

# **KONDA**

# **Barometer**

***THEMES***

**The Use of Internet and Social MEdia**  
***May 2013***



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# 1. EXECUTIVE SUMMARY

## DEFINITION OF THE SURVEY

The survey which forms the basis for this report was conducted on May 4 - 5, 2013 by face-to-face interviews with 2585 individuals in 150 neighborhoods and villages of 108 districts –including central districts- of 34 provinces.

## THE USE OF THE INTERNET AND SOCIAL MEDIA

The theme of the January '11 Barometer was again studied this month. Those who own a computer at home and those use the Internet have increased in comparison to the findings in 2011. Those who connect to the Internet at home had an increase of one and a half folds whereas those who connect to the Internet via mobile phones increased in six folds reaching 19 percent.

The rate of those who believe that the Internet causes more harm than good remained as 45 percent in the past two years. Regarding copyrights, 70 percent believe that it is unfair to artists and this opinion is shared even by those who download film or music. The fear of not being able to protect one's privacy on the Internet is widespread throughout all segments of the society.

Regarding the freedom of expression on the Internet which was introduced in the public agenda by instances such as the Fazıl Say case, the decisions to block certain Internet websites and Internet filtering, the most striking finding has been the fact that half of the society is unaware that Say was sentenced due to a message he shared on Twitter. More than half of those who are informed on the matter think that this sentence is detrimental to the freedom of expression on the Internet. 70 percent of the society believe that the state should guarantee freedom of expression on the Internet and the same rate of the society also believe in the necessity of the state's ability to block certain websites. The society thinks that the decision as to which websites their children can have access to should be made by themselves and not by the state.

Among social networks, Facebook has become widely common and the most similar to the profile of Turkey. Youtube also shares this popularity despite its male and youth dominance. Twitter also became more popular within the past two years as one in every six adults are members, however it is still far from having a user profile that is similar to the population in Turkey. Instagram, which is one of the newest social networks, resembles the Twitter of 2011 with a rate of usage of 4 percent which makes 2 million people.

Those who connect to the Internet in Turkey use this medium mostly for chatting and communicating with friends and relatives, for following-up on the news and for entertainment. The most uncommon reasons for using the Internet in Turkey are job searching, sharing current political views on social media and banking transactions. Two in every five Internet users use the Internet for watching TV serials. A significant finding is that those who shop online have increased two folds in the last two years.



Such habits increase in parallel to the frequency of Internet usage and traditional modernization indicators such as education, income and urbanization.

Two third of CHP and MHP voters and half of the Ak Parti and BDP voters are Internet users and all of them actively use social networks though in different degrees. The Ak Parti supporters rarely consider the Internet as a political medium and those who use it most frequently are CHP and BDP supporters.

The rate of trust to the Internet as a news source is much lower than that of television. However one in every five people states that he/she checks on the Internet first in case of new news.

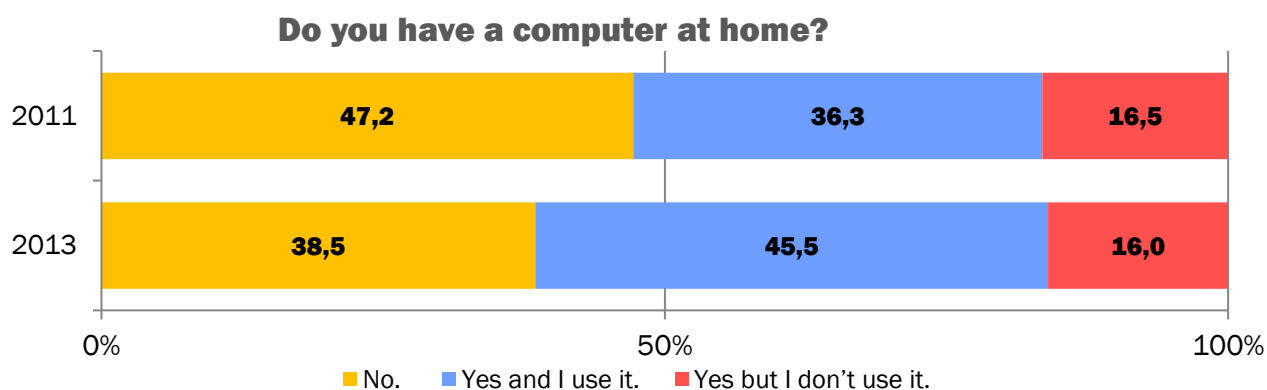


## 2. THE USE OF THE INTERNET AND SOCIAL MEDIA

### 2.1. Internet Habits

Under the theme of May '13 Barometer report, firstly computer ownership is handled. 45 percent state that they personally use the computer and 16 percent state that they do not use the computer although it is available at home which in total makes up to the rate of 62 percent of the society who possess a computer in their homes.

The use of the Internet and social media was previously researched in the January '11 Barometer report, the comparison of results of which show that the rate of computer ownership increased from 53 percent to 62 percent and computer users increased from 36 percent to 46 percent. In short, within the last 2 years, the rates of both computer ownership and usage have increased whereas the rate of those who do not use a computer remains unchanged.



A research on the Internet habits of the society shows that 42 percent of the society does not use the Internet. 58 percent of the society who have a habit of using the Internet were asked where they use the Internet which was answered as at home by 44 percent, via mobile phone by 19 percent, at work by 12 percent, at Internet cafes by 6 percent and via tablet computer by 2.4 percent.

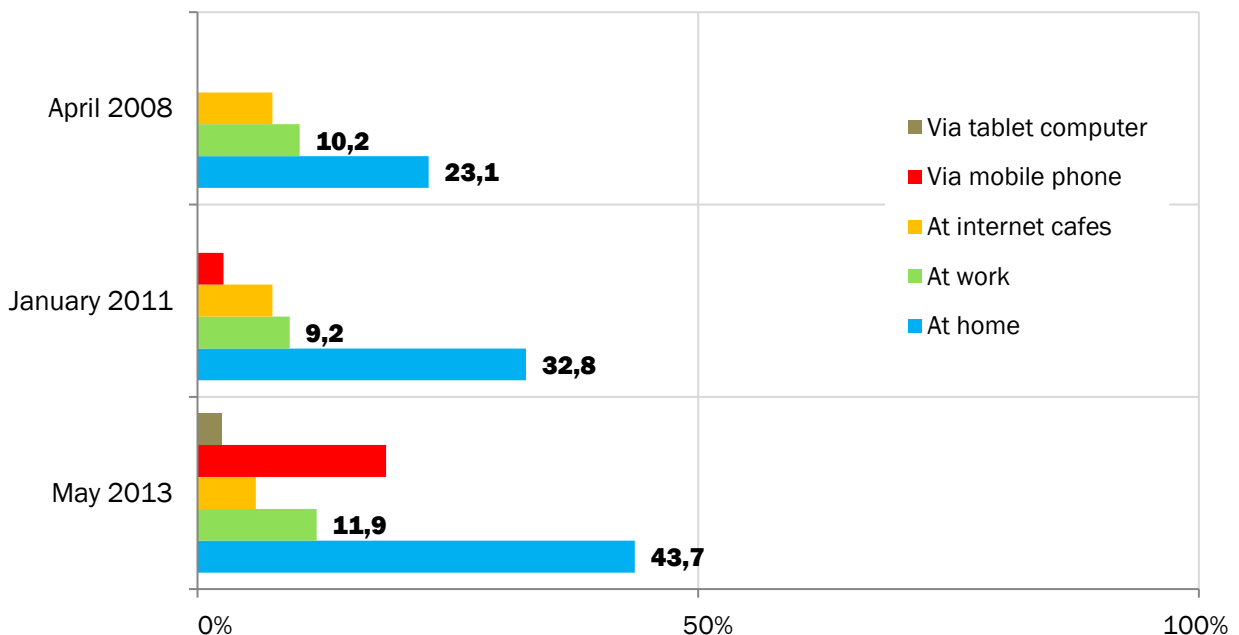
Do you use the Internet and if so, where?	Percentage
At home	43.7
At work	11.9
At Internet cafes	5.8
Via mobile phone	18.8
Via tablet computer	2.4
No use of the Internet	42.4
Total	-



The comparison of the findings of the May 2013 survey with the findings of the previous survey titled “Who are we? Lifestyles” dated April 2008 and the January ’11 Barometer report shows that the habit of using the Internet gradually increased. The rate of non-usage of the Internet was 65 percent in 2008 which dropped to 42 percent in 2013. There is also an increase in the rate of those who use the Internet at home which was 23 percent in 2008 and climbed up to 33 percent in 2011 and 44 percent in 2013. While there is not much change in the rate of those who use the Internet at work, there is a small decrease in the rate of those who use the Internet at Internet cafes.

The most significant change from past years is in the rate of the usage of the Internet via mobile phones which was 3 percent in 2011 but increased 6 folds making up to 19 percent in 2013. The reason for the increase in the usage of the Internet through mobile phones is the fact that it became cheaper and easier to connect to the Internet via mobile phones due to the increase in the usage of smart phones and the improvement of the mobile Internet infrastructure. The increase in the ownership of mobile phones in 2011-2013 may be witnessed in the future in the usage of tablet computers which will bring a parallel increase in the usage of the Internet via tablet computers.

### Means/location of accessing the Internet



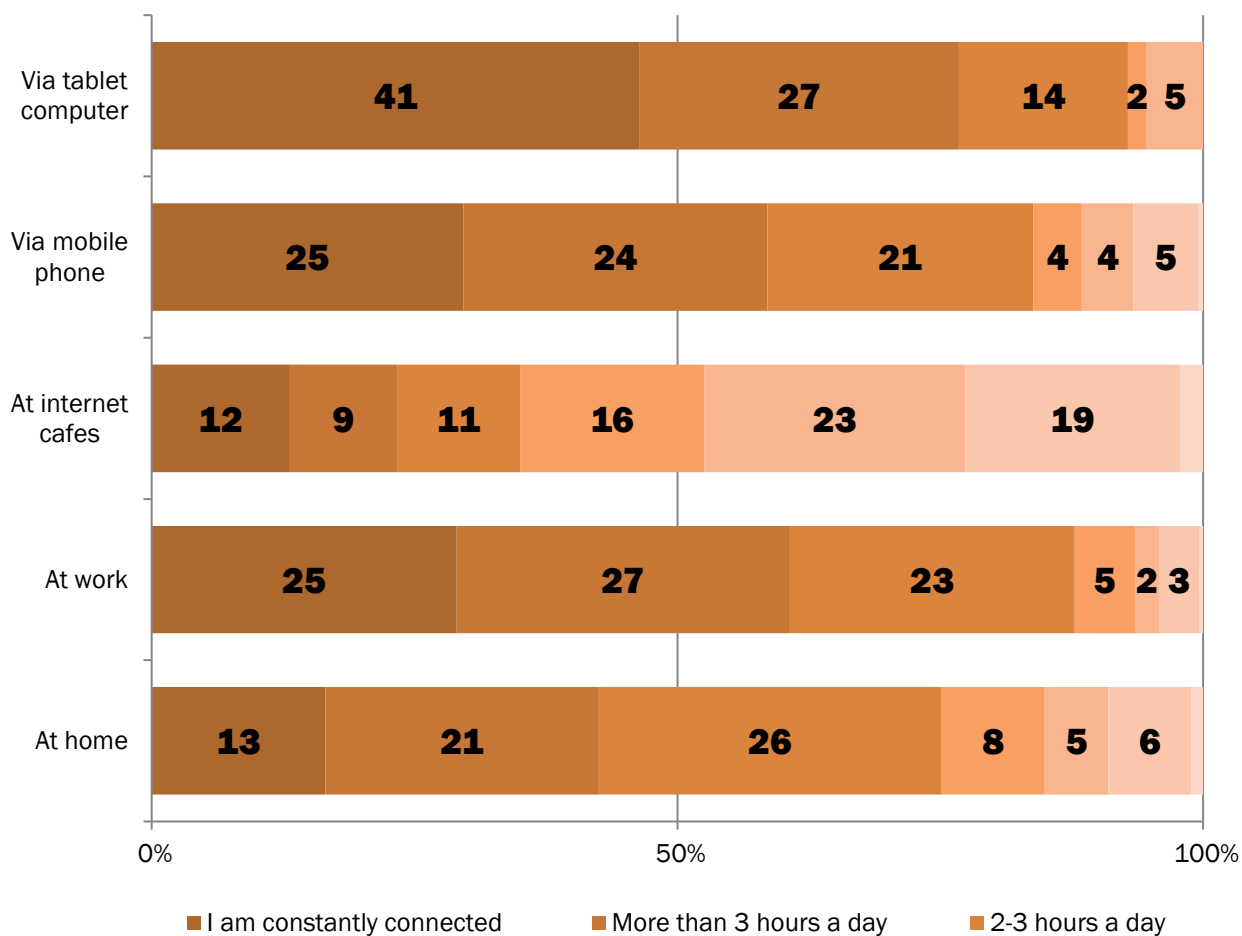
Another basic question regarding the use of the Internet was how often it was used. There is a 43 percent segment of the society who state that they never use the Internet and who do not answer. Those who state that they use the Internet are 57 percent, 7 percent of whom state that they are constantly connected, 10 percent state that they use it more than 3 hours a day, 13 percent state that they use it 2-3 hours a day and 11.6 percent say that they use it 1 hour or less a day. This shows that majority of the



Internet users connect to the Internet everyday. The remaining segment uses the Internet every 2-3 days or less frequently.

How often do you use the Internet?	Percentage
I'm constantly connected	7.0
More than 3 hours a day	9.9
2-3 hours a day	13.0
1 hour or less a day	11.6
Every 2-3 days	4.7
Once a week	4.3
Less frequently	6.3
Never	39.9
No answer	3.4
Total	100.0

**Frequency of use by means/location of access**







The frequency of use according to the location of connection to the Internet brings the following results:

- 80 percent of those who use the Internet at home connect to it everyday. The most frequent duration of usage at home is 2-3 hours.
- The most intensive users of the Internet are those who use it at work: 90 percent connects to the Internet everyday. The most frequent duration of usage at work is more than 3 hours a day.
- Those who connect to the Internet at Internet cafes mention their frequency of use as “once a week.”
- Those who state that they connect to the Internet via mobile phones, which is the most increased segment in the last 2 years, have a rate of 86 percent of usage of the Internet everyday whereas one fourth say that they are constantly connected.
- Those who connect to the Internet via tablet computers, which is a newly developed medium of use, are low in number but 41 percent of them are constantly connected.

As it will be apparent in the following sections of this report, the frequency of the usage of the Internet, is the most effective factor in the habits and opinions of users on the Internet. The higher the usage of the Internet is, the more it is positively perceived, the higher the social networking memberships, the higher the usage of Internet banking, the higher the habit and consumption of technological usage of online entertainment such as videos, games, music and online shopping.

#### **The Usage of the Internet in Turkey and in the world by numbers**

According to the results of “Internet World Stats”<sup>1</sup> dated June 30, 2012, 2.405.518.376 out of the total world population of 7.017.846.922 (34.3 percent) are Internet users. The European segment into which Turkey is included, makes 11.7 percent of the world population whereas 21.6 percent (518.512.109 users) of Internet users live in European countries. About 10 percent of the world population makes up 20 percent of those who have access to the Internet which shows that the economic development level of the countries is determinative in the access to information facilities. On the other hand, access to informational and communicational technologies elevate the level of economical development.

As for Turkey, according to the results of “Internet World Stats” 35 million out of the total population of 78 million are Internet users. According to the aforementioned publication, 45.7 percent of the population in Turkey have access to the Internet whereas the rate is 63.2 in Europe.

1 <http://www.Internetworldstats.com/europa2.htm#tr>



## **2.2. Opinion on the Internet**

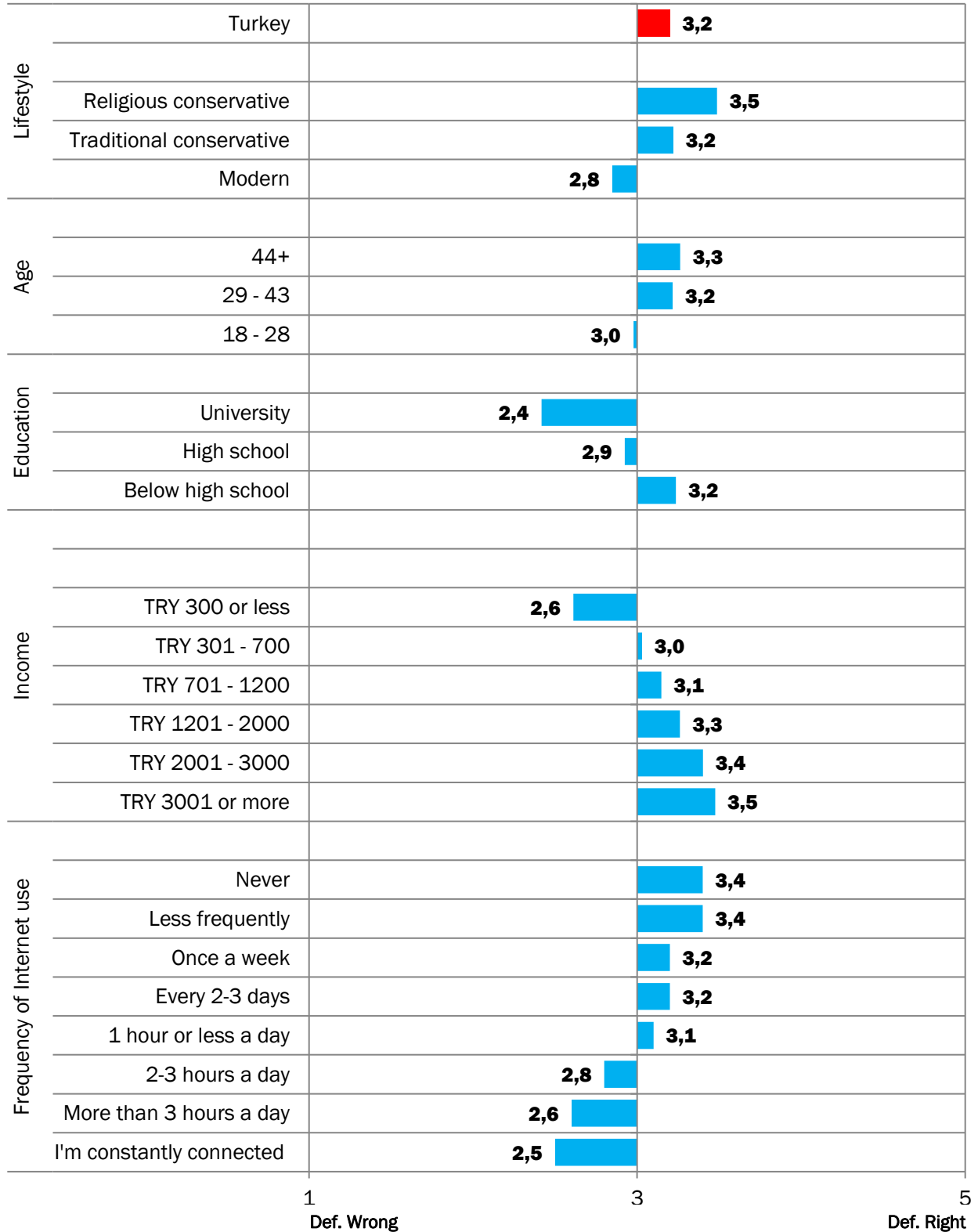
### **2.2.1. The Harm and Good of the Internet**

In order to find out the general opinion of the society on the Internet, we asked the interviewees to what extent they agree with the statement “I believe that the Internet does more harm than good to the society.” 45 percent of the interviewees confirmed this statement whereas 30 percent said that this statement is wrong. The remaining 25 percent are abstaining. It seems that the rates of 2011 are rather stable.

The rates of the answers differ according to the interviewees’ age, educational level, lifestyle and frequency of Internet use. The increase in the frequency of Internet use and educational level as well as the decrease in conservatives are parallel to the decrease in the opinion of harmfulness of the Internet. Such opinion increases with the increase of age and decrease of educational level and income, and all three demographical categories show high variability in the rates of Internet usage.



## I believe that the Internet does more harm than good to the society





## 2.2.2. The Internet and Copyrights

Ever since the Internet has become widespread throughout the world, one of the most important problems has been the easy share of music, films and TV serials which had a dramatic impact on the music and film industries. Large music and film distribution companies have begun to struggle with this situation while some artists who are in favour of liberty started sharing their work through the Internet. Therefore, one of the questions we asked regarding the Internet was on the discussion on copyrights.

We asked the interviewees as to what extent they agree with the statement “Downloading film or music through the Internet free of charge, is unfair to the creators of these works.” 72 percent of the interviewees stated that it is correct whereas 11 percent said that it is wrong. 17 percent are abstaining.

Evaluating the averages of the answers in terms of the differences in demographical profiles and Internet usage habits, it is seen that all groups are placed in the range of 3.6 to 3.9 in a scale of 1 to 5 which means that this statement is approved by almost the whole society.

<b>Downloading films or music through the Internet free of charge, is unfair to the creators of these works.</b>	<b>Percentage</b>
Absolutely wrong	2.8
Wrong	8.4
Neither right nor wrong	17.3
Right	56.1
Absolutely right	15.4
Total	100

73 percent of those who state that they “never” or “rarely” download music/films through the Internet think that it is unfair to the creators whereas 72 percent of those who state that they “frequently” download music/films through the Internet and 54 percent of those who state that they “always” do it, think that it is unfair to the creators. Accordingly, the belief that downloading music and films through the Internet is unfair, does not prevent people from doing it. In other words, although the majority of the society agrees with this statement they nevertheless continue with their actions.



### 2.2.3. Privacy and the Internet

Privacy on the Internet has become a hot topic by the widespread usage of the Internet and the social networking sites. The problem of protecting one's privacy with the development of the Internet has become a subject of discussion especially with regard to instances such as obtaining credit card information, identity information, sharing of private photographs of others through social networking sites, inability to remove misinformation or false accusations from Google search. Another question that was used in order to find out the general opinion of the society with regard to the Internet, was to what extent they agreed with the statement "I worry/would worry that I will not be able to protect my privacy on the Internet." 19 percent stated that this statement is wrong whereas 58 percent agrees with it. 22.5 are abstaining.

Evaluating the averages of the answers in terms of the differences in demographical profiles and Internet usage habits, it is seen that all groups are placed in the range of 3.3 to 3.7 in a scale of 1 to 5 which means that this statement is approved by almost the whole society on the same rate. That is to say, there is a general concern in the society that they will not be able to protect their privacy on the Internet. A detailed study on the findings reveals that religious conservatives and non-users of the Internet have the highest rates in having this concern.

I worry/would worry that I will not be able to protect my privacy on the Internet.	Percentage
Absolutely wrong	5.4
Wrong	13.9
Neither right nor wrong	22.5
Right	45.9
Absolutely right	12.3
Total	100.0

### 2.2.4. Freedom of expression/ State control

Since freedom of expression and state control over the Internet are continuously debated in the public agenda, it was important to evaluate them within the framework of this survey. 5 questions were posed to the interviewees in order to understand their opinion on the matter.

Firstly, we asked to what degree the interviewees agree with the statement "The state must guarantee freedom of expression on the Internet." 11 percent of the society believes that this statement is wrong whereas 70 percent find it right. In terms of demographical profiles, the rate of those who demand that the state provides freedom of expression increases from rural areas to urban areas and in parallel to the increase in educational level and the frequency of Internet usage and the decrease in conservativeness and religiousness.



<b>The state must guarantee freedom of expression on the Internet.</b>	<b>Percentage</b>
Absolutely wrong	2.2
Wrong	8.5
Neither right nor wrong	19.6
Right	52.7
Absolutely right	16.9
Total	100.0

The second statement was “The state must be able to block access to certain sites on the Internet.” This was a very hot topic two years ago when access to Youtube was blocked. 66 percent of the interviewees found this statement to be right whereas 22 percent found it wrong. That is, more than half of the society support state control over Internet sites.

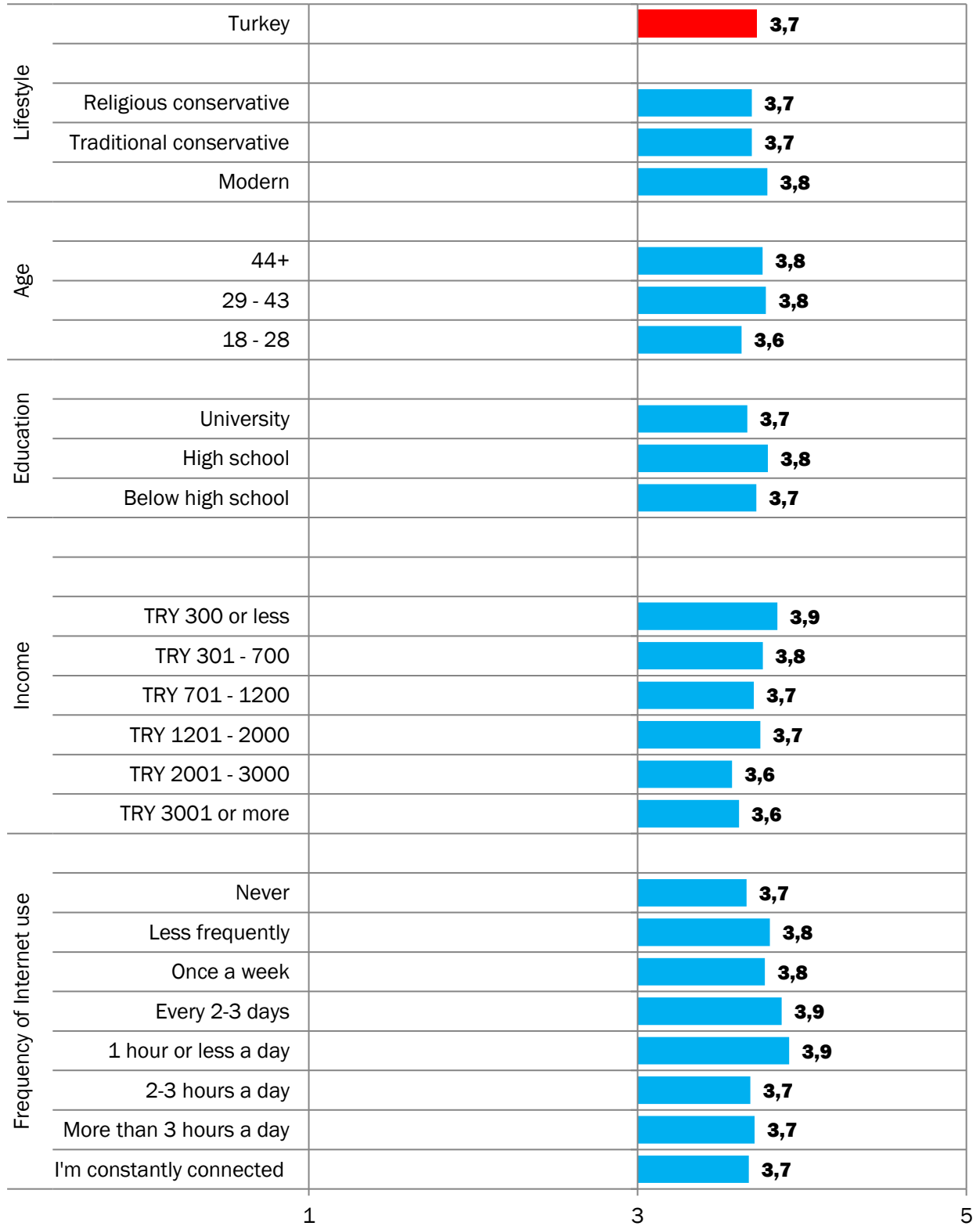
<b>The state must be able to block access to certain sites on the Internet.</b>	<b>Percentage</b>
Absolutely wrong	6.6
Wrong	15.0
Neither right nor wrong	12.6
Right	52.9
Absolutely right	12.9
Total	100.0

Reviewing the averages, it is observed that positiveness towards state control increases as the age, frequency of using the Internet, religiousness and conservativeness increase whereas opposition against state control increases as the educational level and economic class increase. The most prominent differences in opinion within the demographical groups are observed in educational level, religiousness and lifestyle.

It is very surprising that 67 percent of those who state that “The state must guarantee freedom of expression on the Internet” also believe that “The state must be able to block access to certain sites on the Internet” and 25 percent believe that the state should not. As for the whole society in Turkey, 47 percent, i.e. half of the society, think that freedom of expression must be guaranteed on the Internet and at the same time think that the state must be able to block access to certain sites on the Internet. This means that the society, at a large degree, does not associate the concept of freedom of expression on the Internet with the control of the state on Internet sites.



## The state must be able to block access to certain sites on the Internet





Another question that was used to understand the view on state control on the Internet was as to what extent they agree with the statement “I should be the one to decide which Internet site my child will have access to, not the state.” 68.5 percent believe that this statement is right whereas 10 percent believe that it is wrong. 21 percent are abstaining. Accordingly, the majority of the society is of the opinion that not the state but families should have the control over how their children use the Internet.

According to the averages in terms of demographical characteristics, a tendency similar to the answers to the previous questions is observed. The increase in conservativeness and age brings a decrease in the opinion that the families should be the ones to decide and an increase in the opinion that there should be state control.

<b>I should be the one to decide which Internet site my child will have access to, not the state.</b>	<b>Percentage</b>
Absolutely wrong	2.3
Wrong	7.9
Neither right nor wrong	21.2
Right	52.8
Absolutely right	15.8
Total	100.0

Another statement related to the freedom of expression on the Internet was “Some news that is deliberately ignored in the newspapers and TV sometimes appears on Twitter.” The aim in using this statement was to compare traditional media and the “new media” Internet. 58 percent of the interviewees state that this statement is true whereas 9 percent say that it is wrong. 33.6 percent are abstaining. As for the profile of those who agree with the statement, more than half of them, i.e. 54 percent, trust TV as a news source whereas 22 percent trust the Internet as a news source.

<b>Some news that is deliberately ignored in the newspapers and TV sometimes appears on Twitter.</b>	<b>Percentage</b>
Absolutely wrong	2.9
Wrong	5.6
Neither right nor wrong	33.6
Right	49.3
Absolutely right	8.6
Total	100.0

Another question pertaining to the freedom of expression on the Internet was formulated in order to obtain the opinion of the interviewees with regard to the fact that the





composer and pianist Fazıl Say was sentenced to 10 months of imprisonment in April for insulting religious values due to an Omar Khayyam quatrain he shared on Twitter.

The question “Fazıl Say was sentenced to 10 months in prison due to a comment he shared on the Internet. Which of the following statements reflect your opinion on this matter?” was answered by 26 percent of the society as “It is greatly detrimental to the freedom of expression on the Internet” whereas 22 percent commented that Fazıl Say deserved this sentence. 62 percent indicated that they have no information on the matter. These results show that majority of the society is unaware of comments on Twitter therefore is not affected by them. Fazıl Say’s comments on Twitter are not known by the majority and the related court action and sentence was outside of the agenda of a large part of the society.

<b>What is your opinion on the fact that Fazıl Say was sentenced to 10 months in prison due to a comment he shared on the Internet?</b>	<b>Percentage</b>
It is greatly detrimental to the freedom of expression on the Internet	26.1
Fazıl Say deserved this sentence, people should not be allowed to share whatever they please.	22.0
I don’t have any information on the matter.	51.9
Total	100.0

In further analysis of the opinion on the Fazıl Say case, it is observed that the belief that it is greatly detrimental to the freedom of expression increases as the educational level increases, towards modern lifestyle and as the religiousness drops whereas the rate of those who have no information on the matter increases as the educational level decreases, from metropolitan areas to rural areas and as conservativeness and religiousness increase. 61 percent of the AK Parti voters, 44 percent of MHP voters and 55 percent of BDP voters have no information on the matter whereas 58 percent of CHP voters think that it is greatly detrimental to freedom of expression. 54 percent of Sunnis have no information whereas 50 percent of Alevis think that it was greatly detrimental to freedom of speech.



## 2.3. Social Networks

Due to the fact that social networks have become important media for both politics and the private sector, we analysed in this particular section, the number of users of social networks and their profiles that. In addition, the extensiveness within the society and by whom they are used are also analysed.

Although Facebook users have increased throughout Turkey by almost one and a half times since 2011, i.e. from 31 percent to 45 percent, the increase was relatively lower among Internet users, i.e. from 73 percent to 76 percent. There is also increase in the Youtube and Twitter users. Namely, Youtube users increased one and a half fold and Twitter users almost three fold among Internet users. One in every six adults in Turkey and one in every three adults that use the Internet have a Twitter account.

In contrast to increasing social Networks, the MSN service which was widely used in 2011 completely disappeared, the number of Mynet members did not change and even dropped slightly among Internet users. The effect of blogs highly diminished.

	2011		2013	
	Population at the age of 18+	Internet users at the age of 18+	Population at the age of 18+	Internet users at the age of 18+
MSN	31.6	73.6	-	-
Facebook	31.3	73.1	44.8	76.2
Youtube	9.7	22.5	19.7	33.8
Mynet	8.4	19.7	9.5	16.3
Twitter	4.5	10.6	16.7	28.8
Blogs	3	7.0	2.5	4.3
E-mail groups	2.5	5.8	5.6	9.7
Instagram	-	-	3.6	6.2
Other	-	-	10.0	6.3

Among the highly popular and currently hot social-sharing networks such as the photo-sharing site Instagram surfacing in 2011 until now, the average percentage of use in Turkey is 4, whereas the percentage among the Internet users is 6.

Although the extensiveness and the preferability of social networks take shape in parallel to the development of the Internet, it may as well be parallel to the reason to use the Internet. For example, even though it is possible to access Twitter and Instagram through any computer, the usage of these two social networks have been identified with mobile phones and tablet computers, in other words mobile access to the Internet. An analysis of the findings regarding social network memberships and the location of Internet use together shows these relationships clearly.



Preference of Social Networks According to the Medium of Use of the Internet					
	From Internet cafes	At home	At work	Via mobile phones	Via tablet computers
Facebook	78.8	80.2	80.8	90.0	87.3
Twitter	26.5	35.1	39.9	49.2	60.3
Youtube	41.7	37.5	49.7	51.4	54.0
Instagram	6.0	7.9	8.8	15.2	30.2
Blogs	5.3	5.2	8.1	7.8	22.2

The rate of membership to Facebook does not significantly change according to the medium of use of the Internet however it is more common in those who use the Internet through mobile phones and tablet computers. The same applies to the membership of Youtube. However the use of Twitter and Instagram distinctly changes according to the medium/location of use of the Internet: 26 percent of those who use the Internet at Internet cafes are Twitter members whereas it increases to 49 percent among those who use the Internet via mobile phones and to 60 percent among those who use it via tablet computers. Instagram memberships increase two and a half fold in mobile phone users and almost five fold in tablet computer users.

Medium/Location of Use of the Internet According to the Preference for Social Networks					
	At Internet cafes	At home	At work	Via mobile phones	Via tablet computers
Facebook	10.2	78.1	21.4	37.8	4.7
Twitter	9.2	91.5	28.3	55.3	8.8
Youtube	12.4	83.3	30.0	49.2	6.7
Instagram	9.7	95.7	29.0	79.6	20.4
Blogs	12.5	92.2	39.1	59.4	21.9

Analysing the findings in the opposite direction, i.e. with regard to the medium of use of the Internet according to social network memberships, it is observed that 38 percent of Facebook members, 55 percent of Twitter members, 49 percent of Youtube members and 80 percent of Instagram members connect to the Internet via mobile phones. It is also found that 80-95 percent of those who are members of the aforementioned social Networks connect to the Internet also at home.



### 2.3.1. The Profiles of the Members of Social Networks

In addition to the rates of usage and extensiveness of social networks, it is also necessary to understand the profiles of the members of these networks and compare them with both Internet users and the general population. To this aim, the members/users of the most common and most scrutinized four social networks have been analysed below.

Sex	Facebook	Youtube	Twitter	Instagram
Female	39.2	36.9	37.4	40.9
Male	60.8	63.1	62.6	59.1
Total	100.0	100.0	100.0	100.0
Age	Facebook	Youtube	Twitter	Instagram
Ages 18 - 28	48.1	60.8	62.4	81.7
Ages 29 - 43	37.6	28.5	27.3	17.2
Ages 44 and above	14.3	10.6	10.4	1.1
Total	100.0	100.0	100.0	100.0
Educational Status	Facebook	Youtube	Twitter	Instagram
Below high school	31.2	23.9	16.3	8.6
High school	46.8	48.1	53.0	57.0
University	21.9	28.0	30.7	34.4
Total	100.0	100.0	100.0	100.0
Work status	Facebook	Youtube	Twitter	Instagram
Public officer	6.5	6.5	8.3	3.2
Private sector	10.7	13.2	14.1	14.0
Worker	13.7	10.9	9.0	7.5
Small retailer	9.3	6.9	6.7	2.2
Industrialist / Businessman	0.6	0.4	0.5	0.0
Self-employed	2.3	2.0	2.1	3.2
Farmer, agriculturalist, stock breeder	3.1	0.8	0.5	1.1
Works, Other	7.0	9.7	8.1	8.6
Retired	4.9	2.6	3.2	0.0
Housewife	15.1	11.1	6.9	4.3
Student	20.3	28.5	33.6	51.6
Unemployed, seeking job	6.4	7.5	6.7	4.3
Unemployable	0.2	0.0	0.2	0.0
Total	100.0	100.0	100.0	100.0



### **Facebook users**

The ratio of men to women in Facebook has not changed within the past two years however the rate of older age groups and less educated people have increased since 2011.

Students and working people are more common among Facebook members and housewives and retired people are less common, yet it is still parallel to the general working profile of Turkey. As for lifestyle, although the rate of moderns in Facebook is one and a half times more than the average in Turkey and the rate of the religious moderns is almost half the average of Turkey, Facebook is still the closest to the general profile in Turkey among all social networks. Income is also higher than the average of Turkey yet Facebook, which has the user profile which is the most similar to the general profile in Turkey among social networks, has almost the same rate of Kurds and Alevis as users in comparison to the general of Turkey.

One in every three Facebook user trusts the Internet as a news source, 12 percent check Facebook first for a new development and those who regard the Fazıl Say case as a limitation to freedom of expression are two times higher than those who think that he deserves the sentence.

### **Youtube users**

Youtube members mostly resemble Facebook users. Two in every three members are male and again two in every three members are below 28 years of age. The rate of students among Youtube members is three times more than the average in Turkey and half of the members identify themselves as “modern.” The income level is slightly higher than that of Facebook and religiousness and head coverers are lower.

The first medium that Youtube members check when they hear about new news is not television contrary to the general profile of Turkey and Facebook users but it is the Internet websites with a rate of 40 percent. Those who trust the Internet as a news source and those who trust television as a news source are almost the same. Half of them regard the Fazıl Say case as detrimental against the freedom of expression.



<b>Lifestyle cluster</b>	<b>Facebook</b>	<b>Youtube</b>	<b>Twitter</b>	<b>Instagram</b>
Modern	45.7	53.5	60.0	73.1
Traditional conservative	39.3	34.6	32.2	20.4
Religious conservative	14.9	12.0	7.8	6.5
Total	100.0	100.0	100.0	100.0
<b>Head covering status</b>	<b>Facebook</b>	<b>Youtube</b>	<b>Twitter</b>	<b>Instagram</b>
No head cover	40.5	44.8	46.4	46.2
Head scarf	29.6	19.9	13.5	2.2
Hijab	4.6	3.6	4.2	2.2
Chador, purdah	0.2	0.2	0.0	0.0
Bachelor men	25.1	31.6	36.0	49.5
Total	100.0	100.0	100.0	100.0
<b>Ethnicity</b>	<b>Facebook</b>	<b>Youtube</b>	<b>Twitter</b>	<b>Instagram</b>
Turkish	81.2	79.0	84.6	87.1
Kurdish	11.6	12.9	9.2	4.3
Zaza	1.6	2.0	1.4	1.1
Arab	1.9	2.9	0.9	2.2
Other	3.7	3.1	3.9	5.4
Total	100.0	100.0	100.0	100.0
<b>Religion/Sect</b>	<b>Facebook</b>	<b>Youtube</b>	<b>Twitter</b>	<b>Instagram</b>
Sunni Muslim	89.2	87.2	85.6	74.2
Alevi Muslim	7.3	7.3	8.4	14.0
Other	3.5	5.5	6.0	11.8
Total	100.0	100.0	100.0	100.0
<b>Religiousness</b>	<b>Facebook</b>	<b>Youtube</b>	<b>Twitter</b>	<b>Instagram</b>
Non-believer	4.4	6.8	7.7	16.7
Believer	41.1	45.3	49.1	52.2
Religious	47.4	42.1	36.9	26.7
Devout	7.1	5.8	6.3	4.4
Total	100.0	100.0	100.0	100.0



Monthly household income	Facebook	Youtube	Twitter	Instagram
TRY 300 and below	1.9	1.6	1.2	0.0
TRY 301 - 700	4.7	4.1	2.9	2.3
TRY 701 - 1200	28.7	23.9	19.7	14.9
TRY 1201 - 2000	36.5	34.8	35.0	31.0
TRY 2001 - 3000	15.6	19.2	23.7	33.3
TRY 3001 and above	12.6	16.4	17.5	18.4
Total	100.0	100.0	100.0	100.0
Economic Classes	Facebook	Youtube	Twitter	Instagram
Low income	15.3	13.2	8.2	3.8
Lower middle class	33.8	31.8	28.9	31.6
New middle class	26.0	23.4	25.0	19.0
High income	24.8	31.6	37.9	45.6
Total	100.0	100.0	100.0	100.0

### Twitter users

In 2011, Twitter users made 5 percent of the adult population in Turkey and 11 percent of Internet users. It is now observed that Twitter became much more widespread within the past two years and attracts a larger population in terms of demographical profile. According to the May '13 survey, Twitter users make up 17 percent of the population and 29 percent of Internet users. There is one female against every two males, two young people against each upper age group member and one in every three users is a student. This has not significantly changed since 2011. On the other hand it is seen that the membership of Twitter shifted from the highest educated segment to lower educated segments.

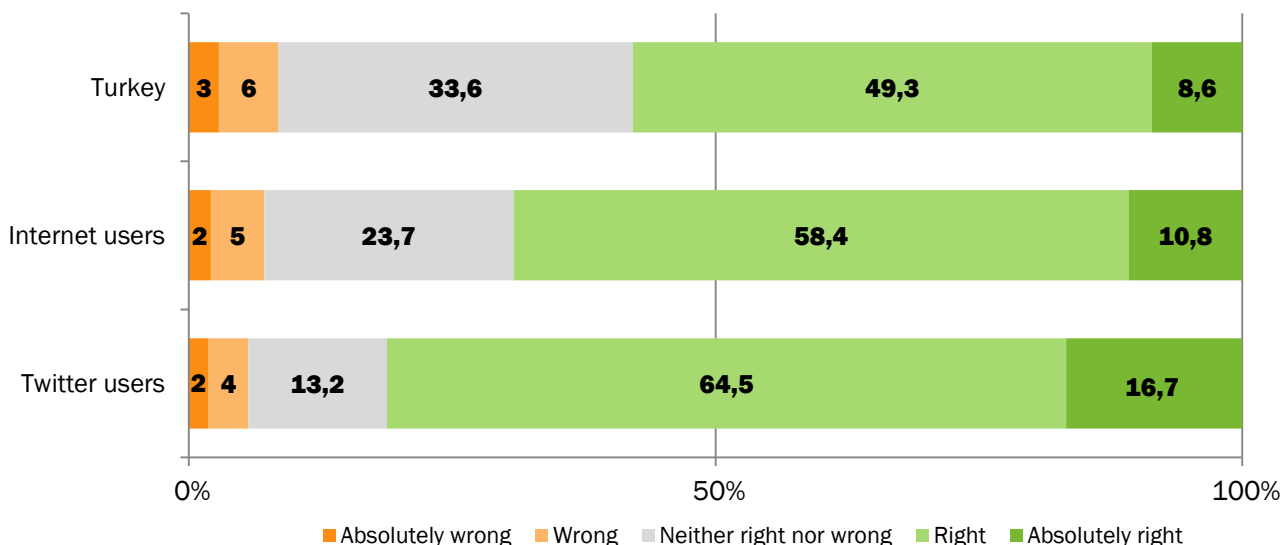
The number of moderns among Twitter users is higher than the number of moderns among Facebook and Youtube users: 60 percent. In addition, the relationship of these users with religion is weaker and their income is higher than both that of the Facebook and Youtube users and Turkey in general.

42 percent of Twitter users consider the Internet as the most trusted news source which is followed by television by 32 percent. When there is new news, only 7 percent of Twitter users check Twitter but 42 percent check an Internet website which surpasses the rate of 30 percent for television being the first choice to check in a situation of new news.

Twitter was not only handled as one of the social networks but also on the basis of news that appear on Twitter and opinion as to the Fazıl Say case. Therefore it is illuminating to compare the opinion on Twitter users on these matter with Turkey in general.

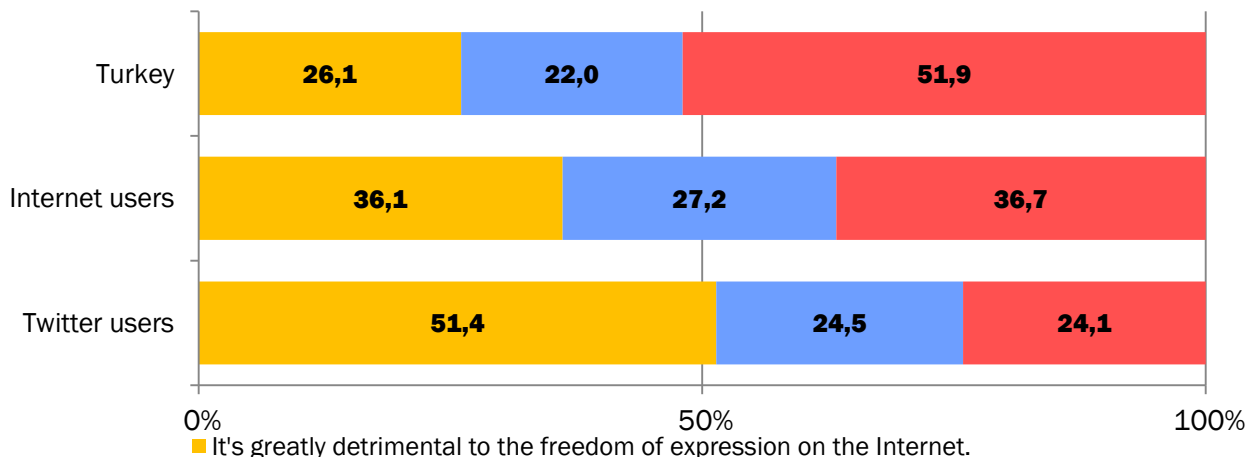


### News deliberately ignored by the traditional media appears in Twitter



More than half of the society in Turkey in general (58 percent) confirm the opinion that news that are deliberately ignored by the traditional media appear in Twitter which rate climbs up to almost two third of the Internet users (70 percent) and four-fifths of Twitter users (80 percent). The difference in these rates pertains to the fact that those who do not comment on the matter and Twitter users are more informed.

### News deliberately ignored by the traditional media appears in Twitter



The Fazıl Say case was related to a message that Fazıl Say shared on Twitter. Half of the society in general in Turkey does not have an opinion in this matter which rate drops to one fourth among Twitter users. On the other hand slightly more than half of those who express an opinion on this matter in general in Turkey emphasize limitation to freedom of expression whereas the other half emphasize the appropriateness of the





sentence which rates change to one in every two in favour of freedom of expression among Twitter users. In other words, freedom of expression on the Internet is more important for Twitter users.

### **Instagram users**

Only 4 percent of the adult population in Turkey, namely roughly 2 million people use Instagram and as expected, the member profile of Instagram is quite different from the general profile of Turkey as well as Internet users and users of other social Networks.

Three-fifths of Instagram users are aged 28 or below, half of them are students and one third are university graduates. Accordingly, it is a social network that is preferred by a small and specific part of the society. A closer look at the user profile shows that Instagram users may be identified as “early-adopters”, i.e. the segment which is the first to use and adopt new technology. In this regard, the users of Instagram in the present survey have similar properties to those of Twitter users in the 2011 survey.

### **2.3.2. Evaluation on the Members of Social Networks**

A more general look at usage rates and profiles of social networks reveals that Facebook and Youtube have become highly widespread among Internet users and in a way are normalized whereas Twitter although quite common, does not represent the general society and is attractive to a limited segment of the society.

On the other hand, findings such as the disappearance of the once quite popular MSN and uncommonness of e-mail groups show that the society in Turkey quickly adopts to rapid changes on the Internet. Therefore the manner of using social networks and the Internet may be subject to further changes in the next two years and the prediction that Instagram will be widely popular such as Twitter or tablet computers such as mobile phones may never come true. Yet there seems to be no reason to expect that the adaptability of the society to novelties in technology and communication will change.

Which news source do you trust?	Facebook	Youtube	Twitter	Instagram
Television	48.4	36.5	32.7	21.5
Newspaper	15.7	17.8	18.0	19.4
Internet	28.2	36.7	41.7	49.5
Radio	1.9	2.2	1.6	2.2
No answer	5.8	6.9	6.0	7.5
Total	100.0	100.0	100.0	100.0



<b>The first source that is checked when there is new news</b>	<b>Facebook</b>	<b>Youtube</b>	<b>Twitter</b>	<b>Instagram</b>
Facebook	11.7	11.3	14.1	17.2
Twitter	2.7	3.4	7.1	11.8
Internet website	32.7	39.8	41.9	45.2
Television	45.3	37.4	30.6	17.2
Newspaper	7.3	7.8	6.1	8.6
Radio	0.3	0.2	0.2	0.0
Total	100.0	100.0	100.0	100.0

<b>Opinion on the Fazil Say case</b>	<b>Facebook</b>	<b>Youtube</b>	<b>Twitter</b>	<b>Instagram</b>
It is greatly detrimental to the freedom of expression on the Internet	39.1	48.5	51.4	65.2
Fazil Say deserved this sentence, people should not be allowed to share whatever they please.	26.7	23.8	24.5	20.7
I don't have any information on the matter.	34.2	27.7	24.1	14.1
Total	100.0	100.0	100.0	100.0



## Social Networks By Numbers

### Facebook:

According to derStandard<sup>1</sup>, with the updated numbers, as of May 2013, the most prevalently used social media network still being Facebook, has one billion one-hundred million users. According to the data of Social Bakers October 2012, besides the numbers obtained after a major operation in having identified and erasing fake accounts, whereby approximately 8 percent of the worldwide accounts were deemed fake and erased, Turkey with its 31 million 430-thousand Facebook users, ranks 7<sup>th</sup> worldwide.

### Twitter:

Twitter, lately having a constant increase in usage and having the role in determining the daily agenda, has lower figures however its effects are above the numeral average. While the worldwide Twitter users amount to 517 million, Turkey with its approximate 9.6 million users ranks 11<sup>th</sup> worldwide. (Semiocast, July 1, 2012)

### LinkedIn:

The most preferred media of setting social networks being LinkedIn is used for professional business life. According to the data of Social Bakers May 3013, there are 168 million 745 thousand users, with Turkey ranking 27<sup>th</sup> with 784,581 users. Concurrently, the interaction is very low between Internet users as well as that of the users of LinkedIn. This is meaningful for the profile of Internet users in Turkey with regard to the characteristics of social networks.

<sup>2</sup> <http://derstandard.at/1363709758089/Facebook-legt-bei-mobilien-Einnahmen-deutlich-zu>

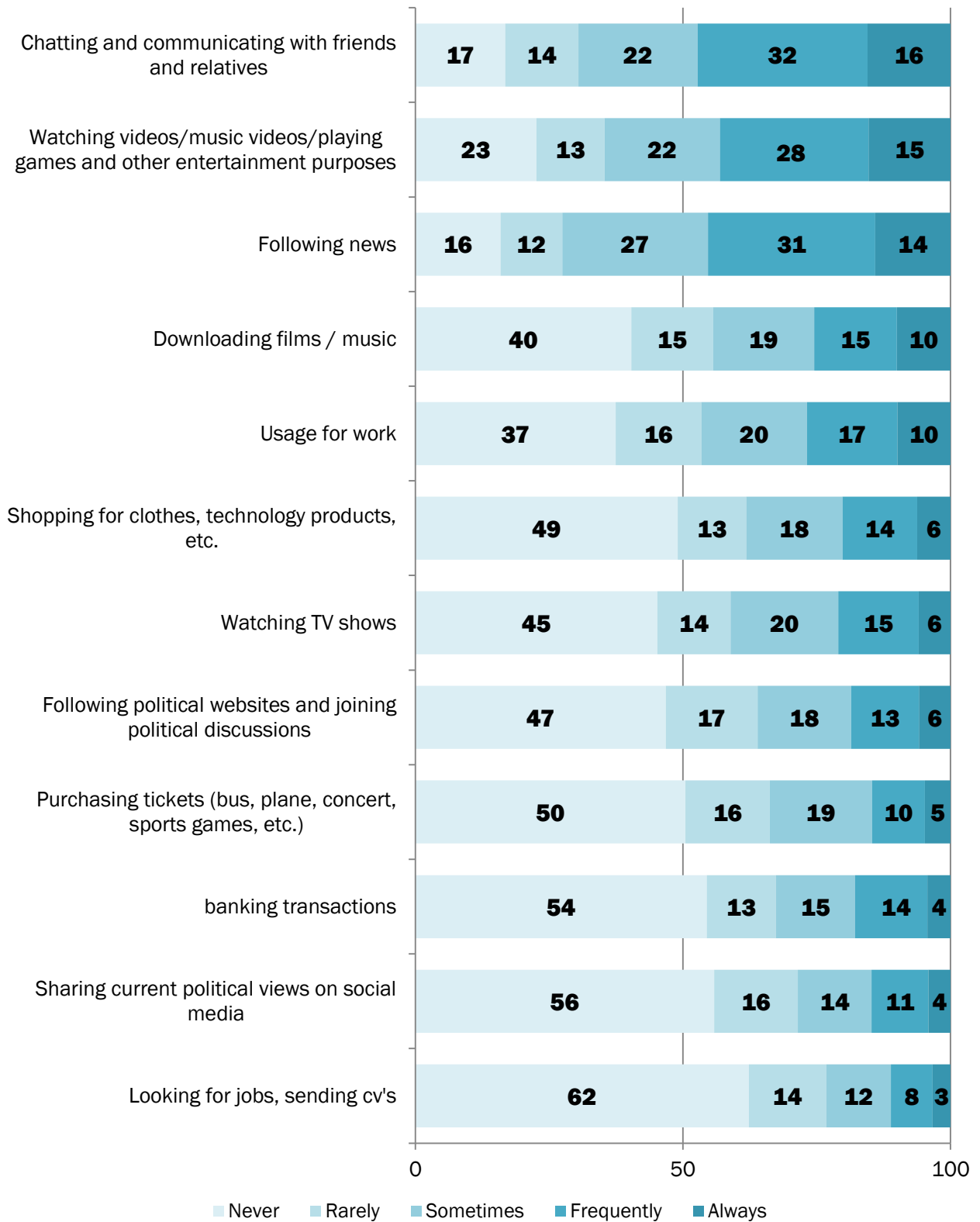
## 2.4. The Habits of Internet Use

In the research, Internet users were asked their purpose of using the Internet and how often they did this. It was determined that in Turkey the users mostly used the Internet for 'chatting, getting news from their friends/relatives', 'following-up on the news' and for 'video/music listening/playing games and similar entertainment'. It has been asserted that Turkey uses the Internet in the least for 'job searching', 'sending cv's', 'sharing current political opinions on the social media' and for 'banking transactions'. When we compare with the findings of 2011, we see that there is no significant change in the sequence however we do determine changes in the average relating to Internet use.

When further examining the habits of Internet use, the persons more prone to this usage and which habits are formed according to which Internet attributes will be understood. The habits of Internet use, like much of the other behaviour and views of society, differ according to demographical characteristics such as education, income, domicile and religion which are classic indicators of modernization, however age, frequency of Internet use and where it is used do partly play a role.



## Internet Usage Habits





#### **2.4.1. News Follow-up and Political Participation**

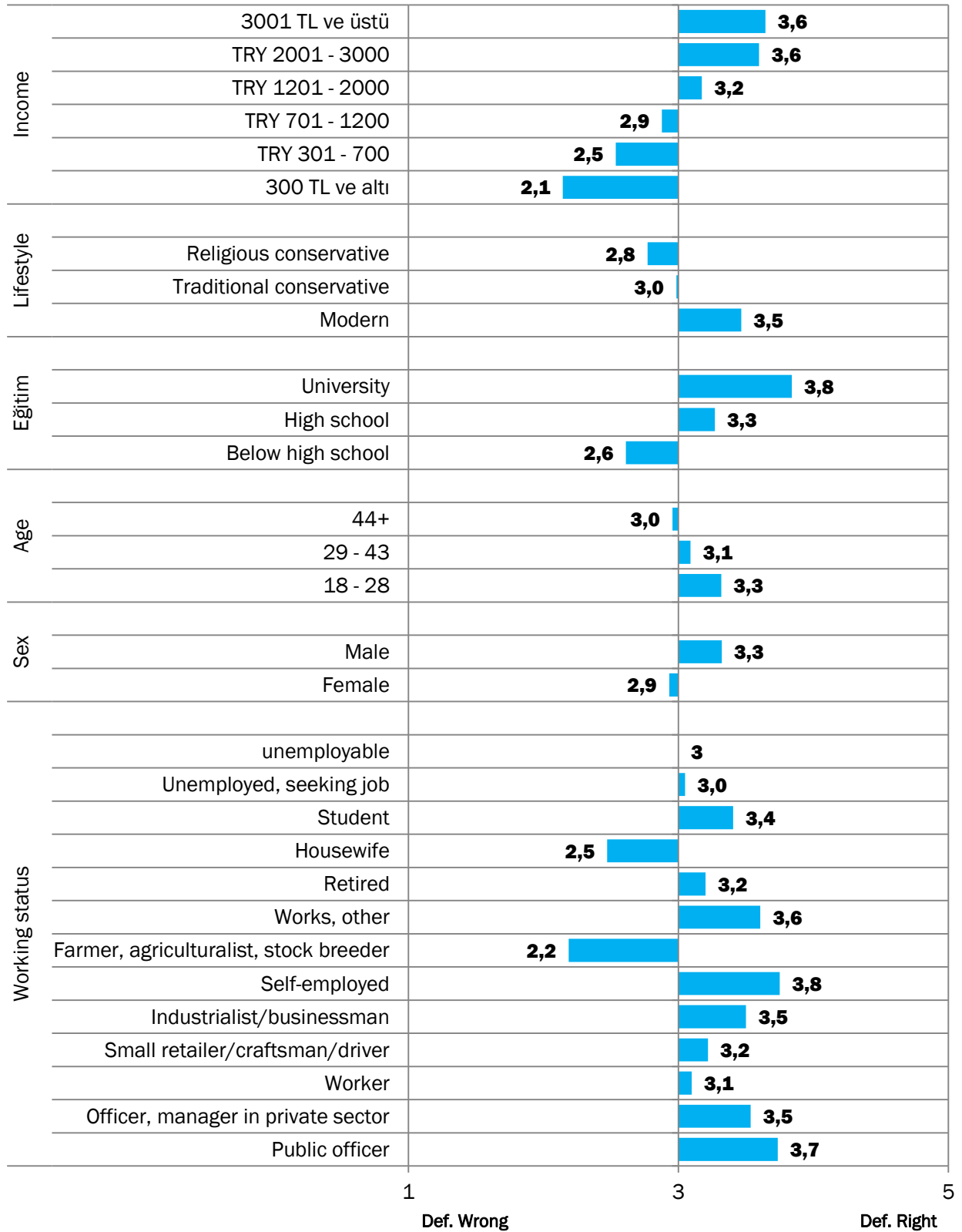
It is determined that 73 percent of the Internet users follow-up on news frequently or always via the Internet. Upon viewing the findings of 2011, 65 percent followed the news via Internet, in other words, within the time frame of 2 years, we see that there is an increase in this average.

Upon further examining the findings, we see that men vis-a-vis women; youth vis-a-vis the elderly; educated vis-a-vis the less educated; the moderns vis-a-vis the conservatives; higher income vis-a-vis lower income; office Internet users vis-a-vis Internet users via other sources; frequent Internet users vis-a-vis infrequent Internet users are more likely to follow-up on the news. Self-employed people and white-collar workers follow-up on the news via the Internet more frequently the average whereas housewives, the unemployed, workers and farmers follow-up on the news via the Internet less frequently. It is however striking that news follow-up is quite rare among Internet users of Internet cafes.

While observing that there is no change in the sequence when comparing with 2011, there has been an increase in news follow-up via the Internet.



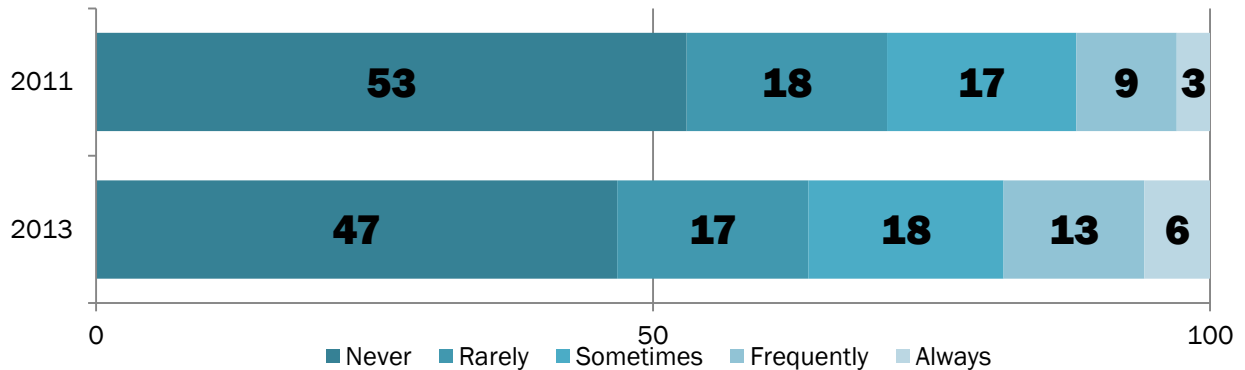
## Habit of following news on the Internet





When we questioned the Internet users in Turkey on how much of their Internet use was for following the discussions and participation of sites of political content, we see that 37 percent of the population did so on occasion, frequently or always. From this it shows that involving in politics via the Internet is a habit of less users. It is observed that this average when comparing with 2011, has increased to 17 percent.

### Following and participating in political debates on the Internet



The habit of following political content increases with the frequency of Internet use and increase in the quality of the home, age, education and income. The follow-ups of political content among the conservatives vis-a-vis the 'moderns', the lower income vis-a-vis the higher income are less frequent. In the average of news follow-up as is, the self-employed, white-collar and private sector workers also follow-up political contents more frequently. In comparing the Kurds with the Turks, they follow political content more frequently.

We asked the Internet users about the frequency of sharing current political opinions on social media upon the recent rapid increase of social media use and the country's engaging agenda, the starting of sharing political opinions on media such as Facebook and Twitter and the starting of applying sanctions on people upon this. The response received was 72 percent rarely or never; 28 percent was sometimes, frequently or always. Upon observation of such findings, the majority of the population do not manifest their political opinions via social media.

While examining the profiles of 15 percent of Internet users who frequently or always share their current political opinions on social media, we see that these consist of people of whom the majority live in metropolitan areas, in apartments, are males ages 18-28, graduated from high-school or higher education, use the Internet everyday for at least one hour, considers himself to be 'modern' and has a Facebook account.

When directing our question to the Turkish population as "which do you trust most as a news source?", it appears that television is the trusted news source for the majority of the population (66 percent). The Internet is in second place with 14.4 percent and in third place, the newspapers with 12.3 percent. Even though the majority of Internet users indicate that they follow-up the news through the Internet, a wide portion of the population do not see the Internet as a news source.

Which do you trust most as a news source?	Percentage
---	------------



Television	65.6
Newspaper	12.3
Internet	14.4
Radio	1.2
No answer	6.4
Total	100.0

Upon examining who trusts the Internet the most as a news source, we see that these consist of people of whom the majority live in metropolitan areas, in apartments, are males ages 18-28, graduated from high-school or higher education, use the Internet everyday for at least one hour, check out the Internet sites first as soon as he hears of new news, is 'modern' and has a Facebook account.

When asked the question to the surveyed people "when you hear about new news, find out about something happening, which source do you refer to first?", again we see that the majority being 68 percent, responded the television. Here we see again that the population is used to and trusts the television. The Internet has not yet reached the place of the television as a news source for the Turkish population.

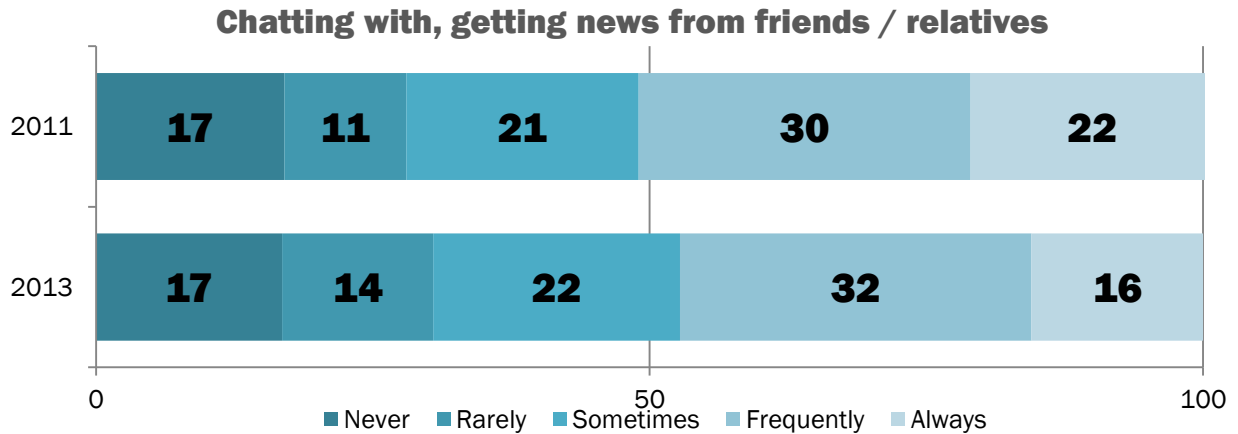
<b>When you hear about new news, find out about something happening, which source do you refer to first?</b>	<b>Percentage</b>
Facebook	5.7
Twitter	1.4
Internet website	18.0
Television	68.1
Newspaper	6.5
Radio	.2
Total	100.0





### 2.4.2. Communication, Socialization and Entertainment

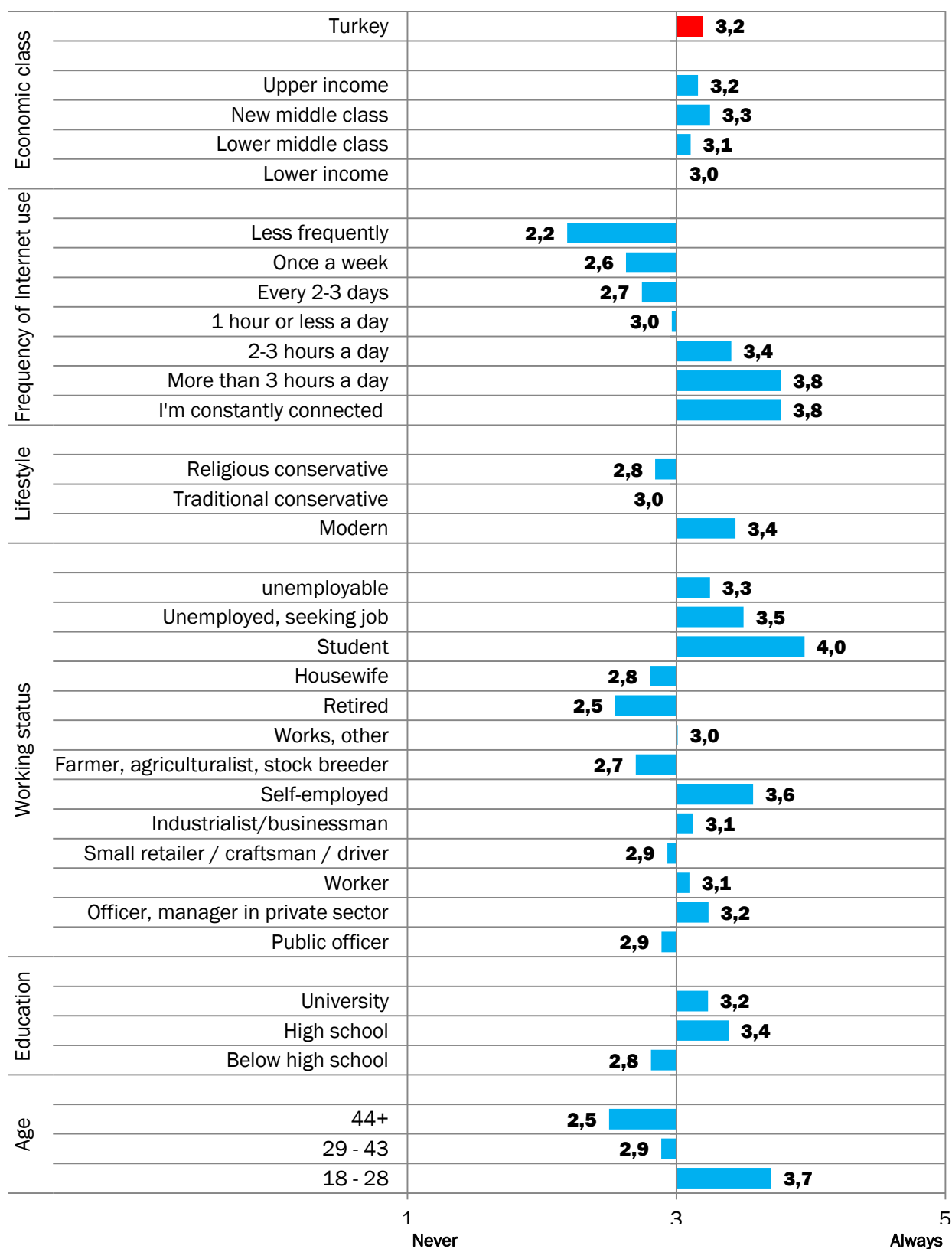
As we previously indicated, “chatting with, getting news from friends/relatives” is the foremost means of activity among Internet users. In other words, it is determined that the majority of Internet users firstly use the Internet as a means of socialization. When comparing with the findings of 2011, there is not much of a striking difference in the average.



As it is with most other Internet habits, the use increases for the purpose of chatting according to the frequency of Internet use, lower age group and higher education. While Internet use for socialization is most prevalent among students, self-employed and unemployed persons, it is understood that this specific means is the least used by retirees, housewives and farmers. The fraction as the new middle-class and the ‘moderns’ also socialize on the Internet. It is also interesting that those who connect to the Internet via Internet cafes and mobile telephones chat more than those that connect to the Internet via other sources. The users who use the Internet frequently and always for chatting and socialization are 92 percent Facebook members and 43 percent Twitter members.



## Chatting with, getting news from friends / relatives online



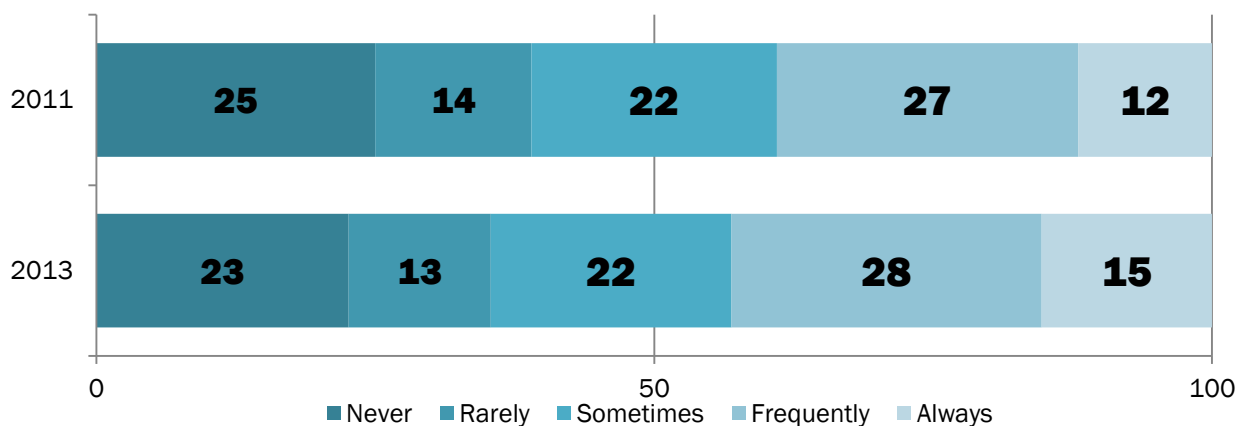


The second place of the common Internet uses consists of “video/music video listening / game playing and use for similar entertainment purposes”. Use of the Internet for this purpose is mostly used by students, unemployed and unemployable people. When comparing with those who connect to the Internet via other means, while most use the Internet for entertainment purposes via Internet cafes and mobile phones, there is less use for entertainment purposes by those connecting via the office, by small retailers, farmers and public officers.

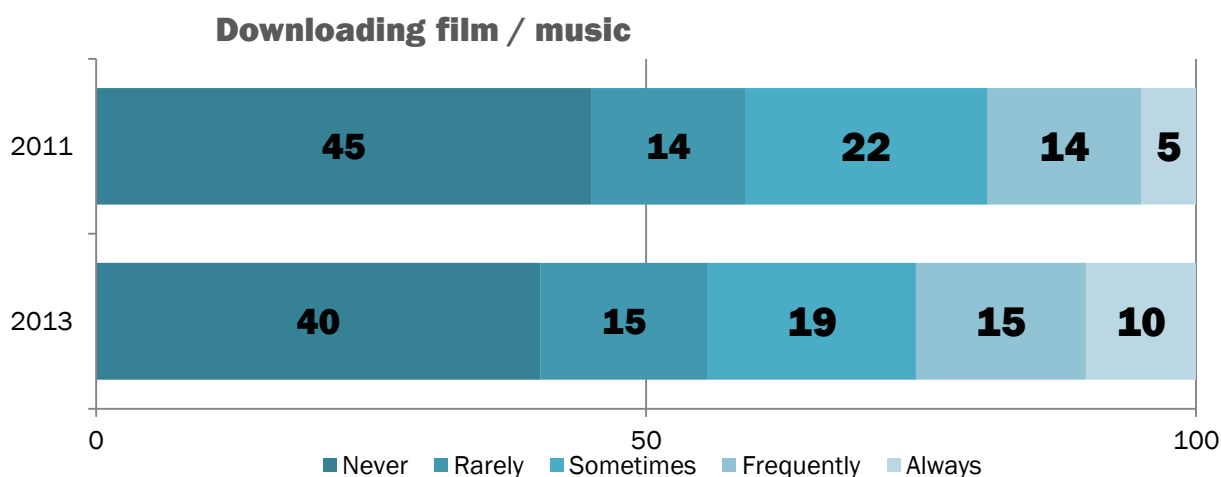
In parallel to the findings of 2011, it is observed that the Alevis vis-a-vis the Sunnis and those who live in cities vis-a-vis metropolitan areas use the Internet a little more for entertainment purposes.

However, when looking among memberships, while the Internet is used for entertainment purposes most frequently among Instagram and Twitter members, Facebook users have said that they use it less often for entertainment purposes.

### Frequency of entertainment (video, movie, games etc) online

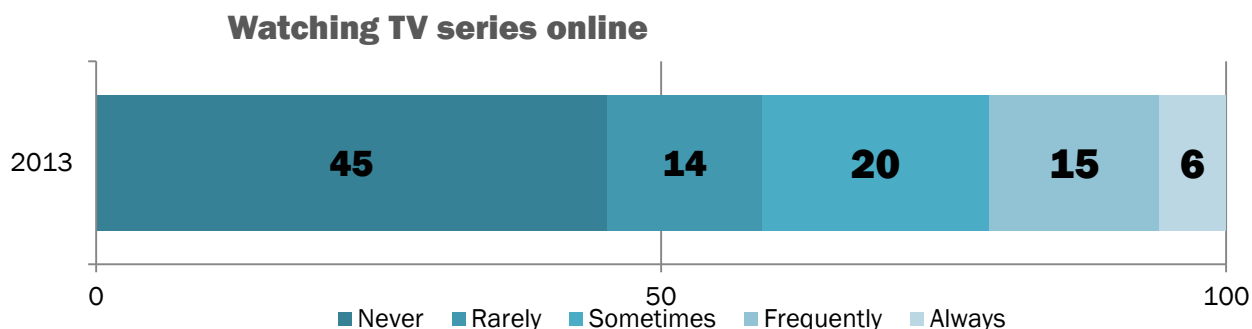


It draws one attention to see that another common use related to entertainment purpose being downloading films/music has become a habit for less than half of a portion of Internet users. 44 percent of Internet users have indicated that they frequently or always download films/music. While there is not much difference in this average being 43 percent in 2011, after almost 2 years, the average is two-fold for those who said “I always download films/music” and there has been a decrease in the average for those who said “never”.



Along with the showing that there are no significant differences according to demographical specifications in downloading films/music from the Internet, it is determined that the most frequent downloaders are students and those who have the Internet on at all times. It is understood that those who use the Internet via mobile phones or tablets are more prone to download films/music.

While taking into consideration that television serials take more than enough time of the agenda of Turkish population and that it holds an important place in their daily lives, we asked the interviewees their frequency in television serial viewing via the Internet. It is understood from the answers given that 41 percent of the users sometimes, frequently or always watched television serials via the Internet. In other words, television serial viewing via the Internet is not a widespread habit among the general population however one out of every five persons are accustomed to doing so.



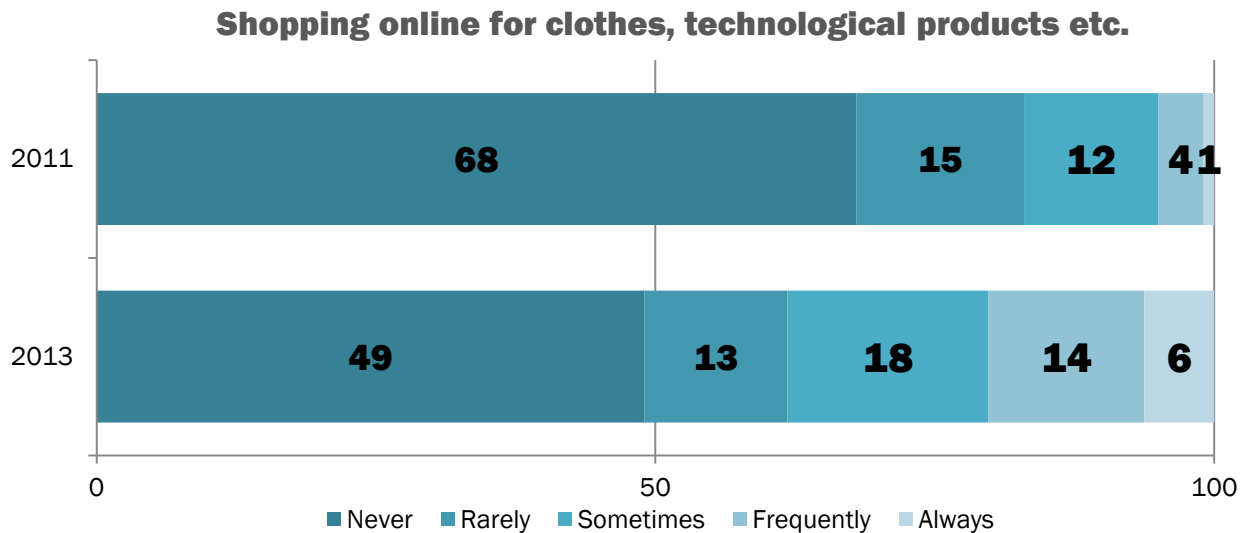
When we look at the demographical average, it appears that the most frequent viewers of television serials are students and those who have their Internet on for more than 3 hours a day. Women, youth aged between 18-28, those who live in the city, the 'moderns' watch television serials more via the Internet.

### **2.4.3. Shopping**

At a time where all types of our needs can be met through the Internet, we tried to comprehend how common shopping via the Internet is within the Turkish population and who shops via the Internet.



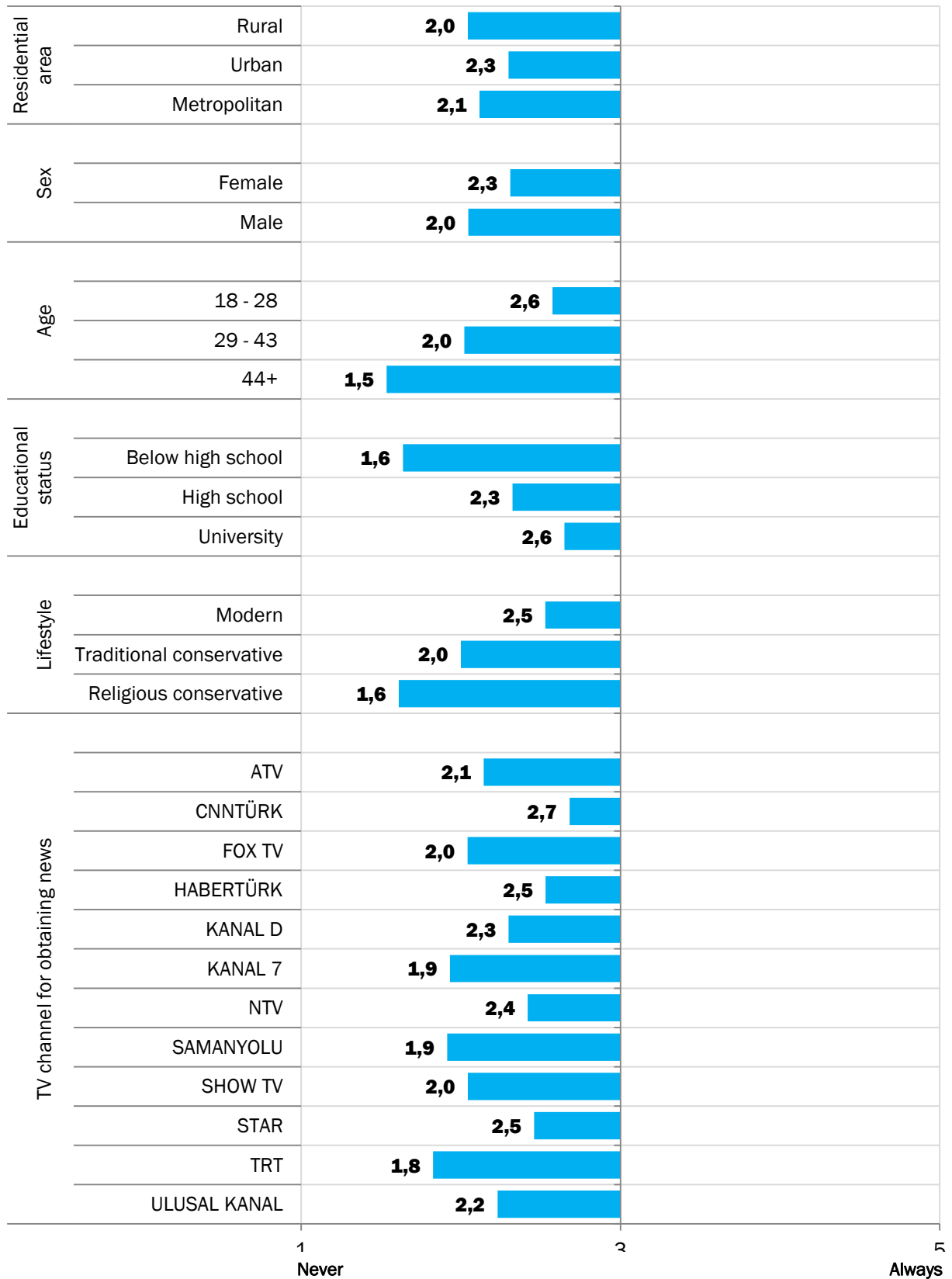
Firstly we asked how often Internet users did their shopping via the Internet for clothing, technological products, etc. 38 percent of the users indicated that they sometimes, frequently or always did their shopping via the Internet. When comparing with the findings of 2011, we see that this average has increased two-fold and that the percentage of those who said “I never shop online” decreased from 68 to 49 percent. Accordingly, it is possible to say that the habit of shopping via the Internet among Internet users is being increasingly widespread.



Upon looking at those who shop for clothing, technological products and so on, via the Internet, we see that these consist more of women vis-a-vis men, youth between the ages of 18-28, people who live in cities, university graduates, students, ‘moderns’ and frequent Internet users. Moreover, the higher the income, shopping via the Internet naturally increases in frequency.

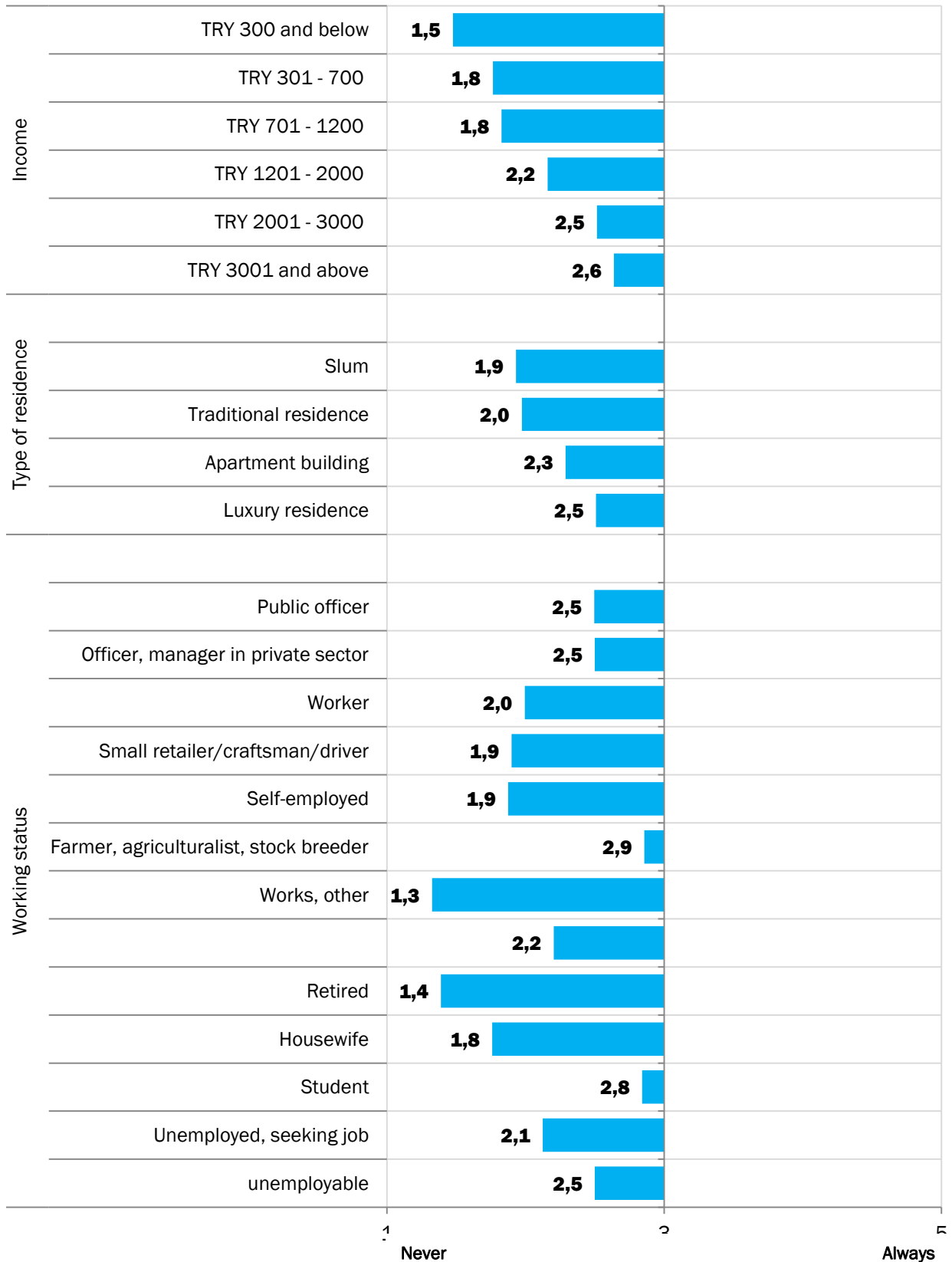


### Frequency of shopping online (among Internet users)



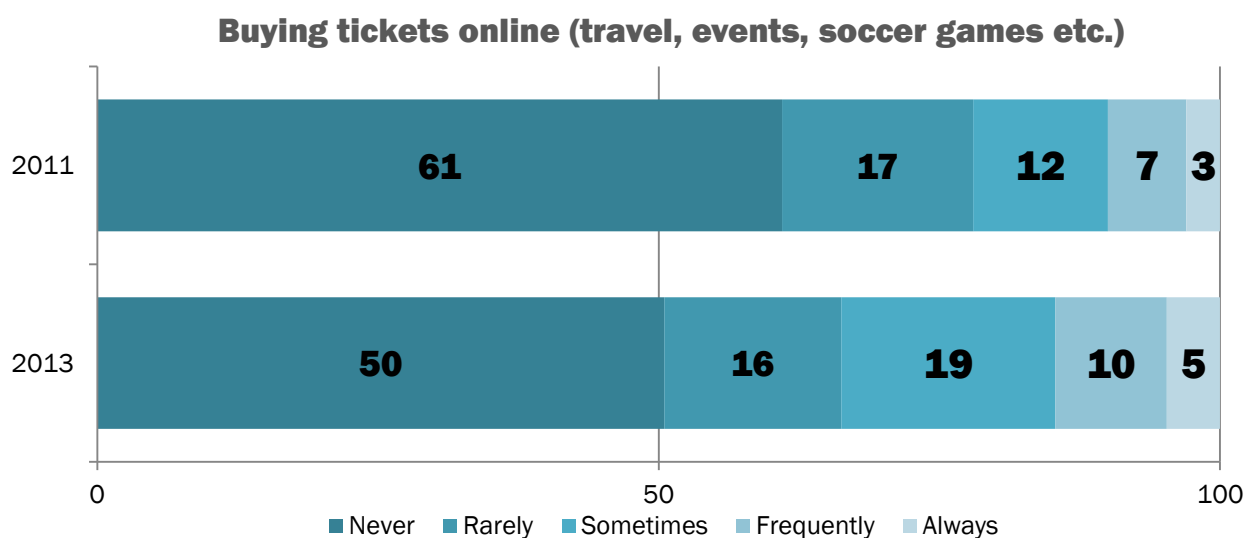


### Frequency of shopping online (among Internet users)





Secondly, we directed the question on how often ticket shopping via the Internet was effected. 34 percent indicated that they sometimes, frequently or always purchased tickets via the Internet. When comparing with 2011, it is observed that the habit of obtaining tickets via the Internet has become more widespread. While the average of those who have said never dropped from 61 to 50 percent, the average of those who said frequently and always has increased from 10 to 15.

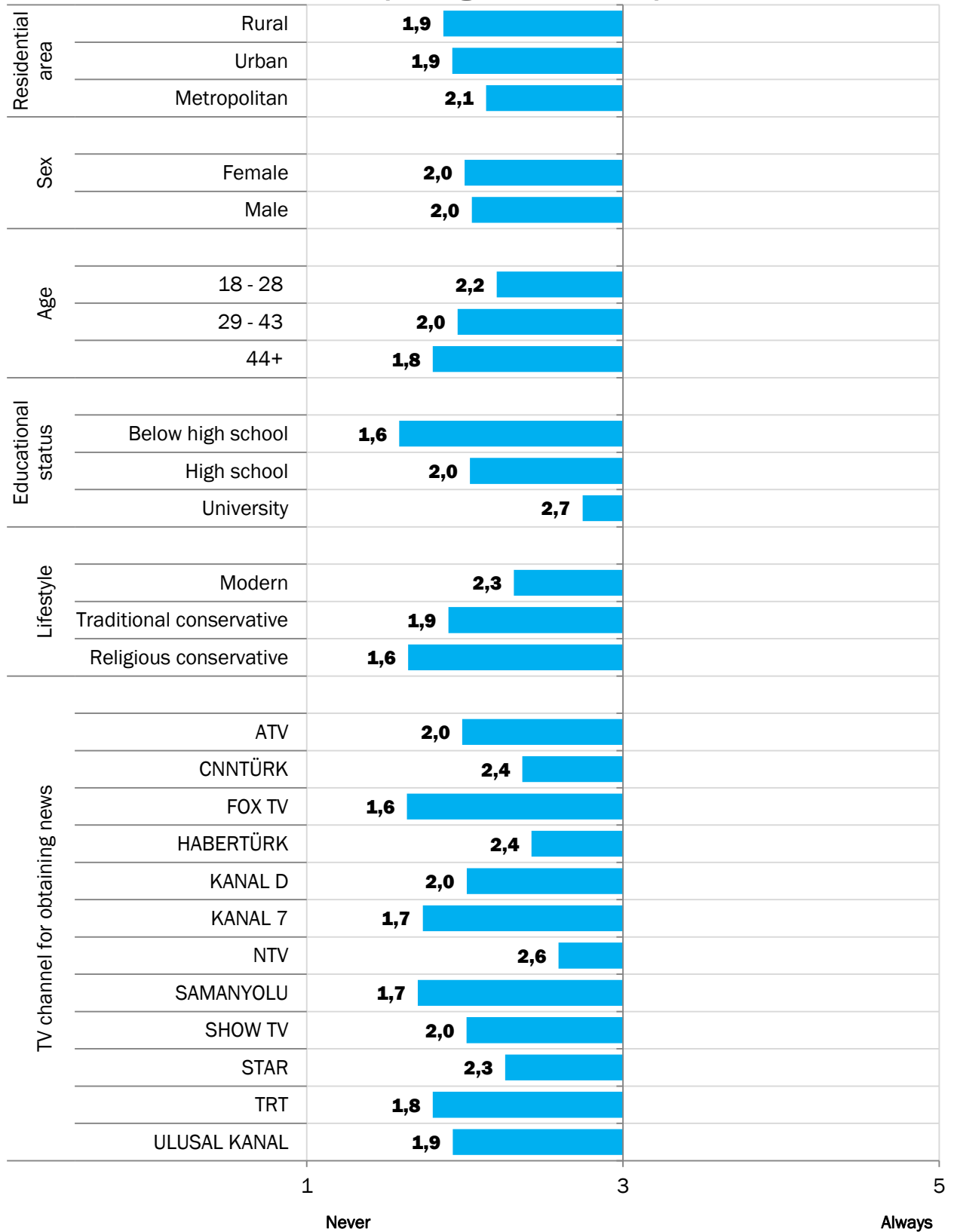


While mostly youth and students obtain tickets via the Internet, we can also say that ticket shopping increases with the increase of education, moving from rural areas to the city, evolving from conservatism to modernists and with the rising of income level. It is also possible to say that people most prone to shop via the Internet in general are those who connect from their office, tablets or from their mobile phones.



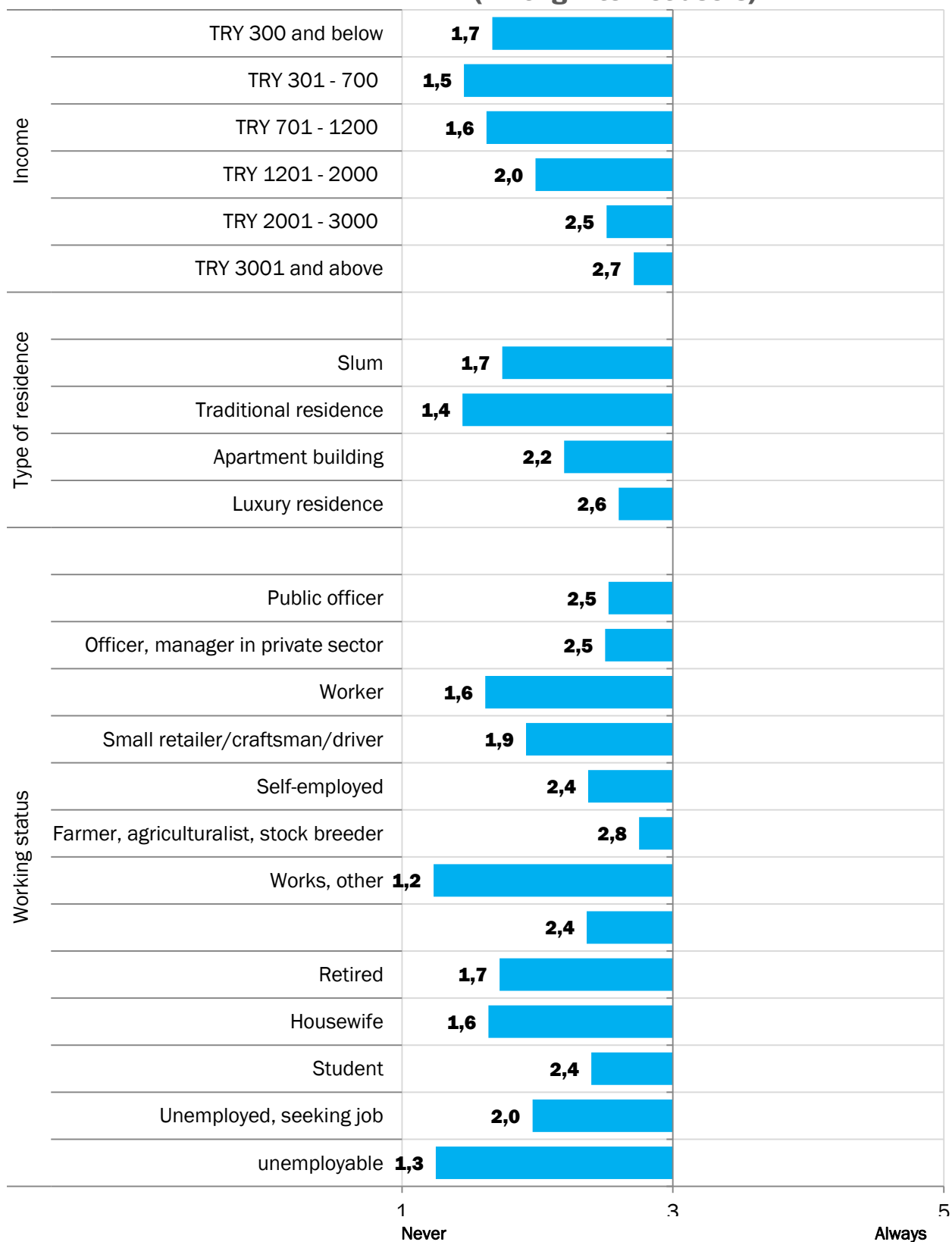


### Frequency of buying tickets online (Among Internet users)





### Frequency of buying tickets online (Among Internet users)

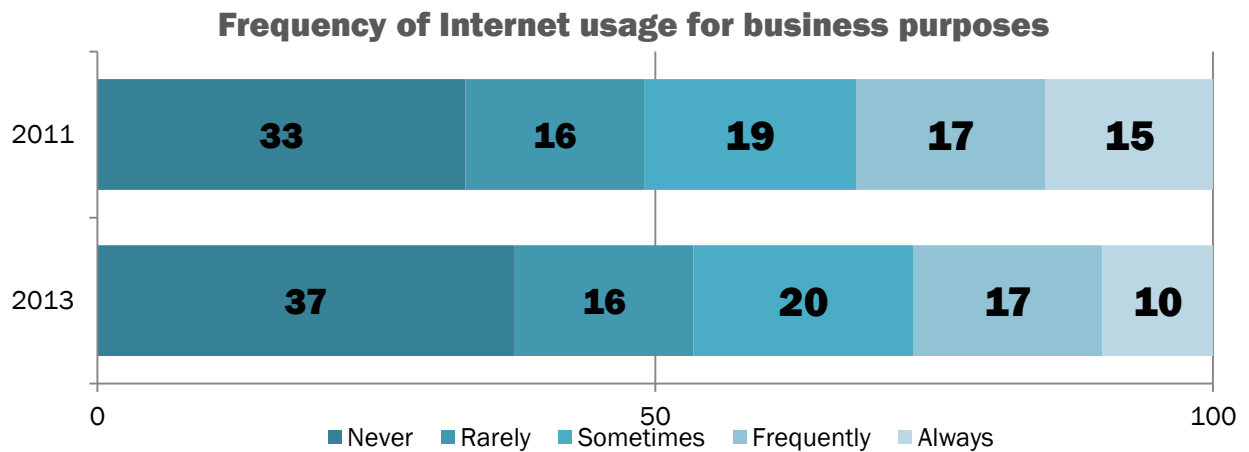




#### 2.4.4. Business World

In consideration of the fact that the Internet is an indispensable item in the business world, we asked 3 questions to interviewees in order to comprehend their habits of Internet use in the business world.

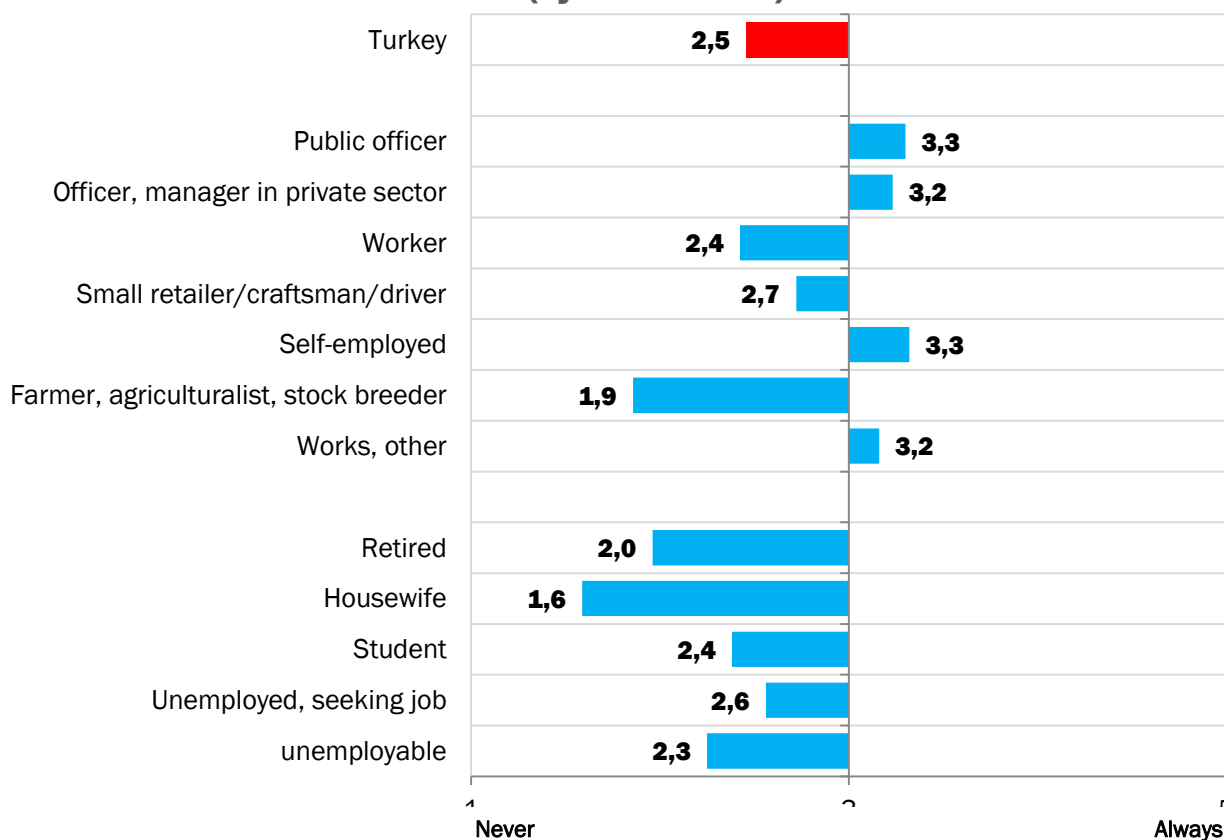
In the first question we asked the Internet users how often they used the Internet for business purposes. In viewing the received answers, while the percentage of those who indicated that they used the Internet frequently or always for business purposes is 51, the percentage of those who said never is 37. While not much of a difference can be seen when comparing with 2011, the average for those who said never, increased by four points within 2 years.



Among the workers who use the Internet frequently for business purposes are managers or those in white-collar positions, namely self-employed persons, private sector workers and employees. It is interesting to note that as for the other career groups, including the small retail group, it can be said that they rarely use the Internet for business purposes. While housewives and retirees naturally do not use the Internet much for business purposes, we see that students use it more often.



### Frequency of use of Internet for business purposes (by work status)

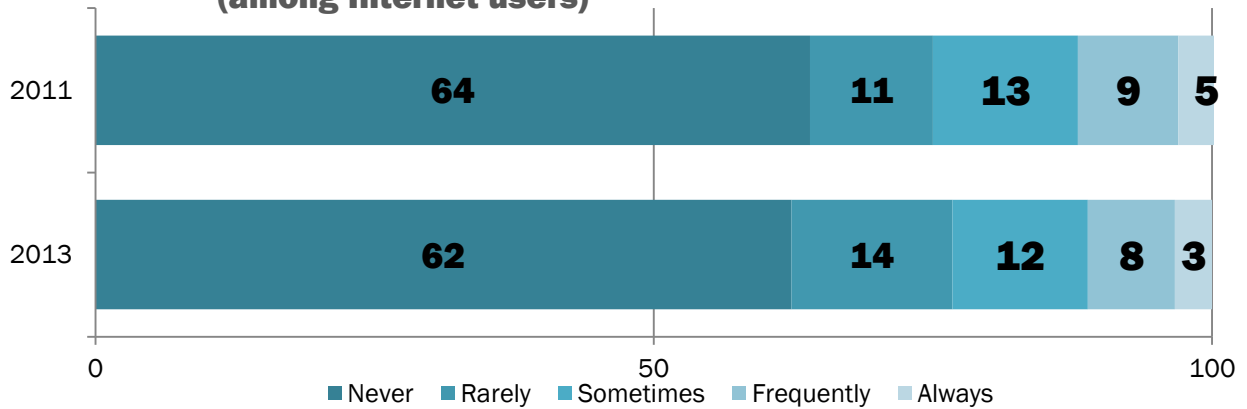


It is not surprising to see that as with other other areas, the frequency of use of the Internet for business purposes being effected by factors such as income, education, head covering status, religiousness and frequency of Internet use, the fact that those who connect to the Internet from their workplace use it more for business purposes as opposed to others or more use by men in comparison to women. Furthermore, the frequency of Internet use for the age groups of 29-43 and 18-28 are the same.

When looking at those who use the Internet for job searching and cv sending, in most of Turkey, those who frequently or always use the Internet for job search is 32 percent, while 41 percent of Internet users frequently or always refer to the Internet while searching for a job. Use of the Internet while searching for a job in the general population of Turkey is not yet widespread however when we compare with 2 years ago, the average of those referring to the Internet while job searching has increased.

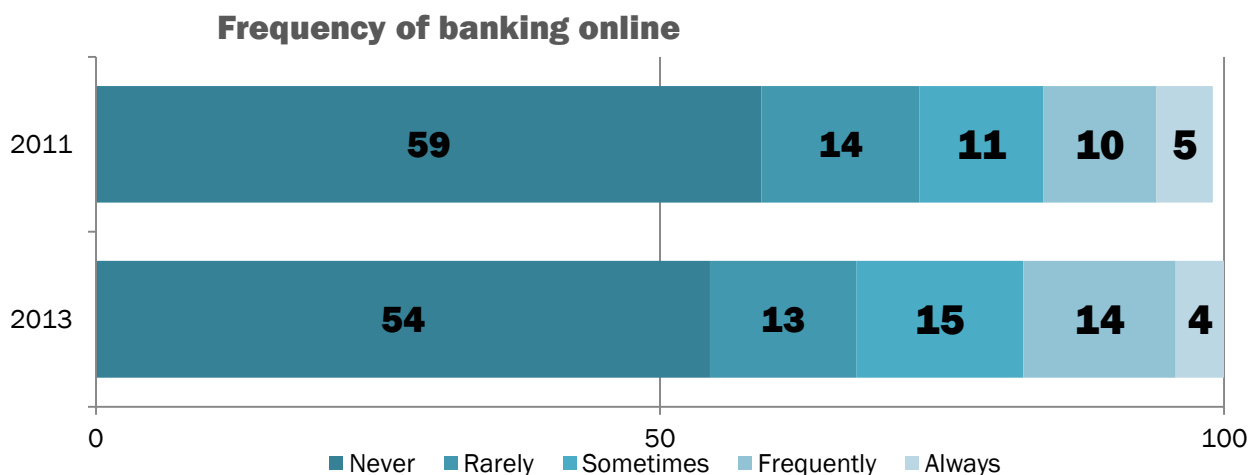


### Searching jobs online (among Internet users)



Job searching and resume sending	Job seekers (general)	Job seekers (Internet users)
Never	43.5	30.5
Rarely	13.0	14.6
Sometimes	11.1	13.4
Frequently	24.1	31.7
Always	8.3	9.8
Total	100.0	100.0

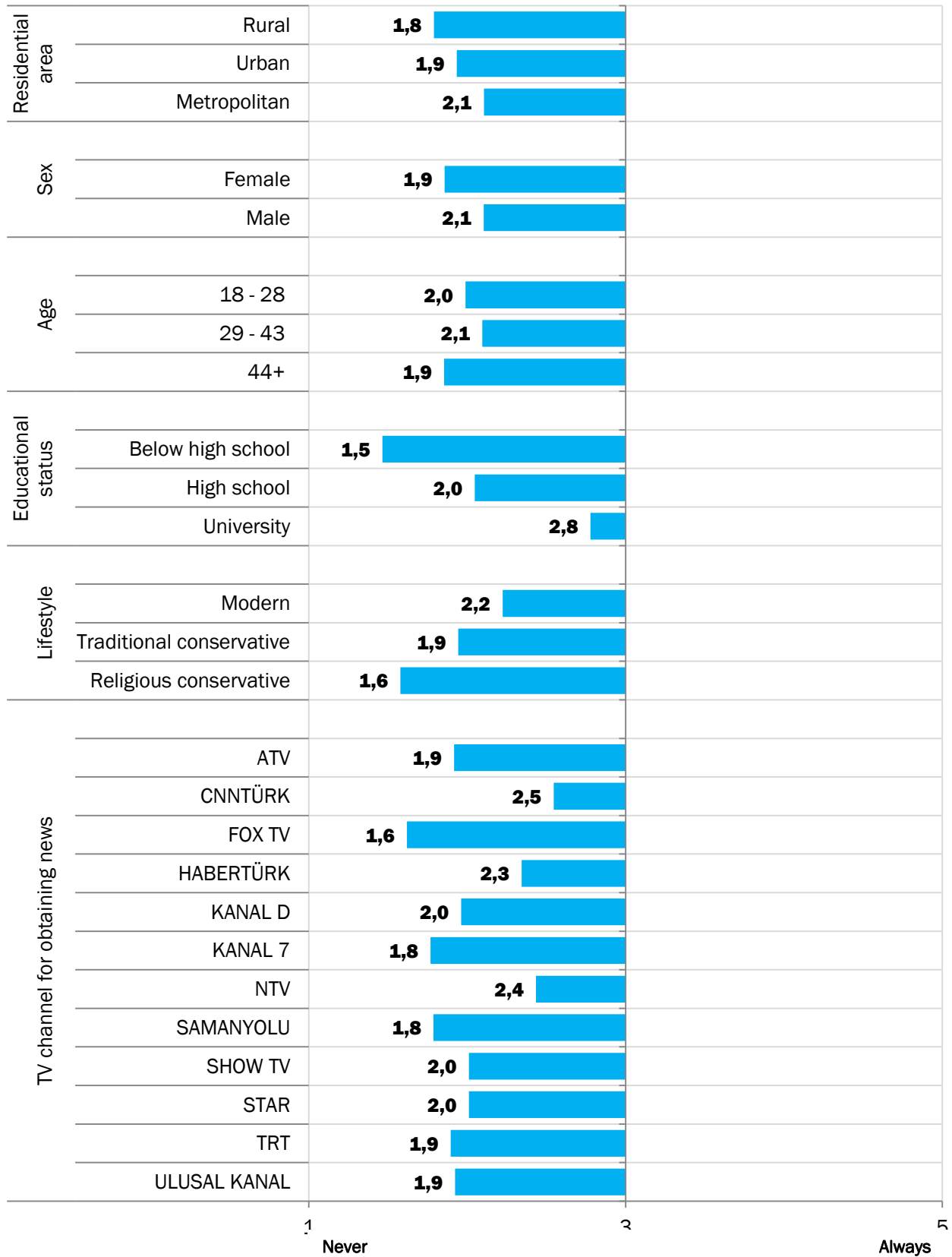
As the last habit we associate with the business world, we asked the interviewees the frequency in which banking transactions were effected via the Internet. 18 percent answered frequently and always which indicates that almost 9 million people use Internet banking. On the other hand, 54 percent answered “never”, which means more than half of the Internet users do not look warmly onto effecting banking transactions via the Internet. If we set aside those who said “never”, it appears that Internet banking eventhough rarely used, is in fact used by 23 million people which is an average of 46 percent using Internet banking. This average coincides with the average of the March 2013 publication of the Banking Association. According to the numbers clarified by the Banking Association, Turkey has 24 million Internet banking customers who have entered at least once. When comparing the findings of 2011 and 2013, we see that the use of Internet banking has increased.



As the length of time of use increases among the daily Internet users and as income increases, the frequency of banking transactions also increases. While factors such as education, quality of domicile effects frequency, more frequent banking transactions are effected when comparing the Turks vis-a-vis the Kurds, men vis-a-vis women, those who connect from their workplace, mobile phones and tablets vis-a-vis those who connect from home or Internet cafes, white-collar workers vis-a-vis other workers and the unemployed. Furthermore, the education level makes a difference, whereby the average of university graduates vis-a-vis school graduates makes a distinct difference in the frequency of Internet banking.

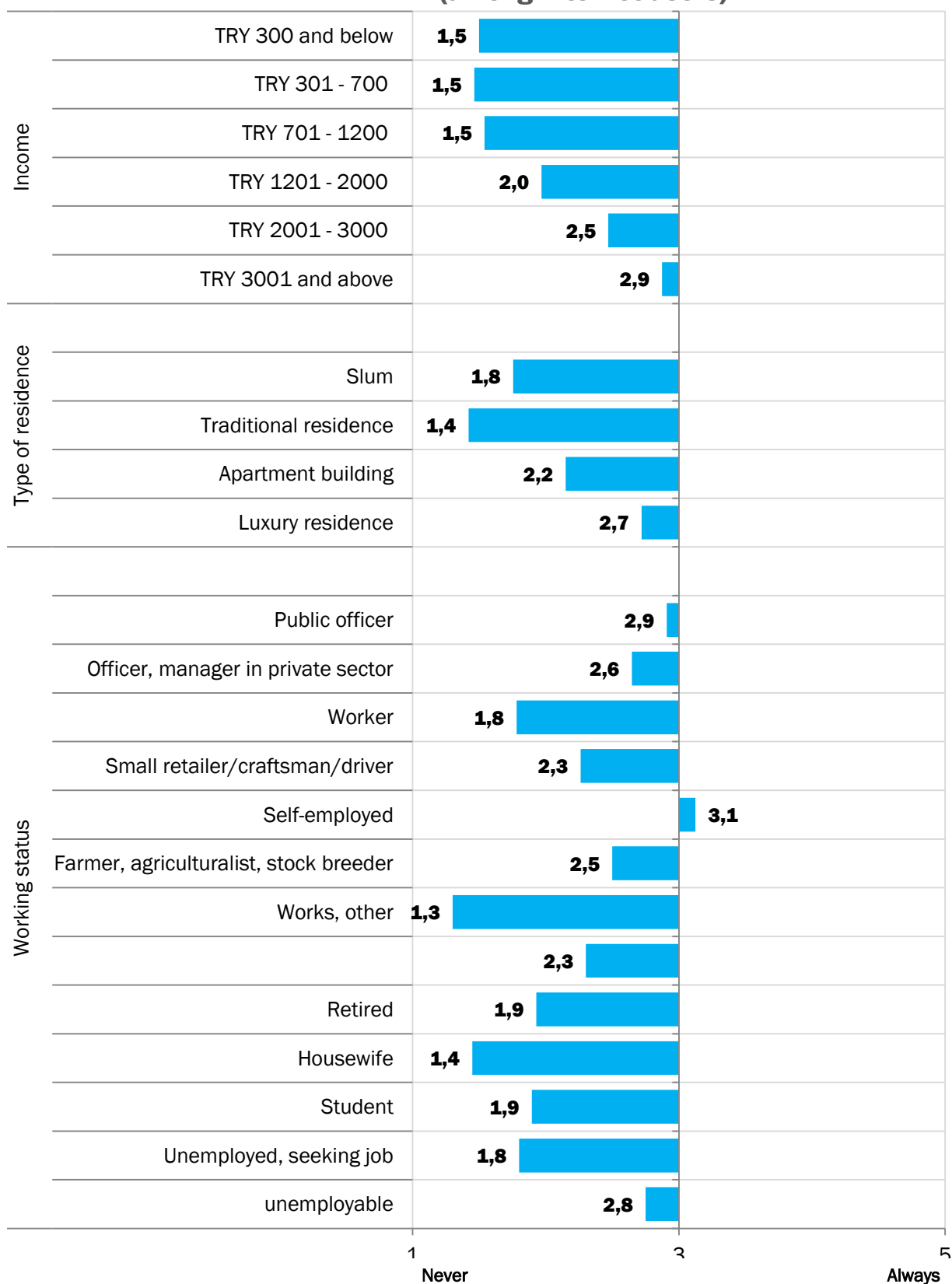


### Frequency of banking online (among Internet users)





### Frequency of banking online (among Internet users)







## 2.5. The Internet User Profiles of Voters

In this section we tackled the Internet users as voters and have examined the Internet use habits of the voters of every party.

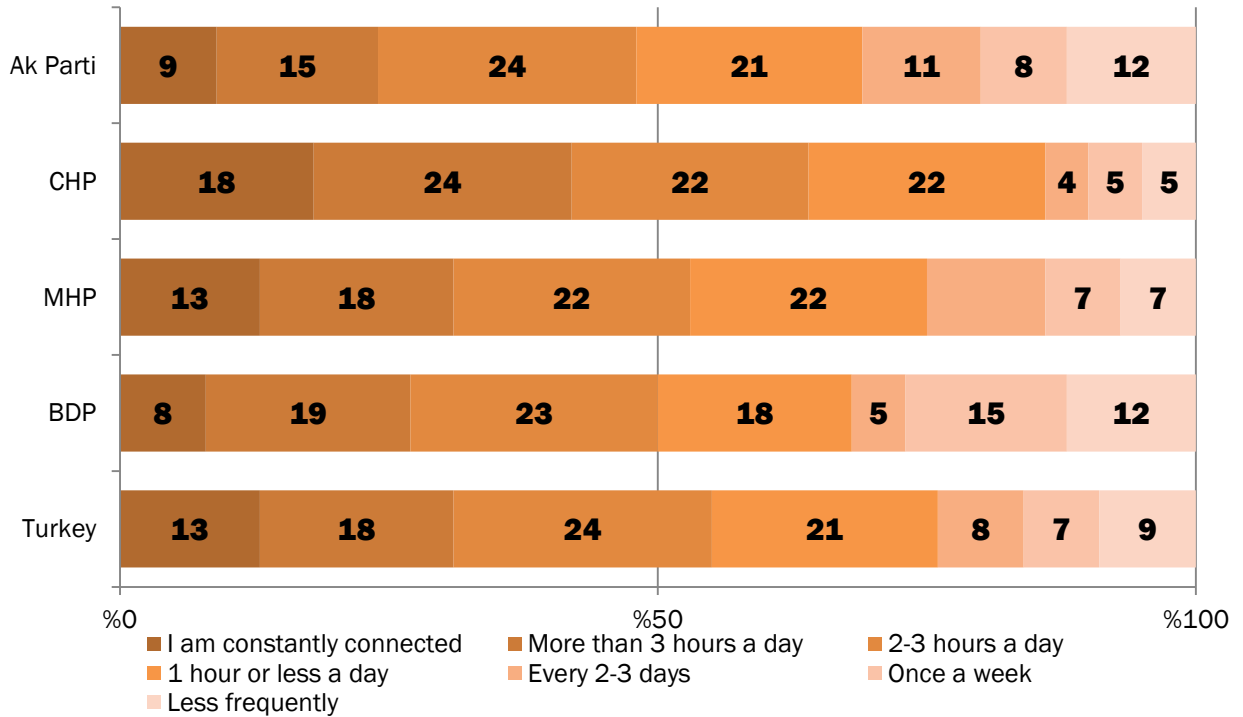
### 2.5.1. Profiles of Voters

Do you use the Internet?	Internet Use 2011	Internet Use 2013	Turkey
Ak Parti	31	35	39
CHP	27	18	16
MHP	9	13	11
BDP	4	5	6
Other party	7	3	3
Swing voter	19	18	18
Non-voter	4	8	7
Total	100	100	100

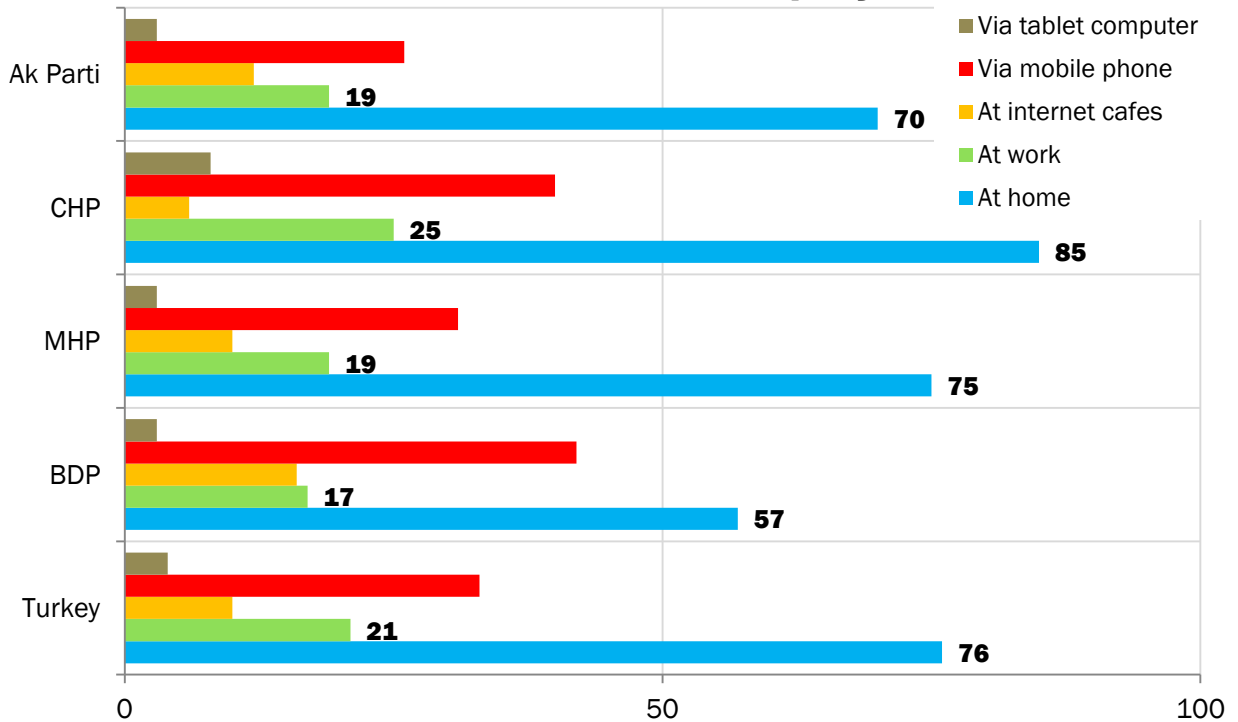
Do you use the Internet?	Ak Parti	CHP	MHP	BDP	Other	Swing voter	Non-voter	Total
Yes	50	67	70	49	69	58	68	58
No	50	33	30	51	31	42	32	42
Total	100	100	100	100	100	100	100	100



### Frequency of Internet access of party voters (among Internet users)

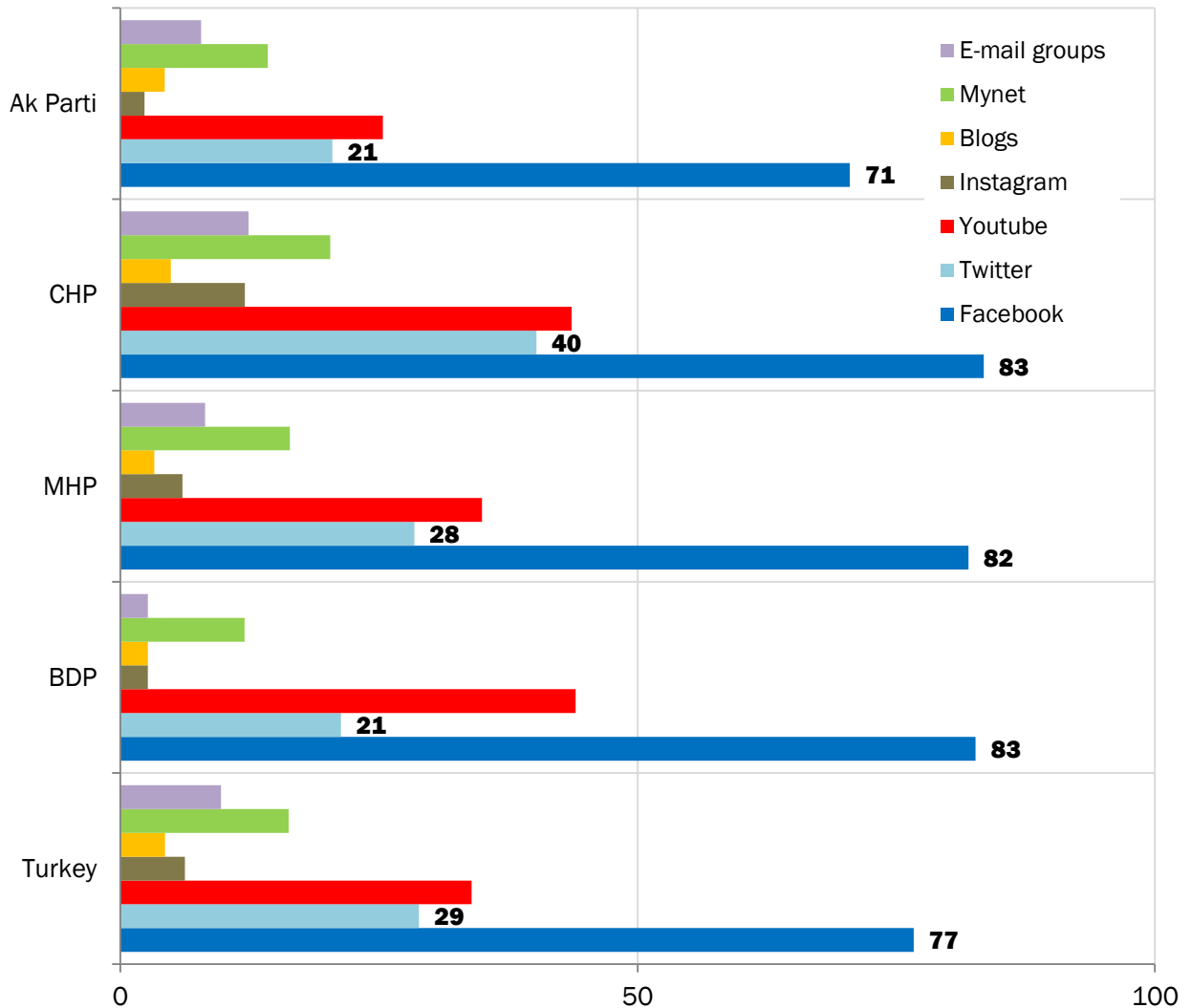


### Means of Internet access of party voters





### Social network membership of party voters



#### Ak Parti supporters on the Internet

Half of the Ak Parti voters use the Internet, mostly connecting from their home. 69 percent of Ak Parti Internet users use the Internet every day for at least one hour. 70 percent connect to the Internet from home, 19 percent from their workplace and 12 percent from Internet cafes. In comparing with 2011, the most significant increase is with those who connect to the Internet via their mobile phones: the average increased from 4 percent to 26 percent. 71 percent of Ak Parti Internet users are Facebook members, one fourth are Youtube members and 21 percent are Twitter users. The least used social-sharing network by Ak Parti voters is Instagram. In the stand point of social networks, the Ak Parti profile is quite similar to Turkey's profile. Turkey's 32 percent of Facebook users, 25 percent of Twitter users and 26 percent of Youtube users consist of Ak Parti voters. When comparing the habits of Internet use of the Ak Parti Internet users in 2011, the tendencies have not changed however the average use has increased in parallel to the general population.



### **CHP supporters on the Internet**

67 percent of the CHP voters mostly connect to the Internet from home. 80 percent connect to the Internet every day for at least one hour. 40 percent of CHP Internet users connect to the Internet via their mobile phone, 25 percent from their workplace and 6 percent from Internet cafes. In the last two years, yet another striking increase is the connection to the Internet via mobile phones from an average of 8 to an increase to 40 percent. The CHP voters have the highest average of connecting to the Internet via tablet. 83 percent of the CHP Internet users are Facebook members, 44 percent Youtube members and 40 percent Twitter users. With the highest average of Instagram users, the CHP has 12 percent. It is interesting to note that in general, the membership to social-sharing networks of CHP voters is higher than the average of Turkey. Turkey's 20 percent of Facebook members, 25 percent of Twitter members, 23 percent of Youtube members and 35 percent of Instagram members consists of the CHP Internet users.

### **MHP supporters on the Internet**

70 percent of the MHP uses the Internet and 75 percent of these users connect to the Internet every day for at least one hour. Two thirds of the the MHP Internet users connect to the Internet from home, 19 percent from their workplace and 10 percent from Internet cafes. Turkey in general and as in other party voters, within 2 years time, the highest increase in Internet connection is via mobile phones, increasing from 8 to 31 percent. Facebook is MHP's first preference among the social-sharing networks (82 percent), the second is Youtube (35 percent) and finally Twitter (28 percent). When we compare with the year 2011, we observe that membership to Twitter has increased the most, increasing in average from 6 to 28 percent.

### **BDP supporters on the Internet**

Half of the BDP voters use the Internet, when comparing with the voters of other party's we see that this voter's group has the least relation with the Internet. 57 percent of the BDP's Internet users connect to the Internet from home, 17 percent from their workplace, 16 percent from Internet cafes, 42 percent from their mobile phones and 3 percent from tablets. It comes out to the fact that the voters group with the highest average that connect to the Internet the most via their mobile phones or Internet cafes is the BDP. The BDP being quite heavy social-sharing network users, 83 percent of them are Facebook members, 44 percent Youtube members and 21 percent Twitter members. While Twitter was used the most in 2011 by the BDP voters, in 2013 it decreased below the average of Turkey, the average of Twitter users increased from 20 to 21 percent.



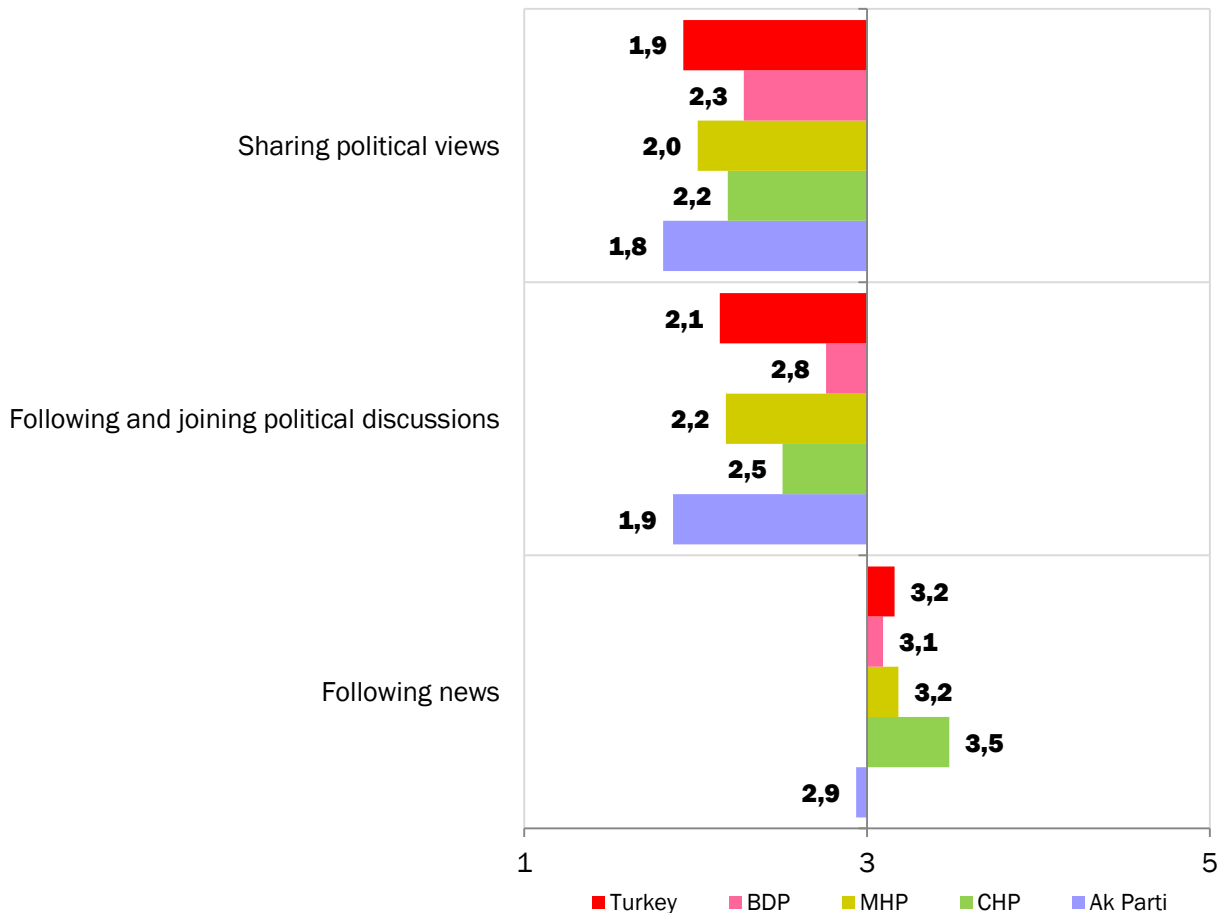
### 2.5.2. The Habits of Internet Use of Voters

What voters do, how widespread and what kind of habits voters have on the Internet can be examined in detail. However, this type of habit based on lifestyle is in general shaped as a result by the demographical profiles of voters. Therefore, predictable profiles come forth. For example, for a member of the Barometer, it should not be surprising news that the CHP voters more frequently use Internet banking in comparison to the other voters, and that this should be predictable from the higher levels of income and education of the CHP.

The most striking main features of the profiles are as such:

- Other than political purposes, the CHP voters in comparison to other voters are much more active.
- The CHP voters are more frequent shoppers.
- The use of the Internet for “the follow-up and participation of discussions of sites of political content” and “for sharing their views on current politics on the social media” is most heavily used by the BDP voters.
- The MHP voters mostly use the Internet for chatting and following up on the news.
- It is observed that voters who have least adapted to the various uses of the Internet in general are the Internet users of Ak Parti.

**Internet usage habits of party voters**





News is followed via the Internet mostly by the CHP and the MHP and the least by the Ak Parti. When observing the follow-up and participation of political content, we see that this is of least demand by the Ak Parti, mostly followed and participated by the BDP and then by the CHP. When examining the average of sharing political views via social media, it comes forth that the CHP and the BDP's do this more frequently. When looking in general, the Ak Parti rarely sees the Internet as a means of political source while the most frequent users are the CHP and the BDP's.

When comparing with 2011, we see that the habits of the AK and BDP's have not changed; that the MHP and the CHP's are following up the news more frequently via the Internet however their follow-up and participation in political content have decreased.

When examining the views of the Kurdish matter for those who trust the Internet as a news source, we see that 57 percent of them consider that the meeting held between the BDP parliament members and Öcalan as a failure. As to the question about if the Wisemen Committee were to come to your neighborhood, 28 percent indicated that I would welcome them to my home, 25 percent said I would not be interested, 30 percent said I would give them my criticism and 18 percent said I do not want them to come. As for the withdrawal of the PKK squad to the outer border, 55 percent said they are still terrorists, 22 percent said that i'm not comfortable with it and 23 percent said that this is a normal part of the process. Accordingly, we can say that the those who trust the Internet as a news source have a more critical approach to this process.

For those who said "I check the Internet when I first hear of news", 54 percent said that the meeting with Öcalan was a failure, 29 percent said that they would welcome the Wisemen Committee to their home, 27 percent said that they were not interested, 27 percent said that they would give their criticism and 28 percent said that they did not want them to come. In relation to the PKK being withdrawn to the outer borders, 50 percent of them indicated that "they are still terrorists". In parallel to those who said that they trust the Internet as a means of news source, those who said that they refer to the Internet when they first hear of news had a more negative approach to the solution process.



## **2.6. Information Society Statistics of the Turkish Statistics Institute in 2012**

With the research of the TUIK on information society, data on use has been compiled on the information and communication technology of households, individuals and organizations. These researches provide basic updated data about the connection, frequency of use, online shopping and e-governmental applications to information and communication technology in individual households; and of organizations, the use of computers, the Internet and other data technology, technological sufficiency and integration, online trade, online business and the integration of business administrators on the virtual platform. In the research effected in households, while data consisted of individuals aged 16-74, the research effected in organizations consisted of business administrations who had 10 and more employees.

### **2.6.1. Household Computer Ownership**

According to TUIK data, there are computers in 58.9 percent of households: desktop computers in 31.8 percent and laptop and tablet computers in 27.1 percent. Of those households which have computers, 71.7 percent are in urban areas and 28.1 in rural areas. In 2011 both in urban and rural areas, desktop PC ownership starts to fall while laptop and tablet computer ownership starts to rise. The rise of laptop/tablet PC ownership is three-folds the fall of desktop PC ownership, indicating that PC ownership of individuals is taking over household ownership.

### **2.6.2. Relation of Computer, Internet Use and Education**

There is a strong link between educational attainment level and computer use. Among those with no formal education, only 3.5 percent use computers and this percentage is 9.6 among men in this demographic group as opposed to 1.7 percent among its women, pointing to a digital divide along gender lines. Going from primary school level education to college-level education, computer and Internet usage rise steadily up to 93 percent. The 8 percent gender difference in the uneducated group closes in, coming down to 1 percent. Also, the data shows that almost all individuals who have computers also have access to the Internet.

### **2.6.3. The purposes of Internet Use**

In the survey, there are two main areas for the reasons individuals use the Internet: The first is chatting and communication and the second is obtaining information. 72.5 percent of users use the Internet to access online news sites, 61 percent to obtain information about products and services, 40 percent to listen to radios or watch television channels. Also, 67 percent use e-mailing services, 42.5 percent to chat and 41 percent to access chat rooms, forums and social networks such Facebook and Twitter. Downloading content and playing online games follow the first two reasons for Internet use. Uses such as planning vacations, obtaining appointments and health service appointments, receiving health services and online baking services, with 5 percent, all come before blogging and publishing websites.



### **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 May 4 - 5, 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 2585 individuals in 150 neighborhoods and villages of 108 districts -including central districts- of 34 provinces.

<b>Provinces visited</b>	<b>34</b>
Districts visited	108
Neighborhoods/villages visited	150
Subjects interviewed	2585





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	İstanbul
2	Western Marmara	Balıkesir, Tekirdağ, Edirne
3	Aegean	İzmir, Denizli, Kütahya, Uşak
4	Eastern Marmara	Bursa, Eskişehir, Kocaeli, Sakarya
5	Western Anatolia	Ankara, Konya
6	Mediterranean	Antalya, Adana, Hatay, Mersin
7	Central Anatolia	Kayseri, Sivas
8	Western Black Sea	Samsun, Tokat, Zonguldak
9	Eastern Black Sea	Trabzon, Giresun
10	Northeastern Anatolia	Ardahan, Kars
11	Middle Eastern Anatolia	Malatya, Van, Elazığ
12	Southeastern Anatolia	Diyarbakır, Gaziantep, Mardin, Şanlıurfa



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

	Region of Survey	Rural	Urban	Metropolita n	Total
1	Istanbul			17.5	17.5
2	Western Marmara	2.1	3.5		5.6
3	Aegean	4.2	5.9	5.3	15.4
4	Eastern Marmara	1.4	2.8	5.6	9.7
5	Western Anatolia	.7		10.2	10.9
6	Mediterranean	3.4	2.8	6.1	12.3
7	Central Anatolia	1.4	2.1	1.4	4.9
8	Western Black Sea	2.1	3.5		5.7
9	Eastern Black Sea	1.4	2.0		3.4
10	Northeastern Anatolia	1.4			1.4
11	Middle Eastern Anatolia	1.4	2.1		3.5
12	Southeastern Anatolia	2.1	3.5	4.2	9.8
	Turkey	21.6	28.2	50.2	100.0





## 4. FREQUENCY TABLES

### 4.1. Profile of Subjects

Sex	Percentage
Female	49.9
Male	50.1
Total	100.0

Age	Percentage
Ages 18 - 28	28.1
Ages 29 - 43	34.6
Ages 44 and above	37.3
Total	100.0

Educational Status	Percentage
Illiterate	6.0
Literate without degree	2.7
Primary school graduate	34.9
Secondary school graduate	14.7
High school graduate	29.0
University graduate	11.7
Post graduate / Doctorate	1.0
Total	100.0



<b>Paternal educational status</b>	<b>Percentage</b>
Illiterate	14.4
Literate without degree	7.4
Primary school graduate	53.8
Secondary school graduate	8.9
High school graduate	11.5
University graduate	3.7
Post graduate / Doctorate	.3
Total	100.0

<b>Monthly household income</b>	<b>Percentage</b>
TRY 300 and below	2.6
TRY 301 - 700	8.5
TRY 701 - 1200	37.4
TRY 1201 - 2000	32.4
TRY 2001 - 3000	10.9
TRY 3001 and above	8.2
Total	100.0

<b>Household population</b>	<b>Percentage</b>
1 - 2 persons	16.3
3 - 5 persons	65.6
6 - 8 persons	15.2
9+ persons	2.9
Total	100.0



<b>Head covering status</b>	<b>Percentage</b>
No head cover	29.4
Head scarf	51.0
Hijab	5.9
Chador, purdah	.5
Bachelor men	13.2
Total	100.0

<b>Ethnicity</b>	<b>Percentage</b>
Turkish	79.5
Kurdish	13.6
Zaza	1.8
Arab	1.9
Other	3.2
Total	100.0

<b>Religion/Sect</b>	<b>Percentage</b>
Sunni Muslim	91.6
Alevi Muslim	6.0
Other	2.4
Total	100.0

<b>Religiousness</b>	<b>Percentage</b>
Non-believer	3.1
Believer	28.3
Religious	55.8
Devout	12.7
Total	100.0



Lifestyle cluster	Percentage
Modern	32.0
Traditional conservative	42.9
Religious conservative	25.1
Total	100.0

Work status	Percentage
Public officer	4.2
Private sector	6.5
Worker	9.4
Small retailer	8.0
Industrialist / Businessman	.4
Self-employed	1.2
Farmer, agriculturalist, stock breeder	4.3
Works, Other	4.6
Retired	12.6
Housewife	32.7
Student	10.2
Unemployed, seeking job	4.5
Unemployable	1.4
Total	100.0

Which TV channel do you usually prefer for obtaining news?	Percentage
ATV	13.1
CNNTÜRK	1.2
FOX	6.6
HABERTÜRK	3.7
KANAL D	21.5
KANAL 7	5.2
NTV	5.8
ROJ TV	.9
SAMANYOLU	6.2
SHOW TV	6.2
STAR	6.8
TRT	13.7



TRT 6 (ŞEŞ)	.0
ULUSAL	1.6
Local Channels	.9
Other Channels	6.7
Total	100.0

<b>Birthplace</b>	<b>Percentage</b>
Istanbul	7.8
Western Marmara	5.3
Aegean	13.0
Eastern Marmara	7.6
Western Anatolia	7.2
Mediterranean	11.6
Central Anatolia	8.4
Western Black Sea	9.6
Eastern Black Sea	5.9
Northeastern Anatolia	5.6
Middle Eastern Anatolia	5.6
Southeastern Anatolia	11.6
Abroad	.9
Total	100.0

<b>Paternal birthplace</b>	<b>Percentage</b>
Istanbul	2.3
Western Marmara	5.4
Aegean	11.8
Eastern Marmara	6.8
Western Anatolia	6.2
Mediterranean	11.0
Central Anatolia	10.0
Western Black Sea	10.3
Eastern Black Sea	7.8
Northeastern Anatolia	7.2
Middle Eastern Anatolia	6.2
Southeastern Anatolia	12.7





Abroad	2.4
Total	100.0

Region of Survey	Percentage
Istanbul	17.5
Western Marmara	5.6
Aegean	15.4
Eastern Marmara	9.7
Western Anatolia	10.9
Mediterranean	12.3
Central Anatolia	4.9
Western Black Sea	5.7
Eastern Black Sea	3.4
Northeastern Anatolia	1.4
Middle Eastern Anatolia	3.5
Southeastern Anatolia	9.8
Total	100.0

Residential area	Percentage
Rural	21.6
Urban	28.2
Metropolitan	50.2
Total	100

Type of residence	Percentage
Traditional residence	42.4
Slum	6.0
Standard urban area	48.0
Luxury residence	3.6
Total	100.0

Automobile ownership	Percentage
Yes	41.0
No	59.0
Total	100



## 4.2. Monthly Theme: The Use of Internet and Social Media

<b>I believe that the Internet does more harm than good to the society.</b>	<b>Percentage</b>
Absolutely wrong	7.0
Wrong	22.8
Neither right nor wrong	25.3
Right	36.4
Absolutely right	8.4
Total	100.0

<b>Downloading films or music through the Internet free of charge, is unfair to the creators of these works.</b>	<b>Percentage</b>
Absolutely wrong	2.8
Wrong	8.4
Neither right nor wrong	17.3
Right	56.1
Absolutely right	15.4
Total	100.0

<b>The state must guarantee freedom of expression on the Internet.</b>	<b>Percentage</b>
Absolutely wrong	2.2
Wrong	8.5
Neither right nor wrong	19.6
Right	52.7
Absolutely right	16.9
Total	100.0

<b>I worry/would worry that I will not be able to protect my privacy on the Internet.</b>	<b>Percentage</b>
Absolutely wrong	5.4
Wrong	13.9
Neither right nor wrong	22.5
Right	45.9
Absolutely right	12.3
Total	100.0



<b>The state must be able to block access to certain sites on the Internet.</b>	<b>Percentage</b>
Absolutely wrong	6.6
Wrong	15.0
Neither right nor wrong	12.6
Right	52.9
Absolutely right	12.9
Total	100.0

<b>I should be the one to decide which Internet site my child will have access to, not the state.</b>	<b>Percentage</b>
Absolutely wrong	2.3
Wrong	7.9
Neither right nor wrong	21.2
Right	52.8
Absolutely right	15.8
Total	100.0

<b>Some news that is deliberately ignored in the newspapers and TV sometimes appears on Twitter.</b>	<b>Percentage</b>
Absolutely wrong	2.9
Wrong	5.6
Neither right nor wrong	33.6
Right	49.3
Absolutely right	8.6
Total	100.0

<b>Your opinion on the fact that Fazil Say was sentenced to 10 months in prison due to a comment he shared on the Internet</b>	<b>Percentage</b>
It is greatly detrimental to the freedom of expression on the Internet.	26.1
Fazil Say deserved this sentence, people should not be allowed to share whatever they please.	22.0
I don't have any information on the matter.	51.9
Total	100.0



<b>Do you have a computer at home?</b>	<b>Percentage</b>
No.	38.5
Yes and I use it.	45.5
Yes but I don't use it.	16.0
Total	100.0

<b>Where do you use the Internet?</b>	<b>Percentage</b>
At home	43.7
At work	11.9
At Internet cafes	5.8
Via mobile phone	18.8
Via tablet computer	2.4
No use of the Internet	42.4
Total	-

<b>How often do you use the Internet?</b>	<b>Percentage</b>
I'm constantly connected	7.0
More than 3 hours a day	9.9
2-3 hours a day	13.0
1 hour or less a day	11.6
Every 2-3 days	4.7
Once a week	4.3
Less frequently	6.3
Never	39.9
No answer	3.4
Total	100

<b>Which social networks are you a member to?</b>	<b>Percentage</b>
Facebook	44.8
Twitter	16.7
Youtube	19.7
Instagram	3.6
Blogs	2.5
Mynet	9.5



E-mail groups	5.6
Other	10.0
Total	-

Which news source do you trust most?	Percentage
Television	65.6
Newspaper	12.3
Internet	14.4
Radio	1.2
No answer	6.4
Total	100

What is the first source you check when there is new news?	Percentage
Facebook	5.7
Twitter	1.4
Internet website	18.0
Television	68.1
Newspaper	6.5
Radio	.2
Total	100.0

Usage for business purposes	Percentage
Never	58.9
Rarely	11.3
Sometimes	12.8
Frequently	10.7
Always	6.3
Total	100.0

Chatting and getting news from friends and relatives	Percentage
Never	45.5
Rarely	9.8
Sometimes	14.9
Frequently	20.0



Always	9.8
Total	100.0

<b>Banking transactions</b>	<b>Percentage</b>
Never	71.0
Rarely	8.3
Sometimes	9.5
Frequently	8.4
Always	2.7
Total	100.0

<b>Following-up on news</b>	<b>Percentage</b>
Never	45.9
Rarely	8.0
Sometimes	17.7
Frequently	19.6
Always	8.9
Total	100.0

<b>Following political websites and joining political discussions</b>	<b>Percentage</b>
Never	66.4
Rarely	10.9
Sometimes	11.1
Frequently	7.9
Always	3.7
Total	100.0

<b>Shopping for clothes, technology products, etc.</b>	<b>Percentage</b>
Never	67.5
Rarely	8.3
Sometimes	11.5
Frequently	8.8
Always	4.0
Total	100.0



<b>Video / music listening / playing games and similar entertainment</b>	<b>Percentage</b>
Never	50.7
Rarely	8.3
Sometimes	13.7
Frequently	17.6
Always	9.6
<b>Total</b>	<b>100.0</b>

<b>Downloading film / music</b>	<b>Percentage</b>
Never	61.9
Rarely	10.0
Sometimes	11.9
Frequently	9.9
Always	6.3
<b>Total</b>	<b>100.0</b>

<b>Purchasing tickets (bus tickets, plane tickets, concert tickets, sports game tickets)</b>	<b>Percentage</b>
Never	67.4
Rarely	11.2
Sometimes	12.1
Frequently	6.2
Always	3.1
<b>Total</b>	<b>100.0</b>

<b>Job searching, sending cv's</b>	<b>Percentage</b>
Never	75.5
Rarely	9.6
Sometimes	7.8
Frequently	4.9
Always	2.2
<b>Total</b>	<b>100.0</b>



<b>Sharing current political views on the social media</b>	<b>Percentage</b>
Never	72.0
Rarely	10.1
Sometimes	8.7
Frequently	6.6
Always	2.6
Total	100.0

<b>Watching TV serials</b>	<b>Percentage</b>
Never	64.4
Rarely	9.5
Sometimes	12.7
Frequently	9.5
Always	3.8
Total	100.0