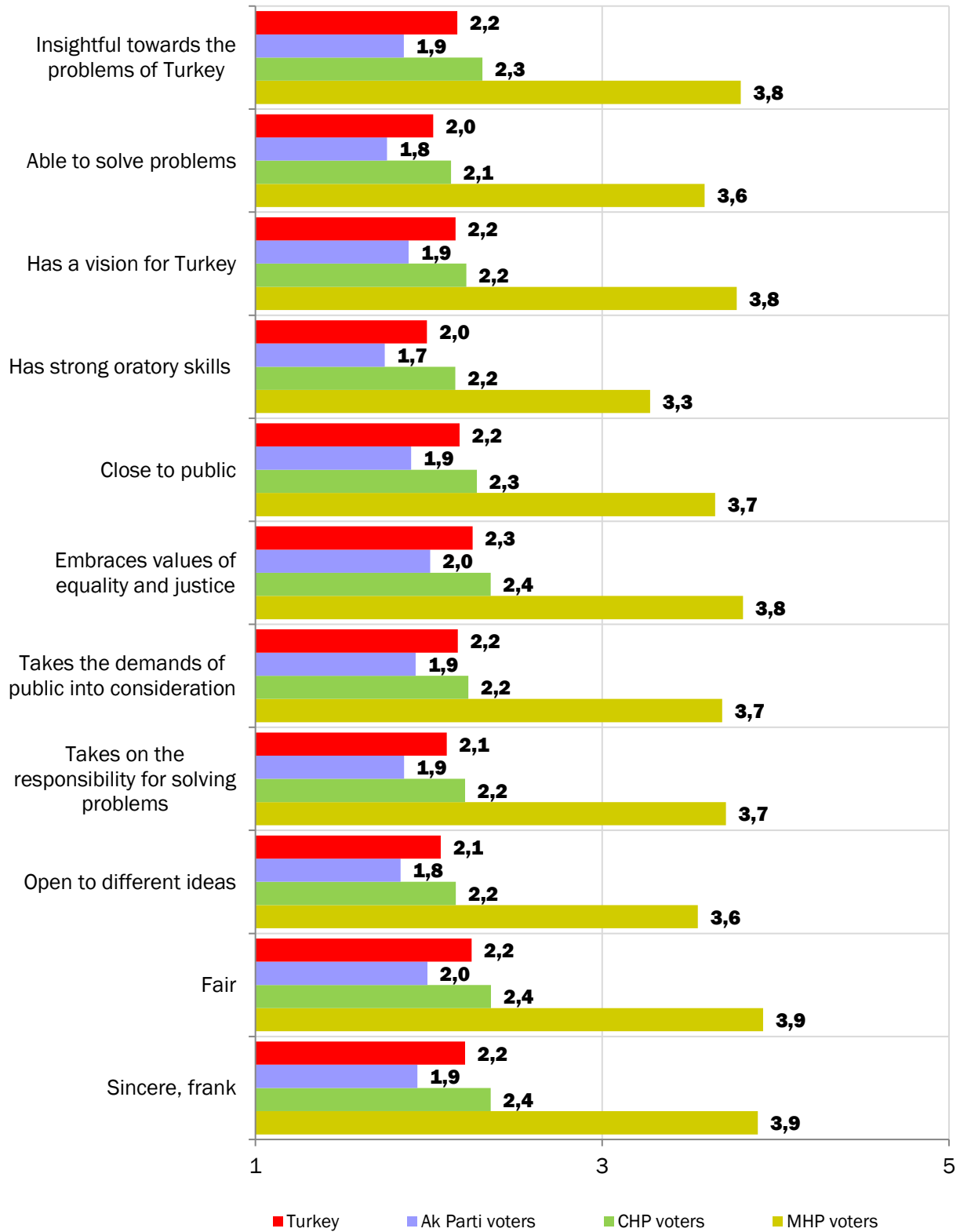
These graphs clearly show that the voters grade the leaders of their own parties much higher than average for each characteristic and they grade the other leaders with very low points, almost totally irrespective of the characteristic in question. The only exception may be considered as the grade of CHP and MHP voters given to the oratory skills of Erdoğan. Colloquially speaking, CHP and MHP voters “gave the devil his due” in this regard.

This situation may be interpreted in two ways: First, the political polarization in Turkey obviously affected the party voters and instead of an objective evaluation, they preferred to praise their own leaders and criticize the others. Secondly, these voters may have exactly these opinions and this is why they follow that particular leader and thereby vote for his party. Both alternatives may be in effect on different levels of intensity. However, an analysis on the basis of other demographical features of the interviewees, especially lifestyles, reveals that polarization predominates.

In addition, the voters of the three largest parties make up 66 percent of the interviewees and when we take into consideration the other 33 percent, i.e. one third, as the basis for the society’s evaluation of leaders, we reach more reliable findings.

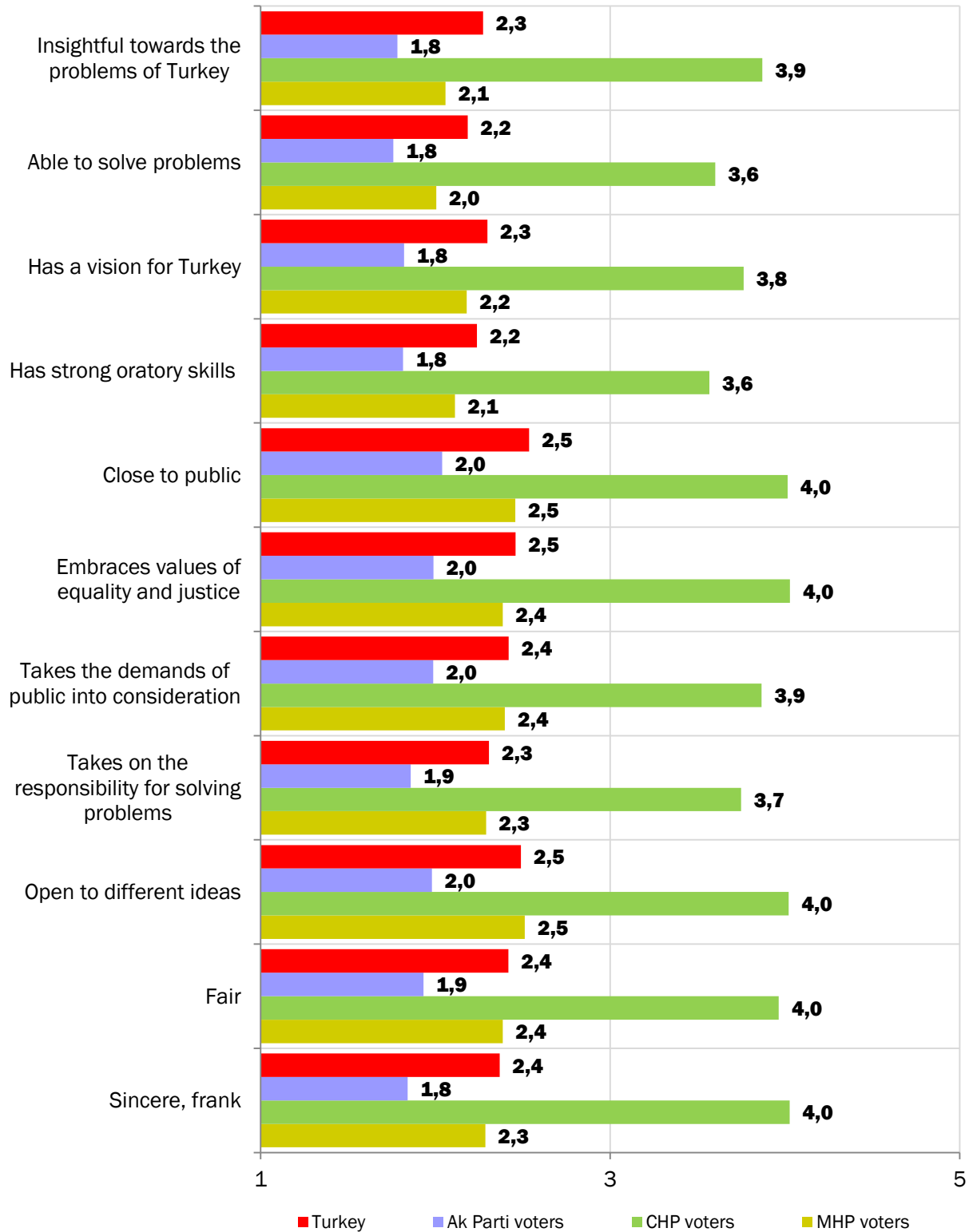


### Voters' grading for Bahçeli



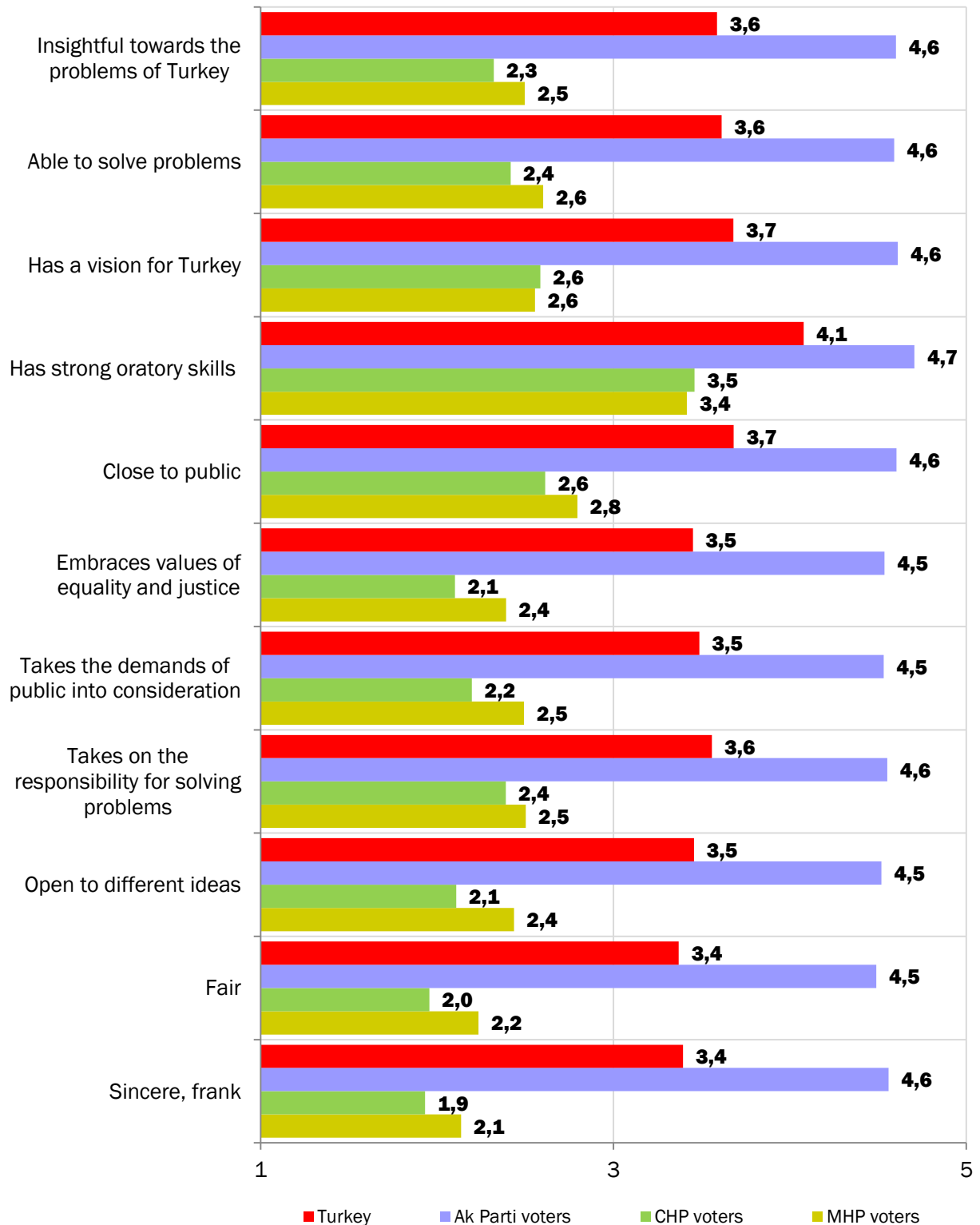


### Voters' grading for Kılıçdaroğlu





### Voters' grading for Erdoğan



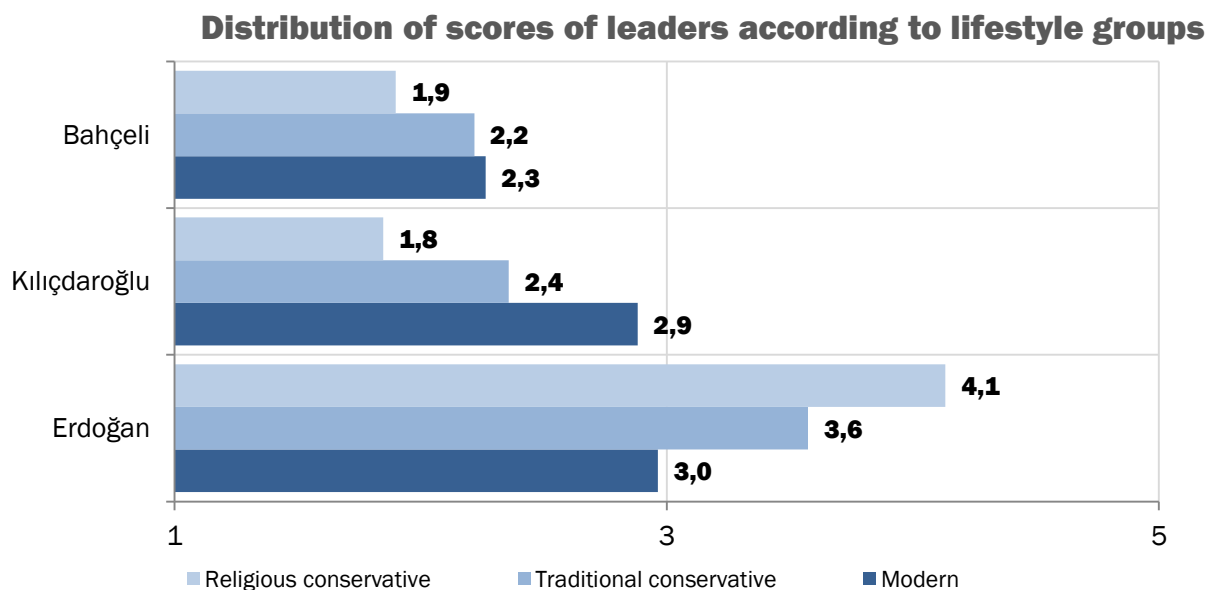


## 2.5.1. Evaluation of leaders by demographical clusters

### Lifestyle

Examination of the scores of the three leaders in view of lifestyles that the interviewees identify themselves with shows that lifestyle has a distinct influence on the grading of the leaders.

In the evaluations of all lifestyle groups Erdoğan leads; the highest being among religious conservatives and the lowest being among moderns.

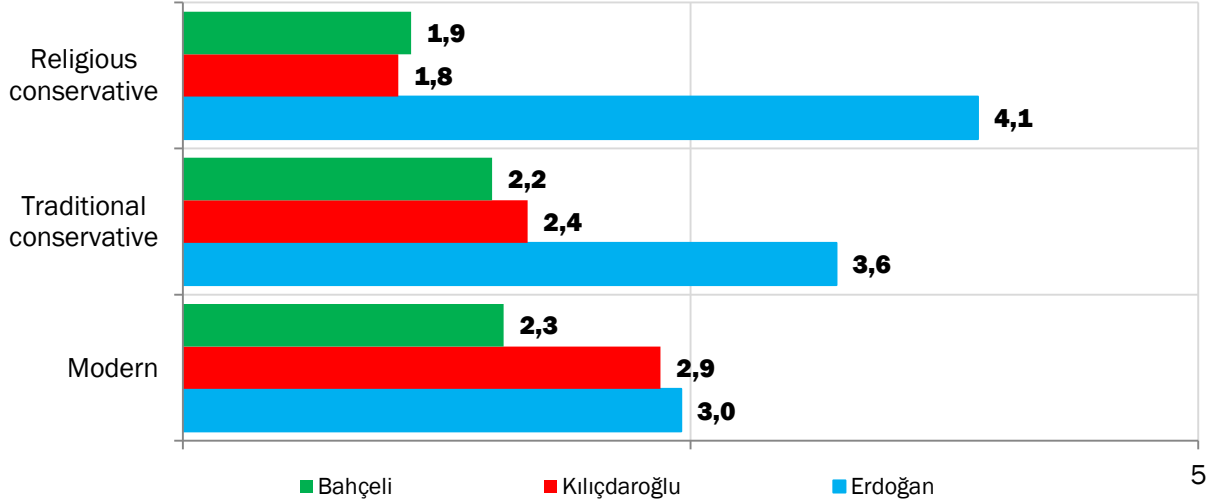


However, as for assessment of the scoring rates in terms of lifestyle groups, it is revealed that there are different distributions of grading in each lifestyle group. In the modern lifestyle group, the difference in score is lowest between Kılıçdaroğlu and Erdoğan, whereas the highest difference in score between Kılıçdaroğlu and Erdoğan is observed in the religious conservative lifestyle group. This is the indication of the fact that Erdoğan receives the highest points from religious conservative group whereas Kılıçdaroğlu receives the highest points from moderns. Kılıçdaroğlu scored the lowest average in the religious conservative group and increased his score towards the modern group. Similarly, the score of Bahçeli increases from conservative to modern. In summary, the higher the conservatism, the higher Erdoğan's score and the difference from the other leaders.





### Evaluation of leaders according to lifestyle groups



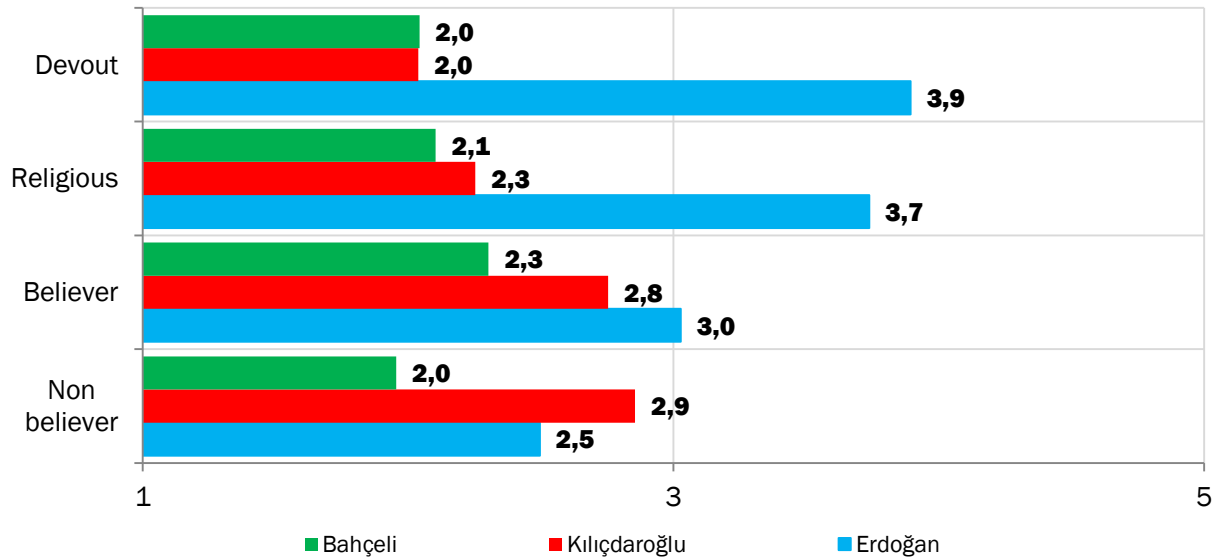
#### Religiousness, Head Covering Status and Sects

The relationship between the religiousness level and the scores of the leaders reveals that Erdoğan's score increases parallel to the religiousness level. Erdoğan gets the highest points from the segments "devout" and "religious" and lowest points from "non-believers."

On the other hand, Kılıçdaroğlu's score increases as the religiousness level decreases. Kılıçdaroğlu receives the highest points from non-believers and the lowest points from devout believers. Bahçeli's average score is higher in the believer segment and lowest in the non-believer segment.

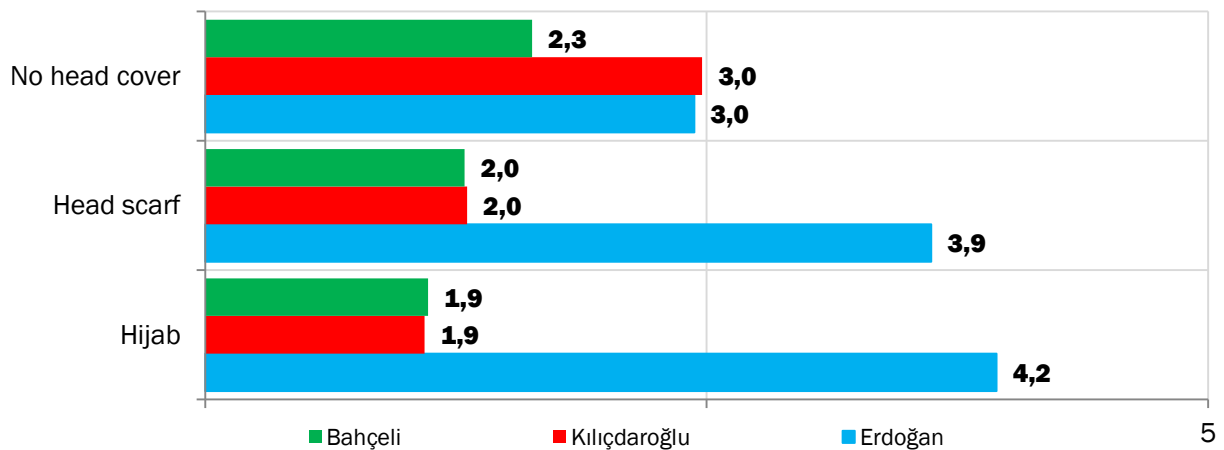


### Evaluation of leaders according to religiousness



The relationship between head covering status and the scores of the leaders shows that Erdoğan gets the highest points from head covering people. Erdoğan received the highest scores from those who cover their heads or whose wives cover their heads, whereas among non-head covering people Kılıçdaroğlu barely leads.

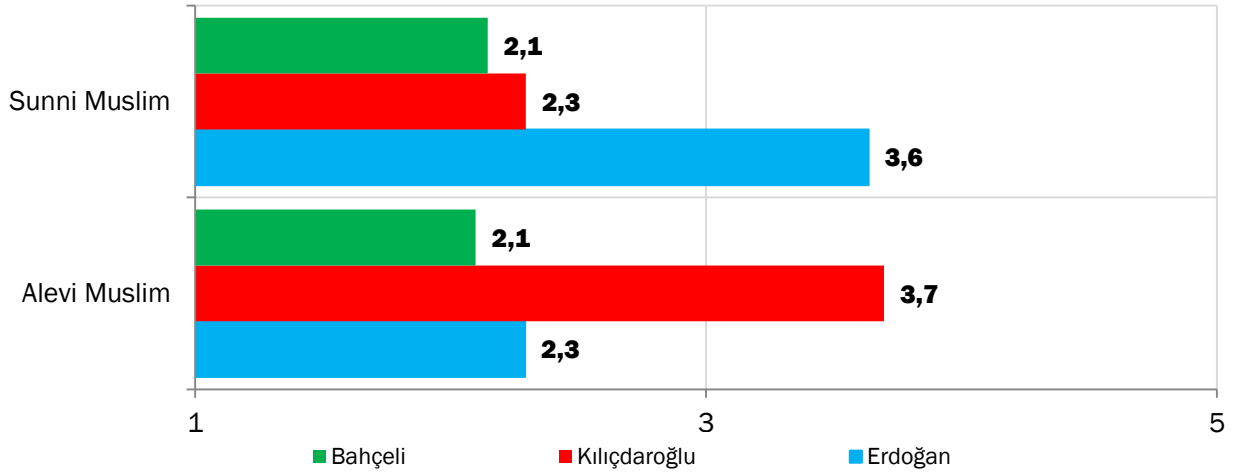
### Evaluation of leaders according to head covering status



There is a clear distinction between the evaluations of Sunni and Alevi Muslims. Erdoğan leads among Sunni Muslims whereas Kılıçdaroğlu leads among Alevi Muslims. Bahçeli scored the lowest in both segments. The highest scored trait of Kılıçdaroğlu among Alevis is “being close to the public” whereas the lowest scored trait is “to take on the responsibility for solving problems.” The highest scored trait of Erdoğan was “oratory skills”, whereas his lowest scored traits were by far “fairness” and “sincerity, frankness.”



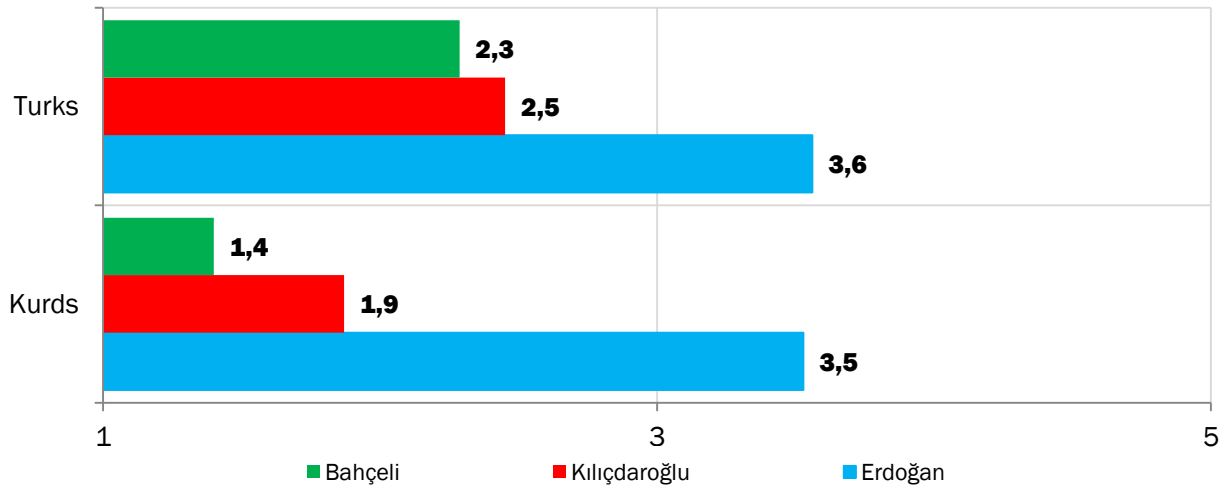
### Evaluation of leaders by Sunnis and Alevi



### Ethnicity

With regard to the evaluation of the leaders' scores according to ethnicity, Erdoğan emerges as the leader by receiving the highest scores from both Turks and Kurds, whereas Bahçeli received the lowest scores from both segments. Erdoğan received the highest scores for his "oratory skills" and "closeness to public" and the lowest score for "fairness" in both segments.

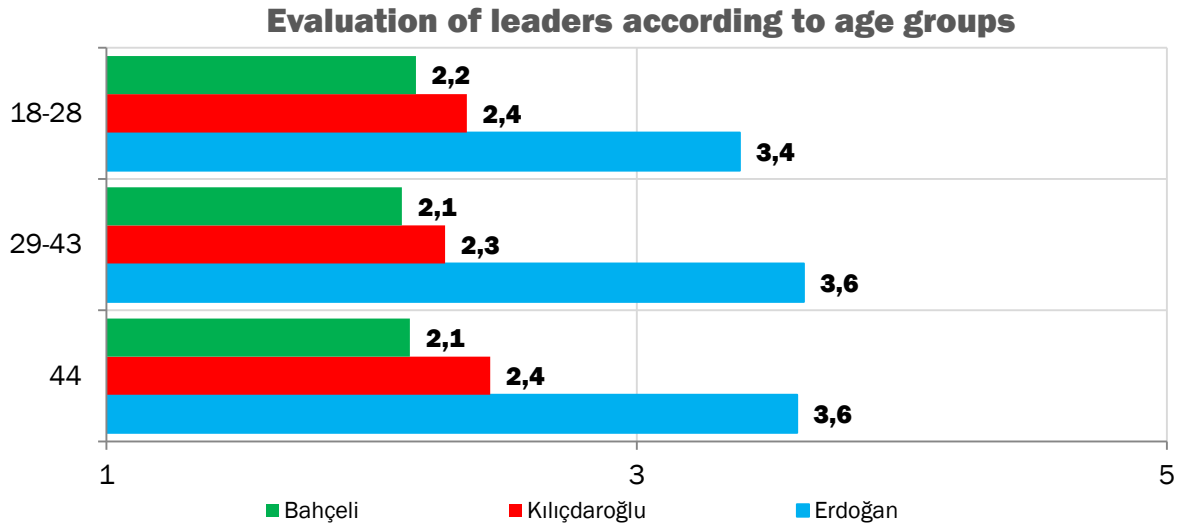
### Evaluation of leaders according to ethnicity



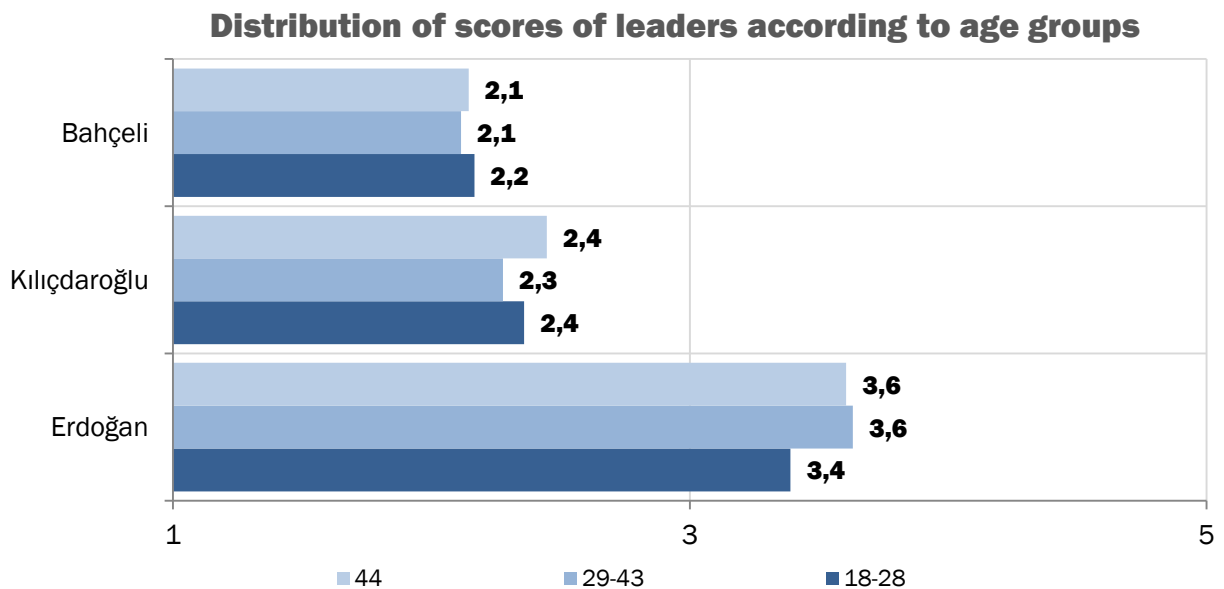


## Age and educational level

Erdoğan gets the highest average score in the averages of all age groups.



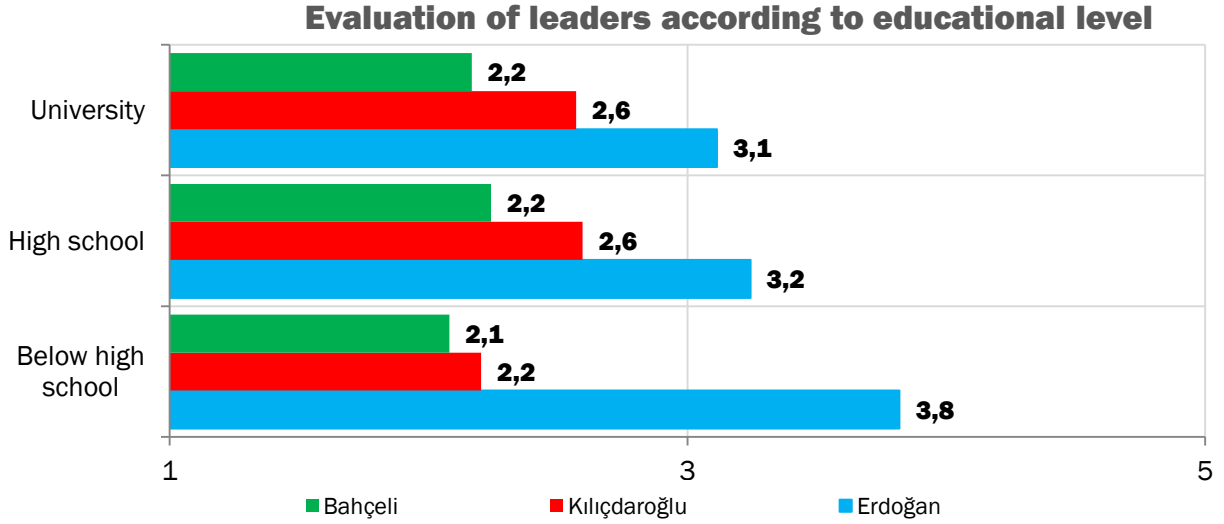
Examining the distribution of the scores of all leaders according to age groups, it is observed that all 3 leaders received almost identical grading rates from each age group. However, as seen in the below graph, Kılıçdaroğlu scored slightly higher in the age group of 44 and above, compared to his score in the other age groups whereas Erdoğan scored lower in the age group 18-28.



A general overlook on the evaluation of leaders according to educational level reveals similar results, namely Erdoğan gets the highest scores from all groups. Examination of the



distribution of scores according to educational category shows that Erdoğan gets the highest average in the group “below high school degree” and the lowest average in the “university/post graduate” group. Kılıçdaroğlu and Bahçeli received their highest average scores in the “high school” and “university/post graduate” groups. These results show that the lower the educational level, the higher Erdoğan’s score.



The distribution of the points received from both age and education groups in terms of characteristics shows that Erdoğan receives the highest scores from all groups for his trait of “oratory skills.”

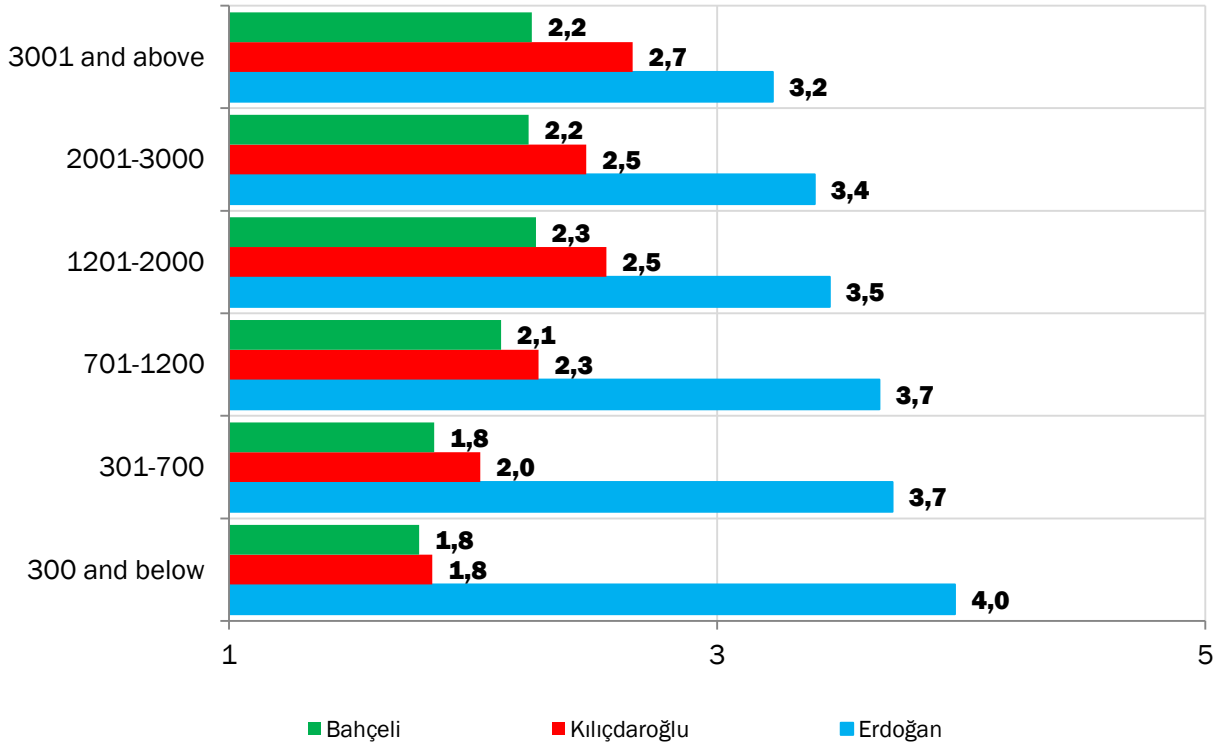
### Income status, type of residence and residential area

As for the evaluation of leaders according to income status, type of residence and residential area, Erdoğan comes out as the most successful leader in all groups and categories.

With regard to income status, an increase in the household income brings the effect of an increase in Kılıçdaroğlu’s score and a decrease in Erdoğan’s score. Erdoğan receives the highest average score from the lowest income group whereas Kılıçdaroğlu received the highest average score in the highest income group. For Bahçeli, it is true to a certain extent that the increase in his scores is parallel to the increase in income levels, however Bahçeli received his highest average score in the group with a monthly income of TRY 1,201-2,000 albeit with a very small difference.

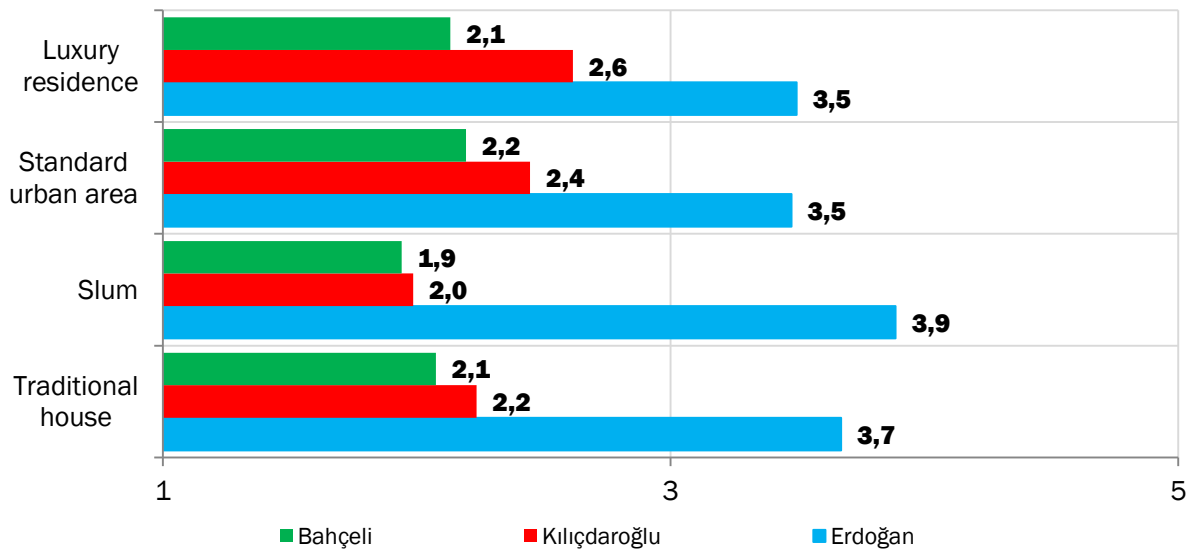


### Evaluation of leaders according to income level



As for residential areas, Kılıçdaroğlu gets the highest average score in the metropolitan areas whereas Erdoğan receives his highest scores in the rural and urban areas. According to the type of residence, Erdoğan gets the highest average score in “slums”, Kılıçdaroğlu in “luxury residences” and Bahçeli in “standard urban areas.” On the other hand, Erdoğan gets the lowest average score in “luxury residences” and Kılıçdaroğlu and Bahçeli in “slums.”

### Evaluation of leaders according to type of residence





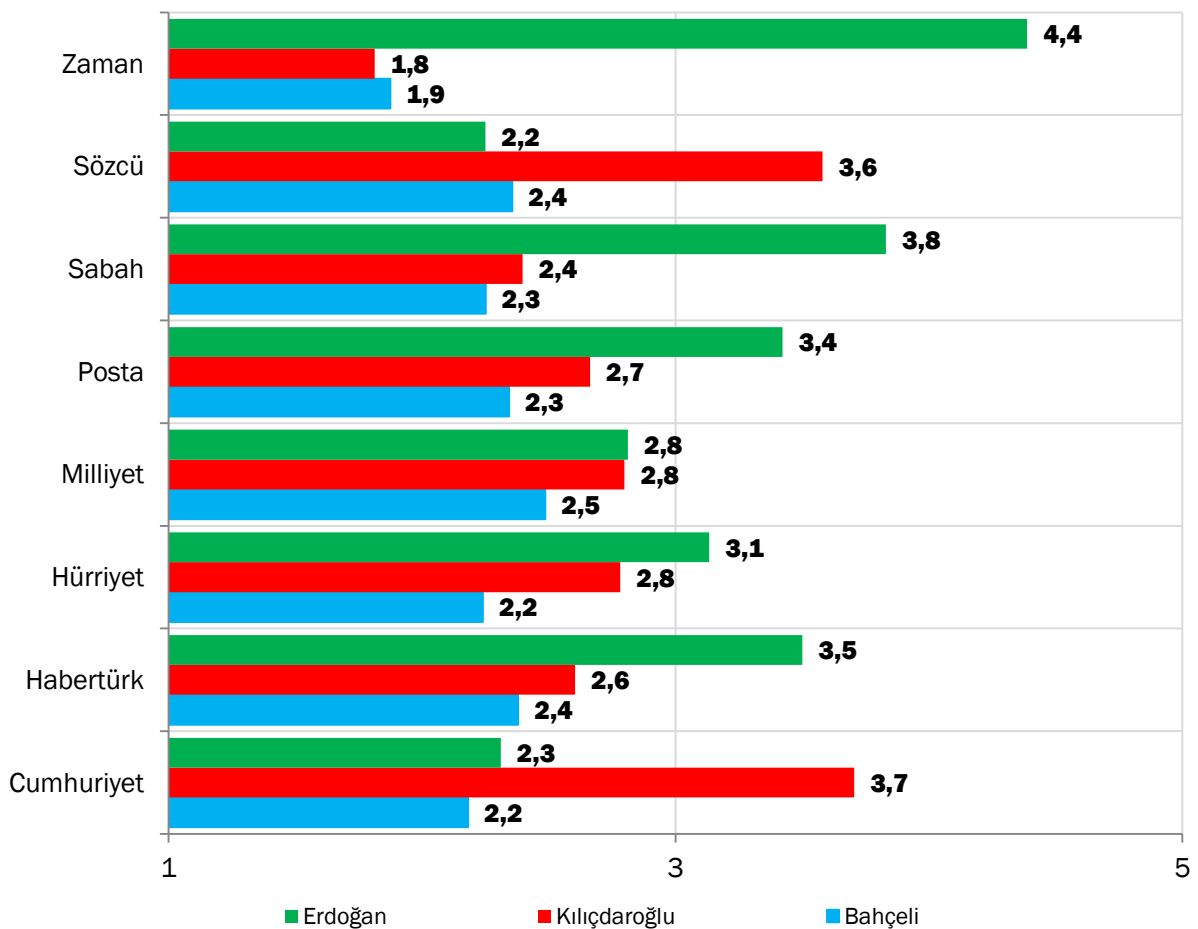


## Media Preference

The TV channel and newspaper preferences of individuals for obtaining news are in close relation to their grading of leaders.

As seen in the graph below, readers of Zaman and Sabah as well as those who do not read newspapers gave by far the highest grading to Erdoğan. On the other hand readers of Cumhuriyet and Sözcü gave the highest grading to Kılıçdaroğlu. Bahçeli received his highest scores from Milliyet readers. Bahçeli and Kılıçdaroğlu received their lowest points from Zaman readers whereas Erdoğan received his lowest points from Cumhuriyet and Sözcü readers.

### Evaluation of leaders according to newspaper preference

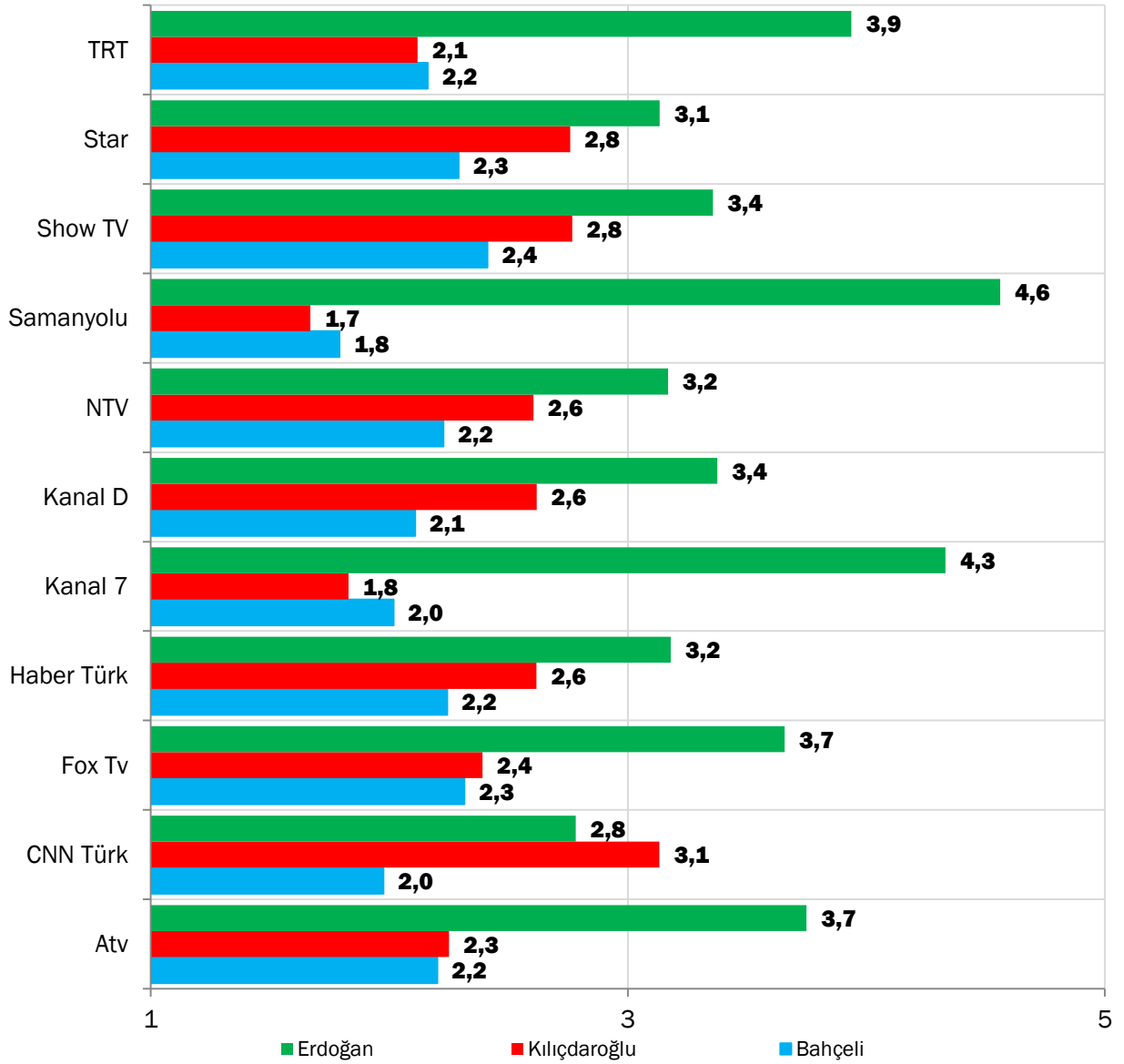


The relationship between news channel preferences and evaluation of leaders shows that Erdoğan received the highest scores from the viewers of Samanyolu, Kanal 7, TRT and ATV and lowest average scores from the viewers of CNN Türk whereas Kılıçdaroğlu received the highest scores from the viewers of CNN Türk and lowest from the viewers of Samanyolu and Kanal 7. Bahçeli, on the other hand, received the highest score from the viewers of Show TV and lowest from the viewers of Samanyolu.





### Evaluation of leaders according to news channel preferences



News channel and newspaper preferences are two fields that clearly demonstrate the polarization of the society in Turkey. Accordingly, there is a very clear and close relation between the leader preference and the news source preference.



### **3. METHOD OF THE SURVEY**

#### **3.1. General Definition of the Survey**

The survey on which this report is founded was conducted by KONDA Araştırma ve Danışmanlık Ltd. Şti. for KONDA Barometer subscribers.

The field survey was conducted on March 9 – 10, 2013. This report reflects the current political tendencies, preferences and profiles of the adult population above the age of 18 in Turkey.

The survey was designed and applied for the aim of determining and monitoring the tendencies and changes in the preferences of the subjects that represent the adult population above the age of 18 in Turkey.

The error margin of the findings in the survey is +/- 2 in the confidence interval of 95 percent and +/- 2.6 in the confidence interval of 99 percent.

#### **3.2. Sampling**

The sample was prepared by stratification of the data on population and educational level of neighborhoods and villages based on Address-Based Population Registration System with the neighborhood and village results of the general elections dated June 12, 2011.

Residential areas were first graded as rural/urban/metropolitan and then the sample was determined based on 12 regions.

Within the scope of the survey, face-to-face interviews were carried out with 2669 individuals in 150 neighborhoods and villages of 98 districts -including central districts- of 30 provinces.

|                                |           |
|--------------------------------|-----------|
| <b>Provinces visited</b>       | <b>30</b> |
| Districts visited              | 98        |
| Neighborhoods/villages visited | 150       |
| Subjects interviewed           | 2669      |



Age and sex quotas were applied to 18 surveys conducted in each neighborhood.

| Age Groups        | Female     | Male       |
|-------------------|------------|------------|
| Ages 18-28        | 3 subjects | 3 subjects |
| Ages 29-44        | 3 subjects | 3 subjects |
| Ages 44 and above | 3 subjects | 3 subjects |

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



The table below shows the distribution of subjects according to regions and residential areas.

|           | <b>Region of Survey</b> | <b>Rural</b> | <b>Urban</b> | <b>Metropolitan</b> | <b>Total</b> |
|-----------|-------------------------|--------------|--------------|---------------------|--------------|
| <b>1</b>  | Istanbul                |              |              | 19.0                | 19.0         |
| <b>2</b>  | Western Marmara         | 2.0          | 3.4          |                     | 5.4          |
| <b>3</b>  | Aegean                  | 3.7          | 5.9          | 5.4                 | 14.9         |
| <b>4</b>  | Eastern Marmara         | 1.3          | 2.7          | 5.4                 | 9.4          |
| <b>5</b>  | Western Anatolia        | 0.7          |              | 10.2                | 10.9         |
| <b>6</b>  | Mediterranean           | 3.3          | 2.7          | 6.0                 | 12.0         |
| <b>7</b>  | Central Anatolia        | 1.3          | 2.0          | 1.4                 | 4.8          |
| <b>8</b>  | Western Black Sea       | 2.7          | 3.4          |                     | 6.1          |
| <b>9</b>  | Eastern Black Sea       | 1.3          | 2.0          |                     | 3.4          |
| <b>10</b> | Northeastern Anatolia   | 1.4          |              |                     | 1.4          |
| <b>11</b> | Middle Eastern Anatolia | 1.3          | 2.0          |                     | 3.4          |
| <b>12</b> | Southeastern Anatolia   | 2.1          | 3.4          | 4.0                 | 9.5          |
|           | Turkey                  | 21.3         | 27.4         | 51.3                | 100.0        |





## 4. FREQUENCY TABLES

### 4.1. Profile of Subjects

| Sex    | Percentage |
|--------|------------|
| Female | 48.7       |
| Male   | 51.3       |
| Total  | 100.0      |

| Age               | Percentage |
|-------------------|------------|
| Ages 18 - 28      | 25.6       |
| Ages 29 - 43      | 36.2       |
| Ages 44 and above | 38.2       |
| Total             | 100.0      |

| Educational Status        | Percentage |
|---------------------------|------------|
| Illiterate                | 5.4        |
| Literate without degree   | 2.4        |
| Primary school graduate   | 36.8       |
| Secondary school graduate | 14.4       |
| High school graduate      | 26.8       |
| University graduate       | 12.9       |
| Post graduate / Doctorate | 1.3        |
| Total                     | 100.0      |

| Paternal educational status | Percentage |
|-----------------------------|------------|
| Illiterate                  | 15.4       |
| Literate without degree     | 6.6        |
| Primary school graduate     | 54.7       |
| Secondary school graduate   | 8.6        |
| High school graduate        | 10.3       |
| University graduate         | 4.2        |
| Post graduate / Doctorate   | .2         |
| Total                       | 100.0      |

| Monthly household income | Percentage |
|--------------------------|------------|
|--------------------------|------------|



|                    |       |
|--------------------|-------|
| TRY 300 and below  | 3.8   |
| TRY 301 - 700      | 9.8   |
| TRY 701 - 1200     | 37.2  |
| TRY 1201 - 2000    | 30.7  |
| TRY 2001 - 3000    | 11.0  |
| TRY 3001 and above | 7.5   |
| Total              | 100.0 |

| Household population | Percentage |
|----------------------|------------|
| 1 - 2 persons        | 14.8       |
| 3 - 5 persons        | 63.2       |
| 6 - 8 persons        | 14.8       |
| 9+ persons           | 7.3        |
| Total                | 100.0      |

| Head covering status | Percentage |
|----------------------|------------|
| No head cover        | 28.7       |
| Head scarf           | 49.7       |
| Hijab                | 8.1        |
| Chador, purdah       | .3         |
| Bachelor men         | 13.2       |
| Total                | 100.0      |

| Ethnicity | Percentage |
|-----------|------------|
| Turkish   | 79.5       |
| Kurdish   | 13.6       |
| Zaza      | 1.7        |
| Arab      | 2.6        |
| Other     | 2.6        |
| Total     | 100.0      |

| Religion/Sect | Percentage |
|---------------|------------|
| Sunni Muslim  | 94.2       |
| Alevi Muslim  | 4.4        |
| Other         | 1.4        |



|       |       |
|-------|-------|
| Total | 100.0 |
|-------|-------|

| Religiousness | Percentage |
|---------------|------------|
| Non-believer  | 1.8        |
| Believer      | 23.2       |
| Religious     | 62.9       |
| Devout        | 12.1       |
| Total         | 100.0      |

| Lifestyle cluster        | Percentage |
|--------------------------|------------|
| Modern                   | 27.1       |
| Traditional conservative | 45.4       |
| Religious conservative   | 27.5       |
| Total                    | 100.0      |

| Work status                            | Percentage |
|----------------------------------------|------------|
| Public officer                         | 5.5        |
| Private sector                         | 6.2        |
| Worker                                 | 11.5       |
| Small retailer                         | 6.4        |
| Industrialist / Businessman            | .2         |
| Self-employed                          | 1.8        |
| Farmer, agriculturalist, stock breeder | 4.5        |
| Works, Other                           | 3.6        |
| Retired                                | 13.6       |
| Housewife                              | 33.6       |
| Student                                | 8.1        |
| Unemployed, seeking job                | 3.6        |
| Disabled                               | 1.2        |
| Total                                  | 100.0      |





| Which TV channel do you usually prefer for obtaining news? | Percentage |
|------------------------------------------------------------|------------|
| Kanal D                                                    | 21.5       |
| ATV                                                        | 12.7       |
| TRT                                                        | 12.1       |
| Samanyolu                                                  | 8.6        |
| Fox TV                                                     | 8.4        |
| Show TV                                                    | 7.1        |
| NTV                                                        | 5.1        |
| Star                                                       | 6.0        |
| Kanal 7                                                    | 4.5        |
| Haber Türk                                                 | 2.7        |
| CNN Türk                                                   | 1.5        |
| Ulusal                                                     | 1.1        |
| Roj TV                                                     | .2         |
| TRT 6 (Şeş)                                                | .3         |
| Local Channels                                             | .6         |
| Other Channels                                             | 7.4        |
| Total                                                      | 100.0      |

| Newspaper preference    | Percentage |
|-------------------------|------------|
| Cumhuriyet              | 2.4        |
| Habertürk               | 4.3        |
| Hürriyet                | 10.7       |
| Milliyet                | 5.7        |
| Posta                   | 14.9       |
| Radikal                 | .9         |
| Sabah                   | 7.9        |
| Sözcü                   | 4.8        |
| Zaman                   | 13.9       |
| Other newspapers        | 18.7       |
| Does not read newspaper | 15.8       |
| No answer               | 100.0      |
| Total                   |            |



| <b>Birthplace</b>       | <b>Percentage</b> |
|-------------------------|-------------------|
| Istanbul                | 7.0               |
| Western Marmara         | 3.6               |
| Aegean                  | 13.5              |
| Eastern Marmara         | 6.4               |
| Western Anatolia        | 7.6               |
| Mediterranean           | 10.3              |
| Central Anatolia        | 8.4               |
| Western Black Sea       | 9.7               |
| Eastern Black Sea       | 6.9               |
| Northeastern Anatolia   | 4.9               |
| Middle Eastern Anatolia | 7.2               |
| Southeastern Anatolia   | 12.2              |
| Abroad                  | 2.0               |
| Total                   | 100.0             |

| <b>Paternal birthplace</b> | <b>Percentage</b> |
|----------------------------|-------------------|
| Istanbul                   | 2.4               |
| Western Marmara            | 3.7               |
| Aegean                     | 13.2              |
| Eastern Marmara            | 5.7               |
| Western Anatolia           | 6.9               |
| Mediterranean              | 9.1               |
| Central Anatolia           | 9.2               |
| Western Black Sea          | 10.8              |
| Eastern Black Sea          | 8.4               |
| Northeastern Anatolia      | 6.1               |
| Middle Eastern Anatolia    | 8.3               |
| Southeastern Anatolia      | 13.1              |
| Abroad                     | 3.0               |
| Total                      | 100.0             |



| <b>Region of Survey</b> | <b>Percentage</b> |
|-------------------------|-------------------|
| Istanbul                | 19.0              |
| Western Marmara         | 5.4               |
| Aegean                  | 14.9              |
| Eastern Marmara         | 9.4               |
| Western Anatolia        | 10.9              |
| Mediterranean           | 12.0              |
| Central Anatolia        | 4.8               |
| Western Black Sea       | 6.1               |
| Eastern Black Sea       | 3.4               |
| Northeastern Anatolia   | 1.4               |
| Middle Eastern Anatolia | 3.4               |
| Southeastern Anatolia   | 9.5               |
| Total                   | 100.0             |

| <b>Residential area</b> | <b>Percentage</b> |
|-------------------------|-------------------|
| Rural                   | 21.3              |
| Urban                   | 27.4              |
| Metropolitan            | 51.3              |
| Total                   | 100.0             |

| <b>Type of residence</b> | <b>Percentage</b> |
|--------------------------|-------------------|
| Traditional residence    | 33.8              |
| Slum                     | 6.2               |
| Standard urban area      | 55.7              |
| Luxury residence         | 4.3               |
| Total                    | 100.0             |

| <b>Automobile ownership</b> | <b>Percentage</b> |
|-----------------------------|-------------------|
| Yes                         | 40.4              |
| No                          | 59.6              |
| Total                       | 100.0             |

## **4.2. Leadership**

| <b>Comprehending problems correctly</b> | <b>Percentage</b> |
|-----------------------------------------|-------------------|
|-----------------------------------------|-------------------|



|                      |       |
|----------------------|-------|
| Not important at all | .1    |
| Not important        | .8    |
| All the same         | 3.2   |
| Important            | 46.1  |
| Very important       | 49.9  |
| Total                | 100.0 |

| <b>Ability to solve problems</b> | <b>Percentage</b> |
|----------------------------------|-------------------|
| Not important at all             | .1                |
| Not important                    | .6                |
| All the same                     | 2.3               |
| Important                        | 45.7              |
| Very important                   | 51.4              |
| Total                            | 100.0             |

| <b>Having dreams, ideas and plans for the future</b> | <b>Percentage</b> |
|------------------------------------------------------|-------------------|
| Not important at all                                 | .2                |
| Not important                                        | 1.8               |
| All the same                                         | 6.1               |
| Important                                            | 44.9              |
| Very important                                       | 46.9              |
| Total                                                | 100.0             |



| <b>Inspiring people</b> | <b>Percentage</b> |
|-------------------------|-------------------|
| Not important at all    | .2                |
| Not important           | 2.6               |
| All the same            | 10.8              |
| Important               | 47.9              |
| Very important          | 38.4              |
| <b>Total</b>            | <b>100.0</b>      |

| <b>Oratory skills, persuasiveness</b> | <b>Percentage</b> |
|---------------------------------------|-------------------|
| Not important at all                  | .3                |
| Not important                         | 1.3               |
| All the same                          | 4.7               |
| Important                             | 40.8              |
| Very important                        | 52.9              |
| <b>Total</b>                          | <b>100.0</b>      |

| <b>Embracing values of equality and justice</b> | <b>Percentage</b> |
|-------------------------------------------------|-------------------|
| Not important at all                            | .3                |
| Not important                                   | .6                |
| All the same                                    | 2.7               |
| Important                                       | 36.2              |
| Very important                                  | 60.2              |
| <b>Total</b>                                    | <b>100.0</b>      |

| <b>Being close to the people he rules, being approachable</b> | <b>Percentage</b> |
|---------------------------------------------------------------|-------------------|
| Not important at all                                          | .6                |
| Not important                                                 | 2.6               |
| All the same                                                  | 6.8               |
| Important                                                     | 42.8              |
| Very important                                                | 47.3              |
| <b>Total</b>                                                  | <b>100.0</b>      |



| <b>Taking into consideration the demands of the people he rules</b> | <b>Percentage</b> |
|---------------------------------------------------------------------|-------------------|
| Not important at all                                                | .2                |
| Not important                                                       | .7                |
| All the same                                                        | 2.6               |
| Important                                                           | 41.4              |
| Very important                                                      | 55.0              |
| Total                                                               | 100.0             |

| <b>Taking on the responsibility for solving problems</b> | <b>Percentage</b> |
|----------------------------------------------------------|-------------------|
| Not important at all                                     | .2                |
| Not important                                            | .5                |
| All the same                                             | 2.0               |
| Important                                                | 39.3              |
| Very important                                           | 58.1              |
| Total                                                    | 100.0             |

| <b>Being open to different ideas</b> | <b>Percentage</b> |
|--------------------------------------|-------------------|
| Not important at all                 | .2                |
| Not important                        | .6                |
| All the same                         | 4.0               |
| Important                            | 44.0              |
| Very important                       | 51.3              |
| Total                                | 100.0             |



#### 4.2.1. Characteristics of leaders

|                                                  | Erdoğan     | Kılıçdaroğlu | Bahçeli     |
|--------------------------------------------------|-------------|--------------|-------------|
| Insightful towards to problems of Turkey         | 3.57        | 2.27         | 2.16        |
| Able to solve problems                           | 3.59        | 2.18         | 2.02        |
| Has a vision for Turkey                          | 3.66        | 2.30         | 2.15        |
| Strong oratory skills                            | 4.06        | 2.24         | 1.99        |
| Close to public                                  | 3.66        | 2.54         | 2.18        |
| Embraces values of equality and justice          | 3.43        | 2.46         | 2.25        |
| Takes the demands of public into consideration   | 3.46        | 2.42         | 2.16        |
| Takes on the responsibility for solving problems | 3.54        | 2.31         | 2.10        |
| Open to different ideas                          | 3.43        | 2.49         | 2.06        |
| Fair                                             | 3.35        | 2.42         | 2.25        |
| Sincere, frank                                   | 3.38        | 2.37         | 2.21        |
| <b>Average score</b>                             | <b>3.56</b> | <b>2.36</b>  | <b>2.14</b> |