KONDA

Barometer

THEMES

Turkey's Mood

December 2015

KONDA

ARAŞTIRMA VE DANIŞMANLIK

CONTENTS

1. EXECUTIVE SUMMARY

The survey which forms the basis of this report was conducted on 5-6 December 2015 by face-to-face interviews with 2521 individuals in 153 neighborhoods and villages of 101 districts including the central districts of 27 provinces.

This month, in the first survey we conducted after the November 1 elections, we investigated the general social mood and election results, their reflection in the economy and how the events after the elections have been perceived. Since there are no upcoming elections, the political findings and the rates of the parties in a possible election were considered secondary matters.

SOCIAL MOOD

In order to study the social mood, we measured the depression index through 8 questions used for measuring the state of depression according to the European Social Survey (ESS) conducted regularly throughout Europe. The survey revealed that Turkey is still the country with highest rate of depression among the European countries with a score of 0.49 points in a scale of 0 to 1.

The ESS findings show that the state of depression is mostly related to income level in all countries which was also the case in our survey. However, the situation in Turkey goes beyond economy in that depression or in other words the mood does not differentiate in terms of demographic features and even in the modern-conservative axis we frequently witness in the Barometer surveys. Even if it does, the difference is not significant. In shaping the mood, the effect of income is followed by the effect of political preferences and the perception and anticipation about the economic and political situation and stability while educational level and ethnic origins are also partially effective.

Relief and positive anticipations in the society after the elections

In this month's survey, we also focused on the election results, their reflection on the economy and how the events afterwards have been perceived. The most important determination we made based on the findings is that the completion of the November 1 election and the diminishing of uncertainties with the single party government brought visible relief to the society. The rate of those who consider the situation in Turkey as a serious political crisis dropped from around 80 percent to around 50 percent and the anticipation of a crisis decreased 27 points within 3 months. In addition, in the post-election term, 33 percent of the society indicated decrease in the anticipation of a crisis. Further, in terms of the perceptions and anticipations with regard to the past situation and the future of both national and personal living conditions, it is observed that the Optimistic Cluster which was at a rate of 23 percent in January 2014 increased to 40 percent this month following the rate of 27 percent in October. Moreover, the expectations of people about their personal living conditions have taken a positive turn more rapidly than the national expectations.

INVESTMENT AND SPENDING PREDICTIONS

In order to understand how the social mood and the evaluation about the post-election term influence daily life and consumption and investment preferences, we asked the interviewees how they would prefer to spend a certain amount of money next year. The amount was specified as 3 to 5 thousand liras and 30 to 50 thousand liras, respectively. The lower classes who predict that they will have difficulty in making a living next year at the highest rates as well as partially those at the age of 44 and above, religious conservatives and educational groups below high school are much more inclined to spend 3 to 5 thousand liras on household goods and basic domestic needs such as white goods and furniture. Young people show a considerable tendency towards clothing and technologic goods.

As for spending the sum of 30 to 50 thousand liras, people mostly consider buying a house, followed by owning a car for the first time or changing the existing one, then sending their children to a different school. These preferences do not change much according to classes. However, those with lower educational levels and having limited access to education place more importance on sending their children to a different school. At the same time, they also prefer buying a house over buying a car, probably because buying a house is a means of investment. On the other hand, those people having higher educational levels, young people, modern people and men prefer buying cars over buying houses. It seems that preferences at the level of 30 to 50 thousand liras cannot be explained by people's desires to own something that they do not.
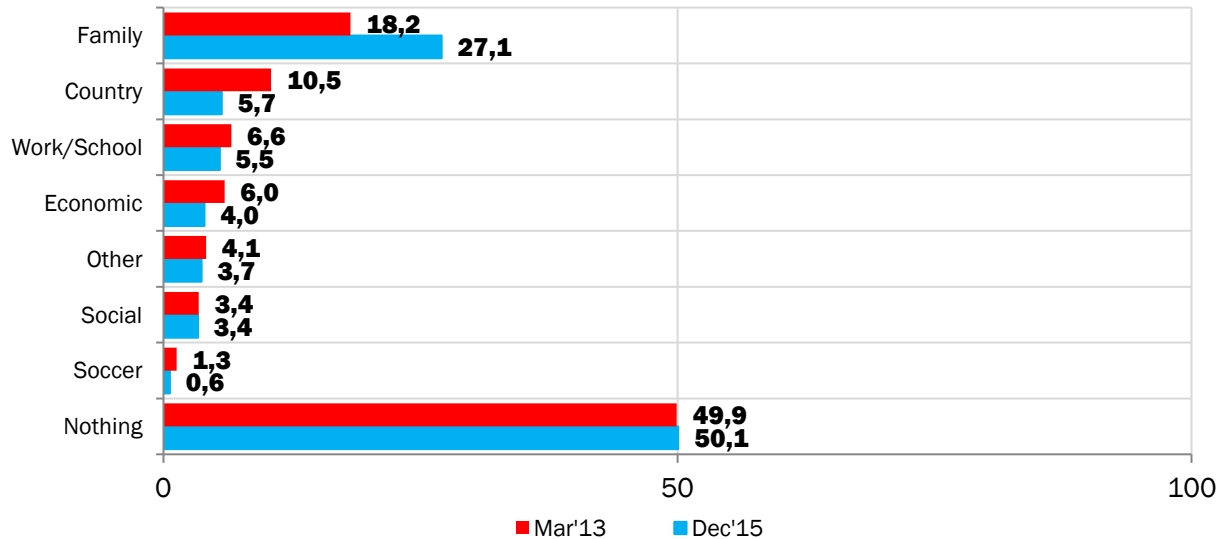
2. TURKEY'S STATE OF MIND

It has been two months since the snap election, and in the December'15 Barometer, we endeavored to understand both the individual and social mood in Turkey. We also attempted to understand what kind of concrete consumption and investment plans individuals have made for the coming year.

The respondents were directed the open-ended question, "What made you the most happy over the past month?" and the responses were grouped in several categories. For instance, responses such as marriage, nephew's success in the higher education entrance exam, being healthy and grandchild's visit were grouped under the category "domestic." Responses such as salary raise and buying a house were grouped under the category "economic," while responses such as Ak Parti's success in the general election and downing of a Russian warplane were grouped under the category "national." We had last directed the same question back in March 2013. In the graph below, the first noteworthy finding is that, over the last two and a half years, roughly half of the general public expressed that nothing made them happy. The second finding that attracts attention is the 50 percent decrease in the rate of the respondents who stated that the state of affairs in the country or politics made them happy. Finally, the rate of the respondents they found contentment in their family rose by 10 points. A remarkable change cannot be observed in any of the other categories.

What made you the most happy over the past month?

Category	Mar'13	Dec'15
Family	18,2	27,1
Country	10,5	5,7
Work/School	6,6	5,5
Economic	6,0	4,0
Other	4,1	3,7
Social	3,4	3,4
Soccer	1,3	0,6
Nothing	49,9	50,1

In a similar fashion, we also asked the respondents the question, "What made you the most angry over the past month?" The distribution of the responses provided to the question on what made the respondents angry is similar to the distribution of responses for the question on what made the respondents happy. In December 2015, half of the respondents indicated that nothing made them angry. It is striking that this rate increased by more than 10 points over the past two and a half years. One out of every four respondents indicated that the state of affairs in the country is

what annoyed them the most, and this rate has remained more or less the same over the past two and a half years. Domestic matters is the second item that made the respondents angry, and the rate of the respondents who stated that family matters annoyed them the most reflects the highest increase (16 points). The rate of the respondents who expressed that economic matters and unemployment are a source of anger decreased slightly.

What made you the most angry over the past month?

Category	Mar'13	Dec'15
Aile	13,0	29,4
Family	24,3	24,1
Country	4,0	9,4
Work/School	11,6	9,3
Economic	3,4	6,1
Other	3,4	11,7
Social	2,1	1,6
Soccer	0,7	0,7
Nothing	37,6	48,1

■ Mar'13   ■ Dec'15
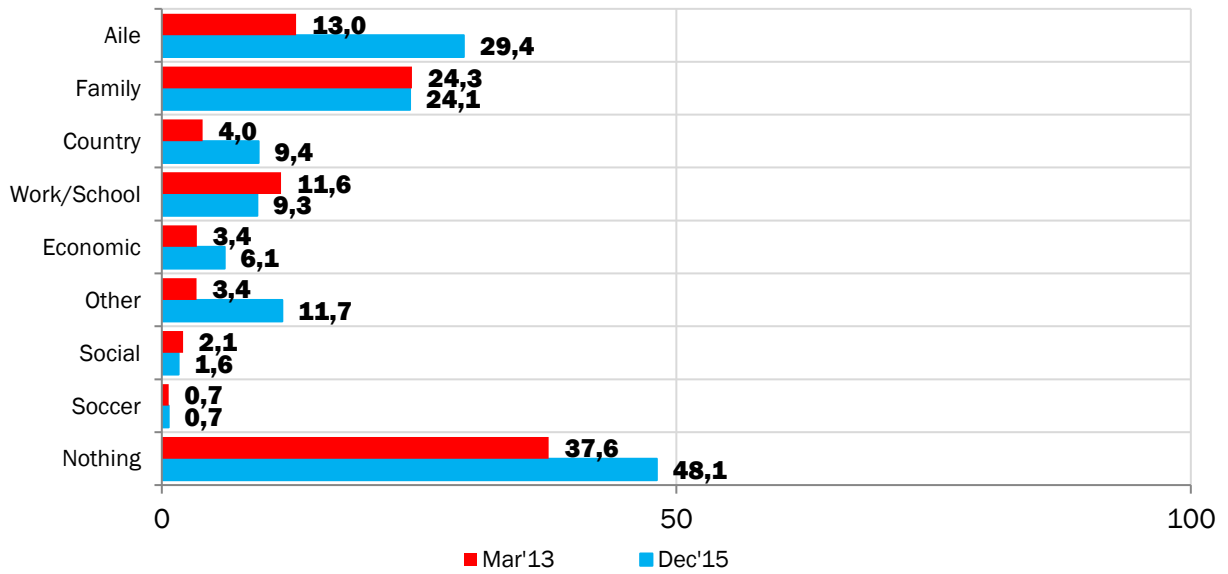
We encounter two main findings on these two graphs. **First of all, domestic and national matters are the main sources of happiness and anger in Turkey.** We can also mull over this outlook by means of the points of contact in our daily lives. Individuals feel content or annoyed because of the matters in their household with which they have the closest ties (and also the most tangible relation) and because of national matters which are the most distant (and also the most intangible). In other words, individuals' relations with their families, which shape their daily life practices, and their relations with their country, which identify their values, may simultaneously lead to both positive and negative reactions.

Second, **half of the general public stated that there was nothing that made them happy or angry.** At this point, we can speak of two possibilities: Half of the respondents either do not feel extremely happy or extremely annoyed in contrary to what is presented in the media or they refrain from responding to the question because it is open-ended. **In any case, if half of the respondents have really become emotionally numb, we should seriously consider it as a possibility that half of the general public are more likely to be not angry or happy.** To what extent could political preferences and social profiles of the respondents affect the responses they provide to the questions on what made them happy/angry?

2.1. Mood and Depression Index

In order to provide further clarification and more details, we asked two different sets of questions to the respondents in the survey. The first set of questions included several questions from the European Social Survey (ESS) which aim to measure the moods of individuals. The second set of questions inquired about how individuals feel about the course of things over the past five years in their own lives and in the country, as well as their anticipation for the next five years. The results revealed by the second set of questions are presented in the section titled Perceptions, Expectations and Clusters.

The questions from the ESS have been designed to measure the moods of individuals across Europe. In the field survey, we asked the respondents "How often did you feel the emotions below during the past week?" and then read them six negative emotions and two positive emotions. In general, 40 or 50 percent of the respondents indicated that they did not feel any of the negative emotions during the previous week.

When we analyze the responses provided to the two statements at the end of the list, it is observed the responses are distributed more evenly than the negative statements on the previous page.

At first sight, it is possible to suggest that society in Turkey is neither in an extremely positive nor in an extremely negative mood. In response to the various questions, almost one out of every two respondents stated that they did not feel negative emotions. On the other hand, the rate the respondents who feel happy or who enjoy life is lower than the rate of those who bear negative emotions. Certainly, different individuals give similar responses to different statements; and therefore, the analyses provided so far do not necessarily indicate the overall feelings of different segments in society.

Thus, we made use of the factor analyses and evaluated the responses from a different perspective. First and foremost, we calculated the average value of the responses provided to these eight questions in order to calculate the depression index in Turkey. Based on the responses provided to the question on how often the respondents felt depressed during the week before the field survey, the average score in Turkey equals to 1.97. This score corresponds to "some of the time" on a scale where 1 refers to "none or almost none of the time", 2 refers to "some of the time", 3 refers to "most of the time" and 4 refers to "all or almost all of the time." This score constitutes one of values in the axis in the graphs on following pages, and it should also be taken as reference to understand how depressed different segments of society are. The index we created is not intended to provide a scientific psychological evaluation to identify whether the respondents are in depression or not. It only gives us the opportunity to perform analyses and make comparisons.

During the past week, I felt depressed.

None of the time	Some of the time	Most of the time	All of the time
40	42	12	6

During the past week, I felt that everything I did was an effort.

None of the time	Some of the time	Most of the time	All of the time
50	35	11	4

During the past week, my sleep was restless.

None of the time	Some of the time	Most of the time	All of the time
42	40	13	5

During the past week, I felt lonely.

None of the time	Some of the time	Most of the time	All of the time
50	36	9	5

During the past week, I could not get going.

None of the time	Some of the time	Most of the time	All of the time
44	39	11	5

During the past week, I felt sad.

None of the time	Some of the time	Most of the time	All of the time
26	56	14	4

During the past week, I enjoyed life.

None of the time	Some of the time	Most of the time	All of the time
14	43	31	12

During the past week, I felt happy.

None of the time	Some of the time	Most of the time	All of the time
10	41	35	15

■ None of the time　■ Some of the time　■ Most of the time　■ All of the time

Where is Turkey located on the Depression Index?

European Social Survey (ESS) conducts periodical surveys in 15 countries in Europe and evaluates how individuals evaluate their personal mood. In addition, periodical surveys about various topics are conducted in 24 countries including Turkey. The questions about the different moods of individuals we asked in the December'15 Barometer are based on the modules researched by ESS in 2006 and 2012.

ESS Well-being Categories	Questions asked in the field survey
Emotional well-being	How much of the time during the past week did you feel depressed?
	How much of the time during the past week did you feel happy?
	How much of the time during the past week did you you enjoy life?
	How much of the time during the past week did you feel sad?
Vitality	How much of the time during the past week you did you feel that everything you did was an effort?
	How much of the time during the past week was your sleep restless?
	How much of the time during the past week could you not get going?
Supporting relations	How much of the time during the past week did you feel lonely?

Upon the comparison we made between different countries after scoring each response option ("none or almost none of the time," "some of the time," "most of the time," and "all or almost all of the time"), we reached the conclusion that society in Turkey is more prone to depression.

Comparison of the ESS depression index in different countries

Country	Value
Norway	0,37
Denmark	0,39
Iceland	0,39
Sweden	0,39
The Netherlands	0,40
Finland	0,40
United Kingdom	0,42
Belgium	0,42
France	0,42
Spain	0,44
Portugal	0,45
Bulgaria	0,46
Italy	0,47
Russia	0,47
Turkey	0,49

<< Not depressed   Depressed >>

The factor analysis revealed that individuals with similar profiles responded similarly to the questions. What is striking here is the fact that different subjective and objective parameters such as gender, age, lifestyle, sect and degree of piety did not lead to any differentiation in how individuals responded. As presented below, five factors (educational attainment level, economic well-being, future expectations, political preference and ethnic identity) have an influence on the moods of individuals.

We will first take a look at the impact of educational attainment level and economic well-being. Higher educational attainment and economic well-being both lead to a lower tendency for depression. In our previous studies, it was observed that the segments with the highest educational attainment also enjoy the highest income; and therefore, the strong correlation between educational attainment and income is reflected on the mood of individuals.

When we analyze the responses by household income, it is obvious that the respondents with ample economic means are less likely to feel depressed. The moods of the respondents whose household income is between TRY 1,200-2,000 TL is quite similar to the average in Turkey. In light of this, the respondents with a lower household income are more likely to feel depressed.
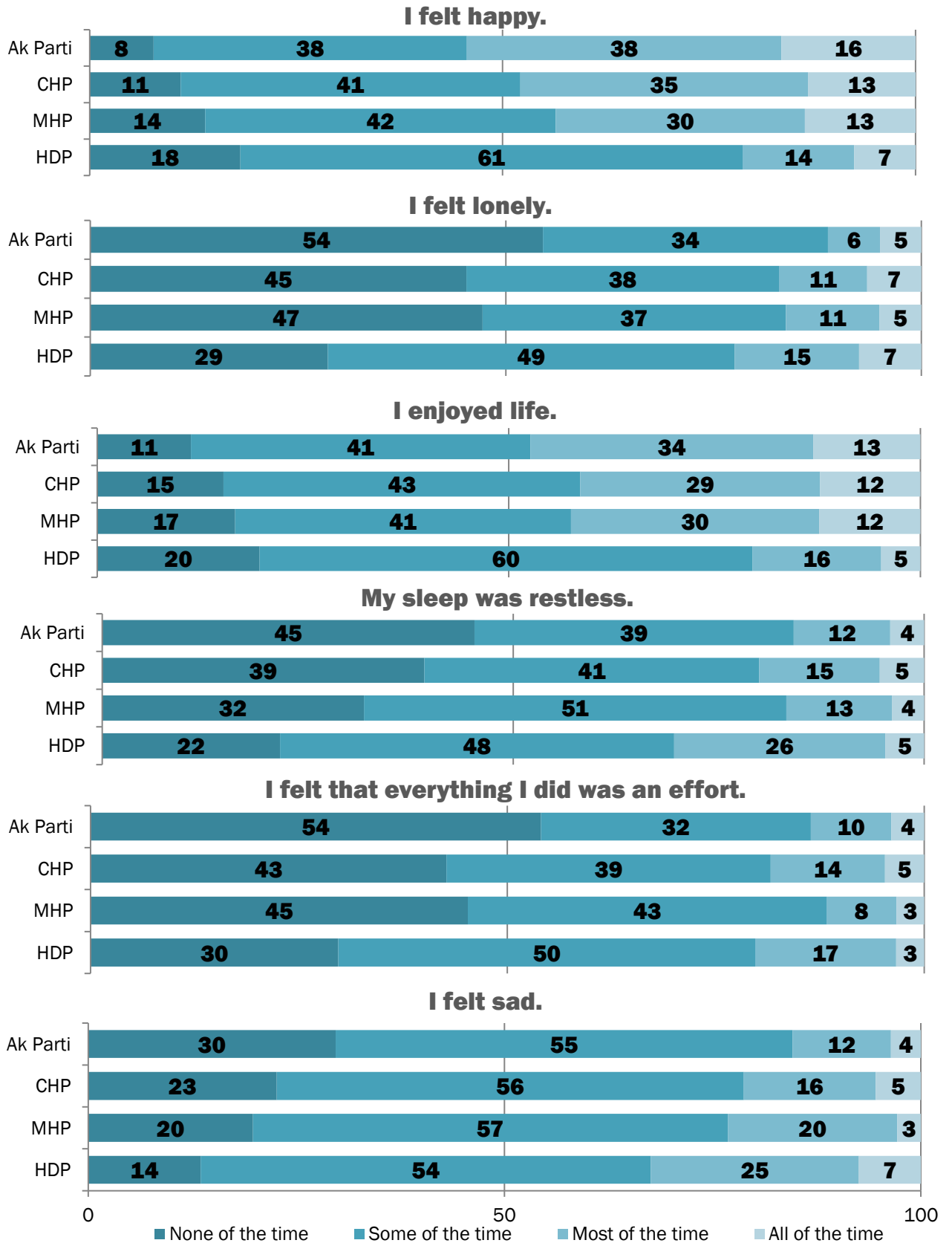
The analysis by employment indicate that unemployed have the highest tendency for depression. Housewives present an outlook that is similar to the countrywide average. The findings for small retailers and workers are also quite close to the average. Public officers and private sector employees, respectively, present the lowest tendency for depression.

Ethnic identity and political preference demonstrates other clues on the tendency for depression. In comparison to the Turkish, the Kurdish have a higher tendency for depression. When we analyze both the Kurdish and the Turkish by economic class, considering that such a difference may arise due to the fact that the Kurdish have limited economic means, it is evident that the Kurdish are more likely to feel depressed regardless of economic class, and the Kurdish in the lower income groups present even a higher tendency for depression.

The analysis of the responses by political preference reveals that only Ak Parti voters, who score slightly higher than the nationwide average, are less likely to become depressed. In comparison to other parties, HDP voters, the majority of whom is composed of the Kurdish, feel more depressed.

At this point, it becomes apparent that the political polarization we frequently mention in our reports has an obvious influence on the moods of individuals. The graphs below present the distribution of responses provided by different voter groups to the questions that collectively make up the depression index. According to the graphs, Ak Parti and HDP represent two opposite moods.

Depression index by demographic characteristics

Category	Group	Value
	Turkey	2,0
Educational Attainment	University	1,8
	High school	1,9
	Below high sch.	2,0
Economic Class	Upper	1,8
	New middle	1,9
	Lower middle	2,0
	Lower	2,2
Monthly Household Income	TRY 700 or less	2,3
	TRY 701 - 1200	2,1
	TRY 1201 - 2000	2,0
	TRY 2001 - 3000	1,9
	TRY 3001 - 5000	1,8
	TRY 5001 or more	1,7
Employment Status	Unemployed	2,2
	Housewife	2,0
	Worker	2,0
	Farmer	2,0
	Small retailer	1,9
	Student	1,9
	Retired	1,9
	Private sector	1,9
	Public officer	1,7
Ethnic Identity	Turkish	1,9
	Kurdish	2,1
Political Preference	Ak Parti	1,9
	CHP	2,0
	MHP	2,0
	HDP	2,3

<< Not depressed   Depressed >>

I felt happy.

	None of the time	Some of the time	Most of the time	All of the time
Ak Parti	8	38	38	16
CHP	11	41	35	13
MHP	14	42	30	13
HDP	18	61	14	7

I felt lonely.

	None of the time	Some of the time	Most of the time	All of the time
Ak Parti	54	34	6	5
CHP	45	38	11	7
MHP	47	37	11	5
HDP	29	49	15	7

I enjoyed life.

	None of the time	Some of the time	Most of the time	All of the time
Ak Parti	11	41	34	13
CHP	15	43	29	12
MHP	17	41	30	12
HDP	20	60	16	5

My sleep was restless.

	None of the time	Some of the time	Most of the time	All of the time
Ak Parti	45	39	12	4
CHP	39	41	15	5
MHP	32	51	13	4
HDP	22	48	26	5

I felt that everything I did was an effort.

	None of the time	Some of the time	Most of the time	All of the time
Ak Parti	54	32	10	4
CHP	43	39	14	5
MHP	45	43	8	3
HDP	30	50	17	3

I felt sad.

	None of the time	Some of the time	Most of the time	All of the time
Ak Parti	30	55	12	4
CHP	23	56	16	5
MHP	20	57	20	3
HDP	14	54	25	7

Legend: ■ None of the time ■ Some of the time ■ Most of the time ■ All of the time

Finally, we will take a closer look at the relation between perceptions and expectations, and the depression index. The respondents who are more pessimistic in their evaluation of or anticipation for the state of affairs in Turkey or in their personal lives are more likely to feel more depressed. The tendency for depression among the respondents who think that the living conditions in Turkey have improved over the last 5 years decreases significantly. On the other hand, the respondents who disagree that the living conditions in Turkey have improved over the last 5 years are more likely to feel depressed. Similarly, the respondents who state that their living conditions have improved over the last 5 years are more likely to feel depressed. They are also more likely to express their feelings. Being pessimistic in personal life related expectations plays a more significant role in determining the tendency for depression than pessimism does in shaping the expectations for the country.

However, the strongest relation is observed between the tendency for depression and how the respondents evaluate their living conditions over the last 5 years. In other words, the respondents who think that their living conditions worsened to a greater extent are more likely to be depressed.

Relation between Perceptions-Expectations and Depression

Turkey		2,0
The overall living conditions in Turkey have improved over the last 5 years.		
Strongly disagree		2,1
Disagree		2,1
Neither agree nor disagree		2,0
Agree	1,8	
Strongly agree	1,7	
My living conditions have improved over the last 5 years.		
Strongly disagree		2,3
Disagree		2,2
Neither agree nor disagree		2,0
Agree	1,8	
Strongly agree	1,7	
The overall living conditions in Turkey will improve over the next 5 years.		
Strongly disagree		2,1
Disagree		2,1
Neither agree nor disagree		2,0
Agree	1,9	
Strongly agree	1,8	
My living conditions will improve over the next 5 years.		
Strongly disagree		2,3
Disagree		2,1
Neither agree nor disagree		2,0
Agree	1,8	
Strongly agree	1,7	

<< No depressed   Depressed >>

The responses provided by different social groups to these four questions on perceptions and expectations are presented further in the report.

2.2. Economic-Political Expectations and Tendency for Depression

The analyses of the responses provided to the questions on the political and economic outlook after the snap election indicate that the respondents who have a positive perception or expectation are less likely to feel depressed. For instance, the tendency for depression is higher among the respondents who believe that the recent developments are a sign of political crisis.

On the other hand, the respondents who do not anticipate economic hardship in their household or in the country show a lower tendency for depression, while the respondents who expect an economic crisis are more likely to feel depressed.

Prior to the November 1st General Election, many argued that a single-party government would ensure stability. In the following sections of the report, we will strive to understand which segments of society believe that the outcome of the election and the two-month period afterwards enabled stability in the country. In this section, however, we will only take a look at the findings presented in the two graphs below. It is observed that the respondents who have increased expectations for crisis and who think that the outcome of the election is not favorable, are more likely to feel depressed.

On the other hand, the respondents who believe that outcome of the election made a positive impact on their individual economic well-being, but a negative impact on the economic conditions in the country show a lower tendency for depression, in comparison to those who think that the elections made a positive impact on economic conditions in the country, but a negative impact on their own household economic conditions. This finding uncovers the mood that is prevalent in Turkey, which we addressed many times so far in this report. Economic factors is the underlying reason why individuals particularly feel depressed.

The respondents who anticipate that they will afford a living and also make some savings have a stronger resistance against depression. The difference between the average scores for these respondents and others is quite high.
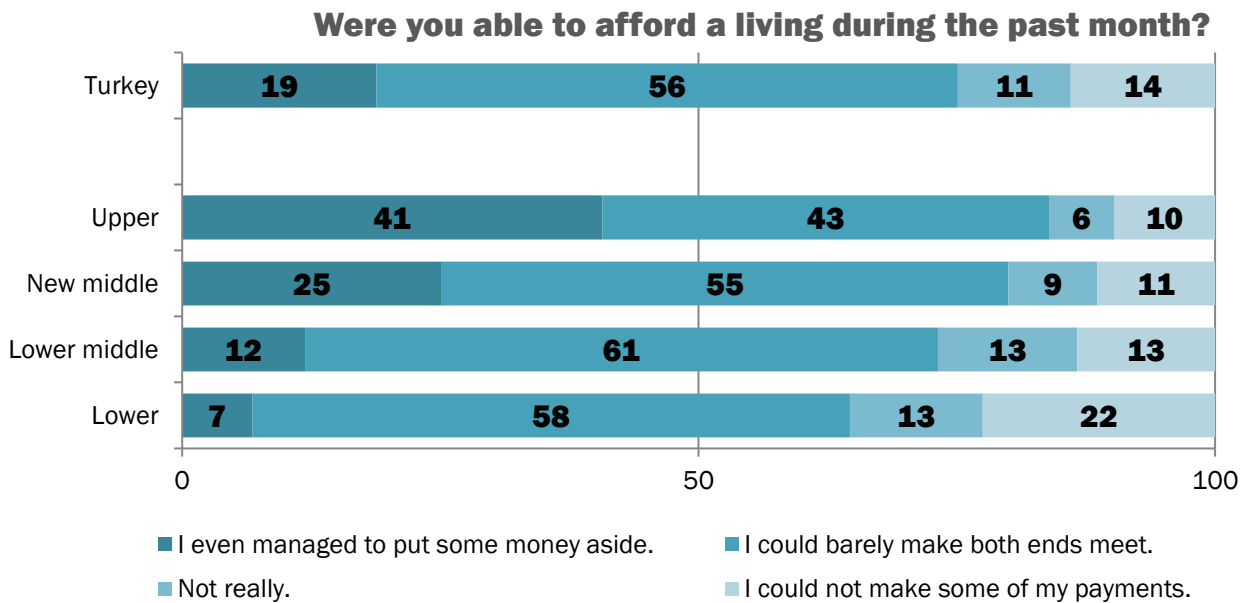
Relation between Economic-Political Expectations and Depression

		Value
	Turkey	2,0
Current state of affairs in Turkey	The country is making good progress.	1,9
	Things are running their normal course.	1,9
	Recent developments are a sign of a serious political crisis.	2,1
Economic crisis in Turkey	Does not expect	1,9
	Expects	2,1
Economic crisis in household	Does not expect	1,8
	Expects	2,1
Based on the outcome of the Nov 1st GE...	Decreased crisis expectation	1,8
	No change	2,0
	Increased crisis expectation	2,2
Outcome of the Nov 1st GE	Political and economic stability	1,8
	Favorable in terms of politics, no impact on my economic conditions	2,0
	Favorable for my economic condition, but unfavorable in terms of politics	1,9
	Unfavorable in terms of politics and economics	2,1
Next year...	I will be able to put some money aside.	1,7
	I will barely make a both ends meet.	2,0
	I will not be able to make make a living.	2,2
	I will go in debt.	2,2

<< Not depressed   Depressed >>

2.3. Projections on Investment and Spending

In this section, we endeavored to analyze individuals' expectations for their economic outlook. As we mentioned in previous sections, existing economic conditions of the respondents and their anticipations for the future are the most important factor that determine the level of tendency for depression in Turkey. However, the graph below reveals that the respondents' perceptions on the economic conditions in their household are not necessarily based on objective sources. On the contrary, objective opinions outweigh others in most cases. For instance, in response to the question, "Were you able to afford a living during the past month?" 40 percent of the respondents in the upper income group indicate that they could barely make a living, while almost 7 percent of the respondents in the lower income group state that they could put some money aside. Although economic conditions have the greatest influence on the mood of the general public, individuals' perception on their economic conditions may not always be parallel with their actual level of well-being. In any case, the respondents who belong to the upper income group are more likely to say that they were able to make savings, while those in the lower income group are more likely to mention that their expenditures are more than their income.

Were you able to afford a living during the past month?

	I even managed to put some money aside.	I could barely make both ends meet.	Not really.	I could not make some of my payments.
Turkey	19	56	11	14
Upper	41	43	6	10
New middle	25	55	9	11
Lower middle	12	61	13	13
Lower	7	58	13	22

We also directed a question similar to the previous one and inquired about what the respondents anticipate for the coming year. This responses to this question reveal that the respondents are more optimistic for the coming year. Even so, the majority of the respondents who do not have difficulty in affording a living anticipate that they will be in a similar economic condition, while those who experience economic hardship anticipate that they will continue living in debt. One out of every three adults state that they could barely afford a living and anticipate that they will barely make a living in the coming year.

Affording a living during the previous month / Affording a living next year

I even managed to put some money aside.	13 4	
I could barely make both ends meet.	8 37 5 6	
Not really.	4 4 2	
I could not make some of my payments.	4 2 7	

0   20   40   60

- ■ I will be able to put some money aside.
- ■ I will barely make both ends meet.
- ■ I will not be able to make a living.
- ■ I will not be able to make some payments.
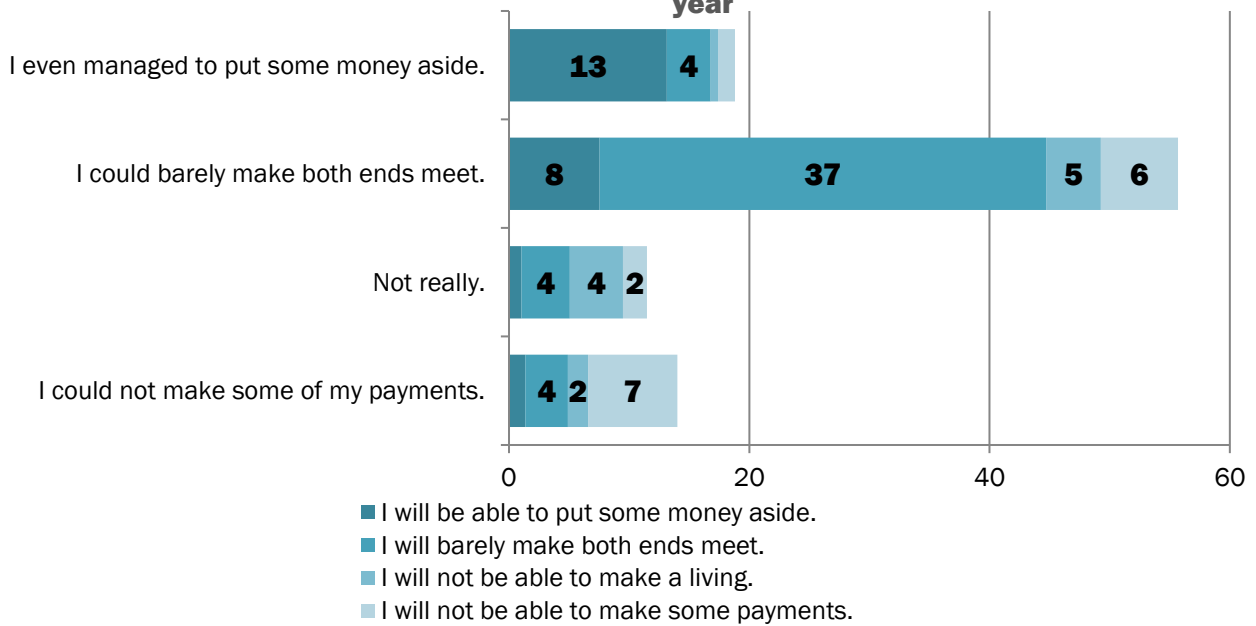
The analysis of the responses by economic class reveals that the respondents who belong to the upper income group anticipate saving more money in the coming year, whereas those who belong to the lower income group anticipate acquiring more debt. Similarly, roughly 13 percent of those in the upper income group anticipate being in debt, while about 10 percent of those in the lower income group expect to save money.

Do you anticipate being able to save money and making savings during the next year?

Turkey	23 49 11 17	
Upper	45 36 6 13	
New middle	30 46 9 15	
Lower middle	16 55 12 17	
Lower	10 49 17 25	

0   50   100

- ■ I even managed to put some money aside.
- ■ I could barely make both ends meet.
- ■ I could barely make both ends meet.
- ■ I could not make some of my payments.
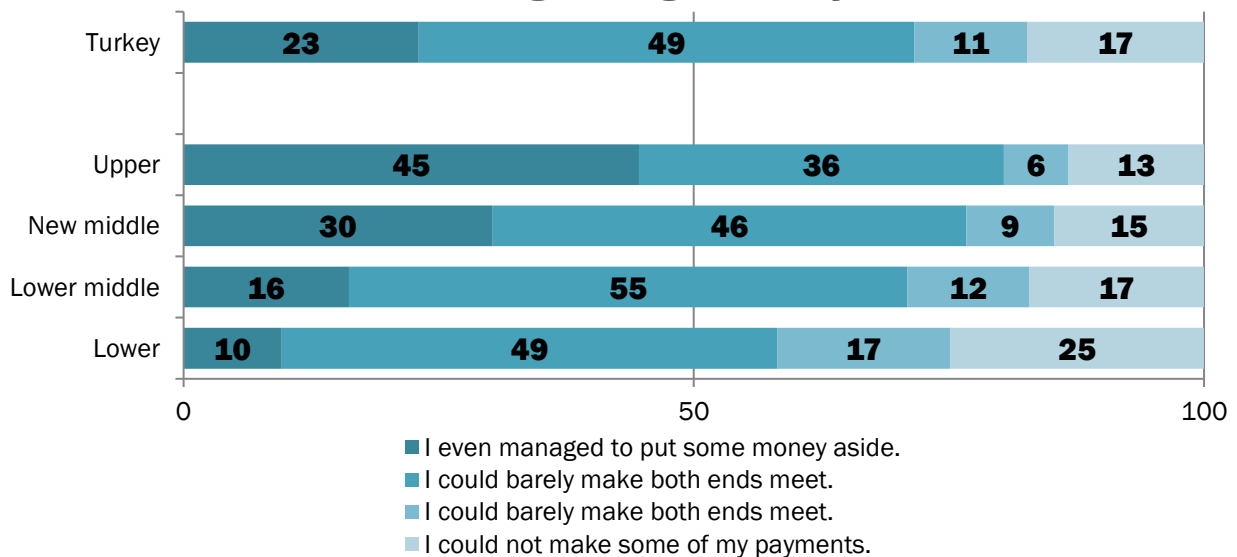
Then, what makes individuals feel that they have a higher level of economic well-being or that they are in economic distress? As we have previously mentioned, factors such as emotional moods, perceptions and expectations constitute the main parameters

of how individuals will use their economic means. In addition, according to the overall trend in Turkey, higher levels of well-being leads to lower tendency for depression and higher optimism in perceptions and expectations. In the remainder of this section, we will disassociate from the previous sections slightly, and we will focus on how the respondents would like to spend the money that they save, instead of making analyses based on demographic characteristics and other values.

In order to explore how the respondents would behave in case they are able to make savings, we directed them two straightforward questions. The first question aimed to understand what the respondents would do if they saved TRY 3,000-5,000. About one out of every three respondents stated that they would buy furniture/appliances, roughly one out of every four respondents expressed that they would spend the money for personal development and education, and more than 10 respondents indicated that they would take a short vacation.

What would you do if you saved/put aside TRY 3,000-5,000?

Category	Value
Appliances	31,8
Personal development, education	23,2
Short vacation	12,4
Furniture	9,4
Clothing	8,0
Technological products	7,1
Leisure (movie, theater, eat outside)	4,2
Hobbies	3,9
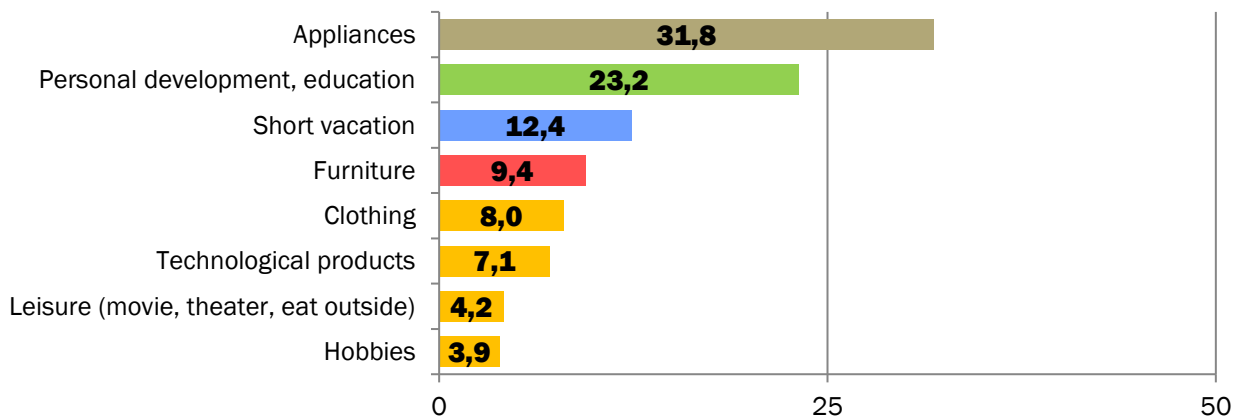
With the purpose to see the distribution of the responses by economic class, we took into account the most popular four responses so as to ensure statistical significance, and we grouped the other responses under the category of "other." The rate of the respondents who state that they would buy appliances is almost three times higher among the respondents who belong to the lower income group. Similarly, the rate of the respondents who would buy furniture is higher in the lower income group. Thus, we can suggest that the lower income households lack many of the basic necessities in a house. It is possible to observe a similar trend when we analyze the respondents who would spend the money on personal development and education. It is anticipated that the corresponding rate is higher in the lower income group whose members are less educated in comparison to the more educated upper income group. However, it is striking that the new middle income class includes the highest rate of the respondents who would spend the money for educational purposes. Finally, the exact opposite can be observed when it comes to the respondents who would like to spend their savings on a short vacation. In comparison to the lower income group, the rate of the respondents who state that they would take a short vacation is five times higher in the upper income group.

What would you do if you saved/put aside TRY 3,000-5,000?

	Personal development, education	Short vacation	Furniture	Appliances	Other
Turkey	23	12	9	32	23
Upper	19	27	5	18	31
New middle	27	13	7	29	25
Lower middle	21	10	12	34	23
Lower	25	5	10	45	14
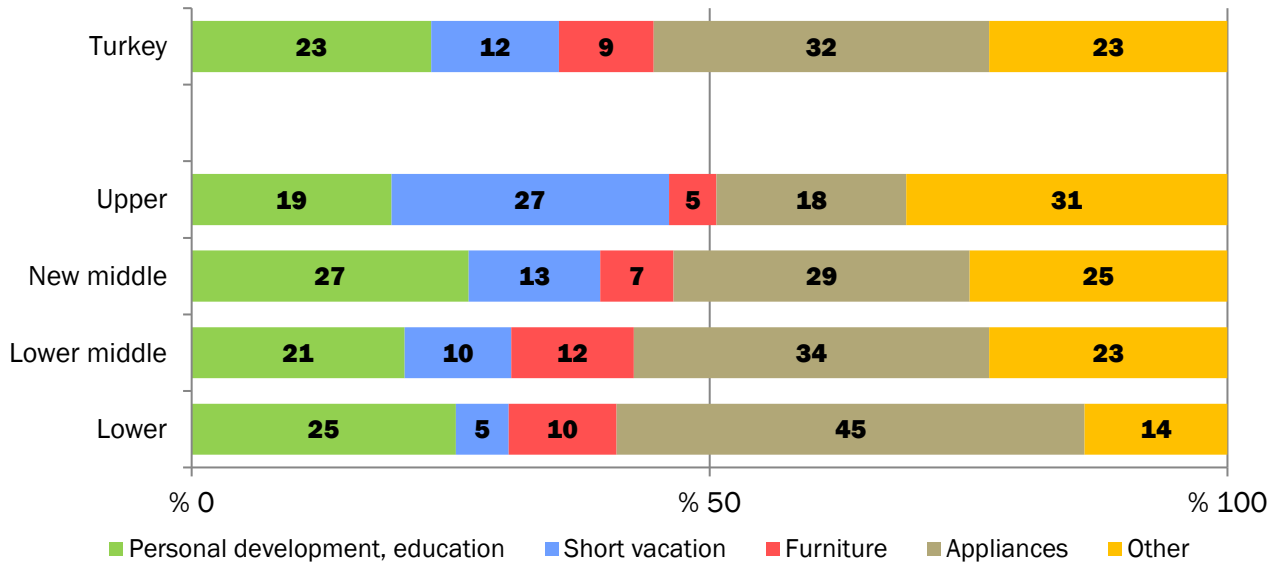
Except for furniture, gender does not have a considerable influence on the preferences of the respondents. The rate of women and men who express that they would buy appliances, take a short vacation, or invest in their personal development is quite close to each other. However, the rate of women who state that they would purchase furniture (12 percent) is double the men (6 percent).

Younger respondents (between 18-28), middle-aged respondents (between 29-43) and the respondents above 44 years of age indicate that they would take a short vacation at similar rates. The major difference is observed when it comes to the rate of respondents who would buy appliances and furniture. Clothing (15 percent) and technological products (14 percent) are more appealing to the respondents who are between 18-28 years of age.

Increased educational attainment level leads to a sharp decrease in the rate of those who state that they would buy appliances. Similarly, the rate of those who would buy furniture also decreases with higher educational attainment. On the other hand, the rate of those who would prefer to take a short vacation triples. At this point, it worth noting that educational attainment level does not influence the rate of the respondents who would spend their savings on personal development and education.

We will now analyze the responses to the same question by lifestyle clusters. The respondents who identify themselves as modern prefer a short vacation at higher rates, while appliances is a less popular choice among the modern. Personal development and education presents the same popularity in all lifestyle clusters.

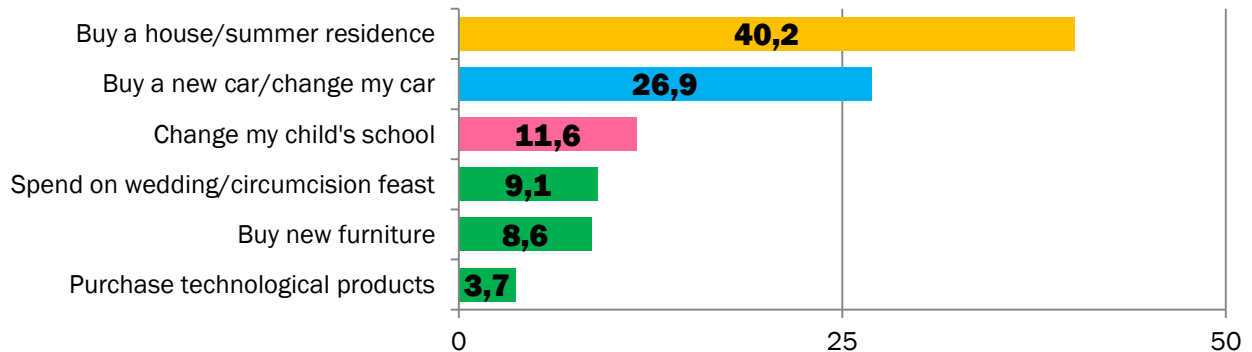## What would you do if you saved/put aside TRY 3.000-5.000?

	Personal development, education	Short vacation	Furniture	Appliances	Other
Turkey	23	12	9	32	23
Between 18 - 28	22	12	4	21	41
Between 29 - 43	27	11	10	32	20
Above 44	20	14	13	39	13
Below high school	21	9	12	43	15
High school	25	12	7	21	36
University	26	24	5	15	30
Modern	26	18	4	16	37
Traditional cons.	22	11	11	36	21
Religious cons.	24	9	12	42	14

%0   %50   %100

■ Personal development, education ■ Short vacation ■ Furniture ■ Appliances ■ Other
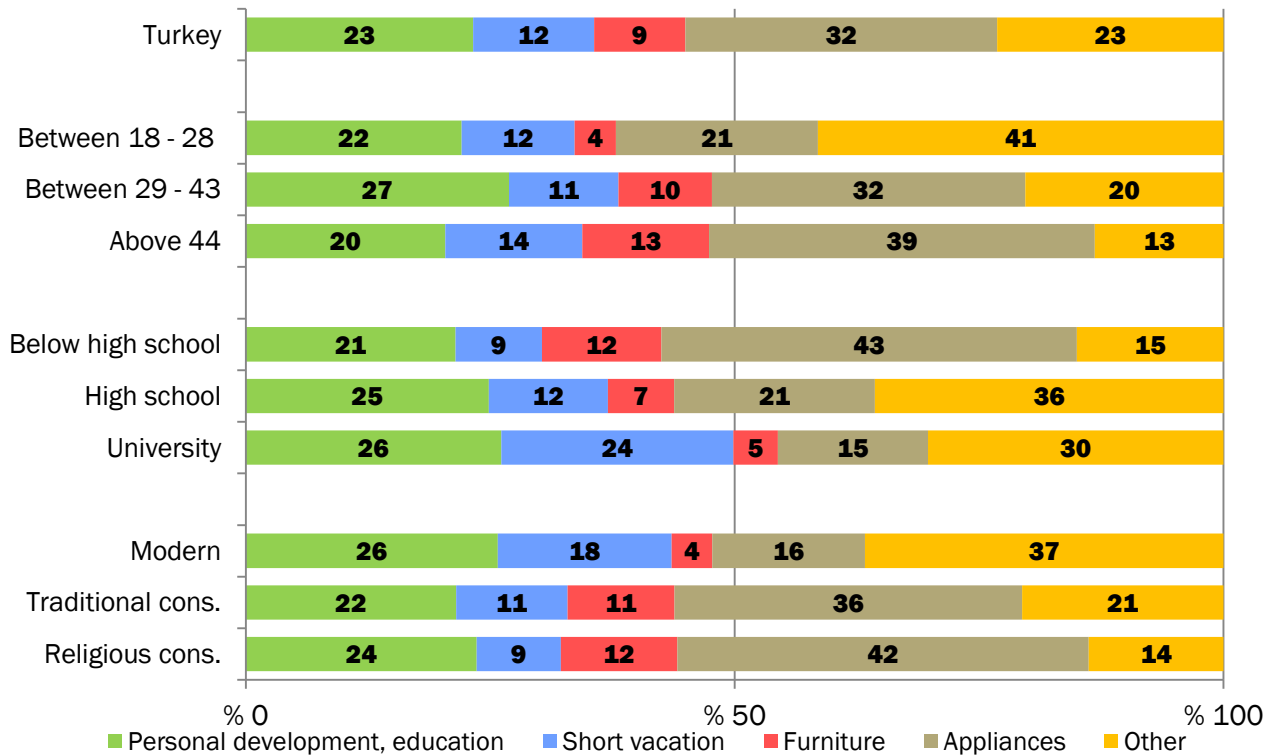
In light of these findings, we can draw several conclusions. Personal development and education are equally popular in different demographic groups and different lifestyle clusters. In summary, different segments of society in Turkey are in agreement on this issue. The greatest difference between different social groups is observed in the preference to spend on vacation and essential household items (i.e. appliances and furniture). The rate of the respondents who state that they would spend the money for their house decreases among younger, more educated and more modern individuals. Such an outlook may be a consequence of the fact that these respondents are not in need of such household essentials. Thus, the respondents who are older, less-educated and more conservative are more likely to make expenditures on household essentials such as appliances and furniture.

The second question we directed in order to reveal the respondents' behavior to understand what the respondents would do in the event they save/put aside 30 to 50 thousand Turkish liras. When the amount of money in question was increased by tenfold, the responses also changed considerably. Four out of every ten respondents express that they would buy a house or a summer residence; one out of every four respondents state that they would purchase a car, and one out of every ten respondents express that they would prefer to spend the money to change their children's school.
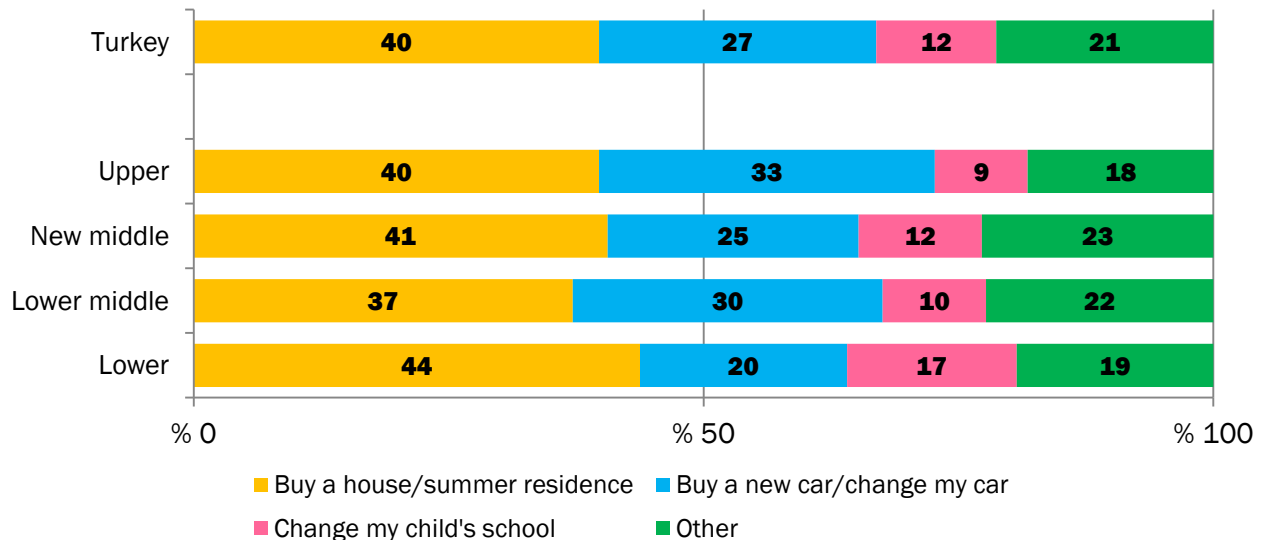
What would you do if you saved/borrowed TRY 30,000-50,000 in the coming year?

Response	Value
Buy a house/summer residence	40,2
Buy a new car/change my car	26,9
Change my child's school	11,6
Spend on wedding/circumcision feast	9,1
Buy new furniture	8,6
Purchase technological products	3,7

We will now take a look at how the distribution of the responses change with respect to economic income. In the graph below, we only presented the most popular three responses and combined the rest of the responses under "other". In response to this question, it looks like the difference between classes is eliminated when it comes to buying a house or a car. It is striking economic groups that are very different from each other aspire to own a house or a car. "I would change the school my child currently attends", which is preferred at a 7.5-point higher level among the lower income groups, constitutes the only exception to this outlook.

What would you do if you saved/borrowed TRY 30,000-50,000 in the coming year?

	Buy a house/summer residence	Buy a new car/change my car	Change my child's school	Other
Turkey	40	27	12	21
Upper	40	33	9	18
New middle	41	25	12	23
Lower middle	37	30	10	22
Lower	44	20	17	19

■ Buy a house/summer residence ■ Buy a new car/change my car
■ Change my child's school ■ Other

An in-depth analysis of the responses reveals the differences between women and men. It was not possible to observe a significant difference between women and men in the previous question that inquired about what the respondents would do in case they saved/put aside TRY 3,000-5,000. However, the significant increase in the amount of money in question led to changes in the respondents' preferences and to increased differences between women and men. Our analyses indicate that the rate of women who would change the school their child currently attends is 6 points higher

than men. In addition, the rate of women who would purchase a house/summer residence is 4 points higher. The most significant divergence can be observed in the rate of those who state that they would "buy a car". The rate of men who would like to buy a car is 10 points higher than that of women. Even so, one out of every five women express that they would like to purchase a car. On the other hand, roughly one third of men would like to buy a car.

When we analyze the responses by age, major differences can be observed between the preferences of the respondents below the age of 28 and those of the respondents above 29. As anticipated, very few of the respondents below the age of 28 state that they would "change the school their child currently attends", whereas the corresponding rate among the respondents above the age of 28 reached 13-14 percent level. The rate of younger respondents who would like to buy a car is about 40 percent. On the other hand, the corresponding rate drops below 20 percent among the respondents who are older than 44 years of age. Increased age leads to increased desire to buy a house/summer residence. Yet, one out of every three of the respondents below 28 state that they would like to buy a house/summer residence.

It can be observed that the rate of those who would like to change the school their child currently attends slumps by half among the more educated respondents. It is anticipated that the respondents who do not currently have adequate access to education opportunities are eager to spend any money they put aside to enable their child attend a better school. At this point, it is worth noting that increased educational attainment leads to an increase in the rate of those who would like to buy a car and to a decrease in the rate of the respondents who would like to purchase a house/summer residence.

Lifestyle clusters do not have a considerable effect on the respondents' eagerness to change their child's school. On the other hand, lifestyle clusters have an influence on the desire to buy a car or a house. The rate of the respondents who state that they would like to buy a car is higher among the modern, while conservative respondents prefer buying a house/summer residence.

What would you do if you saved/borrowed TRY 30,000-50,000 in the coming year?

	Buy a house/summer residence	Buy a new car/change my car	Change my child's school	Other
Turkey	40	27	12	21
Female	42	21	14	22
Male	38	33	9	21
Between 18 - 28	32	40	5	23
Between 29 - 43	42	27	15	17
Above 44	44	18	13	24
Below high school	45	18	14	24
High school	35	35	10	20
University	34	43	7	16
Modern	33	36	11	19
Traditional cons.	43	25	11	21
Religious cons.	43	21	14	23

■ Buy a house/summer residence   ■ Buy a new car/change my car
■ Change my child's school   ■ Other
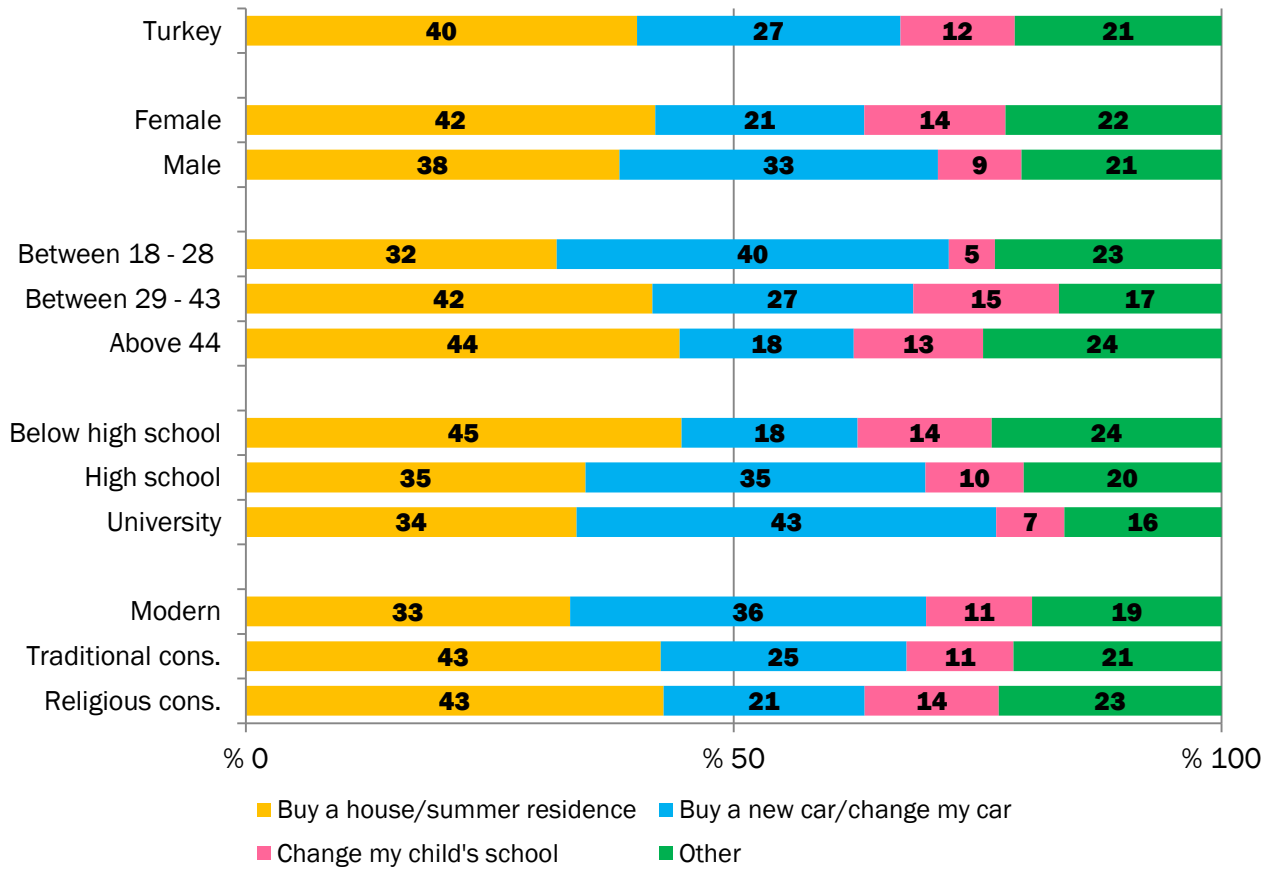
In light of these findings, we can reach the following conclusion: The respondents who are younger, more educated or more modern are more likely to buy a car, while the respondents who are older, less educated or more conservative would prefer buying a house. As we mentioned in our previous researches, such an inclination cannot be justified solely by the fact that individuals aspire to possess something they do not currently have. For instance, it is not possible to suggest that the respondents who do not own a car would like to buy a car and those who do not own a house would like to buy a house. In contrary, compared to the young and the more modern, a higher rate of the respondents who are older and more conservative tend to spend their savings to buy a house. Thus, we can suggest that a house is perceived as an investment instrument rather than a basic necessity. The respondents who are younger and more modern are more eager to spend their savings on buying a car due to their lifestyle.

3. RESEARCH ID

3.1. Overall Description of the Survey

The surveys that this report is based on was conducted by KONDA Research and Consultancy Limited (KONDA Araştırma ve Danışmanlık Ltd. Şti.).

The field survey was conducted on 5-6 December 2015. This report presents the political trends, preferences and profiles of the adult population above the age of 18 in Turkey, within the dates of the field survey.

The survey is designed and conducted with the purpose to determine and to monitor trends and changes in the preferences of respondents who represent the adult population above the age of 18 in Turkey. The margin of error of the survey is +/- 1.7 at 95 percent confidence level and +/- 2.3 at 99 percent confidence level.

3.2. The Sample

The sample was selected through stratification of the data on population and educational attainment level of neighborhoods and villages based on the Address Based Population Registration System (ADNKS), and the results of the 2011 General Elections in neighborhoods and villages.

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

Within the scope of the survey, 2521 respondents were interviewed face-to-face in 153 neighborhoods and villages of 101 districts - including central districts - of 27 provinces.

Provinces visited	27
Districts visited	101
Neighborhoods/villages visited	153
Number of respondents	2521

Among the 18 surveys conducted in each neighborhood, quotas on age and gender were enforced.

Age group	Female	Male
Between 18-28	3 respondents	3 respondents
Between 29-44	3 respondents	3 respondents
44 and above	3 respondents	3 respondents

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

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

	Survey location	Rural	Urban	Metropolitan	Total
1	İstanbul			15.7%	15.7%
2	Western Marmara	2.1%	3.5%		5.7%
3	Aegean	4.1%	6.4%	5.2%	15.7%
4	Eastern Marmara	1.4%	2.8%	5.7%	9.9%
5	Western Anatolia	0.7%		9.7%	10.4%
6	Mediterranean	3.6%	3.0%	6.4%	13.0%
7	Central Anatolia	1.4%	2.1%	1.4%	5.0%
8	Western Black Sea	2.9%	3.6%		6.4%
9	Eastern Black Sea	1.4%	2.1%		3.5%
10	Northeastern Anatolia	1.4%			1.4%
11	Middle Eastern Anatolia	1.4%	2.1%		3.6%
12	Southeastern Anatolia	2.1%	3.5%	4.1%	9.7%
	Total	22.5%	29.2%	48.2%	100.0%

4. FREQUENCY TABLES

4.1. Profile of the Respondents

Gender	Percentage
Female	50.9
Male	49.1
Total	100.0

Age	Percentage
Between 18-28	25.9
Between 29-43	34.9
44 or above	39.2
Total	100.0

Educational attainment level	Percentage
Illiterate	5.7
Literate without degree	2.8
Primary school degree	32.2
Secondary school degree	15.5
High school degree	26.7
Undergraduate degree	15.7
Masters/PhD	1.4
Total	100.0

Birthplace (region)	Percentage
İstanbul	5.4
Western Marmara	5.5
Aegean	13.7
Eastern Marmara	7.6
Western Anatolia	7.5
Mediterranean	11.7
Central Anatolia	7.5
Western Black Sea	9.2
Eastern Black Sea	7.7
Northeastern Anatolia	3.8
Middle Eastern Anatolia	5.4
Southeastern Anatolia	13.2
Abroad	1.7
Total	100.0

Employment status	Percentage
Civil servant	6.2
Private sector	6.0
Worker	9.3
Small retailer	7.5
Merchant/businessman	1.0
Self-employed	2.0
Farmer, agriculturist, stock breeder	3.7
Employed, other	5.2
Retired	11.7
Housewife	32.5
Student	9.8
Unemployed	4.1
Disabled	1.1
Total	100.0

Lifestyle cluster	Percentage
Modern	27.0
Traditional conservative	46.1
Religious conservative	26.9
Total	100.0

Head cover status	Percentage
No head cover	28.6
Headscarf	51.0
Turban	7.2
Chador	0.6
Bachelor male	12.6
Total	100.0

Ethnic identity	Percentage
Turkish	82.2
Kurdish	11.8
Zaza	1.1
Arab	2.0
Other	3.0
Total	100.0

Religion / sect	Percentage
Sunni Muslim	93.3
Alevi Muslim	5.0
Other	1.7
Total	100.0

Piety	Percentage
Non-believer	3.6
Believer	22.9
Religious	61.1
Pious	12.5
Total	100.0

TV channel preference for watching the news	Percentage
Does not watch	7.0
ATV	20.3
CNNTürk	2.4
Fox TV	17.0
Habertürk	2.6
Halk TV	2.3
İMÇ	3.8
Kanal 7	2.0
Kanal D	7.8
Kanaltürk	0.3
NTV	2.7
Roj/Nuçe/Sterk	0.4
Samanyolu	0.9
Show TV	4.1
Star	4.6
TRT	13.0
Ulusal	0.8
Local channels	1.6
Other channels	6.3
Total	100.0

Monthly household income	Percentage
TRY 700 or less	6.3
TRY 701 - 1200	27.4
TRY 1201 - 2000	31.5
TRY 2001 - 3000	20.3
TRY 3001 - 5000	11.4
TRY 5001 or more	3.0
Total	100.0

Type of housing	Percentage
Squatter / apartment without external plastering	5.7
Single family, traditional house	36.8
Apartment	52.5
Housing complex	4.7
Very luxurious apartment, villa	0.2
Total	100.0

Household size	Percentage
1-2 person(s)	20.1
3-5 people	63.8
6-8 people	13.2
9 people or more	2.9
Total	100.0

4.2. Moods

I was in depression, I felt depressed	Percentage
None or almost none of the time	40
Some of the time	41.7
Most of the time	12.3
All or almost all of the time	5.9
Total	100

My sleep was restless.	Percentage
None or almost none of the time	41.6
Some of the time	40.4
Most of the time	13.4
All or almost all of the time	4.6
Total	100.0

I felt happy.	Percentage
None or almost none of the time	10.0
Some of the time	40.6
Most of the time	34.5
All or almost all of the time	14.9
Total	100.0

I felt lonely.	Percentage
None or almost none of the time	50.1
Some of the time	35.8
Most of the time	9.1
All or almost all of the time	5.1
Total	100.0

I enjoyed life.	Percentage
None or almost none of the time	13.6
Some of the time	43.1
Most of the time	31.0
All or almost all of the time	12.3
Total	100.0

I felt sad.	Percentage
None or almost none of the time	25.7
Some of the time	56.0
Most of the time	14.1
All or almost all of the time	4.2
Total	100.0

I could not get going	Percentage
None or almost none of the time	44.4
Some of the time	39.3
Most of the time	11.3
All or almost all of the time	5.0
Total	100.0

5. GLOSSARY of TERMS

All findings in Barometer reports are based on answers to the questions directed to respondents who were interviewed face-to-face in field surveys. Some questions and response options are then used in the rest of the report in short or simplified form. For example, the respondents who respond to the question on how religious they see themselves as "a person who is a believer, but does not fulfill religious requirements", are shortly identified as "believers" in the report. This glossary is prepared for both the readers who receive the report for the first time and the readers who need further clarification on the terms. The first table provides a list of the terms and their explanations, and the following tables list the questions and response options which establish the basis for these terms.

Term	Definition
Alevi Muslim:	A person who identifies his/her religion/sect as Alevi Muslim
Lower middle class:	Households with an income per capita in the 60 percent segment but which do not own a car
Lower class:	Households whose income per capita is in the lowest 20 percent segment
Arab:	A person who identifies his/her ethnic origin as Arab
Headscarf:	A woman who does not cover her head or a man with a headscarf or whose spouse does not cover her head with a headscarf
Chador:	A woman who wears chador or a man whose spouse wears a chador
Religious:	A person who tries to fulfill the requirements of the religion
Religious conservative:	A person who identifies his/her lifestyle as religious conservative
Traditional conservative:	A person who identifies his/her lifestyle as traditional conservative
Ideological:	A person who states a party as the closest to his/her political view
Believer:	A person who believes in the requirements of the religion, but does not fulfill them completely
Non-believer:	A person who does not believe in the requirements of the religion
Urban area:	Settlements with a population of more than 4000 (differs from the official definition)
Rural area:	Settlements with a population of less than 4000 (differs from the official definition)
Kurdish:	A person who identifies his/her ethnic origin as Kurdish
Leader follower:	A person who states that he/she trusts in or favors the leader of a certain party

Metropolitan:	Settlements which are located within the integrated boundaries of the most crowded 15 cities (differs from the official definition)
Modern:	A person who identifies his/her lifestyle as modern
No cover:	A woman who does not cover her head or a man whose spouse does not cover her head
Non-partisan:	A person who states that none of the parties represent him/her
Pious:	A person who fulfills the requirements of the religion completely
Late-decider:	A person who states that he/she makes a decision based on the election campaigns
Sunni Muslim:	A person who identifies his/her religion/sect as Sunni Muslim
Partisan:	A person who states that he/she/they always vote for that party
Turban:	A woman who wears a turban or a man whose spouse wears a turban
Turkish:	A person who identifies his/her ethnic origin as Turkish
Upper class:	Households whose income per capita is in the highest 20 percent segment
New middle class:	Households whose income per capita is in the 60 percent segment and which own a car
Zaza:	A person who identifies his/her ethnic origin as Zaza

5.1. Questions and response options which establish the basis for the terms:

Which of the three lifestyle clusters below do you feel you belong to?
Modern
Traditional conservative
Religious conservative

Do you cover your head or does your spouse cover her head when going out of your home? How do you cover your head?
No head cover
Headscarf
Turban
Chador
Bachelor male

We are all citizens of the Turkish Republic, but we may have different ethnic origins; which identity do you know/feel that you belong to?

Turkish

Kurdish

Zaza

Arab

Other

Which religion or sect do you feel you belong to?

Sunni Muslim

Alevi Muslim

Other

Which of the below describes you in terms of piety?

A person who does not believe in the requirements of the religion

A person who believes in the requirements of the religion, but does not fulfill them completely

A person who tries to fulfill the requirements of the religion

A person who fulfills the requirements of the religion completely

Which of the reasons below influence/determine your political preferences?

I/we always vote for that party.

It is the party closest to my political view.

I trust/favor its leader.

None of these parties represent me.

I make a decision based on the election campaigns.

Total

Settlement Code (Data obtained from the sample)

Rural

Urban

Metropolitan

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

Lower class

Lower middle class

New middle class

Upper class