KONDA

Barometer

THEMES

The Impact of Mass Communication Tools and Social Media

April 2016

KONDA

ARAŞTIRMA VE DANIŞMANLIK

CONTENTS

1. EXECUTIVE SUMMARY

The survey which forms the basis of this report was conducted on 2-3 April 2016 by face-to-face interviews with 2544 individuals in 147 neighborhoods and villages of 96 districts including the central districts of 28 provinces.

THEME OF THE MONTH: The Effect of Mass Media and Social Media

In this month's survey in which we investigated the Internet and social media use in Turkey, we examined the TV channel, newspaper and social media preferences of individuals, their means for accessing the Internet, the time they spend on the Internet, their online habits and shopping preferences, then we connected these with daily politics by analyzing their opinions on freedom of expression, access blocks and their damage on the Internet.

We observed a chicken and egg situation in our findings. The channels individuals use as news source shape their opinion on daily politics and Internet censorship whereas their interpretation of daily politics and Internet censorship shape their choice of media for communication and obtaining the news. The main reason for this is that factors such as socio-economic situation and demographics that influence an individual's access to the Internet are at the same time factors that influence the individual's political inclinations.

Even though Turkey ranks 14th among 201 countries in the world with a total of 46 million Internet users, it ranks 82nd in terms of Internet penetration at a rate of 58 percent (this rate is 72 percent among the adult population). The main reason for this is that different social masses are positioned at different ends about access to the Internet. For instance, we observe that the groups at the age range of 18-28, students, high school and university graduates, private sector employees and those who state that they have a modern lifestyle almost entirely use the Internet. However, women, retired people, those at the age of 44 or above, those with an education level below high school and those with traditional conservative or religious conservative lifestyles remain lower than the average in Turkey at varying rates.

Of course, there are smaller socio-economic or demographic groups within these social groups. For instance, even though women's access to the Internet is lower than that of men, the rate of access to the Internet among educated women is almost equal to that of educated men. Similarly, the rate of access to the Internet among people with lower income level is lower than those with higher income level however this rate is higher than the average in Turkey among those people with lower incomes who define their lifestyles as modern. Therefore, in addition to socio-economic and demographic criteria, we also classified the interviewees in terms of the media channels they use. Accordingly, we determined the existence of a cluster of 17 percent who only watch TV, another cluster of 31 percent who never read newspapers and a cluster of 28 percent who do all (watch TV, have social media accounts and read newspapers). These groups differ in terms of their approach to daily politics and Internet censorship in general, yet there are significant transitions and breakdowns among them. At the current stage, it is difficult to claim that the

Internet and social media threaten the dominance of television. Similarly, there is a new group that uses only Facebook among those social media users who generally have high levels of education and welfare, who are young and have modern lifestyle. These people have newly been discovering the Internet whereas older, more religious, more conservative people currently use the Internet at lower rates. Finally, we observed that newspaper readership is distinctive about an individual's political stance and his/her approach to freedoms on the Internet. Accordingly, the cluster of 28 percent who watch TV, read newspapers and also have social media accounts think differently about daily politics and Internet censorship compared to the cluster of 31 percent who do not read newspapers but watch TV and have social media accounts.

2. THE IMPACT OF MASS COMMUNICATION TOOLS AND SOCIAL MEDIA

The impact of mass communication tools and the proliferation of social media platforms is a topic we consistently monitor in the KONDA Barometers. As our subscribers would know very well, we always include TV channel preferences in our reports, since they serve as a deciding factor in shaping opinions on current developments and political preferences. We occasionally ask questions that are designed to help us understand the relationship of society with social media. We also elaborate on social media use as part of a theme in order to carry out more extensive and detailed evaluations. And most recently, we have decided to elaborate on the topic of "The impact of mass communication tools", which we had included in the April'14 Barometer, as our monthly theme in this month's report.

The social space shared by mass communication tools such as TV and newspapers, and social media has become very dynamic lately. As it can be seen in the findings we will present, the use of internet and social media has come to dominate the space that has been occupied by traditional media until recently. In our report in April'14, we pointed out that social media is not very conducive for propaganda purposes in comparison to traditional mass communication tools, as it is not as unidirectional as TV. As a result, we described the emergence of social media as a news source, as a change that holds the potential transform change the political outlook.

In this report, we have endeavored to understand the effects of this transformation by revisiting this theme after a span of two years. In this sense, we have tried to determine the mass communication channels preferred by the respondents, as well as their relationship with social media in all its aspects. We have learned the environments in which they access the internet, the social media channels they prefer and the extent they use the internet for shopping, in all its different dimensions. In addition to all these, we have also measured how the respondents view social media through a political perspective.

When take all these parameters into consideration, we observe that TV remains to be the most important mass communication tool and unidirectional propaganda tool. Furthermore, we are also able to detect that social media is developing with a remarkable momentum and that this development intensifies towards the base. More importantly, as social media penetrates all social clusters, instead of a particular segment of society, not only society itself, but user profiles are changing.

2.1. Penetration of the Internet and the Actual Status of Social Media Use

Within the scope of this research, some of the issues we measure about mass media tools and social media use are issues that are measurable and digitally identifiable.

However, we have also ascertained that it is very hard to obtain standard data sets due to a variety of reasons, including the fact that data may pertain to different years, the differences between active and registered users, and the rapid evolution of the internet and social media. Consequently, before endeavoring on internet and social media users and TV viewers, based on April'16 Barometer, we will take a quick look at the figures for the internet and social media use in the world and in Turkey. The data presented has been compiled from different online sources listed below.

* http://www.internetlivestats.com/internet-users-by-country/
* http://wearesocial.com/
* http://ecommercenews.eu/ecommerce-in-turkey-reaches-e6-34-billion/
* http://www.somera.com.tr/tr/
* http://www.tuik.gov.tr

The **daily** number of mobile phones sold throughout the world is **3 to 5 million** while the daily number of tablets sold in the world is about **half a million.**

World internet usage

According to 2016 data, **3.4 billion** of the world's population (**7.4 billion**) use the Internet.

In Turkey, the annual smart phone importation amount is over **15 billion dollars.**

Turkey internet usage

In Turkey, according to 2015 TURKSTAT data, almost **70 percent of the households** have Internet access which makes about **45 million** of the population in Turkey.

It is claimed that the number of active social media users is more than **2 billion** worldwide.

Another significant rate is that the total number of those who use social media through mobile devices is close to **2 billion.**

In other words, the incredible increase in the number of Internet and social media users may be attributed to mobile use in general.

There are **40 million** active Facebook users in Turkey.

Facebook

Facebook was established 12 years ago as the first social media platform with expanded use, and has more than **1.6 billion users** as of 2016 according to the numbers declared by the company, whereas **Instagram and Whatsapp**, both owned by Facebook have **400 million** users and **900 million** users, respectively.
Twitter, which is an independent app, has **350 million** users.

%50
Penetration rate in Turkey*

*In 2014, the US ranked first with a user rate of 52 percent.

During the same period, the penetration rate of Facebook in Turkey in general was 42 percent.

Therefore, real data shows that **the rate of use of Facebook in Turkey is quite high.**

Instagram was established in 2010 and sold to Facebook on 2012. It is claimed to be the most rapidly progressing social media as the number of users of Instagram already exceeded that of Twitter which was created much earlier.

Instagram

There are **18 million** Instagram users in Turkey.

27%
73%

The Barometer data shows that 27 percent of the population above age 18 use Instagram.

61%

39%

Among the Internet users, **the rate of activity** in Twitter is indicated as 61 percent in Turkey*

* Turkey ranks third in the list topped by Indonesia whereas Saudi Arabia comes second.

The rate drops to 28 percent in the US (Statistica).

Twitter

17%
83%

There are **16 million** users in Turkey.

The Barometer data shows that 17 percent of the population above age 18 use Twitter.*

*According to this data there are more than 10 million adult Twitter users. The gap between this rate and the rate of 16 million accounts according to real data might be the result of users below age 18, those who have more than one account and robotic accounts.

According to figures for 2016 obtained from the internetlivestats[1] web site, Turkey ranks 14th in the world with over 46 million internet users. However, when we take a look at the figures on the basis of penetration, or in other words, the ratio of internet users to the overall population, Turkey slumps to 82th place. The graph below provides the opportunity to compare the two rankings.

Penetration rate	World rank		Number of users
% 52	94	CHINA 1	721.434.547
% 35	127	INDIA 2	462.124.989
% 89	20	U.S. 3	286.942.362
% 66	64	BRAZIL 4	139.111.185
% 91	18	JAPAN 5	115.111.595
% 71	55	RUSSIA 6	102.258.256
% 46	106	NIGERIA 7	86.219.965
% 88	24	GERMANY 8	71.016.605
% 93	12	U.K. 9	60.273.385
% 45	109	MEXICO 10	58.016.997
% 86	27	FRANCE 11	55.860.330
% 20	151	INDONESIA 12	53.236.719
% 52	95	VIET NAM 13	49.063.762
% 58	82	TURKEY 14	46.196.720
% 44	113	PHILIPPINES 15	44.478.808
% 86	28	S. KOREA 16	43.274.132
% 66	67	ITALY 17	39.211.518
% 49	100	IRAN 18	39.149.103
% 82	34	SPAIN 19	37.865.104
% 18	159	PAKISTAN 20	34.342.400
% 89	21	CANADA 21	32.120.519
% 33	129	EGYPT 22	30.835.256
% 69	58	ARGENTINA 23	30.359.855
% 43	116	THAILAND 24	29.078.158
% 52	96	S. AFRICA 25	28.580.290
% 72	51	POLAND 26	27.922.152
% 57	87	COLOMBIA 27	27.664.747
% 13	167	BANGLADESH 28	21.439.070
% 45	110	KENYA 29	21.248.977
% 69	61	MALAYSIA 30	21.090.777
% 65	71	SAUDI ARABIA 31	20.813.695
% 85	29	AUSTRALIA 32	20.679.490
% 58	86	MOROCCO 33	20.068.556
% 44	112	UKRAINE 34	19.678.089
% 58	84	VENEZUELA 35	18.254.349
% 94	9	NETHERLANDS 36	15.915.076
% 51	98	UZBEKISTAN 37	15.453.227
% 78	41	CHILE 38	14.108.392
% 41	121	PERU 39	13.036.965
% 58	83	ROMANIA 40	11.236.186
% 26	139	SUDAN 41	10.886.813
% 89	22	BELGIUM 42	10.060.745
% 56	89	KAZAKHSTAN 43	9.961.519
% 88	23	CZECH REP. 44	9.323.428
% 93	10	SWEDEN 45	9.169.705

Internet penetration rate in Turkey: **58%** World rank among 201 countries: **82**

Number of internet users in Turkey: **46,196,720** World rank among 201 countries: **14**

The graph clearly reveals that Turkey promises a big potential for those who view the internet as an international market because compared to countries such as Sweden, UK and France, which have a rate of internet penetration above 90 percent, Turkey is not a saturated country in terms of internet penetration at the moment.

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[1] http://www.internetlivestats.com/internet-users-by-country/

2.2. Mass Communication Tools and Internet Use According to Research Data

We have directed many questions to the respondents we have interviewed for the April'16 Barometer in order to understand their relationship with the TV, the newspaper, the radio, the internet and social media. As it will be seen in the following sections of the report, the data on internet use provided by other sources coincide with the findings of our research to a great extent.

According to our findings, among those above the age of 18, 93 percent watch TV, 73 percent use the internet and around 40 percent read the newspaper. All these rates are provided together in the graphic representation below, along with the intersections of these clusters.
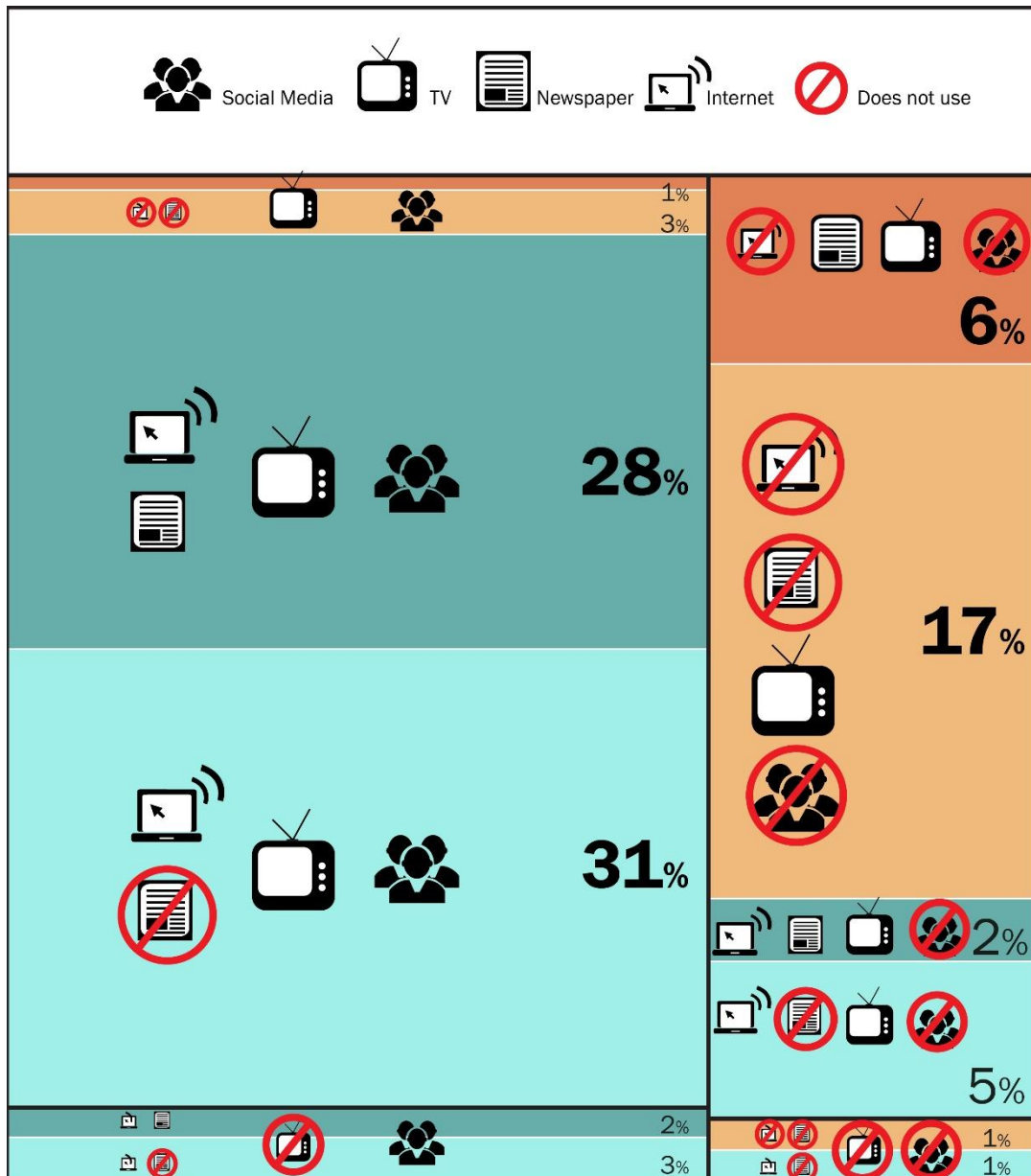
93 percent of those above the age of 18 have a TV channel preference. On the other hand, 68 percent also report that they use or are member of a social media channel. Accordingly, there is five percent who use the internet, but do not interact with social media. The rate of those who state that they do not use the internet, as of April'16, is around 27 percent. This rate was 41 percent according to our survey results two years ago.

When we take a look at the intersection of sets, we observe that the rate of those who watch TV, read the newspaper and use social media at the same time is 28 percent. On the other hand, nearly one third (31 percent) is a social media user, and TV viewer, but is not a newspaper reader. In the meantime, the rate of those who do not go online nor read the newspaper, but watch TV is 17 percent. These largest three groups also make up the main three groups in society, with different profiles.

The one percent who states that they live without a relationship with any mass communication tools or social media is also noteworthy.

The main point that attracts the attention about the use of mass communication tools is that although social media has become widespread, TV remains as the main medium used by the great majority of people. The rate of those who say that they do not watch TV does not exceed seven percent, while at most five percent is a social media user, but do not watch TV. We also understand that TV is a very effective communication tool from the fact that 61 percent of the people first refer to it as the medium to receive the news when they hear about a breaking news story.

However, let's first take a look how these rates change by different demographic groups;

- ✓ The first conspicuous finding is about women: Generally one fourth of the women above the age of 18, and one third of housewives only watch TV.
- ✓ The parameter that affects only watching TV the most is age. We may explain the fact that the retired and widowers are highly attached to the TV by this predicament.
- ✓ Using all of the media at the same time seems to be related to the level of income and educational attainment level.
- ✓ Young people use all of the media at the same time at a much higher rate than the old.
- ✓ Those living in rural areas are more likely to be attached to only watching TV than those living in urban and metropolitan areas, but this difference is actually a lot less than anticipated. At least half of those living in rural areas are engaged with the internet and social media use.
- ✓ It is also remarkable that 41 percent of the students use all of the media, including newspapers. Even among the white-collar employees and civil servants this rate only reaches 49 percent.

2.2.1.   Traditional and social media preferences

Which social media channels do you use?
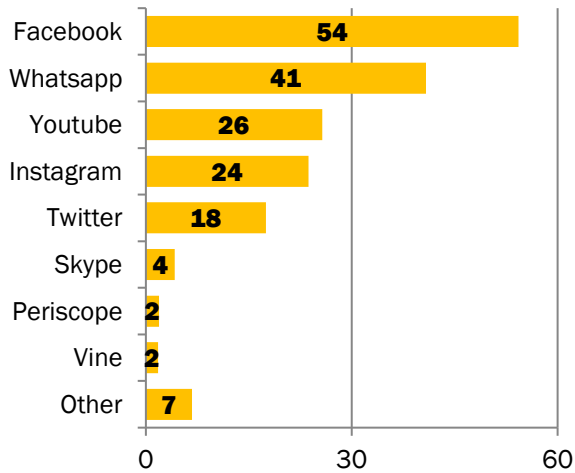
Channel	Value
Facebook	54
Whatsapp	41
Youtube	26
Instagram	24
Twitter	18
Skype	4
Periscope	2
Vine	2
Other	7

Which newspaper do you read?

Newspaper	Value
Posta	9
Sözcü	6
Sabah	6
Hürriyet	6
Milliyet	3
Cumhuriyet	3
Habertürk	2
Other	15
Does not read	50

Which TV channels do you prefer when you turn the TV on?

Channel	Value
ATV	15
Kanal D	13
Fox TV	11
Star	10
Show TV	10
TRT	9
TV8	5
Kanal 7	3
A Haber	3
Sports channels	3
NTV	2
CNN Turk	2
Documentary channels	2
Other	9
Does not watch	3
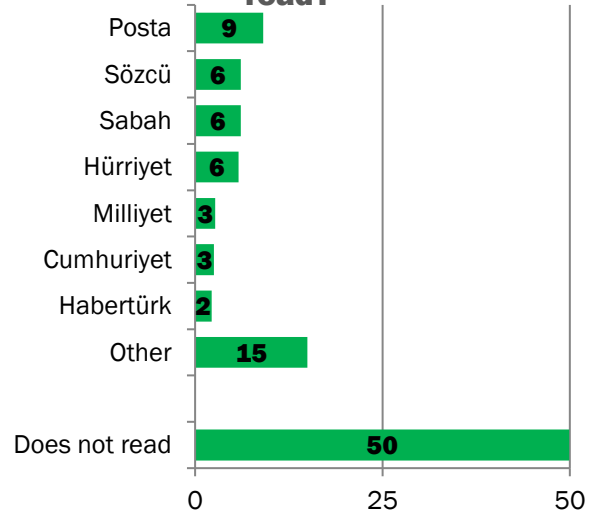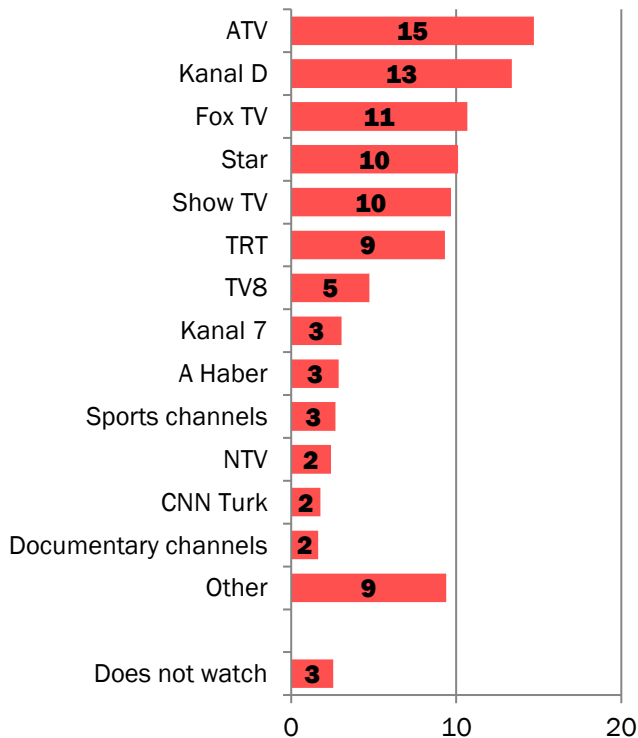
Which TV channel do you prefer to watch the news?

Channel	Value
Fox TV	19
TRT	14
ATV	13
Kanal D	7
A Haber	7
Star	5
Local channels	4
Show TV	4
NTV	4
CNN Turk	3
Kanal 7	3
Haberturk	3
Halk TV	2
IMC TV	2
Other	7
Does not watch	4

Relationship with mass communication tools

		TV only	TV + Newspaper	TV + internet/social media	TV + newspaper + internet/social media	Internet only	Other options
	Turkey	17	6	31	28	8	11
Gender	Female	23	5	31	22	7	12
	Male	10	7	32	33	9	9
Place of Residence	Rural	22	7	31	19	8	13
	Urban	18	5	33	28	9	8
	Metropolitan	14	6	31	31	8	11
Age	18 - 28	4		43	37	12	4
	29 - 43	10	3	40	32	6	8
	44 or above	31	13	15	17	6	18
Educational Attainment	Below high sch.	28	9	26	16	6	14
	High school	3	3	40	39	8	7
	University	2	2	32	45	13	6
Monthly Household Income	TRY 700 or less	34	8	16	18	13	11
	TRY 701 - 1200	28	8	28	11	7	18
	TRY 1201 - 2000	20	7	32	23	6	12
	TRY 2001 - 3000	11	6	36	32	8	7
	TRY 3001 - 5000	5	4	29	49	6	6
	TRY 5001 or more	4	3	30	48	11	3

Legend:
- TV only
- TV + Newspaper
- TV + internet/social media
- TV + newspaper + internet/social media
- Internet only
- Other options

Relationship with mass communication tools

	TV only	TV + Newspaper	TV + internet/social media	TV + newspaper + internet/social media	Internet only	Other options
Turkey	17	6	31	28	8	11
Lifestyle Cluster						
Modern	3	3	31	47	10	6
Traditional cons.	19	7	33	22	7	12
Religious cons.	25	8	29	19	8	12
Marital Status						
Single	2	2	37	41	14	4
Engaged	3	3	44	41	8	3
Married	20	8	31	23	6	13
Widow	50	9	5	8	8	20
Divorced	15		22	52	11	
Employment Status						
Public officer	2		38	46	10	3
Private sector	2		33	49	11	4
Worker	8	3	43	34	2	10
Small retailer	7	7	37	36	6	6
Self-employed	4	4	33	31	19	9
Farmer	24	10	28	13	10	16
Retired	30	20	10	16	4	20
Housewife	31	5	31	13	5	15
Student			40	41	16	2
Unemployed	5	6	37	35	13	4

% 0   % 50   % 100

- 🟨 TV only
- 🟦 TV + Newspaper
- 🟥 TV + internet/social media
- 🟩 TV + newspaper + internet/social media
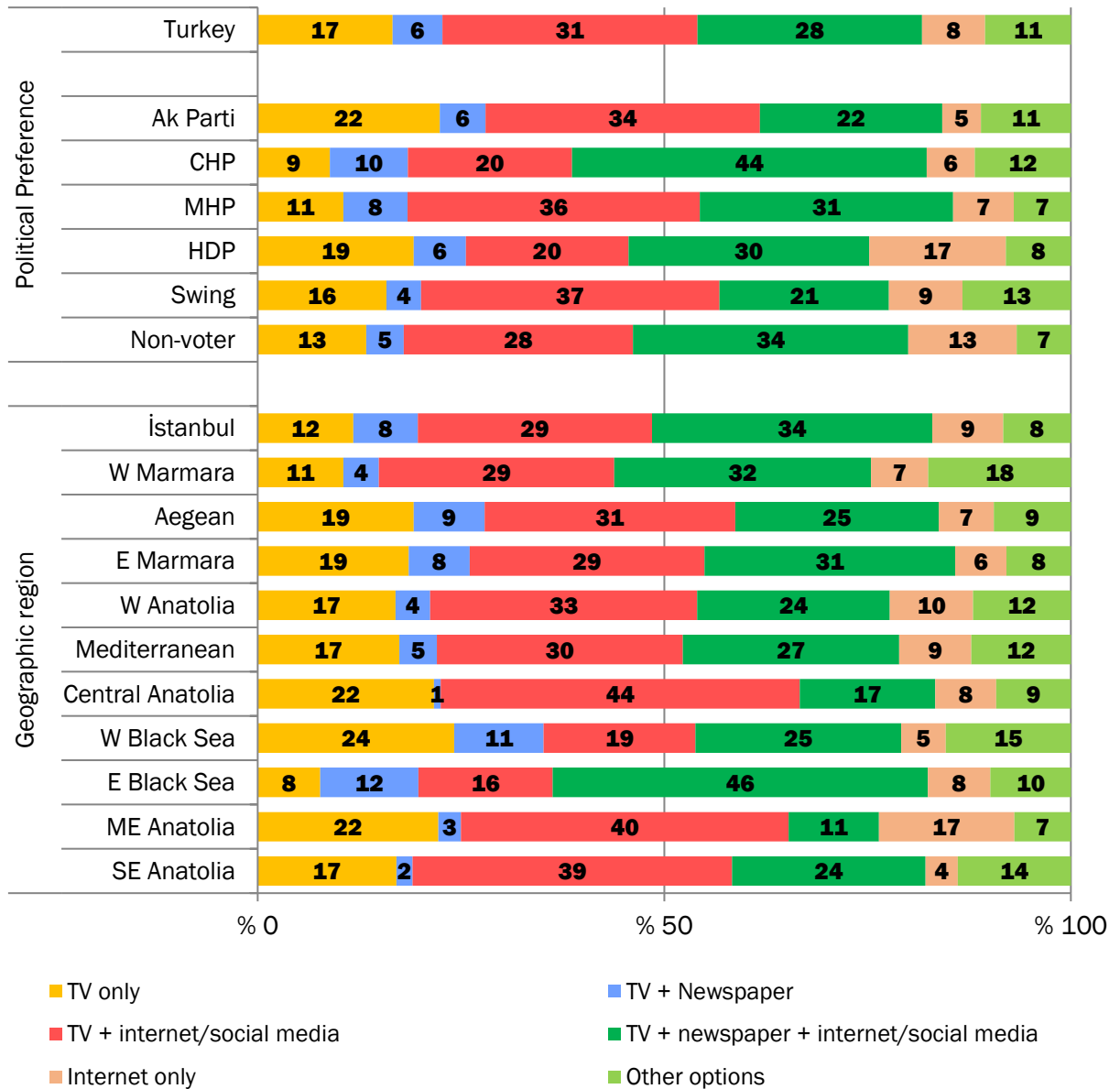- 🟧 Internet only
- 🟩 Other options

When we compare the relationship with mass communication tools and social media by political preference, we do not come across a remarkable differentiation. Ak Parti voters appear to be more distanced to the internet and more closely affiliated with TV and newspapers than CHP voters. Nevertheless, nearly two thirds are listed as internet users.

When we analyze these clusters by place of residence, we do not come across dramatic differences. Not only is there no region where people only have a unidirectional

relationship with TV or newspapers, but also there are no regions only composed of internet users.

Relationship with mass communication tools

		TV only	TV + Newspaper	TV + internet/social media	TV + newspaper + internet/social media	Internet only	Other options
	Turkey	17	6	31	28	8	11
Political Preference	Ak Parti	22	6	34	22	5	11
	CHP	9	10	20	44	6	12
	MHP	11	8	36	31	7	7
	HDP	19	6	20	30	17	8
	Swing	16	4	37	21	9	13
	Non-voter	13	5	28	34	13	7
Geographic region	İstanbul	12	8	29	34	9	8
	W Marmara	11	4	29	32	7	18
	Aegean	19	9	31	25	7	9
	E Marmara	19	8	29	31	6	8
	W Anatolia	17	4	33	24	10	12
	Mediterranean	17	5	30	27	9	12
	Central Anatolia	22	1	44	17	8	9
	W Black Sea	24	11	19	25	5	15
	E Black Sea	8	12	16	46	8	10
	ME Anatolia	22	3	40	11	17	7
	SE Anatolia	17	2	39	24	4	14

Legend:
- TV only
- TV + Newspaper
- TV + internet/social media
- TV + newspaper + internet/social media
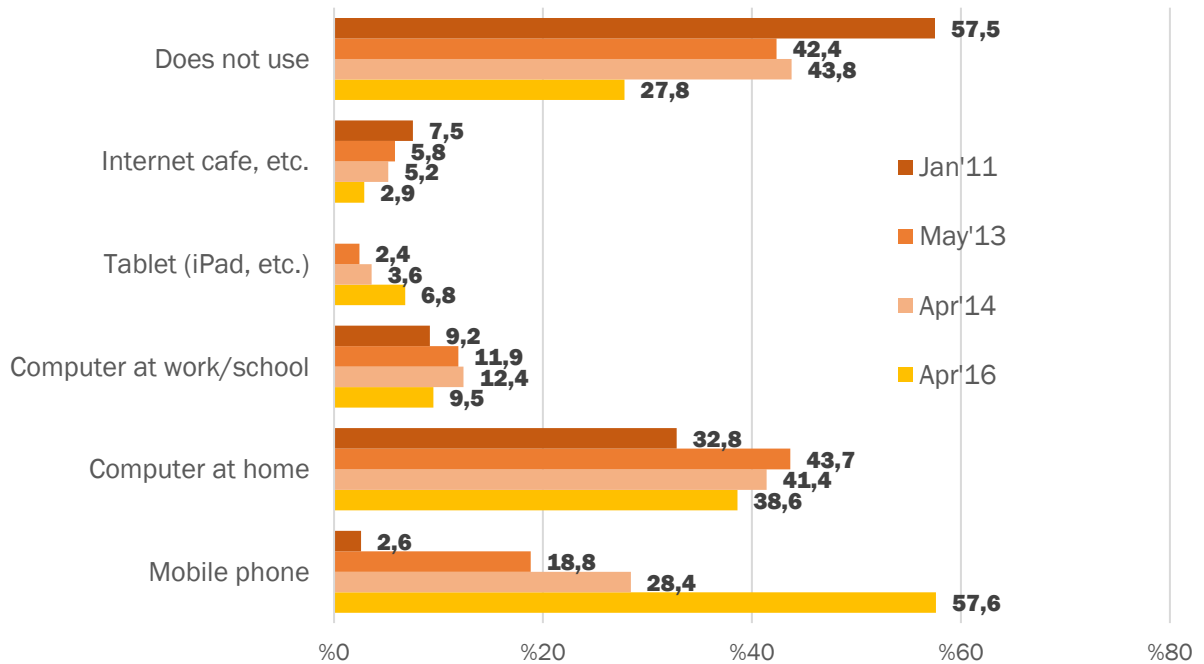- Internet only
- Other options

2.2.2. Internet use media channels and durations of use

At this point, let's take a look at how various elements that form the background of the data depicted above have change over time. Let's first look at through which channels and tools people access the internet.

Do you use the internet? How do you access the internet?

Chart data:

Category	Jan'11	May'13	Apr'14	Apr'16
Does not use	57,5	42,4	43,8	27,8
Internet cafe, etc.	7,5	5,8	5,2	2,9
Tablet (iPad, etc.)	2,4	3,6		6,8
Computer at work/school	9,2	11,9	12,4	9,5
Computer at home	32,8	43,7	41,4	38,6
Mobile phone	2,6	18,8	28,4	57,6

Since 2011, we have been asking people regularly through which channels they access the internet. The most striking finding over the five-year course is the increase in the rate of those who access the internet via mobile devices. Five years ago, only three percent of those above the age of 18 provided the response that they accessed the internet via their mobile phones, while the corresponding rate has shot up to 58 percent this year. In connection with this, the rate of those who access the internet from their homes has decreased to 39 percent today from 44 percent in 2013. On the other hand, the rate of the respondents who specified that they do not use the internet at all has slumped to 27 percent from 58 percent five years ago. These data are similar to the data provided by TÜİK about internet access in households and the overall internet use rates. According to TÜİK data for 2015, 70 percent of those households have internet access one way or another. On the other hand, 55 percent of the overall population uses in the internet according to 2015 data. One third of the population above the age of 18 has become acquainted with the internet over the last five years.
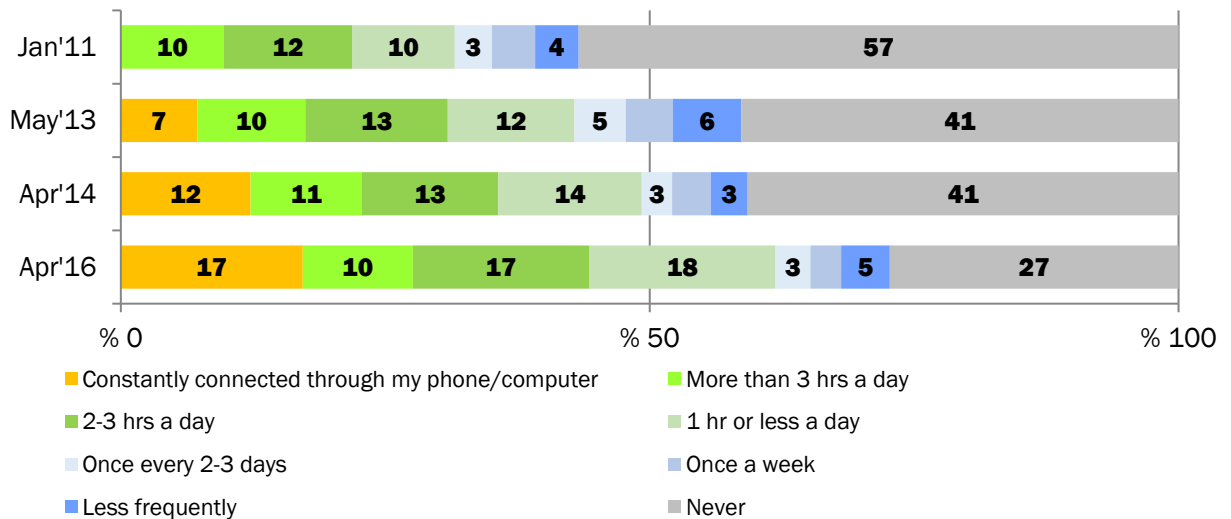
Judging by the general outlook, we can say that internet use has increased greatly over the last three years, and mobile devices are mainly responsible for this increase. In 2011, the option of using a mobile phone for accessing the internet was not used for this question, while the preference rate for this option was 17 percent five years later in 2016. The rate of those who state that they are always online on their phone corresponds to one fifth of the general public, while the same rate among internet users is close to one fourth.

When we take a look at the frequency of accessing the internet, we come across the outlook shown below. In January 2011, 22 percent reported that they spent at least

two hours on the internet, while 57 never used the internet. In this month's survey, the rate of the respondents who spent more than two hours online went up to 44 percent, while the rate of those who do not use the internet at all has gone down to 27 percent. The rate of those who state that they never go online confirms the finding above on which channel people use to access the internet.

How frequently do you access the internet?

	Constantly connected through my phone/computer	More than 3 hrs a day	2-3 hrs a day	1 hr or less a day	Once every 2-3 days	Once a week	Less frequently	Never
Jan'11		10	12	10	3		4	57
May'13	7	10	13	12	5		6	41
Apr'14	12	11	13	14	3		3	41
Apr'16	17	10	17	18	3		5	27

Legend:
- Constantly connected through my phone/computer
- More than 3 hrs a day
- 2-3 hrs a day
- 1 hr or less a day
- Once every 2-3 days
- Once a week
- Less frequently
- Never

Based on this outlook, we observe that the average amount of time spent on the internet by those above the age of 18 is more than two hours per day, and this period of time may reach three and a half hours among those who state that they use the internet frequently.

An overall examination reveals that internet use has increased significantly over the last five years, as attested by the Barometer data.
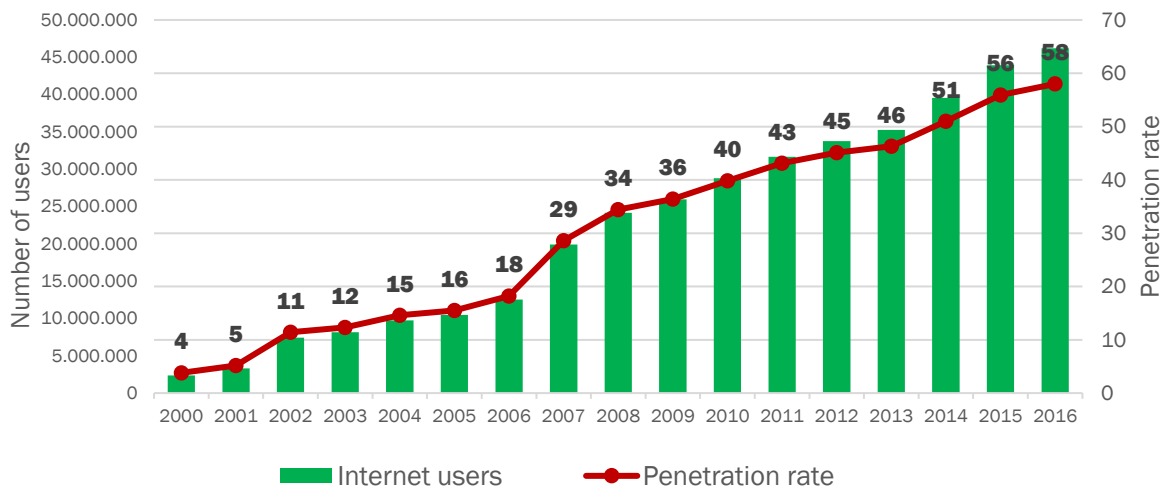
2.2.3.   Internet use has grown 15 fold over the last 15 years

This momentum can be clearly observed in the graph shown below that has been created based on the data obtained from the liveinternetstats[2] web site, as well as the Konda data.

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[2] http://www.internetlivestats.com/internet-users/turkey/

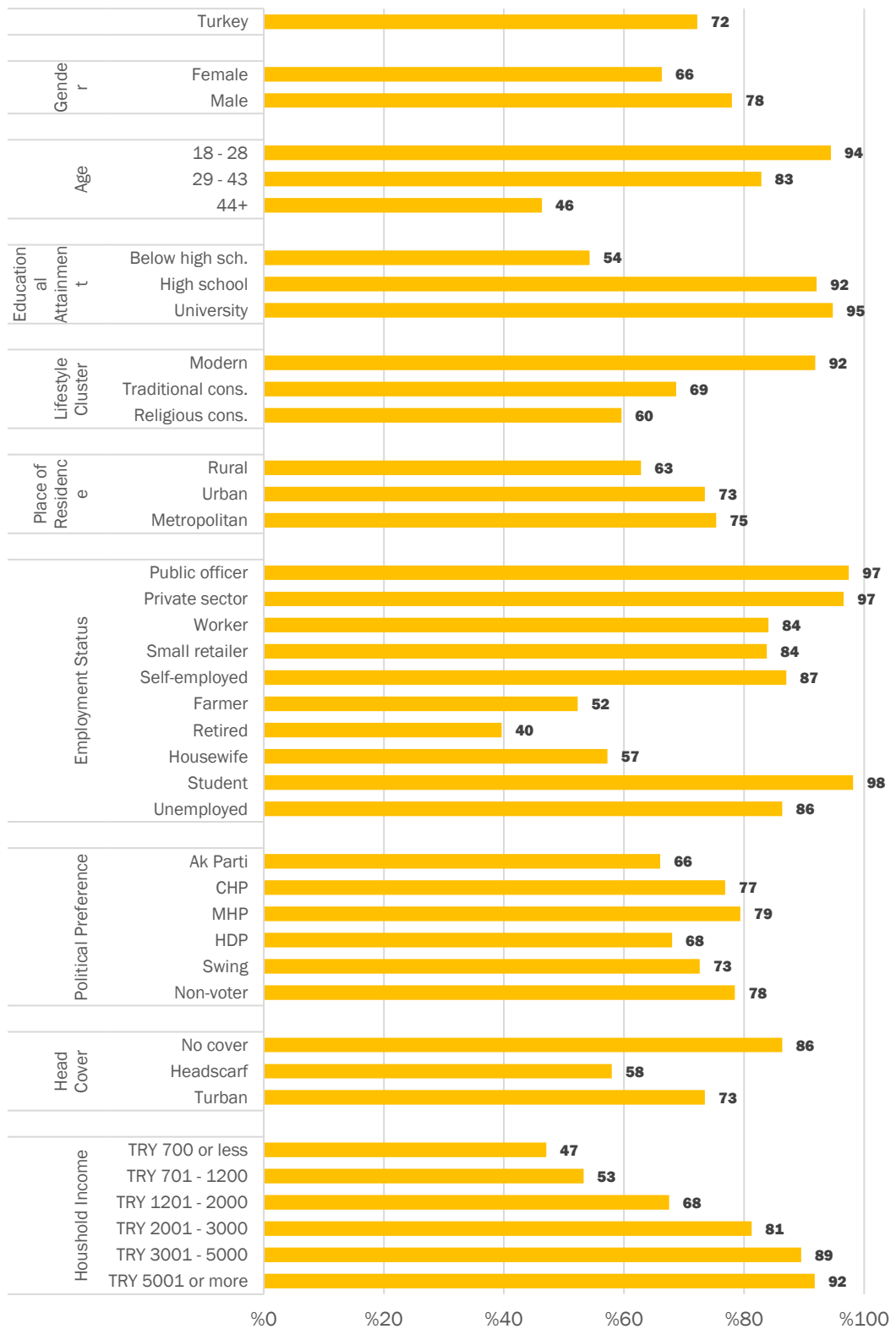## The number of internet users and penetration rates in Turkey*

According to this calculation, the rate of internet penetration in Turkey has increased 15-fold in in the last 16 years. This is a remarkable increase when compared to the data for countries that had internet access in 2000. The ratio of internet users to the overall population has increased 10 times in South Africa (from 5 percent to 52 percent), 6 times in France (from 14 percent to 86 percent) and 11 times in Hungary (from 7 to 80 percent). On the other hand, the same rate has increased twice-fold in South Korea, but only 44 percent of the population were internet users in South Korea in 2000.

We have pointed out earlier that the rapid increase in internet use indicates a great market potential for Turkey. In a different perspective, we may think that people who use the internet to a lesser extent as a potential target group. In this sense, it would be useful to identify the rates of internet use among different demographic groups, as shown in the first graph below. The second graph, on the other hand, demonstrates how these demographic groups are ranked in terms of the internet penetration rate. This graph, which may be used for different purposes, with different perspectives, deserves a more detailed examination.

Internet use among housewives is particularly noteworthy. The penetration rate of 57 percent that is observed in this cluster is comparatively low. Housewives account for one third of the entire population, and two thirds of all women. We can calculate that there are around 8 million housewives who do not use the internet and four fifths of this group is literate.
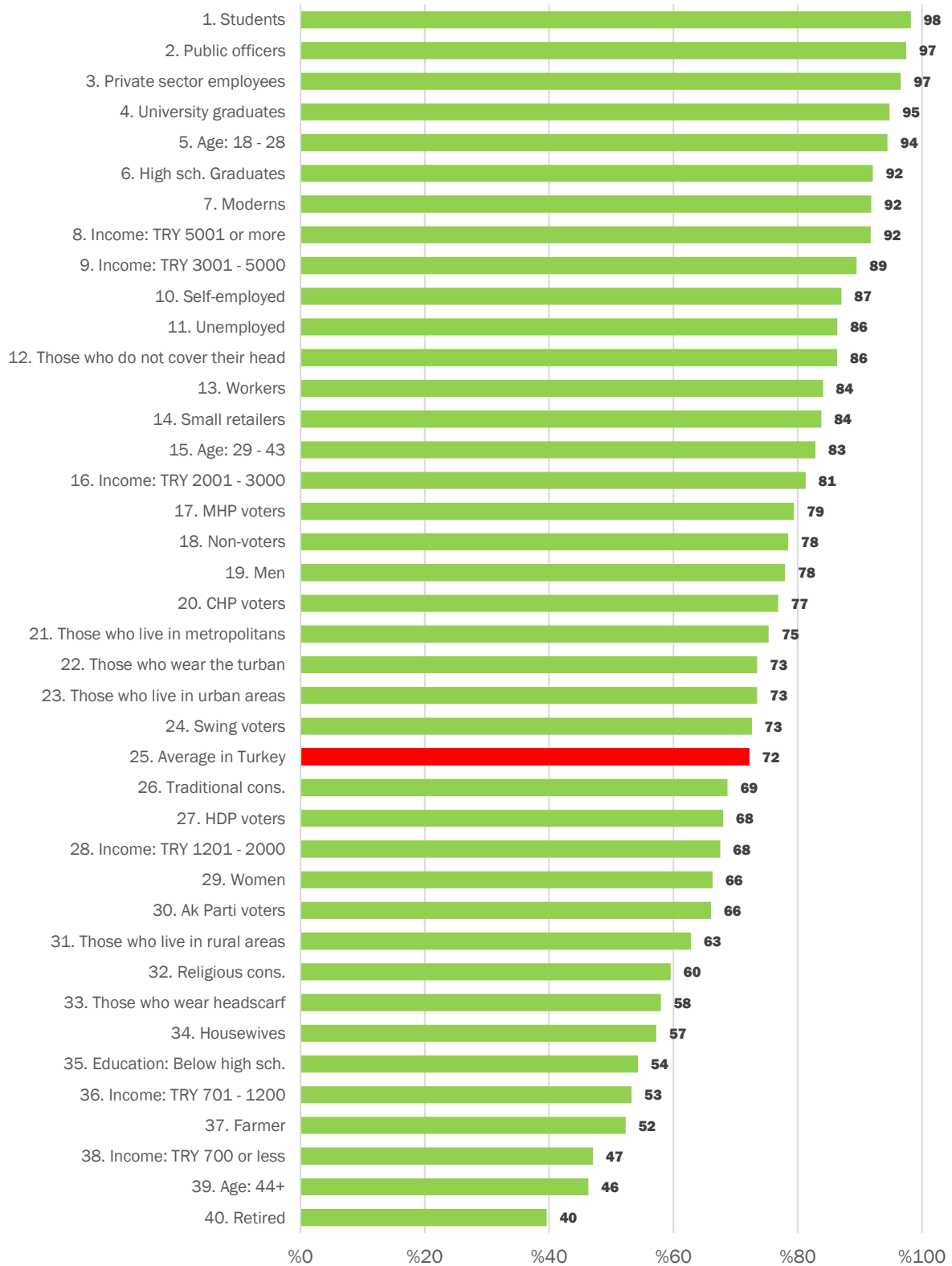
Internet usage rates

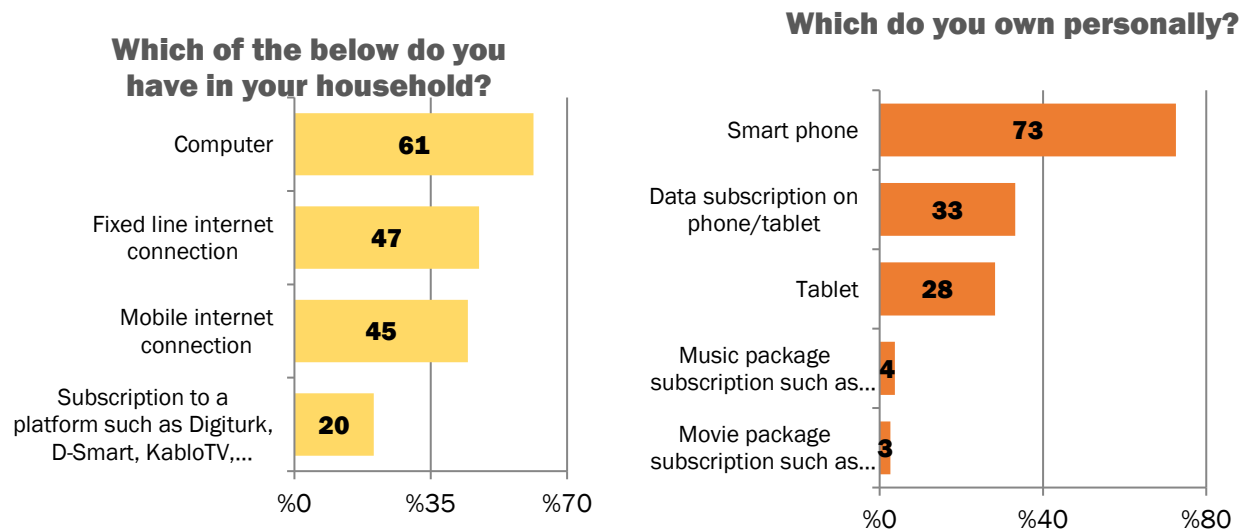| Category	Group	Value
	Turkey	72
Gender	Female	66
Gender	Male	78
Age	18 - 28	94
Age	29 - 43	83
Age	44+	46
Educational Attainment	Below high sch.	54
Educational Attainment	High school	92
Educational Attainment	University	95
Lifestyle Cluster	Modern	92
Lifestyle Cluster	Traditional cons.	69
Lifestyle Cluster	Religious cons.	60
Place of Residence	Rural	63
Place of Residence	Urban	73
Place of Residence	Metropolitan	75
Employment Status	Public officer	97
Employment Status	Private sector	97
Employment Status	Worker	84
Employment Status	Small retailer	84
Employment Status	Self-employed	87
Employment Status	Farmer	52
Employment Status	Retired	40
Employment Status	Housewife	57
Employment Status	Student	98
Employment Status	Unemployed	86
Political Preference	Ak Parti	66
Political Preference	CHP	77
Political Preference	MHP	79
Political Preference	HDP	68
Political Preference	Swing	73
Political Preference	Non-voter	78
Head Cover	No cover	86
Head Cover	Headscarf	58
Head Cover	Turban	73
Household Income	TRY 700 or less	47
Household Income	TRY 701 - 1200	53
Household Income	TRY 1201 - 2000	68
Household Income	TRY 2001 - 3000	81
Household Income	TRY 3001 - 5000	89
Household Income	TRY 5001 or more	92

Internet usage rates (ranking)

Rank	%
1. Students	98
2. Public officers	97
3. Private sector employees	97
4. University graduates	95
5. Age: 18 - 28	94
6. High sch. Graduates	92
7. Moderns	92
8. Income: TRY 5001 or more	92
9. Income: TRY 3001 - 5000	89
10. Self-employed	87
11. Unemployed	86
12. Those who do not cover their head	86
13. Workers	84
14. Small retailers	84
15. Age: 29 - 43	83
16. Income: TRY 2001 - 3000	81
17. MHP voters	79
18. Non-voters	78
19. Men	78
20. CHP voters	77
21. Those who live in metropolitans	75
22. Those who wear the turban	73
23. Those who live in urban areas	73
24. Swing voters	73
25. Average in Turkey	72
26. Traditional cons.	69
27. HDP voters	68
28. Income: TRY 1201 - 2000	68
29. Women	66
30. Ak Parti voters	66
31. Those who live in rural areas	63
32. Religious cons.	60
33. Those who wear headscarf	58
34. Housewives	57
35. Education: Below high sch.	54
36. Income: TRY 701 - 1200	53
37. Farmer	52
38. Income: TRY 700 or less	47
39. Age: 44+	46
40. Retired	40

92 percent of those who identify themselves as Modern appear to be internet users. As we have noted in Barometer reports many times before, people generally identify themselves as Modern, not in the sense of being modern in terms of values, but based on daily practices and using new technologies. In this sense, we may argue that those who identify themselves as Modern in terms of their lifestyle are inclined to see themselves as more than modern they really are, rather than immediately jumping to the conclusion that they have a high usage rate as a group. As we have confirmed in the previous section, Moderns, who make up 25 percent of society, is the group that is more inclined to only watch TV and/or least likely to read the newspaper.

2.2.4. Ownership of mass communication tools

When we look at the platforms which may be considered as the necessary outlets through which people can access mass communication tools and social media, we observe that more than half of the households have a computer and half of the households have fixed or mobile internet access, but only one in every five households has a digital platform subscription for TV such as Digiturk, D-Smart, KabloTV, Teledünya or Tivibu.

Also, three out of every four adults in Turkey have a smartphone and one out of every three people has a tablet. Therefore, personal access to computers seems to be much higher than access to computers in households.

Which of the below do you have in your household?

	%
Computer	61
Fixed line internet connection	47
Mobile internet connection	45
Subscription to a platform such as Digiturk, D-Smart, KabloTV,…	20

Which do you own personally?

	%
Smart phone	73
Data subscription on phone/tablet	33
Tablet	28
Music package subscription such as…	4
Movie package subscription such as…	3

2015 INFORMATION SOCIETY STATISTICS OF TUIK

TUIK (Turkish Statistical Institute) has been compiling data on information and communication technology used by individuals or in households and enterprises through information society surveys since 2004. These surveys provide basic up-to-date data on individuals' access to information and communication technologies in their households, their frequency of use, habits of use of online shopping and e-state applications as well as enterprises' use of computers, the Internet and other information technologies, their technologic competence and integration, online commerce, online business and enterprises' integration to virtual platform. Survey data conducted in households cover individuals at the age range of 16-74 whereas surveys conducted in enterprises comprise businesses with 10 or more employees.

Use of computers and the Internet

According to TUIK data, the rate of computer use is 54.8 percent and the rate of Internet use is 55.9 percent in the age group of 16-74. A gender based distribution of these rates reveals that computer use among men is 64 percent and computer use among women is 45.6 percent whereas Internet use among men is 65.8 percent and Internet use among women is 46.1 percent. The computer use rate had been 53.5 percent and the Internet use rate had been 53.8 percent in 2014.

Households' access to the Internet

As of 2015, the rate of households with Internet access in Turkey increased to 69.5 percent. This rate had been 60.2 percent in 2014 and 49.1 percent in 2013. That is, 7 in every 10 houses have Internet access according to the survey, on the other hand 3 in every 10 houses have no access to the Internet the reasons for which is explained as no need for Internet use in 59.5 percent of the houses, lack of sufficient information in 44.7 percent of the houses and high connection fees in 38.5 percent of the houses.

Telephone, computer and television ownership in households

In the June 2015 TUIK measurement, it was determined that 96.8 percent of the houses had mobile phones or smart phones whereas the ownership of fixed telephones dropped back to 29.6 percent. It was also determined in the same survey that one fourth of the houses had desktop computers, 43.2 percent had laptops and 20.9 percent had television/monitors with Internet connection.
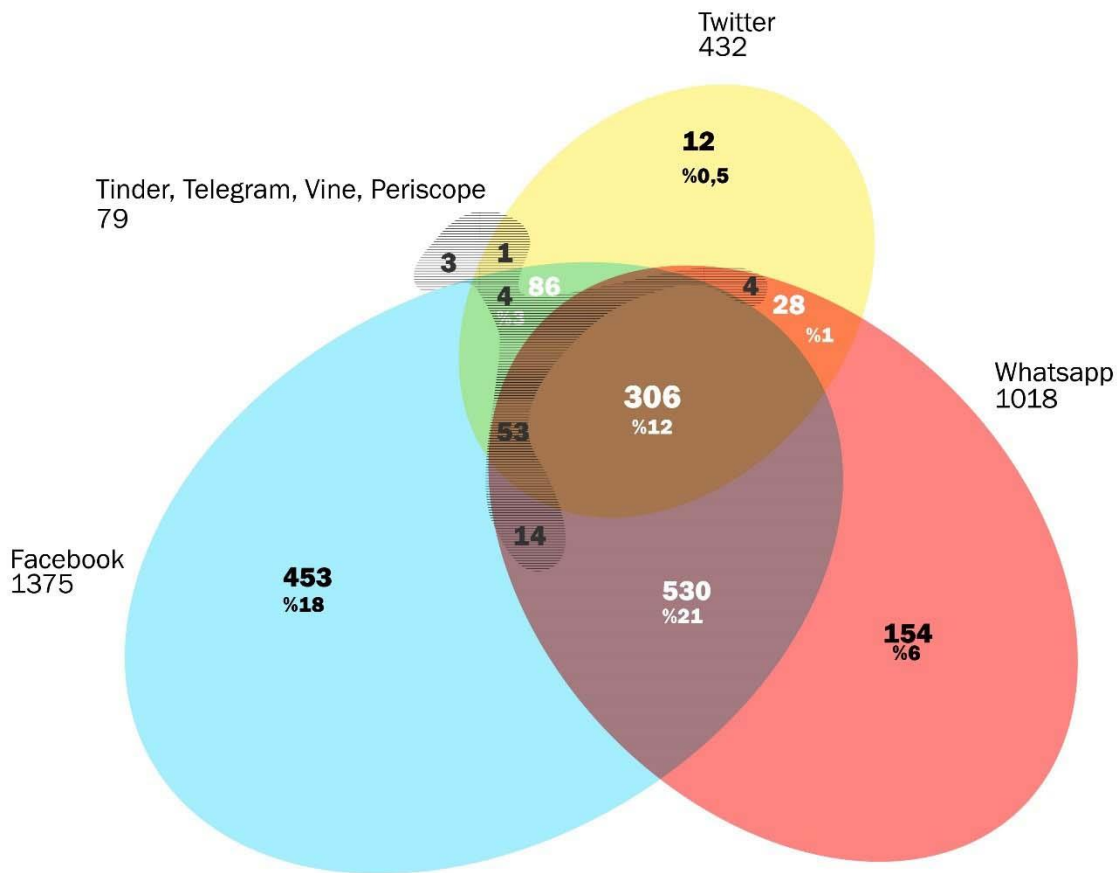
Intended use of the Internet

Among the intended uses of the Internet, access to social media comes first with 80.9 percent whereas reading online news, newspapers or magazines comes second with 70.2 percent. Other intended uses include searching information on health matters with 66.3 percent, uploading one's own texts, images, photographs, videos, music, etc. for sharing in a website with 62.1 percent and gathering information on goods and services with 59.4 percent. Online shopping rate had been measured as 30.8 percent in 2014 whereas it has increased to 33.1 percent in 2015.

The rate of Internet use by individuals for the purposes of communicating with public institutions or benefiting from public services for personal aims was 53.2 percent in the 12-month term between April 2014 and March 2015. This rate had been 53.3 percent in the same period of the previous year (April 2013-March 2014). Among the intended uses, obtaining information from the websites of public institutions ranked first with 50.5 percent.

2.3. Social Media Use

The internet has been an interactive experience for everyone since the very first day it has become a part of our lives. From the early days of the internet onwards, every development in the realm of the internet served towards making it more interactive. Later on social media has become a part of our lives. Small initiatives that are reminiscent of what we know as social media today have always existed, but the emergence of social media, or Web 2.0 as it first came to be known, and the later the introduction of Facebook have brought about a completely new dimension to communication via the internet. Facebook continues to be the main social media platform used today. In the meantime, many other different social media platforms such as Twitter came into our lives. Each new social media platform has also brought about a new user profile. Furthermore, the extent each social media platform is prevalent in society and the kind of users it addresses has become important for all social segments, as well as the changes that are taking place in different user profiles. In this perspective, we are endeavoring to monitor the user profiles that we come across in the different social media platforms that are prevalent in our lives.

Twitter
432

12
%0,5

Tinder, Telegram, Vine, Periscope
79

3 **1**

4 86
%3

4 **28**
%1

Whatsapp
1018

306
%12

Facebook
1375

453
%18

53

14

530
%21

154
%6

**1569 (61%) out of 2544 respondents use
Twitter, Facebook or Whatsapp**

The graph above demonstrates social media use rates and intersections according to the research data. In summary:
- ✓ Those who follow Facebook, Twitter and Whatsapp at the same time among adults, or in other words, those above the age of 18 make up 12 percent of the overall population. When Instagram is added into this group, the rate of people who follow all of these platforms drops down 9 percent.
- ✓ People who simultaneously use Facebook and the two other significant social media platforms it owns, namely Instagram and Whatsapp, make up 17 percent of society.
- ✓ 10 percent does not have a Twitter account, but use Instagram and Facebook.
- ✓ Respectively, the rate of those who have a Facebook and a Twitter account, but do not use Instagram does not exceed 5 percent.

General information on social media platforms;

Facebook: It was created in 2004 by Mark Zuckerberg and 3 friends at the Harvard University campus. Following active use in university campuses, it expanded to the whole world country by country and region by region eventually becoming the world's biggest social networking website. According to the statistics of December 2015, the number of daily active users is 1 billion 4 million (934 million of whom are mobile users)[1] whereas the advertisement revenue is 4.5 billion dollars as of the end of 2015.[1]

Instagram: It was created by Kevin Systorm and Mike Krieger in 2010 operating on the basis of sharing photographs and videos by applying various filters and liking such sharings. Users may describe their sharings or relate them to a topic by tags with prefix #. It was sold to Facebook in April 2012 (with 30 million users) for 1 billion dollars. Thanks to the R&D experience of Facebook, Instagram reached 75 million daily active users and 400 million monthly active users by the beginning of 2016. According to the predictions of eMarketer, Instagram will reach advertisement revenue of 2.81 billion dollars in 2017.[1]

Periscope: Kayvon Beykpour, an Iranian entrepreneur, observed during the Gezi Events in Istanbul that the activists were trying to record images by using mobile phones and cameras upon which he developed this application with his partner Joseph Bernstein. Periscope stood out for providing the opportunity of live broadcasting to all users becoming a new means of freedom of expression. During the Ferguson events, Twitter managers noticed that people broadcasted through Periscope, hence they bought this application at the beginning of 2015 for 100 million dollars. Since then, Periscope has been used through Twitter and has started to grow rapidly.
In Turkey, Periscope is used in social events and also in broadcasts from the Parliament and has been used as an alternative to traditional media by Medyascope TV established under Ruşen Çakır's leadership.

Skype: It is an application that provides audio, visual and written communication through the Internet since 2003. E-bay bought Skype in 2005 for 2.6 billion dollars and sold it to Microsoft in 2011 for 8.5 billion dollars. Skype reached 300 million users[1] in 2016. By now, 2 trillion minutes of free of charge video calls have been made through Skype.[1]

Telegram: It was launched by Pavel and Nikolai Durov brothers in September 2013. It is the biggest competitor of Whatsapp with a symmetric encryption scheme and enabling group chats up to 200 people and sharing all kinds of contents and data transfer up to 1.5 gigabytes in size. The application has message traffic of 15 billion messages daily for 100 million monthly active users and receives 350 thousand new members every day.[1]

Tinder: It is a location-based application for finding friends. It works only on mobile devices through only Facebook. The application shows the user other users around according to filters of sex, age and distance, swiping right for potentially good matches and swiping left to move to the next one on a photo. Mutually interested users are allowed to chat. The application was launched in 2012 and reached 1 billion daily swipes in 2014.

Twitter: It is a microblogging website created by Jack Dorsey in 2006 enabling users to send and read short 140-character messages called "tweets" to which photographs, videos or links can also be added. Users can group posts together by topic or type using hashtags – words or phrases prefixed with a "#" sign. The topics discussed in the Twitter whether with a hashtag or not are ranked in the Trending Topic (TT) list based on variables such as number of tweets, retweets and likes. With the launch of the Turkish language interface in April 2011, the number of users in Turkey leaped up. Another take-off for Twitter occurred during the Gezi events in the summer of 2013 as the activists used Twitter as a means of communication both nationally and internationally. The number of monthly active users is 320 million. It is accessed through mobile means at a rate of 80%.[1]

Vine: It is an application enabling the sharing of 6-second videos launched by Twitter in January 2013. The number of users reached 40 million worldwide. The videos shared are circulated/watched more than 1 billion times daily.

Whatsapp: It was established by former Yahoo employees Brian Acton and Jan Koum in 2009 and sold to Facebook in 2014 for 19 billion dollars. Whatsapp is the most common instant messaging service which announced in its own blog on February 26, 2016 that it has reached 1 billion[1] users.

Youtube: It was established by three former PayPal employees in February 2005 and sold to Google in November 2006. It is used for watching, uploading and sharing videos. There are more than 1 billion users one third of whom are on the Internet every day. 80 percent of the videos are watched outside of the US.

[1] http://newsroom.fb.com/company-info

[1] http://files.shareholder.com/downloads/AMDA-NJ5DZ/968914079x0x859021/F783FA3F-CB65-42C2-AB30-5F4C56567A31/FB_News_2015_11_4_Financial_Releases.pdf

[1] http://www.emarketer.com/Article/Instagram-Mobile-Ad-Revenues-Reach-281-Billion-Worldwide-2017/1012774

[1] http://wearesocial.com/special-reports/digital-in-2016

[1] http://blogs.skype.com/2016/01/12/ten-years-of-skype-video-yesterday-today-and-something-new/

[1] https://telegram.org/blog/100-million

[1] https://about.twitter.com/company

[1] https://blog.whatsapp.com/616/Bir-milyar

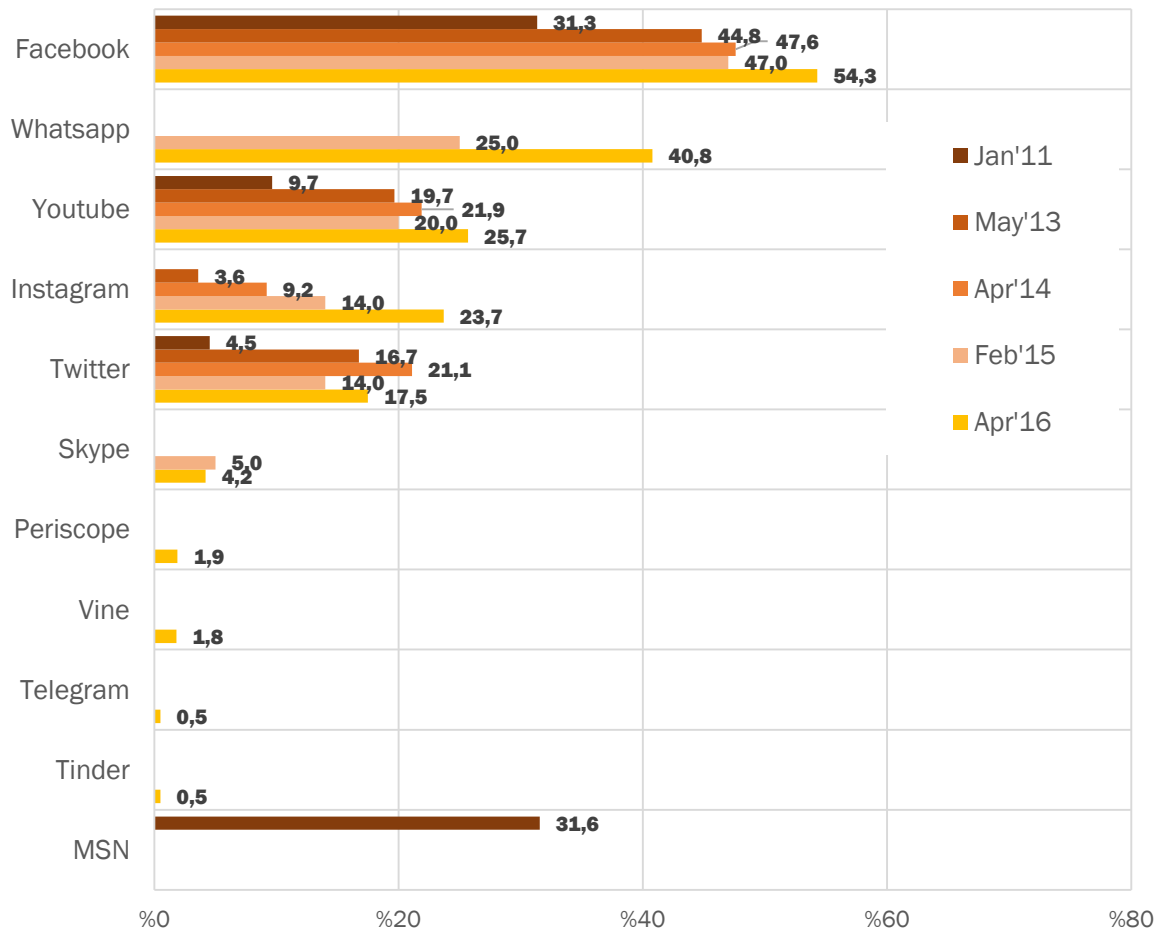## 5-year course of social media use

The usage rates for each medium is provided in the graph above, along with the change observed in the last five years. It should be also be noted that the data provided above has been obtained from a research study carried out with those above the age of 18. First of all, the ongoing proliferation of Facebook and Youtube in the last five years, and the exponential increase in the use of Whatsapp and Instagram are remarkable.

It is noteworthy that major social media platforms such as Twitter or Instagram, which today are able to boast of usage rates that stand around 20-25 percent, were only used at around 2 percent, just 4-5 years ago, similar to the current case for Tinder or Telegram. We are including new generation social media platforms such as Tinder and Telegram in our research, although the number of users for these platforms in Turkey would be defined in ten thousands at the moment. Although the rates of usage for these platforms remain within the margin of error of our research, the graph above is testament to our effort to include newly emerging social media platforms in our evaluation. The rapid pace social media is spreading out in Turkey makes it necessary to include these platforms that have the potential to become
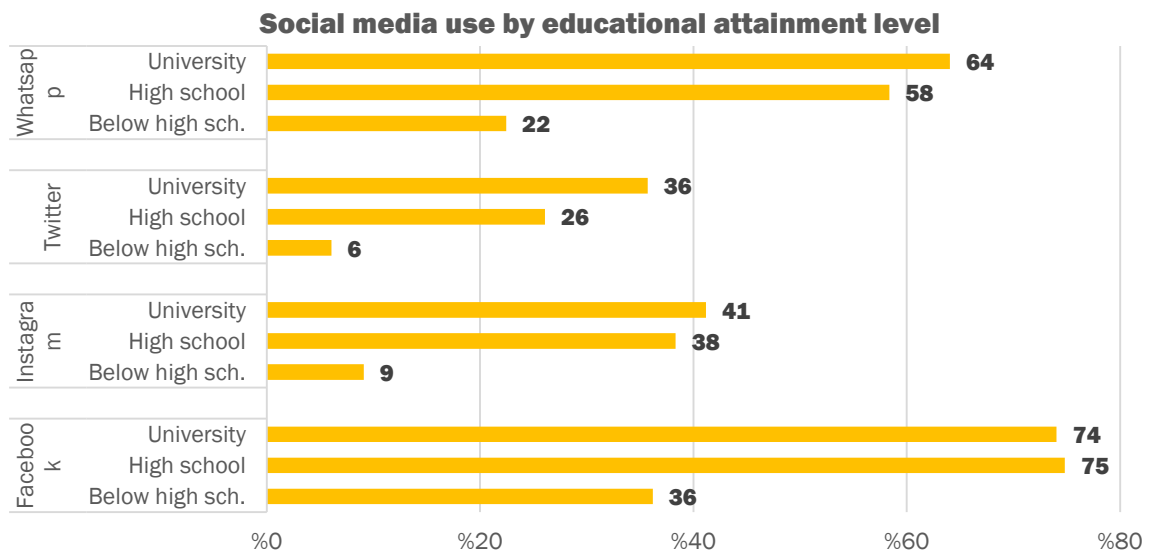
major platforms. Before proceeding with our analysis of these figures in more detail, it should be reminded that this data only pertains to those above the age of 18. Particularly, new social media platforms such as Telegram, Periscope and Tinder are more heavily used by those below the age of 18.

As it can be seen in the graph clearly, Instagram catches the eye as the social media platform that has the most rapidly increasing rate of penetration.

On the other hand, it looks like the penetration rate of Twitter has stayed more or less fixed, in comparison to the increase observed in social media applications such as Whatsapp. We can associate this with two reasons; Twitter can be described as a platform that is more based on reading and on following other users, than the dominance of visual elements. It may have had experienced difficulty in becoming widespread among groups with certain educational attainment levels. Or it could be the case that Instagram and Whatsapp may have become widespread thanks to Facebook, which is used by the great majority of the people who go online, while Twitter may have remained as a more isolated platform.

When we look at usage rates by educational attainment level, we only observe a low usage rate for Facebook and Instagram among those with an educational attainment level below high-school, while the usage rates for Twitter increase gradually with a higher educational attainment level. Particularly, Facebook is being used by three fourths of high school graduates. The low rate of use among those with an educational attainment level less than high-school is due to low internet reach among this cluster.

Social media use by educational attainment level

|		%
Whatsapp	University	64
	High school	58
	Below high sch.	22
Twitter	University	36
	High school	26
	Below high sch.	6
Instagram	University	41
	High school	38
	Below high sch.	9
Facebook	University	74
	High school	75
	Below high sch.	36

We have pointed out that people with higher educational attainment tend to use the internet more heavily. However, we are not able to establish a concrete relation in usage rates of social media platforms. Naturally, people with higher income are

more likely to use social media more intensively. However, it is very difficult to establish an exact relationship.

As shown in the graph below, those who identify themselves as Modern use the four social media platforms a lot more than the people in other clusters. We should remind here again that Moderns appear more inclined to use social media mainly because people who tend to use the internet more frequently are also more likely to identify themselves as Modern.

Social media use by lifestyle cluster
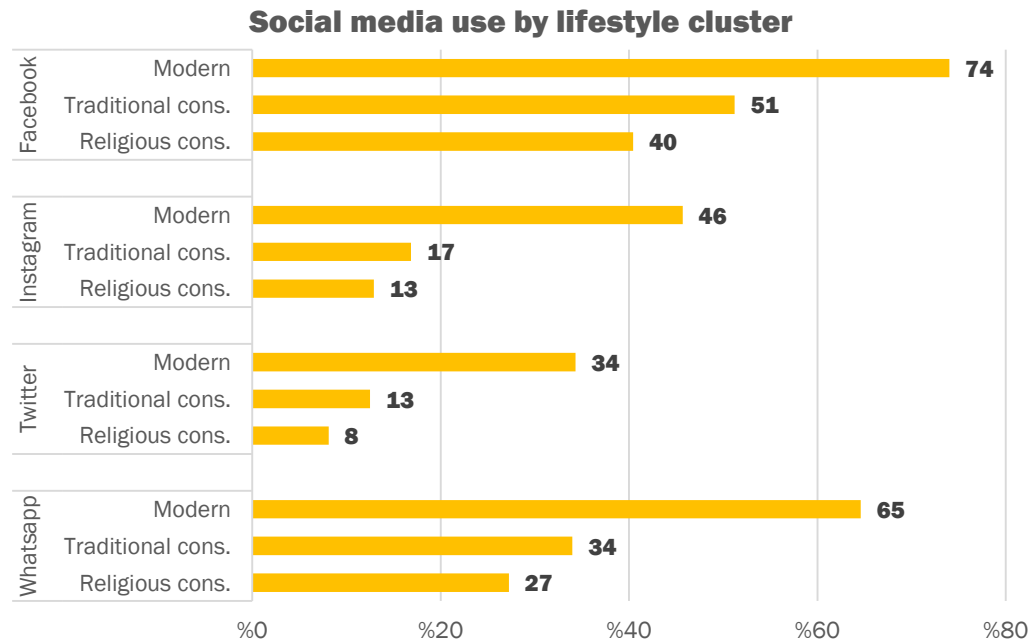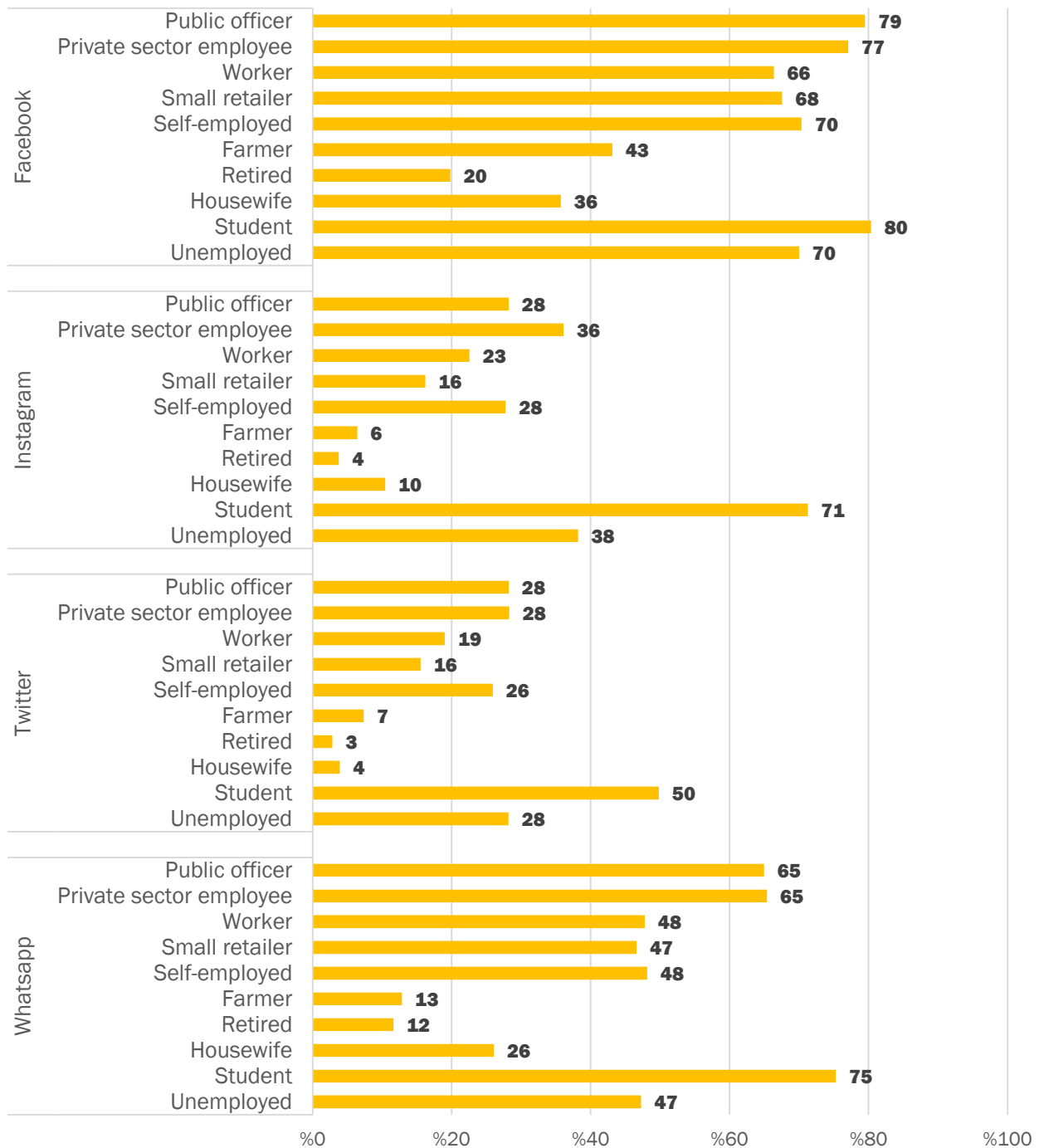

In general, people's employment status can be very decisive on social media use, regardless of their educational attainment or income level. In the graph below, we can identify the penetration rate of the four social media platforms in different employment groups.
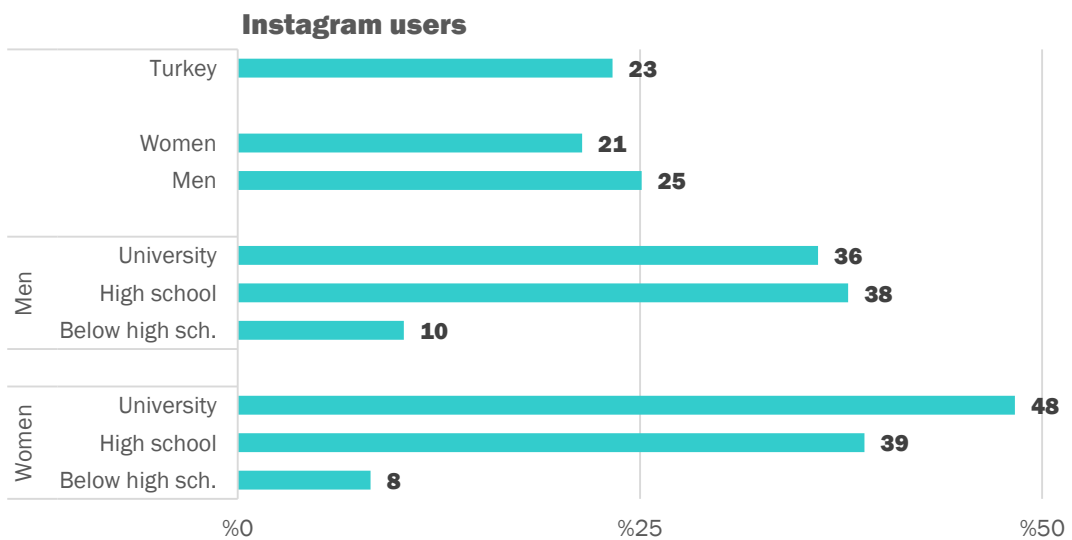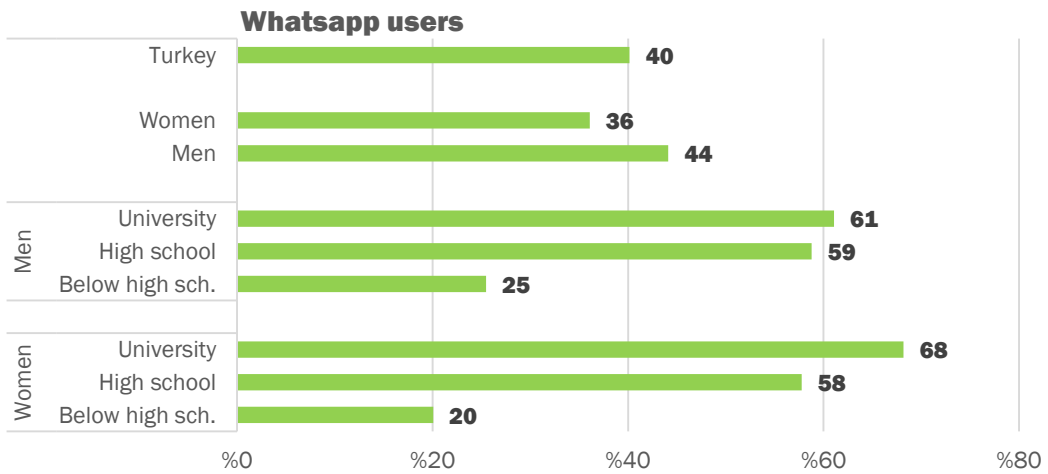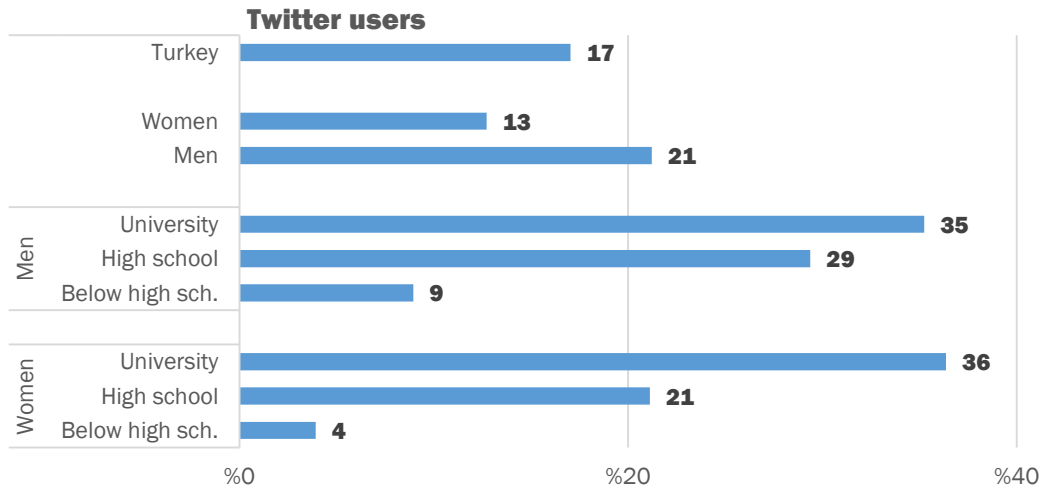
Students have a strong presence in nearly all of the social media platforms. They even make up half of all Twitter users.

Social media use by employment status

Facebook
- Public officer: 79
- Private sector employee: 77
- Worker: 66
- Small retailer: 68
- Self-employed: 70
- Farmer: 43
- Retired: 20
- Housewife: 36
- Student: 80
- Unemployed: 70

Instagram
- Public officer: 28
- Private sector employee: 36
- Worker: 23
- Small retailer: 16
- Self-employed: 28
- Farmer: 6
- Retired: 4
- Housewife: 10
- Student: 71
- Unemployed: 38

Twitter
- Public officer: 28
- Private sector employee: 28
- Worker: 19
- Small retailer: 16
- Self-employed: 26
- Farmer: 7
- Retired: 3
- Housewife: 4
- Student: 50
- Unemployed: 28

Whatsapp
- Public officer: 65
- Private sector employee: 65
- Worker: 48
- Small retailer: 47
- Self-employed: 48
- Farmer: 13
- Retired: 12
- Housewife: 26
- Student: 75
- Unemployed: 47

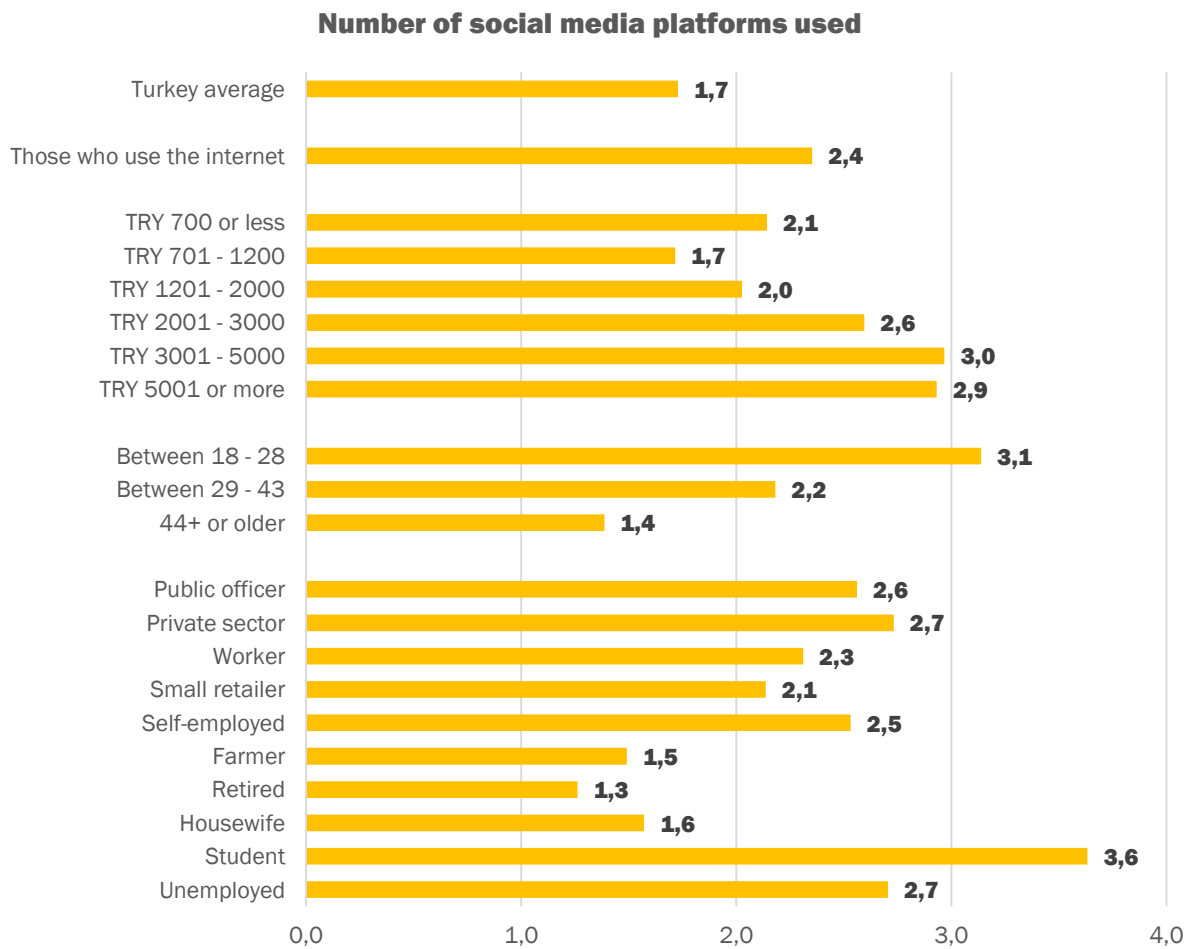Since internet penetration is more prevalent among men than women, men appear to be more active on social media than men. The gap between the genders is only closed among Instagram users. Women with high educational attainment level seem to have a higher social media penetration rate than men. This finding should be evaluated as a clue as to which direction the potential of social media will develop towards.

Twitter users

		%
Turkey		17
Women		13
Men		21
Men	University	35
	High school	29
	Below high sch.	9
Women	University	36
	High school	21
	Below high sch.	4

%0   %20   %40

Whatsapp users

		%
Turkey		40
Women		36
Men		44
Men	University	61
	High school	59
	Below high sch.	25
Women	University	68
	High school	58
	Below high sch.	20

%0   %20   %40   %60   %80

Instagram users

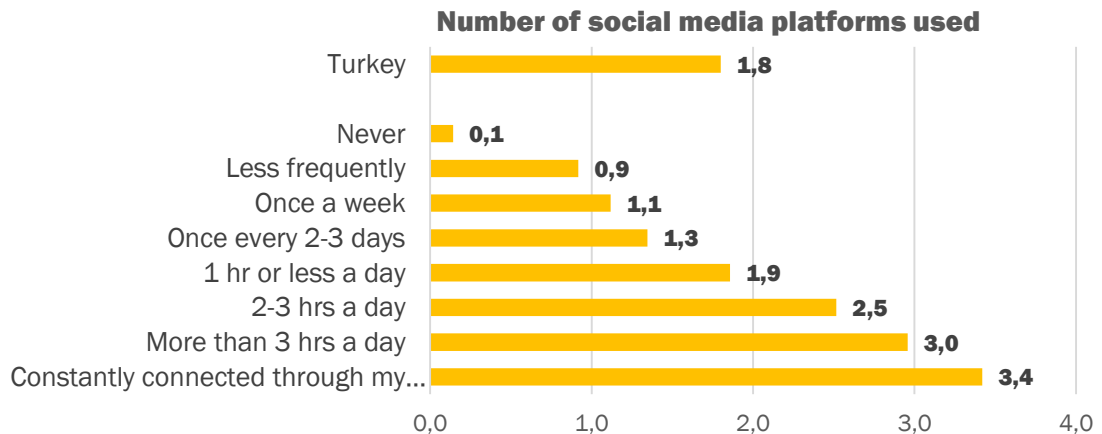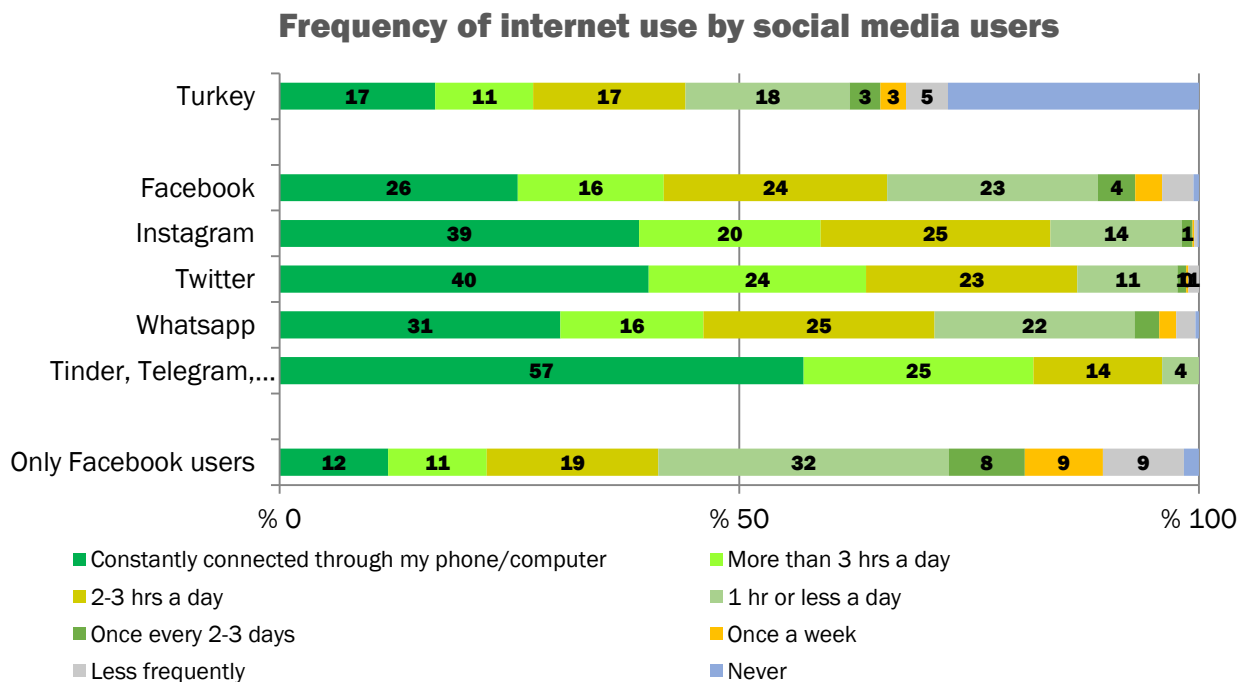|		%
Turkey		23
Women		21
Men		25
Men	University	36
	High school	38
	Below high sch.	10
Women	University	48
	High school	39
	Below high sch.	8

%0   %25   %50

It is possible to carry out a multi-faceted and in-depth examination of social media and arrive at many different findings by taking different perspectives. In this sense, not only the particular social media channel(s) people use, but also the number of social media platforms used offer many clues. We measured the social media platforms used by people and generated the analyses provided below. This graph is different than the previous ones in the sense that the figures in this graph correspond to average figures among all internet users. For example, internet users between the ages of 18-28 use 3.1 social media platforms on average, while the corresponding average for civil servants who are internet users is 2.6

Number of social media platforms used

Category	Value
Turkey average	1,7
Those who use the internet	2,4
TRY 700 or less	2,1
TRY 701 - 1200	1,7
TRY 1201 - 2000	2,0
TRY 2001 - 3000	2,6
TRY 3001 - 5000	3,0
TRY 5001 or more	2,9
Between 18 - 28	3,1
Between 29 - 43	2,2
44+ or older	1,4
Public officer	2,6
Private sector	2,7
Worker	2,3
Small retailer	2,1
Self-employed	2,5
Farmer	1,5
Retired	1,3
Housewife	1,6
Student	3,6
Unemployed	2,7

The graph below demonstrates the frequency of internet use and the number of social media platforms used by internet entry point, and it is clearly visible that the number of social method platforms used increases with more time spent on the internet.

Number of social media platforms used

Turkey	1,8
Never	0,1
Less frequently	0,9
Once a week	1,1
Once every 2-3 days	1,3
1 hr or less a day	1,9
2-3 hrs a day	2,5
More than 3 hrs a day	3,0
Constantly connected through my...	3,4

The analysis below, on the other hand, shows the how frequently different social media users access the internet. Twitter stands out as the social media platform users most frequently use when they are online. 90 percent of Twitter users report that they spend 2-3 hours or more on the internet every day.

Frequency of internet use by social media users

	Constantly connected through my phone/computer	More than 3 hrs a day	2-3 hrs a day	1 hr or less a day	Once every 2-3 days	Once a week	Less frequently	Never
Turkey	17	11	17	18	3	3	5	
Facebook	26	16	24	23	4			
Instagram	39	20	25	14	1			
Twitter	40	24	23	11	1	1		
Whatsapp	31	16	25	22				
Tinder, Telegram,...	57	25	14	4				
Only Facebook users	12	11	19	32	8	9	9	

Legend:
- ■ Constantly connected through my phone/computer
- ■ More than 3 hrs a day
- ■ 2-3 hrs a day
- ■ 1 hr or less a day
- ■ Once every 2-3 days
- ■ Once a week
- ■ Less frequently
- ■ Never

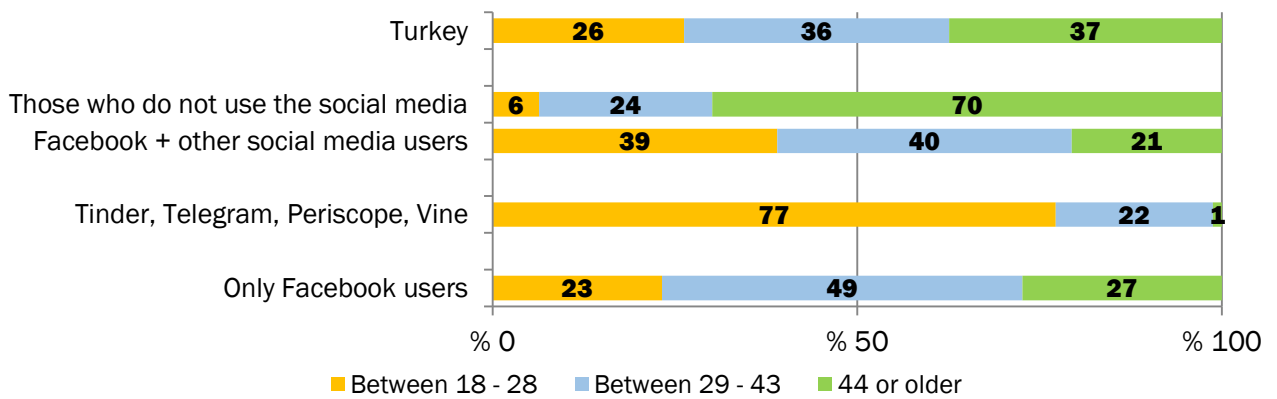### 2.3.1. New generation social media platforms and people who only use Facebook

As noted earlier, new generation social media platforms such as Vine, Tinder, Telegram and Periscope have relatively few users, but they have a certain presence among users. The rate of the respondents who use at least one of such platforms is 3.4 percent, according to the survey results. We can identify students, and people with relatively higher educational attainment and income levels, as members of this group.
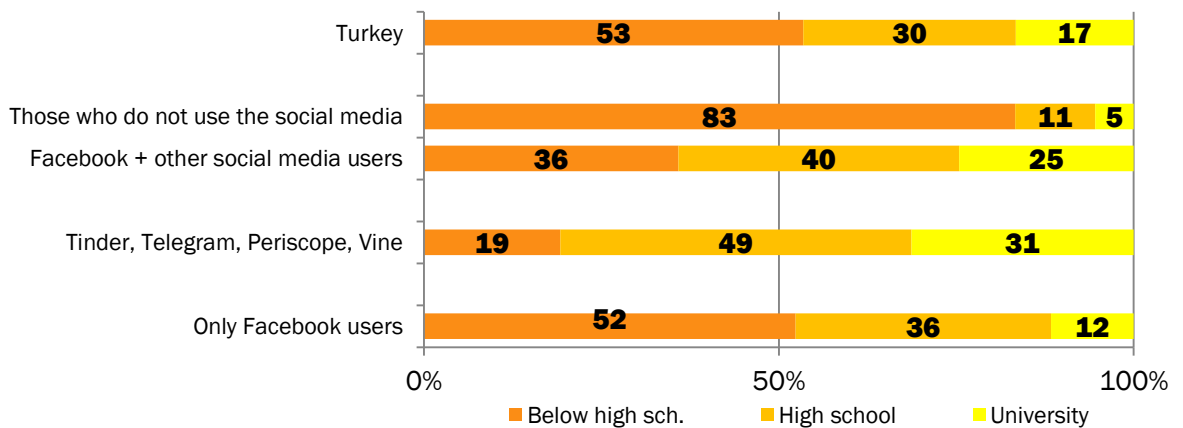
People who only use Facebook make up another group noteworthy for more in-depth scrutiny. 14 percent of all respondents do not use any social media platform other than Facebook. We have reason to believe, in light of the findings below, that this group consists of a new generation of users. The profile of this group is similar to the profile of those who do not use any social media platforms. With a different perspective, we may argue that the members of this group are different from young people who only use Facebook, in being recently introduced to the internet.

A comparative assessment of both groups could provide a different perspective, as both groups seem to have very different member profiles.
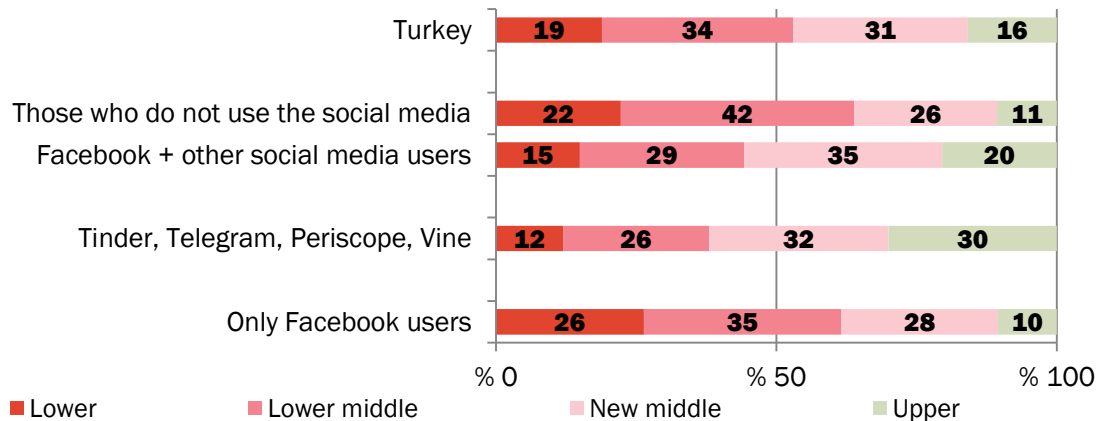
Social media use by age groups

	Between 18 - 28	Between 29 - 43	44 or older
Turkey	26	36	37
Those who do not use the social media	6	24	70
Facebook + other social media users	39	40	21
Tinder, Telegram, Periscope, Vine	77	22	1
Only Facebook users	23	49	27

Social media use by educational attainment

	Below high sch.	High school	University
Turkey	53	30	17
Those who do not use the social media	83	11	5
Facebook + other social media users	36	40	25
Tinder, Telegram, Periscope, Vine	19	49	31
Only Facebook users	52	36	12

Social media use by economic class

	Lower	Lower middle	New middle	Upper
Turkey	19	34	31	16
Those who do not use the social media	22	42	26	11
Facebook + other social media users	15	29	35	20
Tinder, Telegram, Periscope, Vine	12	26	32	30
Only Facebook users	26	35	28	10

■ Lower　■ Lower middle　■ New middle　■ Upper

Social media use by lifestyle clusters

	Modern	Traditional cons.	Religious cons.
Turkey	26	46	28
Those who do not use the social media	10	52	39
Facebook + other social media users	38	42	20
Tinder, Telegram, Periscope, Vine	51	33	17
Only Facebook users	21	49	31

■ Modern　■ Traditional cons.　■ Religious cons.

We will revisit these analyses of social media platforms in the following sections of this report. However, in light of the analyses above provided above, we think that it would be helpful to summarize a few findings;

- ✓ The rate of social media use and the number of social media platforms used are directly correlated with educational attainment and income levels.
- ✓ Social media use increases greatly among young people.
- ✓ Students both use a variety of social media platforms, and they use them intensively.
- ✓ The penetration rates of all social media platforms have increased in the last three years, while it has remained the same for Twitter. This may be due to saturation. Twitter's heavy reliance on written content and its complex structure may have caused it to reach a point of saturation among higher educational attainment groups.
- ✓ Women, and particularly housewives, promise a great potential in terms social media use. Although women generally seem to lag behind men in terms of social media use, higher educational attainment among women is accompanied by a tendency to use all elements of social media more intensively than men.
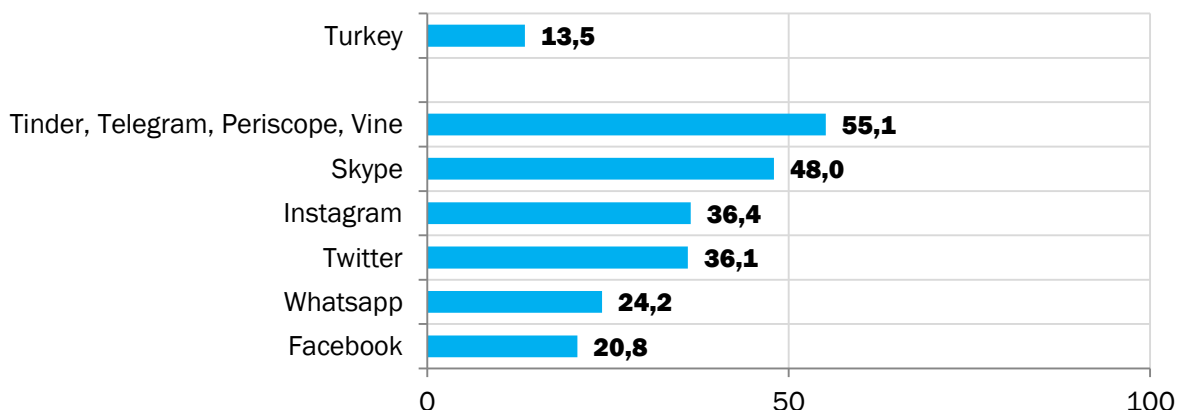
2.4. Individuals Who Meet With People They Have Met Online

In this month's survey we have asked the respondents, the question "Have you ever met someone you first met online?" Our main aim in directing this question was to understand whether people who meet in social media platforms then meet face-to-face, or in other words, whether internet relationships are carried out into the real world or not. Only 13.5 percent of the respondents stated that have physically met someone they met online before; however, this figure corresponds to 7.5 million people in the adult population. This is a substantial figure.

Three out of every four people who have actually met someone they first met online are male, and respectively only one in fourth is female. The ethnic background of the person and religion/sect does not appear to lead to a differentiation, while age, educational attainment level, place of residence, degree of piety and lifestyle cluster cause significant differences. Foreseeably, among young people, those with a higher educational attainment level, metropolitan residents, less pious and Moderns are more likely to report having actually met someone they have met online because they have relatively much broader access to the internet. For example; 18-28 year olds are three times more likely to meet someone they have met online, and those between the ages of 29-43, four times more likely to do the same than people who are high school graduates or less, while Moderns are two and a half times more likely to do the same than Traditional Conservatives, and four times more likely to do the same than Religious Conservatives.

Therefore, the main differentiation here is caused by internet access. As shown in the graph below, time spent on the internet and physically meeting online acquaintances are directly correlated.

Have you ever met someone you first met online? / By social media

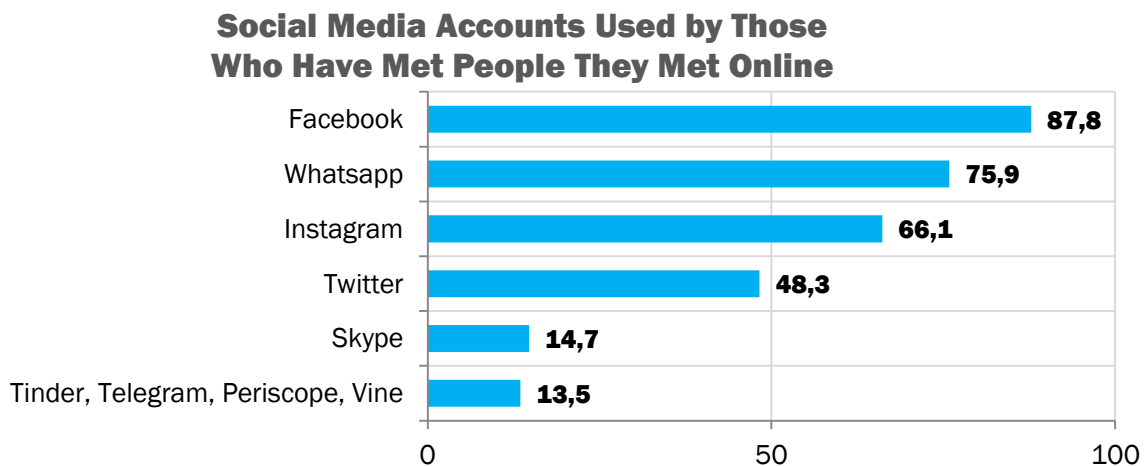| Category	Value
Turkey	13,5
Tinder, Telegram, Periscope, Vine	55,1
Skype	48,0
Instagram	36,4
Twitter	36,1
Whatsapp	24,2
Facebook	20,8

In support of this finding, we observe that nearly everyone who has met someone they first met online have a smartphone (94.4 percent) and that 42 percent have a tablet. One out of every five Facebook users, one out of every three Instagram users, one out of every two Skype users, one out of every three Twitter users, and one out of

every four Whatsapp users report that they have actually met someone they first met online.

It is highly striking that half (or more) of those who use relatively underused platforms such as Skype, Tinder, Telegram, Periscope and Vine, which imply intensive social media, have actually met someone they first met online. However, the rate of those who use these platforms among the people who have physically met an online acquaintance is very slight. As shown in the graph below, among those who report having actually met an online acquaintance, the rate of Tinder (or similar platforms) is only 13 percent, and similarly, the same for Skype users is approximately 15 percent. On the other hand, the corresponding figure for Facebook users is 87.8 percent, and 75.9 percent for Whatsapp, 66.1 percent for Instagram and 48.3 percent for Twitter users.

**Social Media Accounts Used by Those
Who Have Met People They Met Online**

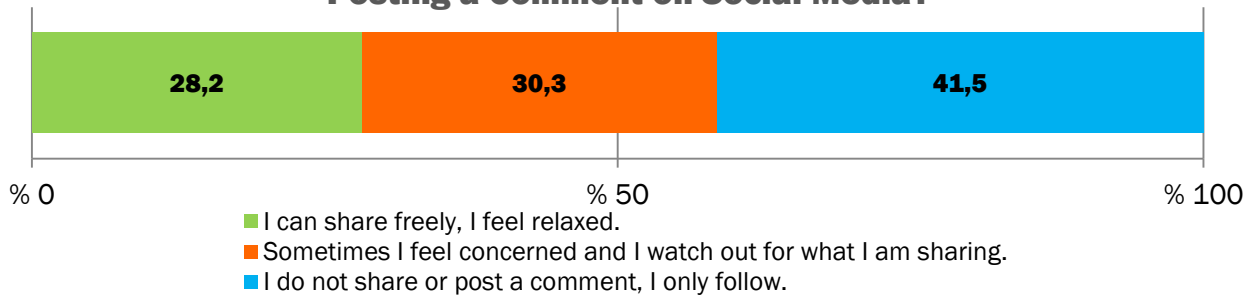| Platform	Percentage
Facebook	87,8
Whatsapp	75,9
Instagram	66,1
Twitter	48,3
Skype	14,7
Tinder, Telegram, Periscope, Vine	13,5

However, it is not possible to determine through which social media platforms individuals who actually meet people they met online do so. Our main aim here is to profile individuals who physically meet people they met online. In this case, we cannot make a generalization than people who meet online acquaintances face-to-face do so for romantic purposes. The diversity of the social media channels used suggest that people meet others due to a variety of reasons. However, we do not have any data on how many of these individuals meet people they met online due to reasons such as political affinity, solidarity or partisanship.

2.5. Online Violence Victims

As part of our field survey, we have directed the respondents a question about to what extent they self-censor themselves, hold back their own opinions or feel under threat when they are sharing something or posting a comment on social media. As demonstrated by the graph below, only three out of every 10 people stated that they shared freely on the internet. Similarly, three out of every 10 people reported that they feel concerned when posting a comment on the internet, while four out of every 10 people said that they do not share or post comments on the internet.
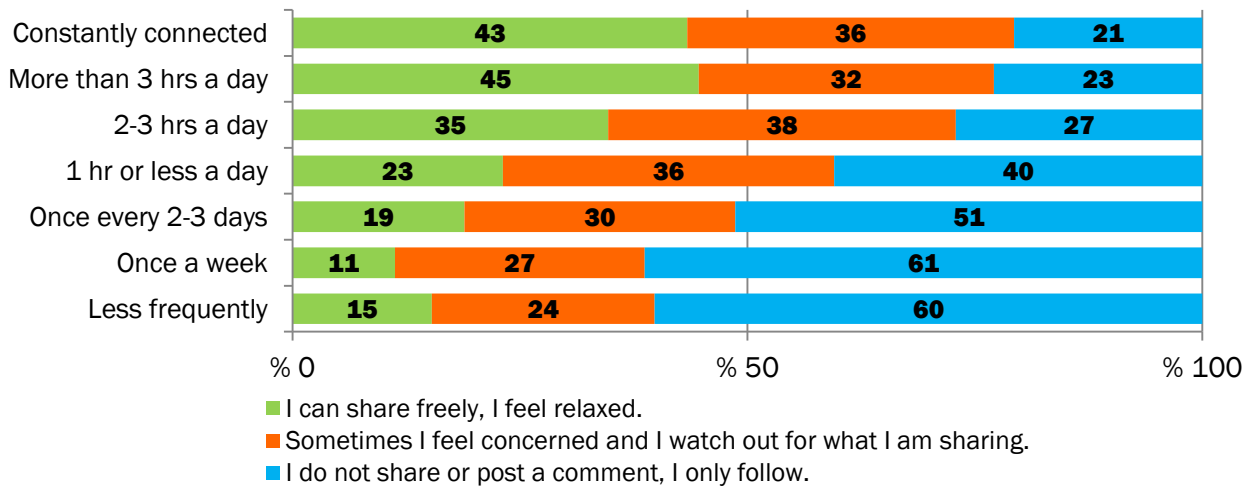
How Do You Feel Yourself When Sharing or Posting a Comment on Social Media?

28,2	30,3	41,5

% 0   % 50   % 100

- 🟩 I can share freely, I feel relaxed.
- 🟧 Sometimes I feel concerned and I watch out for what I am sharing.
- 🟦 I do not share or post a comment, I only follow.

As it is, the graph above does not yield an explanation whether four out of every 10 people do not share or post a comment because they feel themselves under pressure or threat, or due to not having access to the internet. As attested by the graph below, the tendency to share freely on the internet increases with higher access to the internet. We observe that the rate of those who say that "I do not share or post a comment, I only follow" increases among those who do not have a regular access to the internet.

How Do You Feel Yourself When Sharing or Posting a Comment on Social Media? / By Frequency of Internet Use

Constantly connected	43	36	21
More than 3 hrs a day	45	32	23
2-3 hrs a day	35	38	27
1 hr or less a day	23	36	40
Once every 2-3 days	19	30	51
Once a week	11	27	61
Less frequently	15	24	60

% 0   % 50   % 100

- 🟩 I can share freely, I feel relaxed.
- 🟧 Sometimes I feel concerned and I watch out for what I am sharing.
- 🟦 I do not share or post a comment, I only follow.

When we focus on those who have constant access to the internet and spend more than three hours a day online, we observe that both groups reported similar opinions, with 43 and 44 percent stating that they were able to share freely on social media. The fact that more than half of this cluster that has constant access to the internet is concerned about sharing posts or comments, or do not share anything on social media at all is quite worrying. As it will be noted later in this report, this finding underlines the demand from the state to guarantee freedom of speech on the internet.

In the given outlook, the tendency to refrain from sharing material or posting comments among internet users and to remain a passive observer indicates a different predicament than the same tendency among those who do not have access to the

internet. In response to a different question, nearly one out of every 10 people reported that they have been subject to insult, swearing or intimidation due to the comments or opinions they have shared on social media. While this may appear to be a slight and insignificant figure at first, it should be reminded that this rate corresponds to 5.2 million people in the population.

Have You Ever Been Subject to Insult, Swearing or Intimidation Due to A Post or Comment You Shared on Social Media?

Yes; 9,6	No; 90,4

%0   %50   %100
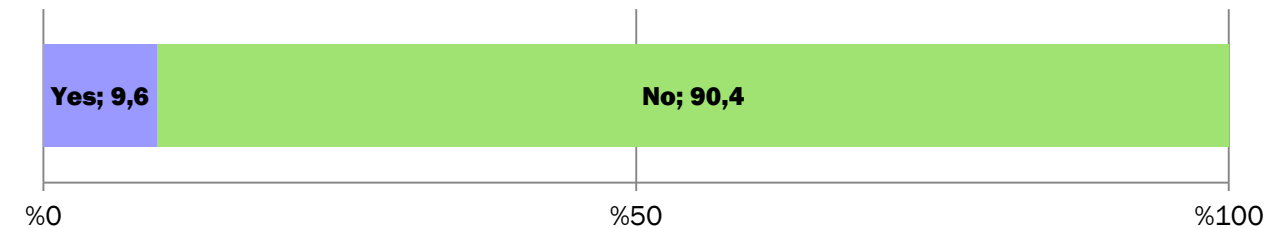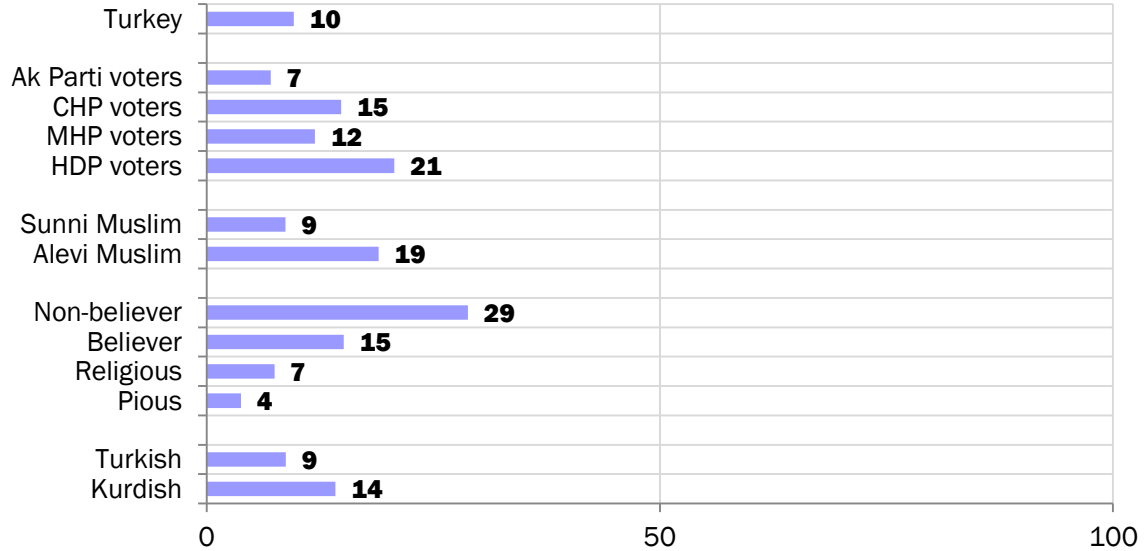
The observation that people who have access to the internet are a lot more likely to be subject to online violence and bullying offers insight into why men are more likely to be subject to online violence than women, and why young people are likely to be the same than other age groups, metropolitan residents more than people living in less urban areas, and those who identify their lifestyle as Modern more than those in other lifestyle clusters.

However, establishing a correlation between having access to the internet and being subject to insult, swearing or intimidation and threat on the internet should not be perceived as naturalizing or justifying online violence on our behalf. While having access to the internet indicates socioeconomic status, we come across a very different outlook when we examine online violence victims by political party preference, ethnic origin, piety level and sects. Reaction to difference and diversity that we generally observe in Turkey manifests itself again when we observe online violence by identity of its victims. As revealed by the graph below, HDP voters are three times more likely to be a victim of online violence than Ak Parti voters, as believers are five times more likely than Alevis and twice more likely than Sunnis, and the Kurdish one and a half times more likely to be subject online violence than the Turkish.

Have You Ever Been Subject to Insult, Swearing or Intimidation Due to A Post or Comment You Shared on Social Media?

Category	Value
Turkey	10
Ak Parti voters	7
CHP voters	15
MHP voters	12
HDP voters	21
Sunni Muslim	9
Alevi Muslim	19
Non-believer	29
Believer	15
Religious	7
Pious	4
Turkish	9
Kurdish	14

### 2.6. Main Source/Medium of Receiving News

In our exploration of the use of mass communication tools in Turkey, we also need to identify the extent to which these tools are employed as a news source. In other words, although people tend to use different mass communication tools, understanding which tool/platform they trust the most for receiving news enables us to measure the confidence they have in these tools/platforms. We have inquired about the news source preferred by the respondents with an open-ended question 2 years ago in the April'14 Barometer, and grouped the responses into the categories listed below. In this survey, we asked the same question by using the five mediums listed in the graph.

Preferred news source
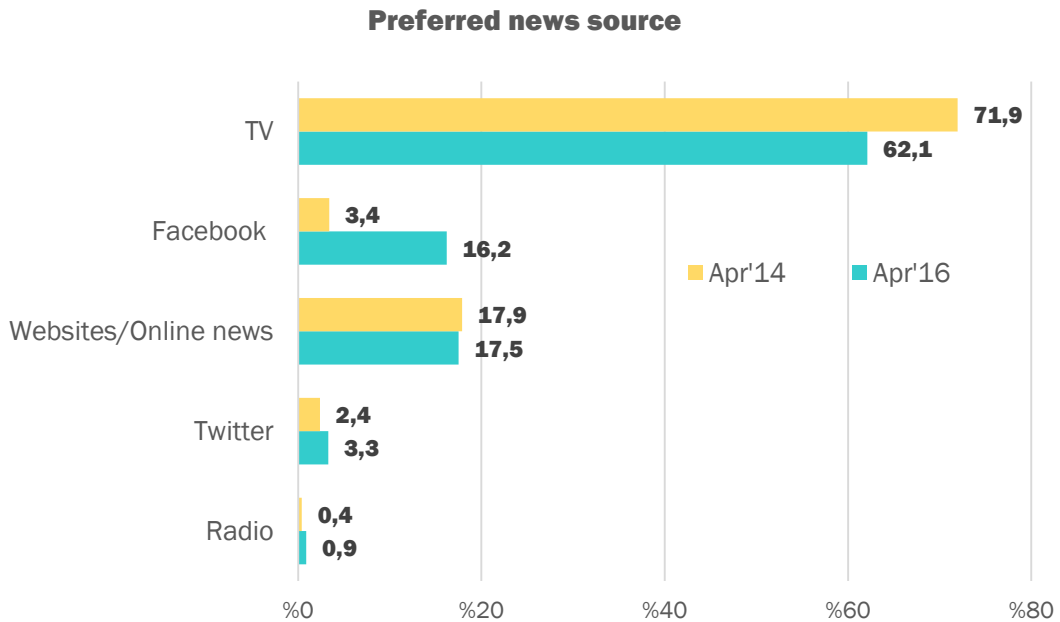
Even for half of all internet users, TV remains the preferred news source

The great majority of society still first receives news from the TV (72 percent). The only change in the rates over the last two years is observed in the preference rate for Facebook: While only three percent of the respondents described Facebook as their preferred news source two years ago, this rate is five times higher this year, standing at 16 percent. We may think that this difference is caused only by the users who only use Facebook among the social media platforms. 28 percent of the users who only use Facebook, also refer to Facebook to check the news.

When we look at the findings for the preferred news source, we observe that TV remains as the most important news source. Half of the internet users also stated that they would check the TV to learn about a news story.

Preferred news source by internet use
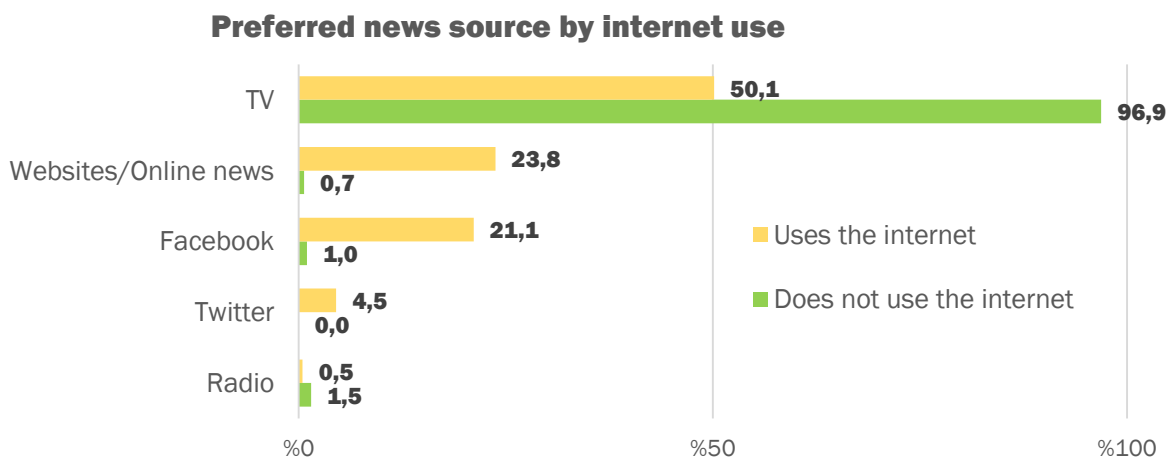
Five percent of internet users say that they first check Twitter for news. Although this may seem like a low rate, it should be noted that this corresponds to nearly one million adults.

Political preference / news source

		TV	Internet	Social media
Turkey	Apr'14	67	15	6
	Apr16	62	18	20
Ak Parti	Apr'14	75	10	2
	Apr16	70	13	16
CHP	Apr'14	61	16	13
	Apr16	57	21	22
MHP	Apr'14	53	27	10
	Apr16	57	19	25
BDP/HDP	Apr'14	69	13	4
	Apr16	55	19	25
Swing	Apr'14	63	16	7
	Apr16	59	18	22
Non-voter	Apr'14	47	24	5
	Apr16	56	26	18

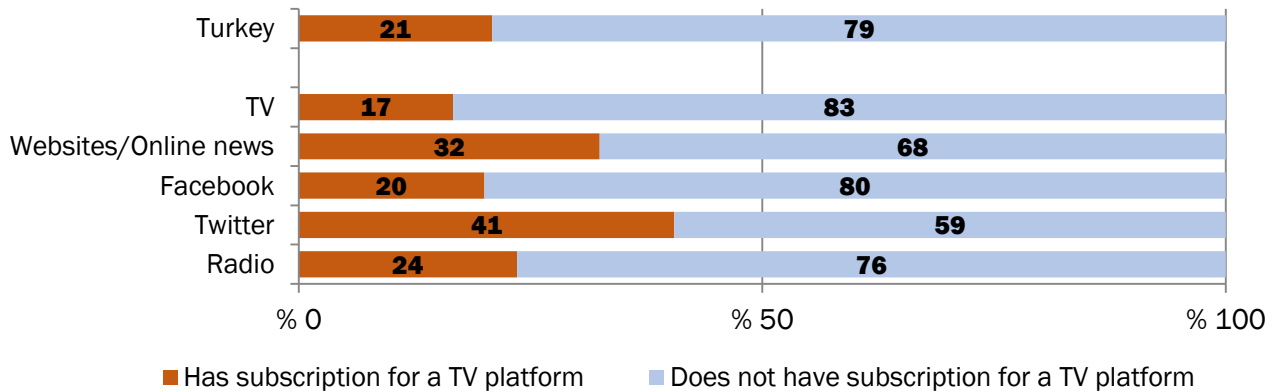■ TV ■ Internet ■ Social media
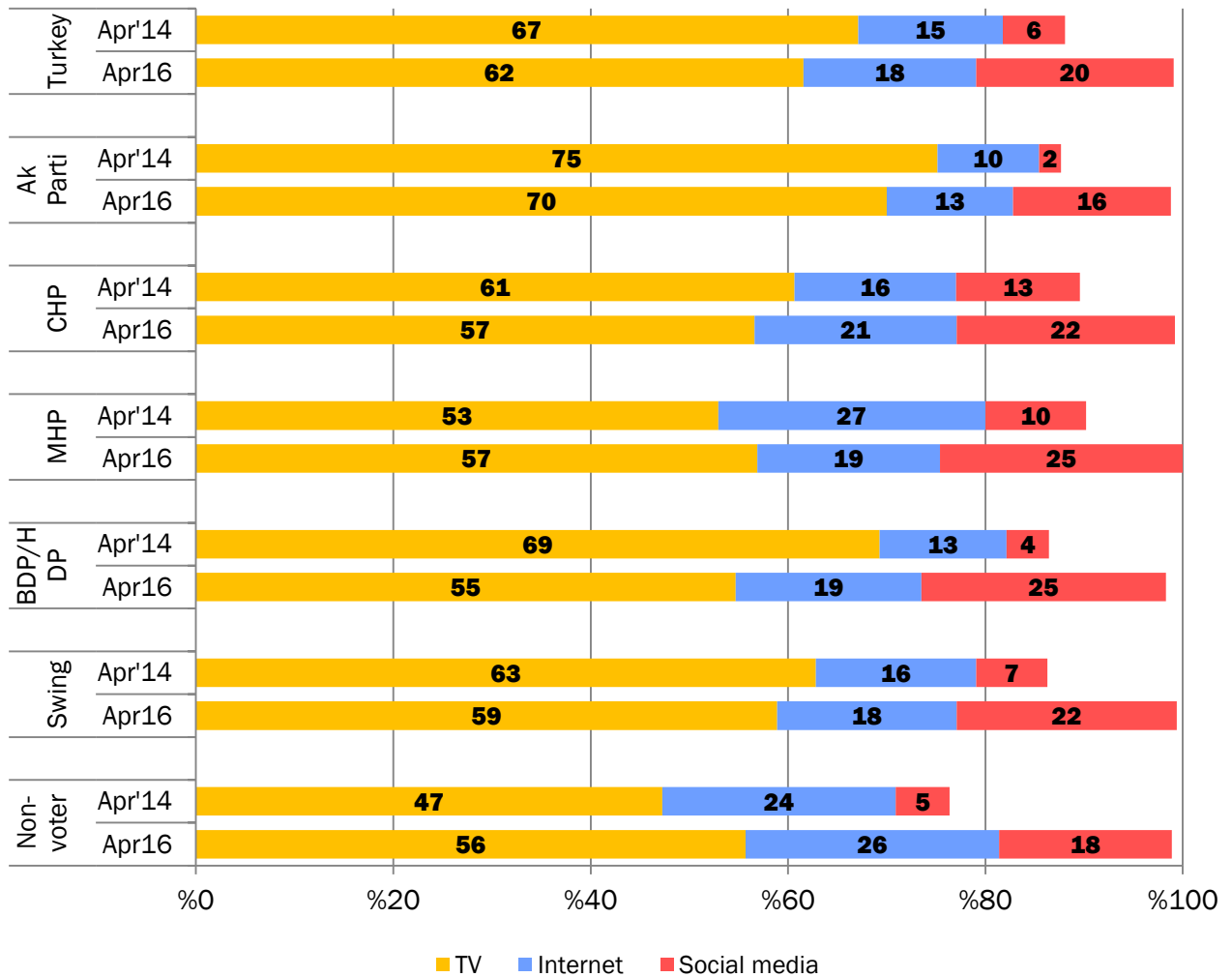
The change in the preferred news source results over the last two years is reflected in the graph above. The missing values between the two survey results are due to the response options of the newspaper, the radio, and the various responses that were provided when this was inquired with an open-ended question. When we look at the voter groups generally, we observe that the voters are more inclined to follow the news on social media and less inclined to do so from TV. Particularly, while only four percent of HDP voters reported that they checked social media for a breaking news story two years ago, this rate has shot up to one forth in the recent survey. The increased tendency to refer to social media may be associated with the increasing restriction and self-censorship of news on the TV channels.

On the other hand, one could be tempted to associate the high dependency on receiving the news from TV with subscription to TV platforms. However, as it can be seen in the graph below, respondents who state that they follow the news from TV are least likely to have a TV platform subscription. People who follow the news on TV also appear to make up a cluster with low educational attainment and income levels.
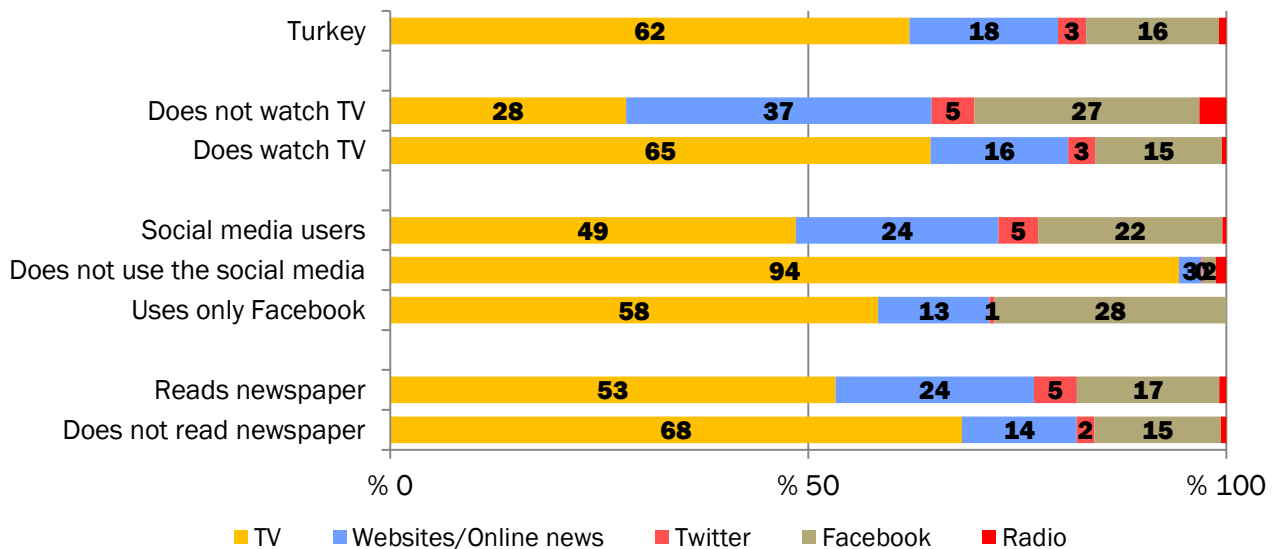
News source / TV platform subscription

	Has subscription for a TV platform	Does not have subscription for a TV platform
Turkey	21	79
TV	17	83
Websites/Online news	32	68
Facebook	20	80
Twitter	41	59
Radio	24	76

■ Has subscription for a TV platform   ■ Does not have subscription for a TV platform

When we examine the preferred medium for following the news in juxtaposition with access to mass communication tools, we come across several noteworthy findings.

News source / mass communication tools

	TV	Websites/Online news	Twitter	Facebook	Radio
Turkey	62	18	3	16	
Does not watch TV	28	37	5	27	
Does watch TV	65	16	3	15	
Social media users	49	24	5	22	
Does not use the social media	94			3	2
Uses only Facebook	58	13	1	28	
Reads newspaper	53	24	5	17	
Does not read newspaper	68	14	2	15	

■ TV   ■ Websites/Online news   ■ Twitter   ■ Facebook   ■ Radio

It is even the case that 28 percent of the five percent who provided the response "I don't watch TV" have also stated that they would first check the TV for a breaking news story. People who only use Facebook, among those who are internet users, strike the eye as the group that has the highest tendency to watch TV for receiving the news. On the other hand, the same group refers to Facebook the most for checking out a breaking news story.

We observe that TV still remains one of the main sources for checking out a breaking news story. Such that, even internet and social media users, and people who do not specify TV as their news source, follow a breaking news story from the TV. The fact that TV is a medium that is not only passive, but that displays live visual footage on a frequent basis may be leading to this outcome. Ultimately, when there is a fresh terror attack or any other kind of disaster, it should not be surprising that anyone who has access to a TV is very highly likely to first check the TV, and then look at the

social media platforms of their choice. However, increased tendency to follow the news on social media rather than TV cannot only be explained by the increased penetration rate of the internet and social media. This is mainly due to the fact that we have come across many findings in the results for TV channel preferences that offer an explanation to this change.
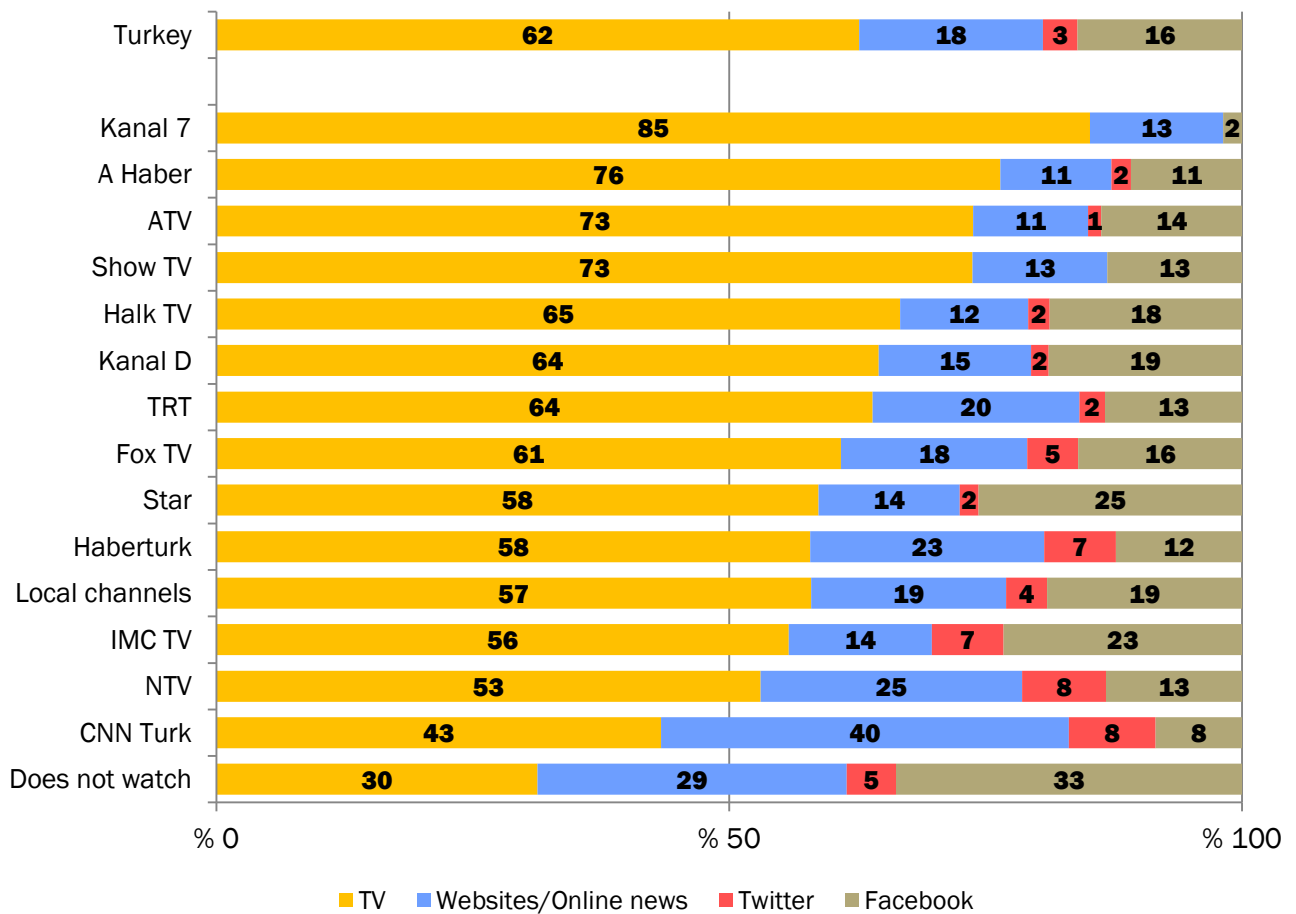
Those who prefer TV for following the news are mainly viewers of pro-government TV channels.

In this month's survey, we have inquired about the respondents' TV channel preference for following the news, as usual. When we rank the TV channels in the order of being preferred for following the news, we come across an outlook that is worthy of further analysis. The three most preferred TV channels for watching the news, are also the TV channels that we can rightly describe as channels with an increasingly pro-governmental broadcasting tone, in the least four years. In other words, Kanal 7, A Haber and ATV Haber are completely polarized TV channels in terms of their newsroom broadcasting policy. These three channels are followed by Show TV and Halk TV. We may associate Show TV has a large news following audience with the fact that this audience is mainly composed of people with a relatively lower educational attainment level and level of income. However, it would not be wrong to claim that Halk TV viewers, 73 percent of whom say that they check the TV for news, are located on the exact opposite end of the polarization axis.

Looking at this overall outlook, we may claim that those who prefer polarized TV channels are ultimately bound to these sources for following the news, whether they are watching pro-government or anti-government channels.

Preferred news source for following news by channel

Channel	TV	Websites/Online news	Twitter	Facebook
Turkey	62	18	3	16
Kanal 7	85	13		2
A Haber	76	11	2	11
ATV	73	11	1	14
Show TV	73	13		13
Halk TV	65	12	2	18
Kanal D	64	15	2	19
TRT	64	20	2	13
Fox TV	61	18	5	16
Star	58	14	2	25
Haberturk	58	23	7	12
Local channels	57	19	4	19
IMC TV	56	14	7	23
NTV	53	25	8	13
CNN Turk	43	40	8	8
Does not watch	30	29	5	33

Legend: ■ TV ■ Websites/Online news ■ Twitter ■ Facebook

2.7. Online Shopping and Habits

2.7.1. Online shopping

We have already pointed out that the internet has a great potential in Turkey. However, both according to Barometer data and real data, the growth in e-commerce appears to lag behind the proliferation of the internet. According to the data for 2014 on the e-commerce[3] web site of the European Union, the share of e-commerce in the Gross National Product (GNP) of Turkey is 1.63 percent. Turkey ranks 17th in Europe with this rate. The corresponding figure for the UK, which ranks first on this list, is 5.7 percent.

We can also determine from the Barometer data that online shopping is not quite widespread in Turkey yet.

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[3] http://ecommercenews.eu/ecommerce-in-turkey-reaches-e6-34-billion/

Status of online shopping

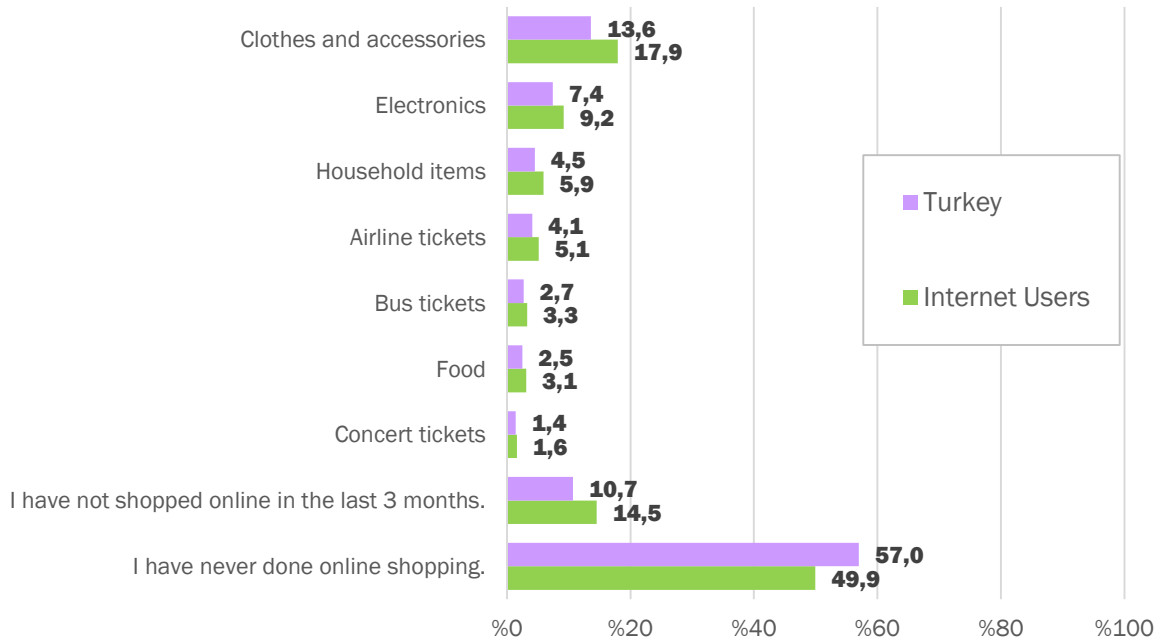| Item	Fef'15	Apr'16
Clothes and accessories	10,6	13,6
Electronics	6,4	7,4
Household items	2,8	4,5
Airline tickets	3,7	4,1
Bus tickets	3,2	2,7
Food	2,8	2,5
Concert tickets	1,0	1,4
I have not shopped online in the last 3 months.	13,3	10,7
I have never done online shopping.	58,3	57,0
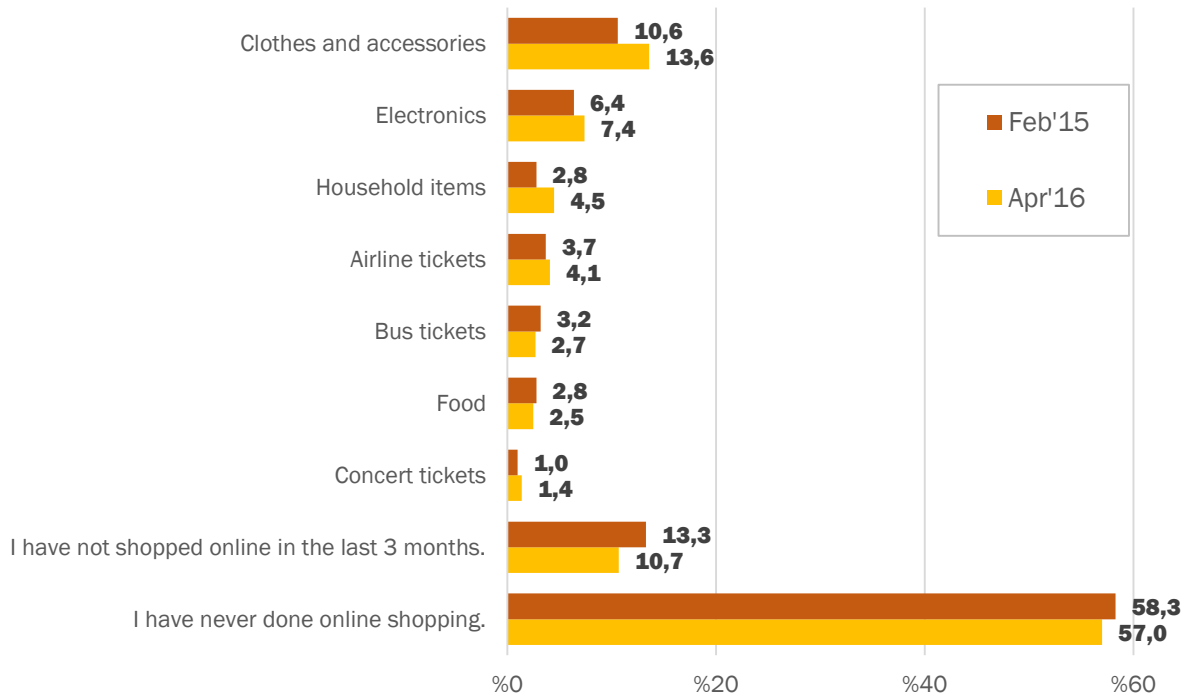
It appears that 57 percent of the adult population have never done online shopping, and clothes and accessories top the list of items purchased online. When we compare the results with those from the 2015 Lifestyles Research, we observe a slight upward momentum in e-commerce. However, when we look at the figures for internet users, we do not observe any significant change.

70 percent of the internet users have never shopped online in their lives before. When we compare this figure to the overall population, we can easily notice the great customer potential. According to this outlook, there are more than seven million people who have bought clothes or accessories on the internet in the last three months. On the other hand, the population of online food shoppers, which is ranked lower on the list, is close to two million people.

Status of online shopping

Category	Turkey	Internet Users
Clothes and accessories	13,6	17,9
Electronics	7,4	9,2
Household items	4,5	5,9
Airline tickets	4,1	5,1
Bus tickets	2,7	3,3
Food	2,5	3,1
Concert tickets	1,4	1,6
I have not shopped online in the last 3 months.	10,7	14,5
I have never done online shopping.	57,0	49,9

It may automatically be presumed that men and women have different preferences and habits in terms of online shopping. However, this type of difference is the most visible in clothes shopping, which is generally more popular among women, and we do not observe a significant difference in other types and the overall rates of online shopping. When we look at the how widespread e-commerce is among the internet users, we do not come observe a different picture. In other words, there is no perceptible difference in online shopping statistics of internet user women in particular.

When we evaluate the findings by different parameters, we find the level of income to be the real determining factor. E-commerce of all types increases with higher level of income

2.7.2. Online habits

In the previous Barometer reports where we focused on the topic of internet use as a theme, we had found out three main reasons for using the internet: Looking for a job (sending CVs), watching TV series and online banking. The graph below demonstrates the frequency of these internet uses, both for the internet users and for country-wide average. In this evaluation, watching TV series appears to the most frequently performed type of internet use. Looking for a job, on the other hand, is the least frequently performed type of internet use.

How frequently do you perform the following on the internet?

		Never	Rarely	Seldom	Sometimes	Frequently	Always
Looking for a job	Turkey	70	6	6	5	5	8
	Internet users	63	7	8	6	5	10
Watching TV series	Turkey	58	5	7	8	8	14
	Internet users	47	7	8	10	10	18
Online banking	Turkey	64	4	5	6	7	14
	Internet users	55	5	6	7	9	18

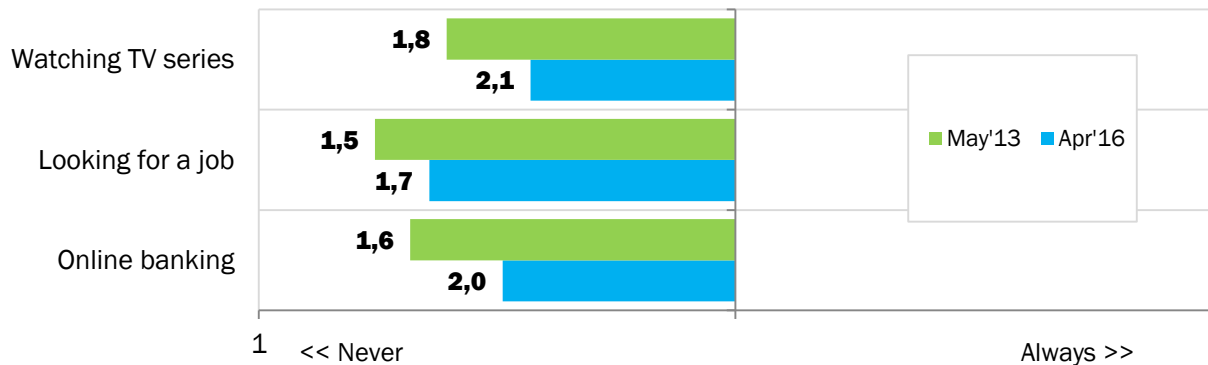■ Never ■ Rarely ■ Seldom ■ Sometimes ■ Frequently ■ Always
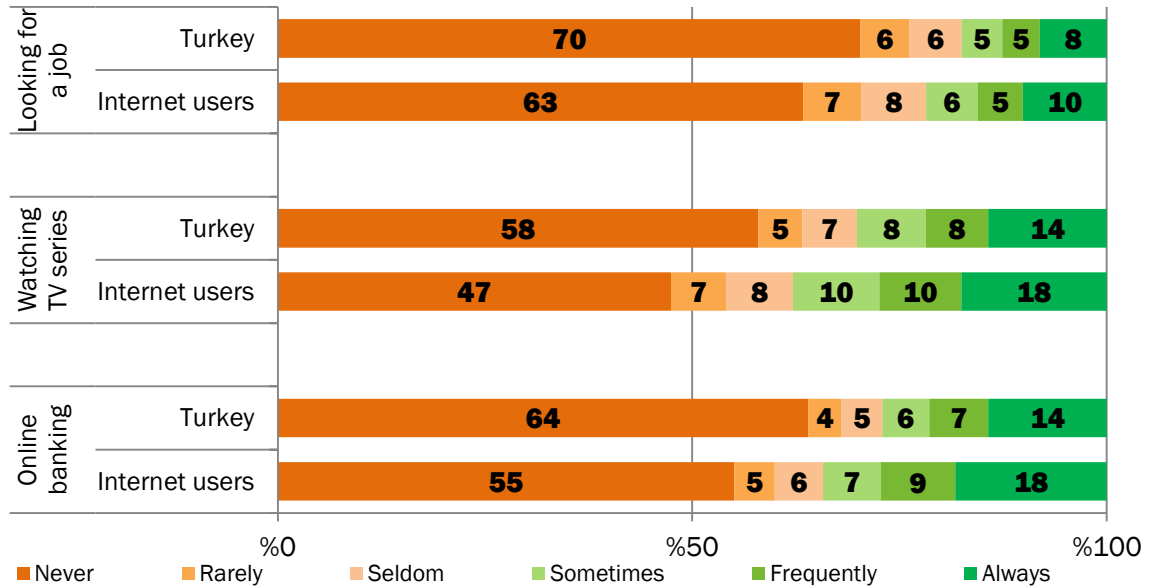
Even more than half of the internet users state that they never perform online banking operations. In this context, those who frequently or always perform their banking operations online only correspond to one third of all internet users. When evaluate this finding in terms of the overall population, we observe that seven-eight million people always use online banking. Similarly, there are more than five million people who always look for a job by using the internet, and more than seven million people who always watch TV series on the internet. This finding reiterates our observation that there is still some time for internet use in Turkey to reach a saturation point, and that the internet promises a very big potential.

We had inquired people's habit in these three areas three years ago, using a question with five-point scale. When we compare data from this month's survey, with those from three years ago, by converting the responses based on the six-point scale to the five-point scale, we observe that there has been an increase in the tendency to perform three of the actions we have inquired about.

How frequently do you perform the following on the internet? (average)

	May'13	Apr'16
Watching TV series	1,8	2,1
Looking for a job	1,5	1,7
Online banking	1,6	2,0

1 << Never   Always >>

When we look at the frequency of online actions by different demographic clusters, it is possible to distinguish a few important clues. The average figures have been calculated for only for the internet users to better portray the differences between preferences.

How frequently do you perform the following on the internet?

Internet users	2,3
Female	2,0
Male	2,6
Below high sch.	1,6
High school	2,4
University	3,3
Between 18 - 28	2,4
Between 29 - 43	2,4
44 or older	2,1
Lower class	1,6
Lower middle class	2,1
New middle class	2,4
Upper class	3,3

1 << Never   3   5 Always >>

Looking for a job, applying for a job

Internet users	1,9
Female	1,8
Male	2,0
Below high sch.	1,6
High school	2,1
University	2,3
Between 18 - 28	2,3
Between 29 - 43	1,9
44 or older	1,5
Lower class	1,8
Lower middle class	2,0
New middle class	1,8
Upper class	1,9

1   3   5

<< Never   Always >>

Internet users	2,5
Female	2,5
Male	2,5
Below high sch.	2,1
High school	2,7
University	2,6
Between 18 - 28	3,1
Between 29 - 43	2,3
44 or older	1,7
Lower class	2,1
Lower middle class	2,5
New middle class	2,4
Upper class	2,6

1   3   5

<< Never   Always >>

We frequently underline educational attainment level, income level and age as the most critical factors that determine internet use. However, when we evaluate the frequency of performing the three online actions noted above, we come across different results.

Performing online banking operations is mainly associated with level of income, and in connection with this, varies the most by educational attainment level. We may think that those with more money are more likely to use online banking.

Looking for a job online, on the other hand, appears to be something mostly performed preferred by educated young people. However, it does not vary by level of income.

We can also determine that watching TV series online is largely the habit of young people. However, watching TV series also comes out as one of the few cases where we do

not observe a difference between women and men, in terms of internet use, as even in looking for a job, men are more likely to use the internet than women. Naturally, it would not be wrong to argue that housewives, who make up on third of society and do not look for a job in any way whatsoever, is the main factor shaping this finding.
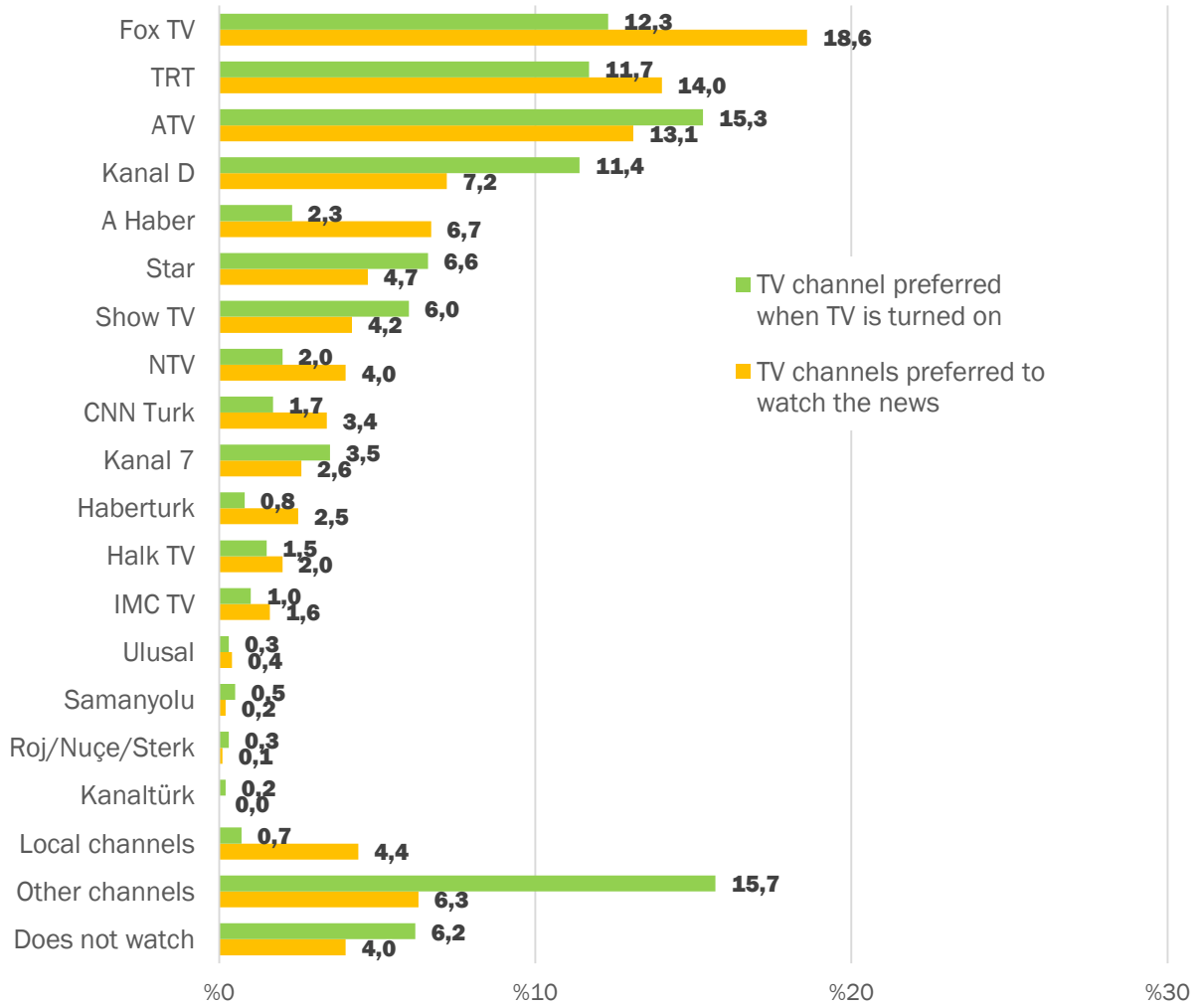
2.8. Main Mass Communication Tools: TV and the Newspaper

Before moving onto TV preferences, we should remind that 17 percent of the adult population in Turkey do not use any mass communication tool other than TV, about 39 percent read the newspaper, and less than 30 percent both read the newspaper and use social media.

As part of the survey for the April '16 Barometer, we have asked respondents two different questions on their TV channel preferences. In the first question, the respondents were asked to list the first three TV channels they prefer to watch when they turn on the TV, in an open-ended fashion. We observe that about 6 percent answered this question with the response "I do not watch TV". The other question we directed to the respondents was the very same question we ask every month about the preferred TV channel for watching the news. The graph below provides the two rates in juxtaposition to each other. The ranking is based on the TV channel preference for watching the news.

TV channel preference

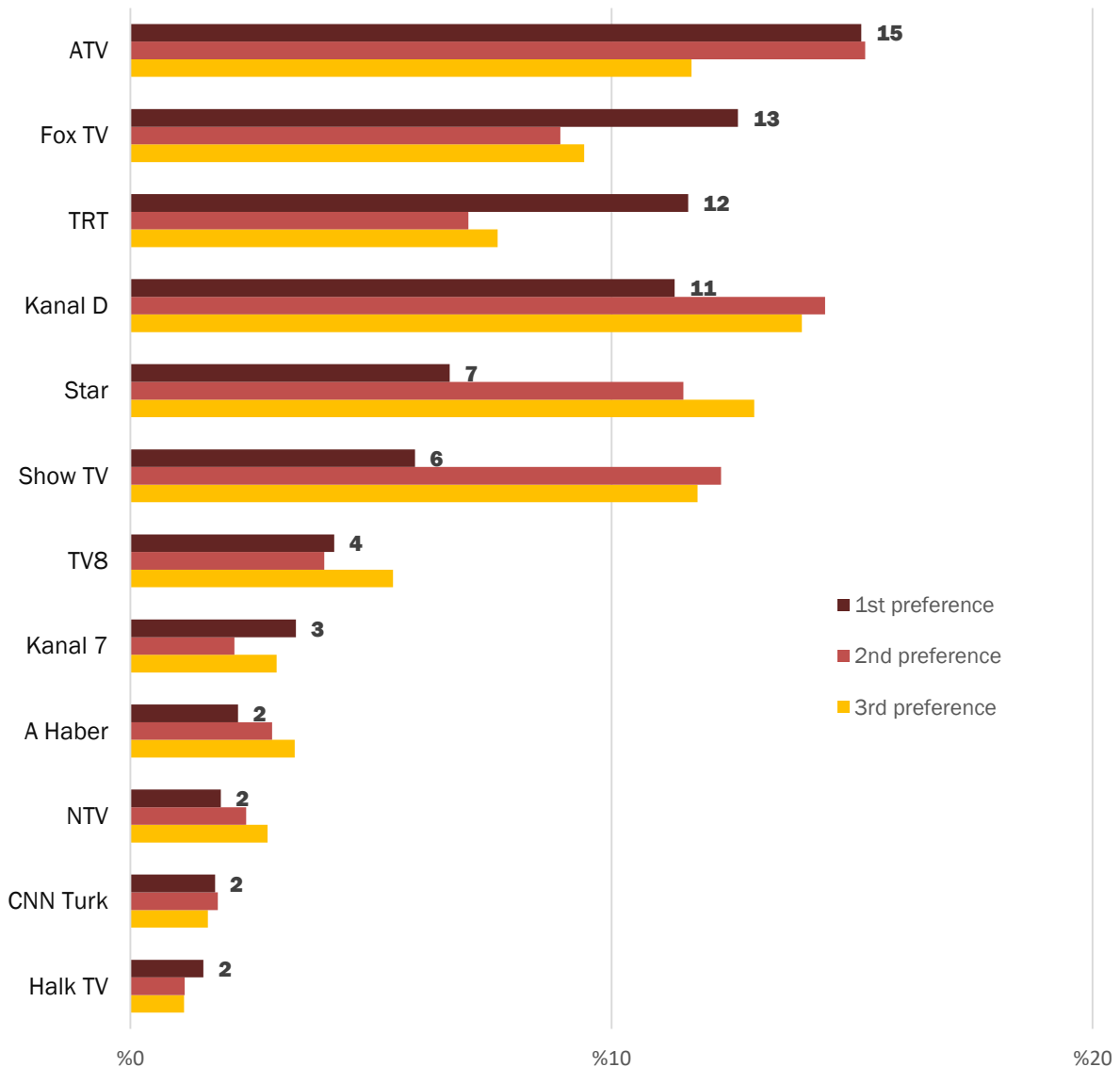| Channel	TV channel preferred when TV is turned on	TV channels preferred to watch the news
Fox TV	12,3	18,6
TRT	11,7	14,0
ATV	15,3	13,1
Kanal D	11,4	7,2
A Haber	2,3	6,7
Star	6,6	4,7
Show TV	6,0	4,2
NTV	2,0	4,0
CNN Turk	1,7	3,4
Kanal 7	3,5	2,6
Haberturk	0,8	2,5
Halk TV	1,5	2,0
IMC TV	1,0	1,6
Ulusal	0,3	0,4
Samanyolu	0,5	0,2
Roj/Nuçe/Sterk	0,3	0,1
Kanaltürk	0,2	0,0
Local channels	0,7	4,4
Other channels	15,7	6,3
Does not watch	6,2	4,0

According to the survey findings, Fox TV is the most preferred TV channel for watching the news, while ATV is the most preferred channel to watch when TV is first turned on. The two TV channels with the closest rates are TRT and Kanal 7. TV8 stands out among the other TV channels.

According to the average data for March provided by the TNS company, which releases the rating figures, ATV is the first, Kanal D is the second, and Fox TV is the third most popular channel for the entire day. According to the results of our field survey, the same list is ranked in the order of ATV, FOX TV, TRT and Kanal D. An overall comparison shows that the actual rating data confirms our survey results for the TV channels preferred when the TV is first turned on.

The most preferred three TV channels when the TV is first turned on

The graph above shows the most preferred three TV channels when the TV is first turned on, in the order of preference. The first finding that strikes the eye is that ATV ranks first for the first and second preference. Star and Show TV, on the other hand, do not necessarily enjoy a high rating in this category, but overall we can describe the performance of these TV channels as successful. It is noteworthy that among the three news channels, A Haber has the highest performance. A Haber used to remain within the survey's margin of error when it first started out broadcasting, but now it has surpassed even NTV and CNNTürk, which have been launched long before. We will be sharing a few findings about the source of A Haber's performance later in this report.

However, the ranking provided by the survey results is clearly confirmed by the actual rating results. According to the graph below, the likelihood of ATV to be one of the

three preferred TV channels when the TV is turned on is 36 percent. The performance of TV8 in comparison to the other TV channels is not as low according to the real rating data. However, this could very well be due to the fact that TV8 is only a prime-time / entertainment channel, which may be encouraging people not to list it as one of the TV channels they prefer when they first turn on the TV.

The rate of being one of the 3 preferred TV channels when the TV is first turned on

Channel	Value
ATV	36,2
Kanal D	33,0
Fox TV	26,3
Star	24,9
Show TV	23,9
TRT	23,0
TV8	11,7
Kanal 7	7,5
A Haber	7,1
NTV	5,9
CNN Turk	4,4
Halk TV	3,1
Haberturk	3,1
IMC TV	1,9
Samanyolu	1,4
Ulusal	1,2
Kanaltürk	0,7
Roj/Nuçe/Sterk	0,7
Music channels	1,5
Local channels	2,0
Children's channels	3,6
Documentary…	4,0
Sports channels	6,6
Other channels	12,8
Does not watch	6,3
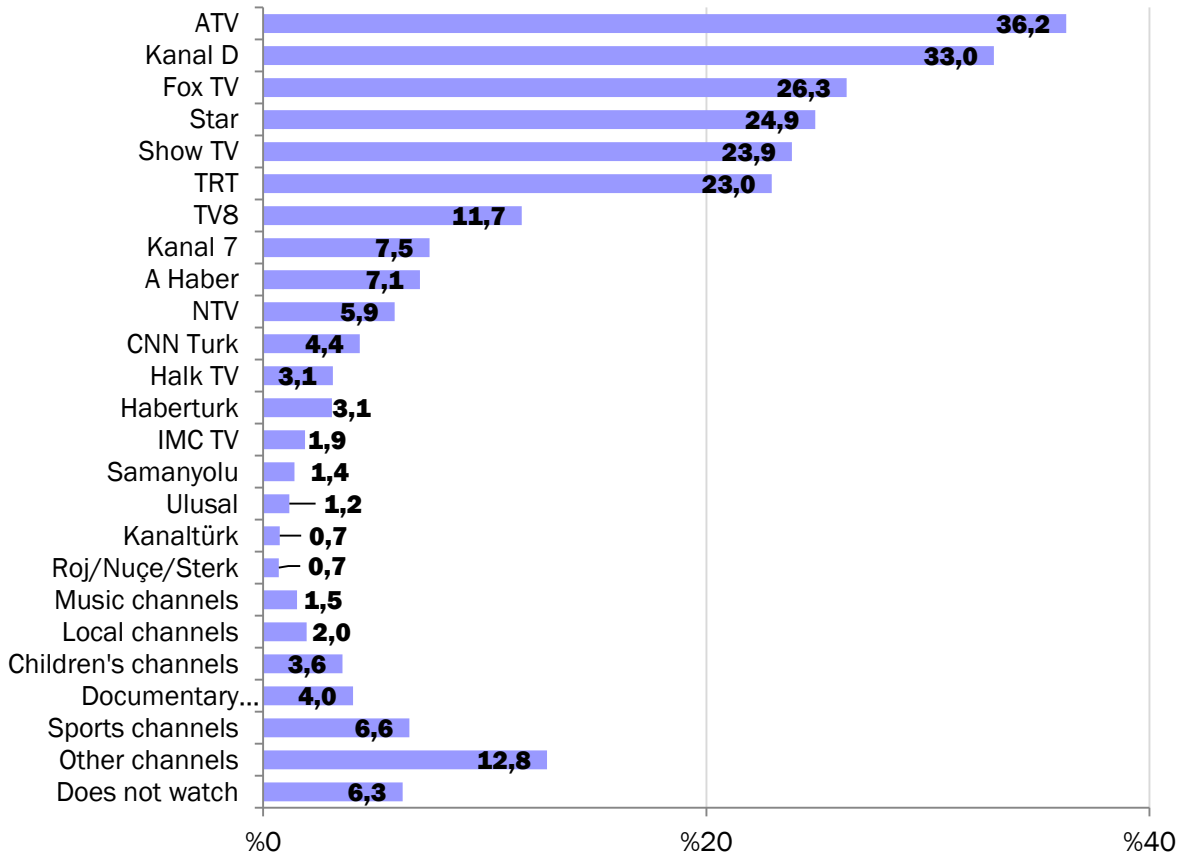
In different Barometer reports, the TV channel preferred for watching the news have always emerged as the most decisive parameter shaping political profiles and opinions on current developments. We are also evaluating political preference in the last four months by the TV channel preferred for watching the news to remind our readers about the context. The channels are listed in the order of having the most Ak Parti voters to the least. As it can be seen in the graph, the increase in the rate of swing voters and non-voters is manifested in most of the TV channel audiences in the country. As we have noted before, the TV channel preferred for watching the news demonstrates the political polarization quite clearly. The viewers of A Haber, ATV, TRT and Kanal 7, which is not listed in this graph, stand out as Ak Parti supporters.

The course of political preference over the last four months by TV channel preference

Channel	Month	Ak Parti	CHP	MHP	HDP	Other	Swing	Non-voter
Turkey	Jan'16	43	21	10	8		11	5
Turkey	Feb'16	42	20	9	8		13	7
Turkey	Mar'16	41	20	10	9		13	6
Turkey	Apr'16	37	19	9	8		17	8
A Haber	Jan'16	81	2	1	1		7	5
A Haber	Feb'16	91	5	0	3		1	
A Haber	Mar'16	84	3	4	2		5	2
A Haber	Apr'16	82	4	4	2		6	3
ATV	Jan'16	77	5	7	1		8	2
ATV	Feb'16	76	6	3	1		8	5
ATV	Mar'16	71	3	6	2		13	4
ATV	Apr'16	64	6	5	2		15	7
TRT	Jan'16	72	6	5			11	2
TRT	Feb'16	67	4	6	1		14	4
TRT	Mar'16	67	3	7	1		15	5
TRT	Apr'16	60	3	9	1		17	8
Show TV	Jan'16	53	16	12	4		11	2
Show TV	Feb'16	50	16	11	5		14	3
Show TV	Mar'16	51	13	14	1		13	5
Show TV	Apr'16	44	15	12	6		14	9
Star	Jan'16	49	12	18	3		13	5
Star	Feb'16	37	22	18	2		15	5
Star	Mar'16	37	26	20	0		10	6
Star	Apr'16	34	24	18	7		10	6
Haberturk	Jan'16	46	11	12	3		17	12
Haberturk	Feb'16	33	9	22	6		15	13
Haberturk	Mar'16	45	9	12			25	6
Haberturk	Apr'16	37	19	13	5		22	5
Kanal D	Jan'16	34	26	11	9		13	5
Kanal D	Feb'16	33	24	13	5		19	8
Kanal D	Mar'16	35	22	14	11		11	6
Kanal D	Apr'16	30	18	10	8		22	9
NTV	Jan'16	37	39	12			8	4
NTV	Feb'16	31	27	12	6		18	3
NTV	Mar'16	24	26	22	3		20	6
NTV	Apr'16	27	23	12	2		22	14
Fox TV	Jan'16	14	47	14	5		12	5
Fox TV	Feb'16	17	46	9	6		14	7
Fox TV	Mar'16	15	42	12	7		14	9
Fox TV	Apr'16	13	40	10	6		20	8
CNNTurk	Jan'16	9	37	8	22		14	9
CNNTurk	Feb'16	9	41	12	13		15	6
CNNTurk	Mar'16	9	49	7	13		13	7
CNNTurk	Apr'16	8	39	10	10		19	12

Legend: ■ Ak Parti ■ CHP ■ MHP ■ HDP ■ Other ■ Swing ■ Non-voter

TV PREFERENCES OF VOTERS
BETWEEN 2010-2016

2010 ●——→ 2016

We have pointed out earlier that we have been following the course of political preference by TV channel preference during the last six years, and we have only provided the course over the last four months in this report. After all, as KONDA, we possess the data on the change in TV channel profiles over the last six years. The graphic representation below shows the changes observed in society for various TV channels over the last six years.

The correspondence analyses reveals the following outlook when TV audiences are places on a two-dimensional plane.

The placement of political party voters, swing voters and non-voters on this two-dimensional plane can be identified from the red dots. We observe that Ak Parti and CHP voters are located at the opposite ends of the y-axis, that HDP voters are placed at a completely different location than all the other voter groups, that swing voters stand in closest proximity to the intersection point of the two axes, and that

MHP voters are oriented towards not Ak Parti but CHP voters. The arrow shaped long lines show the six-year course of the TV channels preferred for watching the news.

First of all, if we start with ATV and TRT, which have the most well defined lines, we clearly see that they have follow a trajectory that is supportive of Ak Parti. What is more interesting is that TRT and ATV have maintained their course in the political playfield more or less along the same line during the last 6 years.

On the other hand, we see how Fox TV has moved from a point in close proximity to Ak Parti to a completely different location that is close to CHP over the last 6 years.

We should also point out that CNNTürk's course, which has been historically pretty close to CHP, has approached towards the corner occupied by HDP and came back to its usual trajectory. More interestingly, Kanal D, which is owned by the Doğan Group, has also demonstrated an orientation towards HDP in 2015.

As a result, the correlation between the TV channel preference and political positioning that we frequently underline in Barometer reports is also clearly visible in this graphical representation.

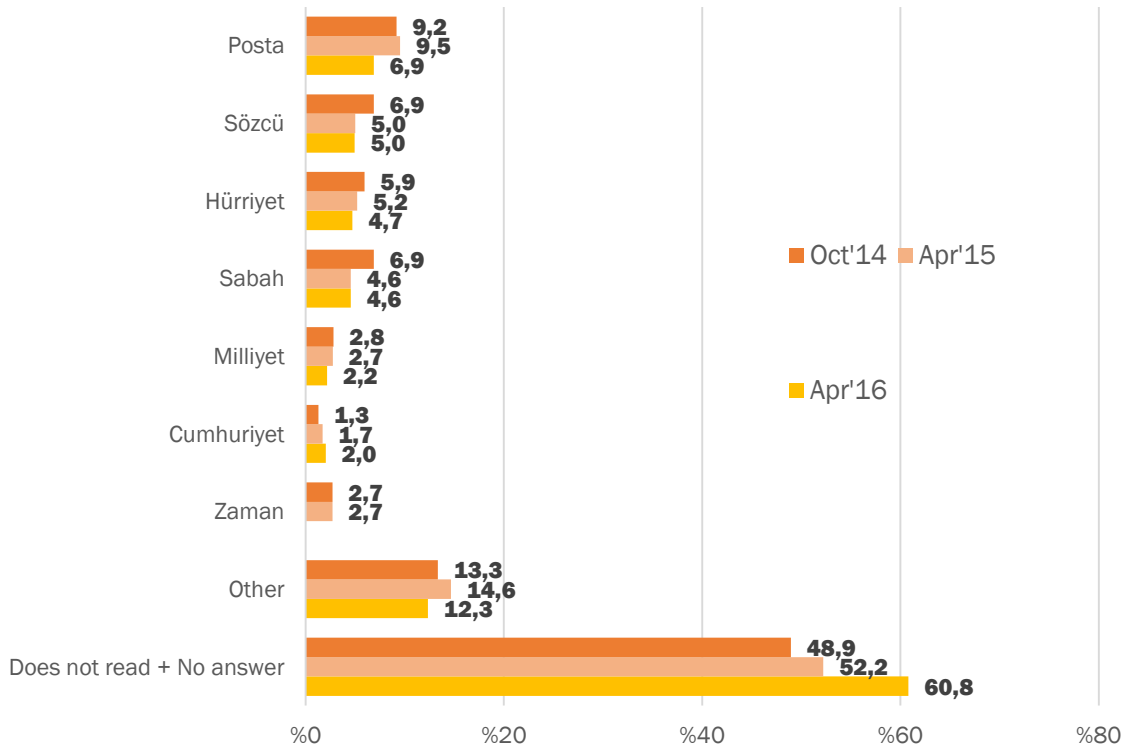### 2.8.1.   Rates of newspaper readership and purchasing

As noted in the initial parts of this report, the great decline in newspaper readership is not only perceptible in the Barometer reports, but also the disclosed circulation figures of the newspapers. For the purposes of this research, we first asked the respondents whether they bought a newspaper to read or not. The rate of those who buy a newspapers is quite low at 13.3 percent.

Is there a newspaper that you buy to read?

13,3	86,7

% 0   % 50   % 100

■ Yes   ■ No
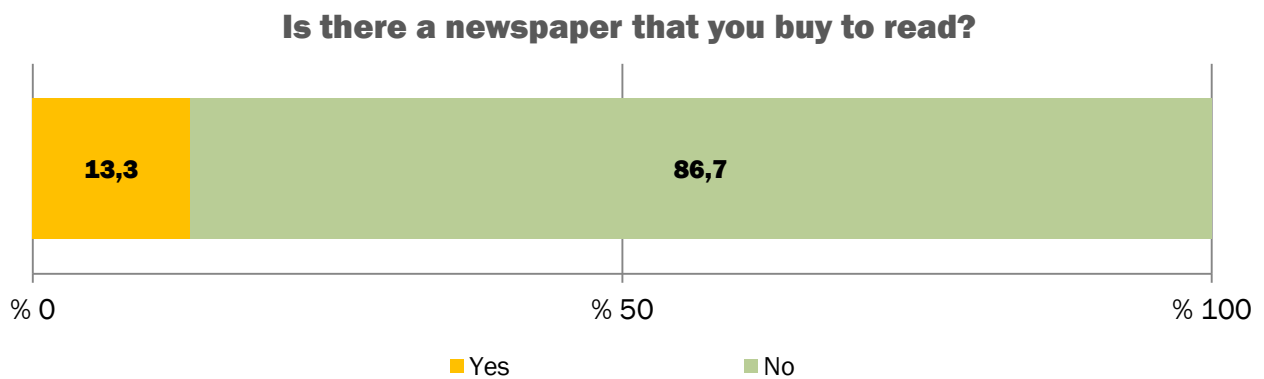
In the survey, we also asked the respondents which newspaper(s) they read. A comparison of the responses to this questions reflects a noticeable decline in newspaper readership. About 2 years ago, approximately half of the general public stated that they read a newspaper, while the same rate has decreased to 39 percent now.

Newspaper readership rate

Newspaper	Oct'14	Apr'15	Apr'16
Posta	9,2	9,5	6,9
Sözcü	6,9	5,0	5,0
Hürriyet	5,9	5,2	4,7
Sabah	6,9	4,6	4,6
Milliyet	2,8	2,7	2,2
Cumhuriyet	1,3	1,7	2,0
Zaman	2,7	2,7	
Other	13,3	14,6	12,3
Does not read + No answer	48,9	52,2	60,8

The circulation numbers of all newspapers have declined over the last two years, except Cumhuriyet, which has been able to expand its reader base somewhat slightly. However, the rate of those who state that they read a newspaper other than the most selling four newspapers falls within the margin of error. Posta comes out as the most widely read newspaper, with seven percent stating that they read this newspaper.
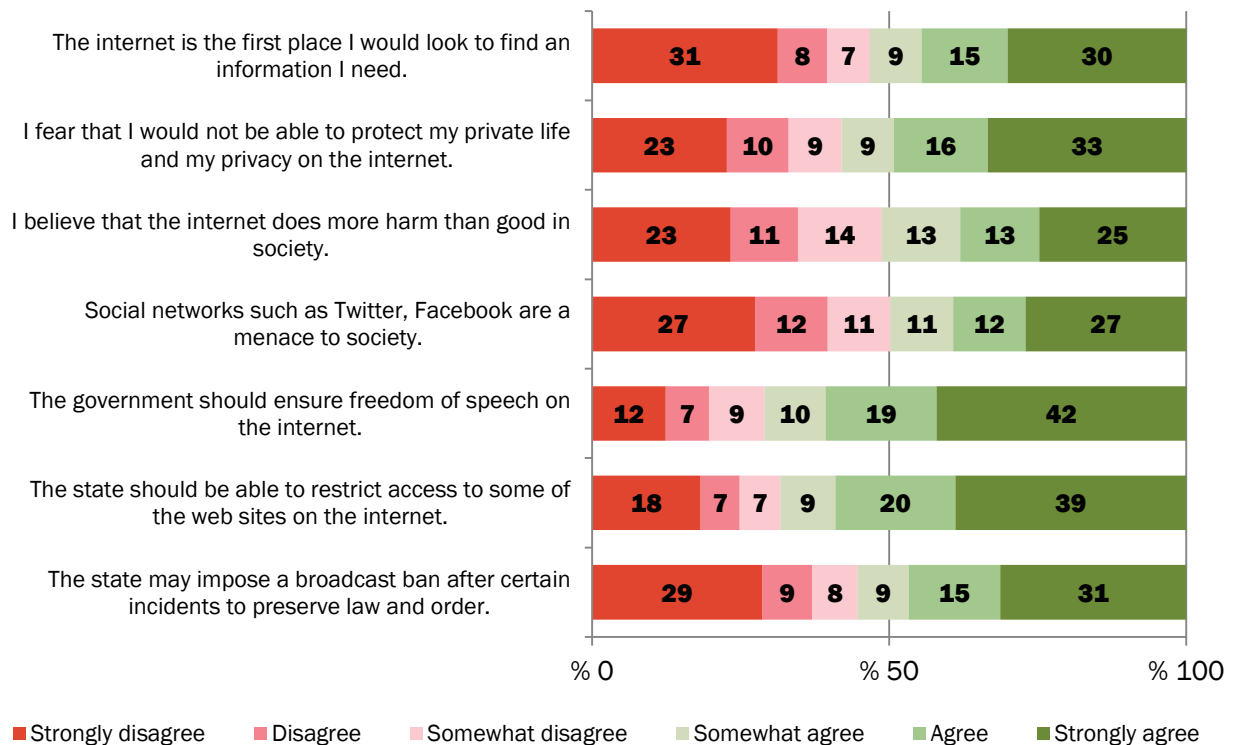
As the numbers are quite low, the findings are not likely to yield a healthy assessment of the readership profiles of the newspapers. Nevertheless, we need to re-emphasize a finding that is clearly visible. Newspaper readership is on the decline. However, social media and internet use do not correspond to the social space that has been traditionally occupied by the newspaper.

2.9. Opinions About the Internet

Within the scope of the research theme, we have elaborated on what people think about various aspects of the internet, in addition to their preferences regarding mass communication tools, and their use of the internet and social media. In doing so, we have started out by making comparisons with the results from our previous surveys about the internet and social media. Then, we have examined the relations between these elements, and the impact of demographic characteristics. And finally, we have endeavored to understand how people's preferences about mass communication tools and social media, and their opinions on current political developments affect their opinions about the internet. In other words, we have used people's opinions about the internet to arrive at a better understanding of both the demographics of the internet and social media, and the role of this demography in current politics.

Opinions about the internet and freedom of speech

Statement	Strongly disagree	Disagree	Somewhat disagree	Somewhat agree	Agree	Strongly agree
The internet is the first place I would look to find an information I need.	31	8	7	9	15	30
I fear that I would not be able to protect my private life and my privacy on the internet.	23	10	9	9	16	33
I believe that the internet does more harm than good in society.	23	11	14	13	13	25
Social networks such as Twitter, Facebook are a menace to society.	27	12	11	11	12	27
The government should ensure freedom of speech on the internet.	12	7	9	10	19	42
The state should be able to restrict access to some of the web sites on the internet.	18	7	7	9	20	39
The state may impose a broadcast ban after certain incidents to preserve law and order.	29	9	8	9	15	31

When we read the respondents the statement, "The internet is the first place I would look to find an information I need," with the aim to understand the importance the internet has in people's lives, approximately half of the respondents (54 percent) agreed this statement. However, about half of the respondents also think that they will not be able to protect their private life on the internet. This fear seems to have decreased in comparison to May 2013.

I fear that I would not be able to protect my private life and my privacy on the internet.

Jan'11	
May'13	3,5
Apr'14	
Apr'16	3,3

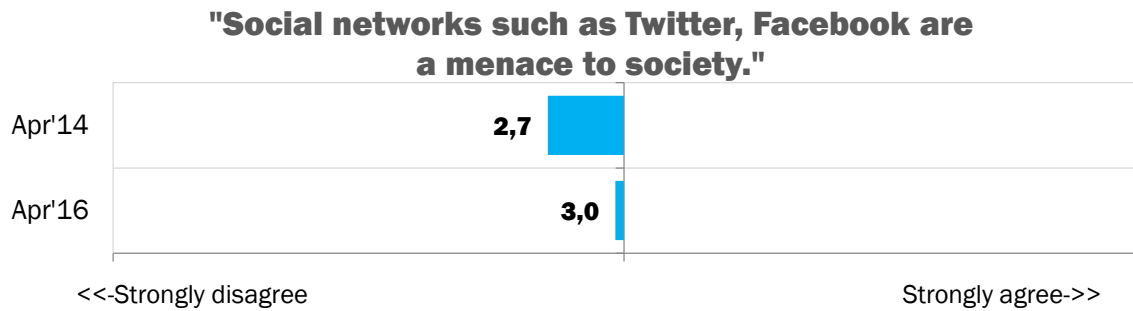<<-Strongly disagree   Strongly agree->>
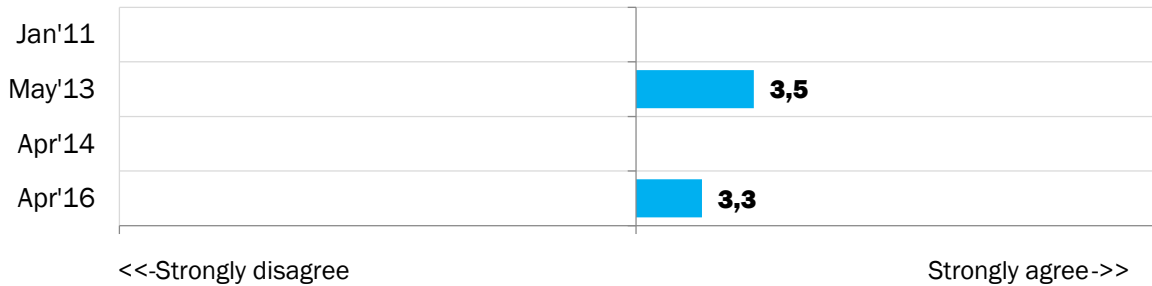
Half of the general public agrees with statement, "I think that the internet is more harmful for society than it is beneficial," while the other half disagrees. When we take an average of the responses that we have obtained since January 2011, when we first started to examine the internet as a thematic concept, and compare the results as shown in the graph below, we do not observe a fundamental change in the opinion of the general public. However, the average belief that the internet brings more harm than benefit declined in April 2014. The next sections, in which we will elaborate on differences observed by political preference, demonstrate that this decline is mainly due to the intense polarization that was prevalent at the time.

I believe that the internet does more harm than good in society.

Jan'11	3,1
May'13	3,2
Apr'14	2,7
Apr'16	3,0

<<-Strongly disagree   Strongly agree->>
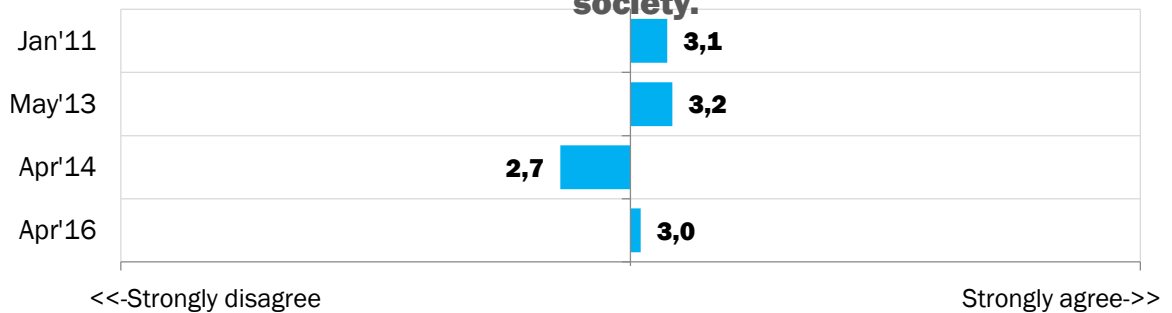
During the Gezi protests in 2013, the Prime Minister of the time, Recep Tayyip Erdoğan had said the following on a TV interview: "There is now a menace which is called social media. The best examples of lies can be found there. To me, social media is the worst menace to society." We had used this statement in the April'14 Barometer, in which examined the impact of mass communication tools, and we have directed this statement to the respondents in this month's survey again. Half of the people we have interviewed do not agree with this statement. However, in April 2014, the general public was a little more inclined to disagree with this statement. In parallel to the increased belief in the opinion that the internet brings more harm than benefit, we also understand that the outlook on social media has turned more negative in the last two years.

"Social networks such as Twitter, Facebook are a menace to society."

Apr'14	2,7
Apr'16	3,0

<<-Strongly disagree   Strongly agree->>

The other three questions we have asked with the aim to understand the public opinion on the internet are related with the state's interference with the internet. First of all, two thirds of the general public have agreed with the more general and abstract statement that "the government should ensure freedom of speech on the internet," which actually proved to be the statement that the general public is the most in consensus with, while the fact that the opinion on this statement has not changed at all in the last 3 years indicates that this is an opinion that is not likely to be contested by the general public at all.

The government should ensure freedom of speech on the internet.

Jan'11	
May'13	3,7
Apr'14	3,7
Apr'16	3,7

<<-Strongly disagree   Strongly agree->>
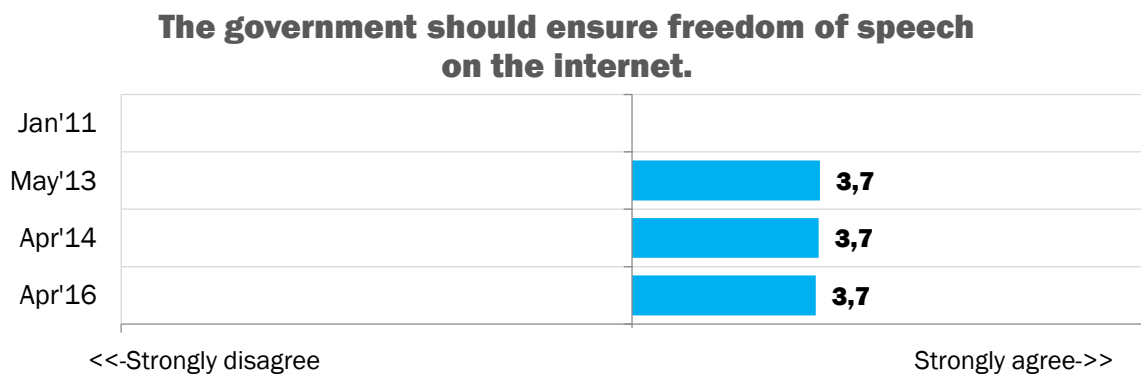
Indeed, when we directed the respondents statements about restrictions on the freedom of speech, we found out that the general public approves these restrictions although it seems to support freedom of speech in general. Two thirds of the general public agrees with the statement that "the state should be able to restrict access to some of the web sites on the internet." Internet access bans had become a controversial issue in 2013, particularly due to the ban on Youtube at the time, and we may state that internet access bans have continued since then, with an even larger scope. However, the average opinion of the general public on internet access bans has remained more or less the same since then, as demonstrated by the graph below.

The state should be able to restrict access to some of the web sites on the internet.

Jan'11	
May'13	3,5
Apr'14	
Apr'16	3,6

<<-Strongly disagree   Strongly agree->>
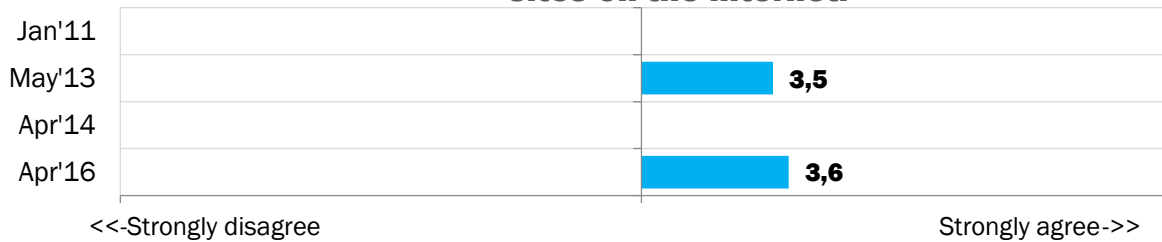
In order to inquire the state's intervention to the internet, with the more concrete and contemporary statement that "the state may impose a broadcast ban after certain incidents to preserve law and order." We observe that this statement is quite explanatory since it not only covers the internet, but also the traditional media. Fewer people agree with the opinion that a broadcast ban may be imposed than those who think that access to some web sites may be restricted, and 55 percent approve imposing a broadcasting ban when necessary.

In summary, it is noteworthy that the general public is roughly divided into two regarding such topics as the benefits of the internet, its impact on privacy and the intervention of the state, and that while fears about the impact of the internet on privacy seems to have decreased slightly in the last couple of years, the opinion that the internet is harmful seems to have grown stronger.

2.9.1.   Relations between opinions

Before moving onto our assessment of how different demographic characteristics and political opinions influence opinions on the internet, we would like to review the correlation table we have prepared, with the aim to identify and to examine the relations between these opinions, and to determine which opinions move together and which opinions stand out as opposite to each other. The closest relation between the statements are represented by the cells in darkest red, which are also the closest to the values of 1 and -1. For example, the two questions that are most closely interrelated, in other words that are most likely to be approved by a respondent if the same respondent agreed with the other statement are the statements, "Social networks such as Twitter, Facebook are a menace to society" and "I believe that the internet does more harm than good in society." All other relation are also strong and statistically meaningful.

A few details are noteworthy on this table:
- ✓ Those who first refer to the internet when they need to find out something, in other words, those who find the internet as a necessary tool, are more likely to place importance to freedom of speech, and to disagree with statements that portray the internet as "harmful" or as a "menace", as well as the restriction of access to web sites, the broadcasting bans, and similar restrictions to freedom.
- ✓ The concern about not being able to protect one's privacy moves in parallel with the agreement with the statement about the internet being harmful or a menace, as well as the statement about intervention of the state. Therefore, this concern or fear

is widespread not among those who have adopted the internet, but among those who have not done so.

✓ Defending the freedom of speech on the internet seems to be inversely correlated with supporting the broadcast ban. In other words, increased support for freedom of speech is accompanied by disagreement with the broadcast ban. However, this relation is not as strong as the relations between the other statements we have covered so far.

✓ The statements about the internet being harmful, the social media being a menace to society, the restriction of web sites and the broadcast ban are strongly related to each other.

	The internet is the first place I would look to find an information I need.	I fear that I would not be able to protect my private life and my privacy on the internet.	I believe that the internet does more harm than good in society.	Social networks such as Twitter, Facebook are a menace to society.	The government should ensure freedom of speech on the internet.	The state should be able to restrict access to some of the web sites on the internet.
I fear that I would not be able to protect my private life and my privacy on the internet.	-0.03					
I believe that the internet does more harm than good in society.	-0.20	0.31				
Social networks such as Twitter, Facebook are a menace to society.	-0.23	0.33	0.57			
The government should ensure freedom of speech on the internet.	0.25	0.08	-0.04	-0.12		
The state should be able to restrict access to some of the web sites on the internet.	-0.06	0.24	0.30	0.38	-0.04	
The state may impose a broadcast ban after certain incidents to preserve law and order.	-0.07	0.14	0.24	0.33	-0.13	0.53

2.9.2. Opinions among demographic clusters about the internet

The previous sections have demonstrated how people's demographic characteristics are very influential in shaping their internet and social media preferences, and news sources, as well as their social media use and preferences. We can also observe that these demographic characteristics influence nearly all of the opinions about the internet to a great extent.

Fundamental demographic characteristics such as gender, age, educational attainment status, characteristics such as level of income, and lifestyle characteristics such as lifestyle cluster, level of piety and head cover status are all very influential in shaping the opinions about the internet. Men, young people, the educated, singles, people with a modern lifestyle and people with a weak relationship with religion are

all more likely to view the internet in a positive light and to give a stronger reaction to restrictions to the internet and the freedom of speech.

Naturally, the fact that people in different demographic clusters have very different opinions about the internet is determined by their socioeconomic status, and respectively by whether they use the internet and social media or not, or in other words, their mass communication tool preferences. Therefore, we may argue that people's different opinions do not originate from the different demographic characteristics of different clusters, but from the very different nature of their relationship with the internet. Indeed, when we compare opinions about the internet by using different mass communication tools, the number of social media channels subscribed to, and the number of mediums used for accessing the internet, we observe that there are striking differences between these opinions. Therefore, for instance men, young people and singles do not have more positive opinions about the internet because they have a more positive opinion about the internet, but because they are very engaged with the internet.

Differences of opinion between different cultural clusters reveal a different outlook. For example, the Turks use the internet more than the Kurds, and believe that it is harmful or a menace to a lesser extent, but they are more supportive of restricting access to the internet and of the broadcast bans than the Kurds. There is a similar dynamic at work between Sunnis and Alevis. Although Sunnis have a more positive outlook on the internet in principle, they have a more restrictive attitude than Alevis.

2.9.3.   Politics and opinions about the internet

The opinions on the internet that we are addressing do not only provide insight about the internet, but they also illustrate the role of the internet in social life and current politics.

The internet is the first place I would look to find an information I need.
- 2,8
- 3,3
- 3,4
- 3,0

I fear that I would not be able to protect my private life and my privacy on the internet.
- 3,3
- 3,1
- 3,1
- 3,2

I believe that the internet does more harm than good in society.
- 3,3
- 2,7
- 2,9
- 3,1

Social networks such as Twitter, Facebook are a menace to society.
- 3,3
- 2,5
- 2,9
- 3,0

■ Ak Parti ■ CHP ■ MHP ■ HDP

<<-Strongly disagree   Strongly agree->>
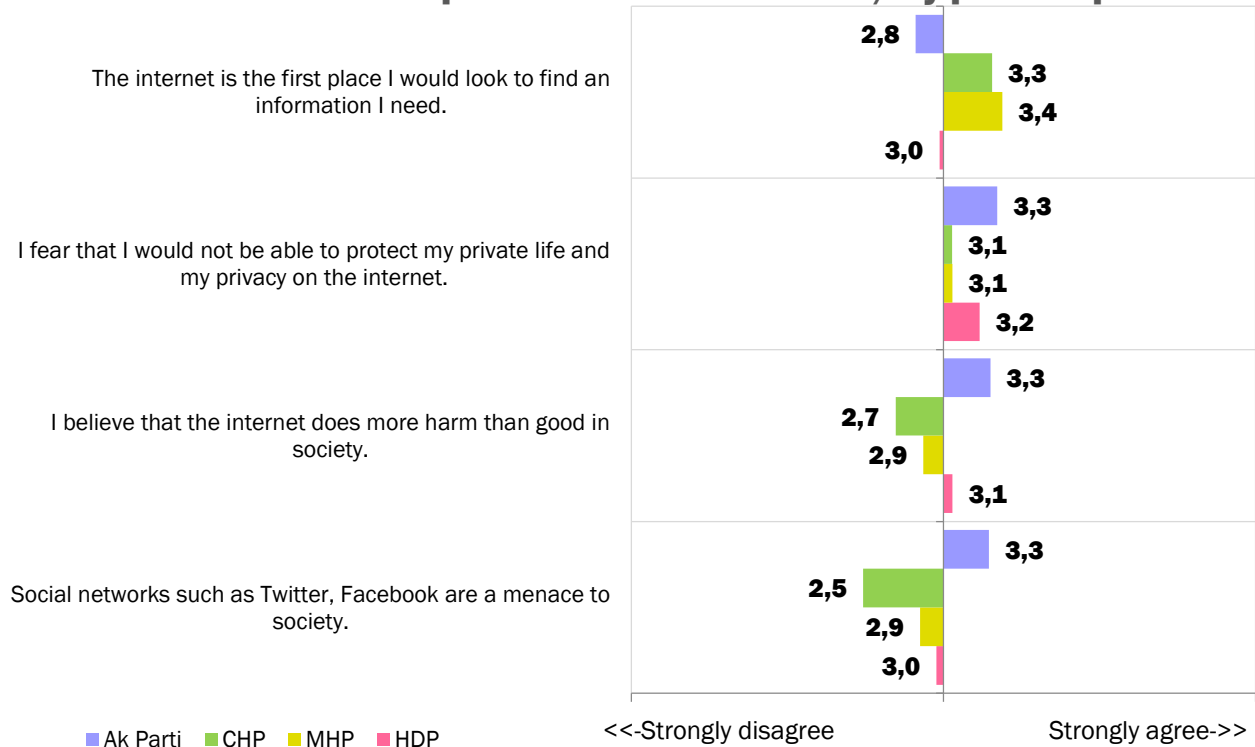
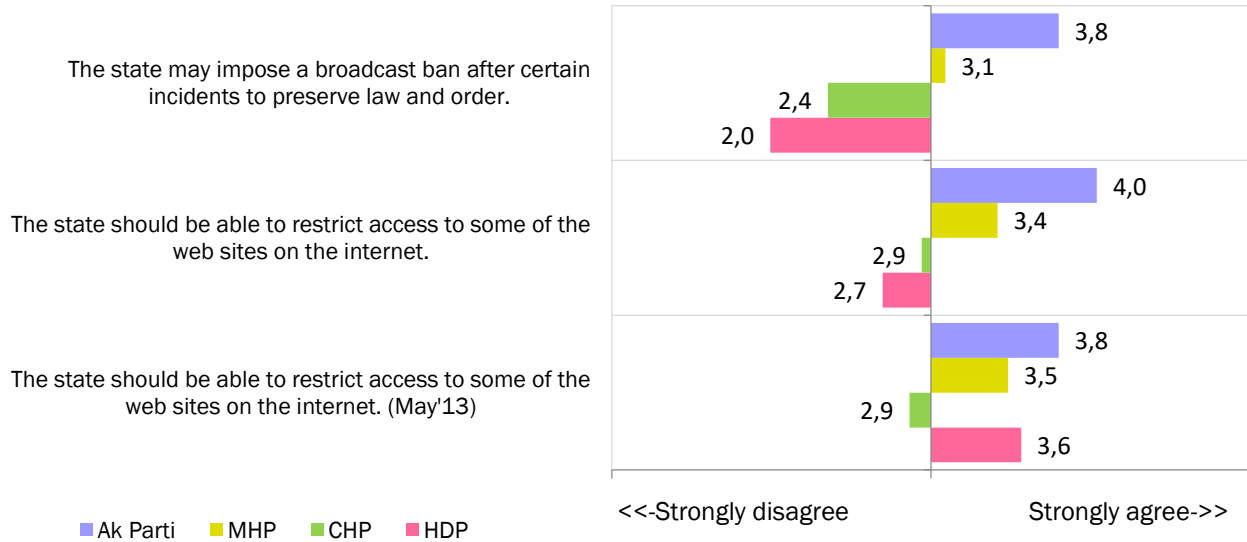When we analyze how opinions about the internet vary by political preference, we observe that Ak Parti voters and HDP voters have more similar opinions to each other than the other party voters. We may think of socioeconomic similarity between the two groups as the main reason for this likeness. Both voter groups are not as inclined to view the internet as a source of information as CHP and MHP voters, and they are more concerned about the protection of their privacy. However, differences in opinion about the internet being harmful and social media being a menace or not are a lot more reminiscent of the classic polarization between Ak Parti supporters and opponents. At this point, the stance of HDP voters is again comparatively similar to that of Ak Parti voters.

However, when we address restrictions by the state, we observe the impact of political preference much more clearly. As demonstrated by the graph below, although Ak Parti voters and lately, in line with the recent trend among this voter group, some of MHP voters support the broadcast ban by the state after certain incidents, CHP voters, and particularly HDP voters are strongly opposed to this policy. The same distribution is also observed in the attitude towards restriction of internet access, but it should be noted that it is not as pronounced as the attitude towards the broadcast ban. However, HDP voters, who today appear as the staunchest opponents of the restriction of internet access, were the second strongest supporters of such restrictions in May 2013 after Ak Parti voters.

Restriction of internet access by the state / By political preference

The state may impose a broadcast ban after certain incidents to preserve law and order.
- 3,8
- 3,1
- 2,4
- 2,0

The state should be able to restrict access to some of the web sites on the internet.
- 4,0
- 3,4
- 2,9
- 2,7

The state should be able to restrict access to some of the web sites on the internet. (May'13)
- 3,8
- 3,5
- 2,9
- 3,6

<<-Strongly disagree   Strongly agree->>

■ Ak Parti ■ MHP ■ CHP ■ HDP

In summary, the opinions of voters with different political preferences are mainly shaped by their socioeconomic status, when we address more concrete and current issues such as the restriction of internet access and the broadcast ban, we observe the impact of ideology on opinions much more clearly.

2.9.4.   Opinions about the internet and current politics

Delving deeper into the relation between the opinions about the internet and politics, and addressing the relation between such opinions and particular political issues provides us with important clues about the outlook of the general public on current politics.

The vote intention in a hypothetical referendum on the presidential system is quite illuminative about the relation between opinions about the internet and current politics. Those who intend to vote "Yes" have a more negative outlook on the internet and are more supportive of the restrictions, while the differences between those who are considering of voting "Yes" and those intending to vote "No" manifest themselves more clearly with respect to more concrete and current issues.

It is also noteworthy in the graph below that those who are undecided are a lot more closer to those who are prospective "Yes" voters, with respect to the statement, "The state should guarantee freedom of expression." This may be implying that swing voters are more inclined to vote "Yes" in a hypothetical referendum on the presidential system.

Opinions about the internet by vote preference about the presidential system

Statement	Yes	Undecided	No
I believe that the internet does more harm than good in society.	4,0	3,6	3,2
Social networks such as Twitter, Facebook are a menace to society.	4,0	3,5	3,0
I fear that I would not be able to protect my private life and my privacy on the internet.	4,1	3,7	3,6
The government should ensure freedom of speech on the internet.	4,2	4,1	4,7
The state should be able to restrict access to some of the web sites on the internet.	4,9	4,3	3,7
The state may impose a broadcast ban after certain incidents to preserve law and order.	4,6	3,8	2,8

<<-Strongly disagree   Strongly agree->>

■ Yes   ■ Undecided   ■ No

When we address the relation between opinions about the internet with current politics through statements on the restriction of internet access and the broadcast ban, we come across outcomes that should be quite expected. For example, those who think that the state is performing its essential function in the conflict in the Southeast, who make up the majority in society, also advocate the opinion that the state may impose a broadcast ban on the media after certain incidents to ensure law and order. However, those who find both the state and the PKK at fault are against imposing a broadcast ban on the media. Being able to observe such expected relations also presents an important clue about how the media in general and the internet in particular cannot be addressed in isolation from politics.

2.9.5.   The Impact of Mass Communication Tools on Current Politics

When we address the responses to the questions on current politics by the use of mass communication tools, we observe that the rate of people who watch TV remains more or less the same for nearly all of the questions. In other words, pretty much everyone watches TV, regardless of their opinions on current political developments.

Those who think that the "state is performing its essential function" within the context of the armed conflict in the Southeast, and those who state that "only the immunities HDP MPs should be lifted" are also the most likely to watch TV at the highest rates

and the least likely to read the newspaper. Regarding the question on security, those who respond that "I do not feel safe, but my daily life is not adversely affected" tend to be social media users at the highest rate.

Opinion on current politics / By use of mass communication tools

■ Watches TV   ■ Uses the internet   ■ Uses social media   ■ Reads newspaper

Turkey
- Watches TV: 92
- Uses the internet: 72
- Uses social media: 68
- Reads newspaper: 39

Public security

I feel insecure, and my daily life is adversely affected.
- Watches TV: 93
- Uses the internet: 71
- Uses social media: 66
- Reads newspaper: 38

I feel insecure, but my daily life is not adversely affected.
- Watches TV: 92
- Uses the internet: 76
- Uses social media: 73
- Reads newspaper: 40

I feel secure.
- Watches TV: 92
- Uses the internet: 71
- Uses social media: 66
- Reads newspaper: 40

Conflict in SE Turkey

The state is oppressing the Kurdish under the pretext of neutralizing the terrorists.
- Watches TV: 89
- Uses the internet: 75
- Uses social media: 69
- Reads newspaper: 49

Both the state and the PKK are doing something wrong, the Kurdish people are being victimized.
- Watches TV: 92
- Uses the internet: 76
- Uses social media: 70
- Reads newspaper: 47

The state is performing its essential function to neutralize the terrorists.
- Watches TV: 93
- Uses the internet: 71
- Uses social media: 68
- Reads newspaper: 36

Parliamentary immunities

Parliamentary immunities of all MPs should be lifted.
- Watches TV: 92
- Uses the internet: 74
- Uses social media: 69
- Reads newspaper: 44

Only the immunities of HDP MPs should be lifted.
- Watches TV: 94
- Uses the internet: 72
- Uses social media: 70
- Reads newspaper: 28

Parliamentary immunities of all MPs should not be lifted.
- Watches TV: 91
- Uses the internet: 66
- Uses social media: 61
- Reads newspaper: 41

%0   %50   %100

As we have noted earlier, nearly everyone in Turkey watches TV. However, those who watch TV at the highest rate, with 95 percent, are those who indicated that they are going to vote "Yes" in a hypothetical referendum on the presidential system.
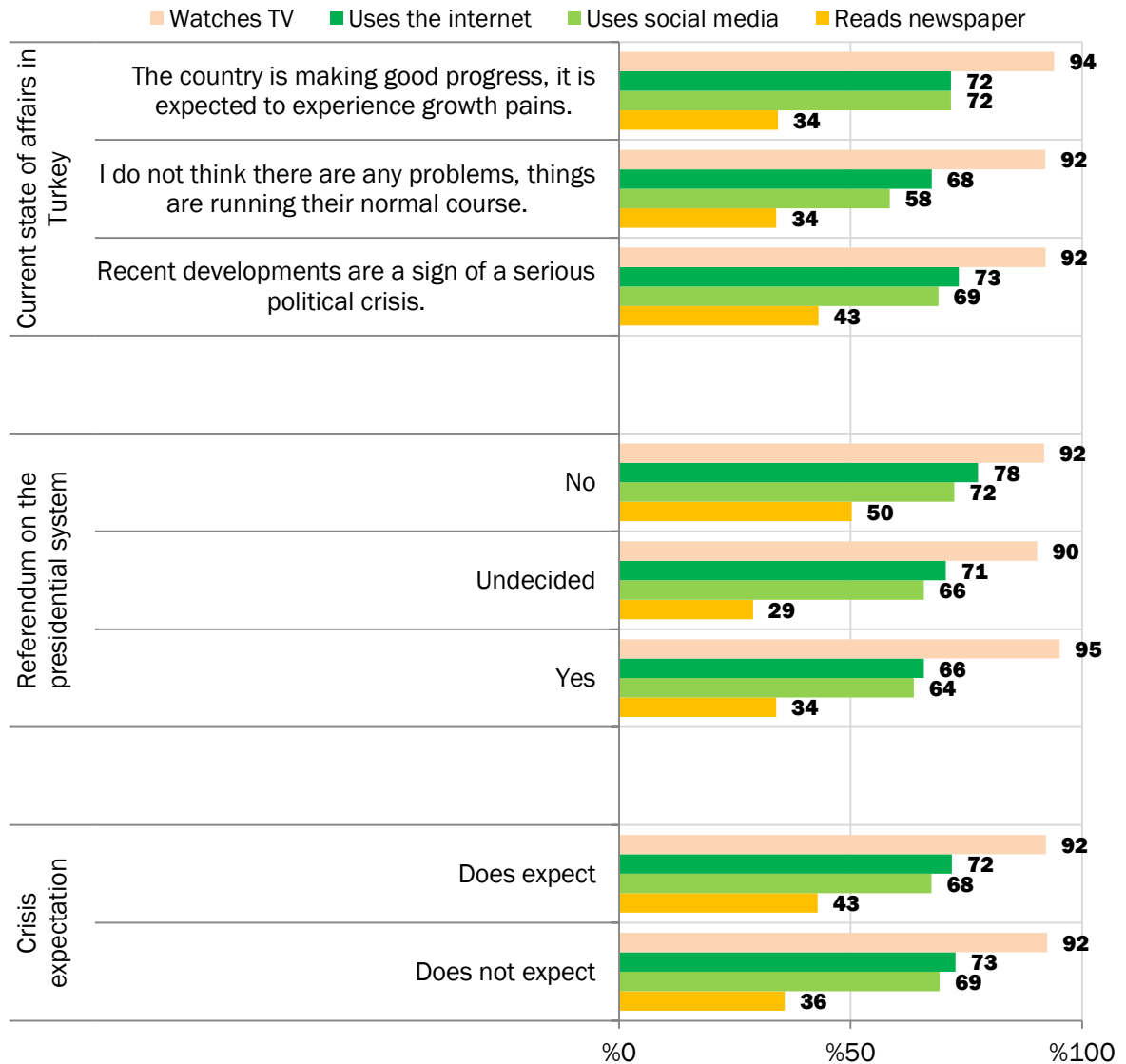
When we examine the responses to the questions on current political developments, we also observe that those who read the newspaper and use the internet and social media the most also correspond to the group made up by those who stated that they are going to vote "No" in a hypothetical referendum on the presidential system.

Opinion on current politics /
By use of mass communication tools

■ Watches TV   ■ Uses the internet   ■ Uses social media   ■ Reads newspaper

Current state of affairs in Turkey

The country is making good progress, it is expected to experience growth pains.
- Watches TV: 94
- Uses the internet: 72
- Uses social media: 72
- Reads newspaper: 34

I do not think there are any problems, things are running their normal course.
- Watches TV: 92
- Uses the internet: 68
- Uses social media: 58
- Reads newspaper: 34

Recent developments are a sign of a serious political crisis.
- Watches TV: 92
- Uses the internet: 73
- Uses social media: 69
- Reads newspaper: 43

Referendum on the presidential system

No
- Watches TV: 92
- Uses the internet: 78
- Uses social media: 72
- Reads newspaper: 50

Undecided
- Watches TV: 90
- Uses the internet: 71
- Uses social media: 66
- Reads newspaper: 29

Yes
- Watches TV: 95
- Uses the internet: 66
- Uses social media: 64
- Reads newspaper: 34

Crisis expectation

Does expect
- Watches TV: 92
- Uses the internet: 72
- Uses social media: 68
- Reads newspaper: 43

Does not expect
- Watches TV: 92
- Uses the internet: 73
- Uses social media: 69
- Reads newspaper: 36
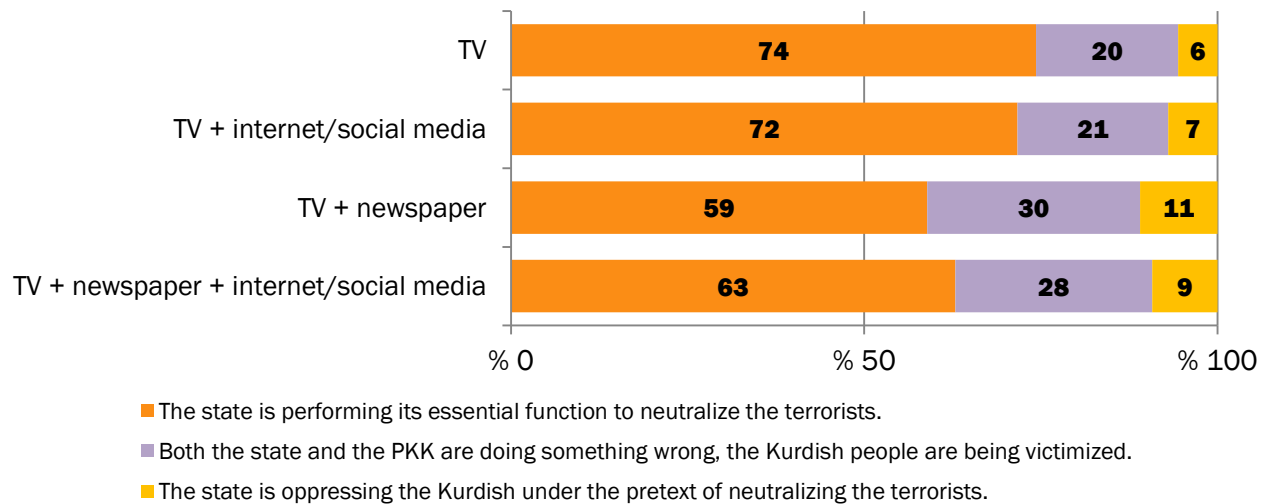
%0   %50   %100

When we observe the opinions on current political developments by the mass communication tools used, we come across striking findings. Traditional media tools, in other words newspapers and TV channels, have been the subject of an ongoing controversy, in terms of how their biased publishing and broadcasting policies have been steering the public opinion, exacerbated with the recent seizures of newspapers and TV channels, the assignment of trustees to the controlling companies and imposition of legally enforced ownership change to these companies by the state. This research enables us to compare the opinions of those who only watch TV, who also read the newspaper and who also receive news from social media, and to examine the effect biased broadcasting policies may have on the public opinion.

The rate of feeling secure/insecure nearly stays the same despite differences in the use of mass communication tools.

Those who both watch TV and read the newspaper differentiate from the other clusters in terms of their opinion on the conflict in the Southeast. This cluster is the least likely to think that the state is performing its essential function and the most likely to advocate that the Kurdish are being victimized. Six out of every 10 people who both watch TV and read the newspaper provide the response that "the state is performing its essential function", while only three fourths of those who only watch TV provide agree with this statement.

How do you define the conflict in the Southeast?

	The state is performing its essential function	Both the state and the PKK are doing something wrong	The state is oppressing the Kurdish
TV	74	20	6
TV + internet/social media	72	21	7
TV + newspaper	59	30	11
TV + newspaper + internet/social media	63	28	9

% 0   % 50   % 100

■ The state is performing its essential function to neutralize the terrorists.
■ Both the state and the PKK are doing something wrong, the Kurdish people are being victimized.
■ The state is oppressing the Kurdish under the pretext of neutralizing the terrorists.
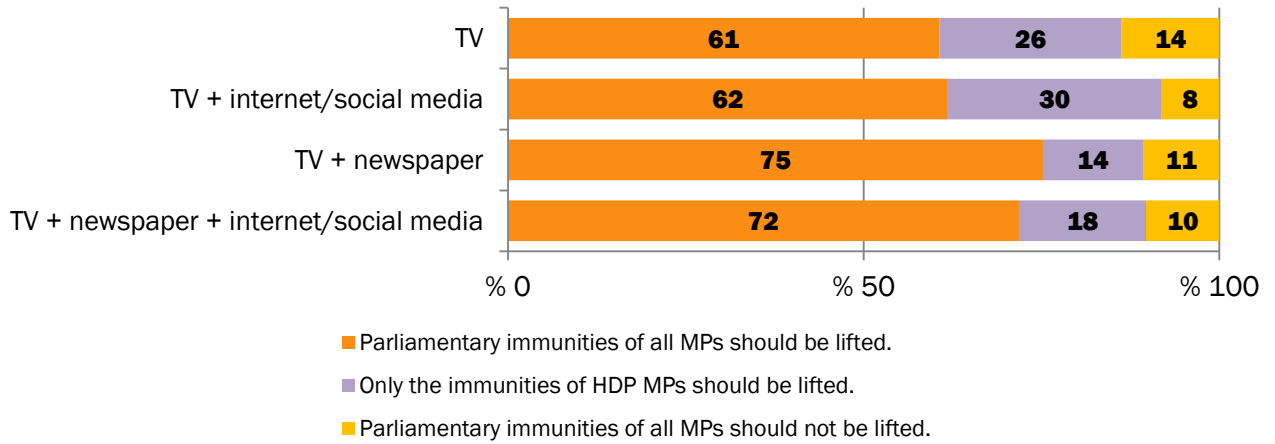
The cluster composed of individuals who both watch TV and read the newspaper also reflect the greatest difference of opinion on the issue of the lifting of parliamentary immunities. In Turkey, where nearly everyone watches TV, being a newspaper reader yields differentiation to a much greater degree than being an internet and social media user.

Those who watch TV and use the internet/social media, but do not read the newspaper also provide the response that "only the immunities HDP MPs should be lifted" at the highest rate, among all the clusters we have formulated by the use of mass communication tools. 30 percent of this cluster opted for this response, while the corresponding rate for those who watch TV, use the internet/social media and read the newspaper at the same time declines to 18 percent.
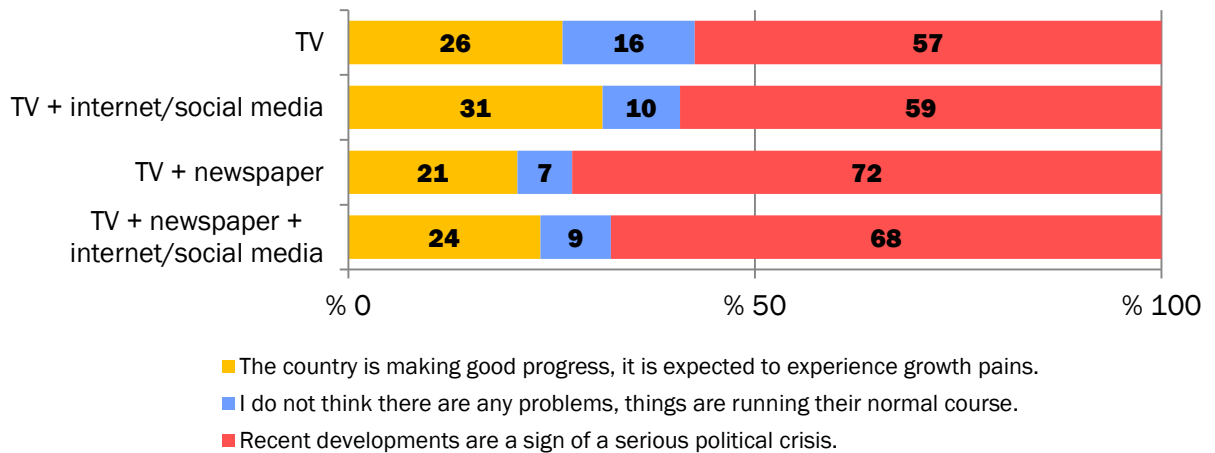
The lifting of parliamentary immunities

	Parliamentary immunities of all MPs should be lifted.	Only the immunities of HDP MPs should be lifted.	Parliamentary immunities of all MPs should not be lifted.
TV	61	26	14
TV + internet/social media	62	30	8
TV + newspaper	75	14	11
TV + newspaper + internet/social media	72	18	10

% 0   % 50   % 100

■ Parliamentary immunities of all MPs should be lifted.

■ Only the immunities of HDP MPs should be lifted.

■ Parliamentary immunities of all MPs should not be lifted.

Those who think most positively about the state of affairs in the country also only watch TV and do not use any of the other mass communication tools. 16 percent of this cluster provided the response, "I do not think there are any problems, things are running their normal course". However, only 7 percent of those who both watch TV and read the newspaper agree with this statement. Respectively, 57 percent of those who only watch TV evaluate the current political developments as "a sign of serious political crisis", while the corresponding rate for those who both watch TV and read the newspaper is 72 percent.
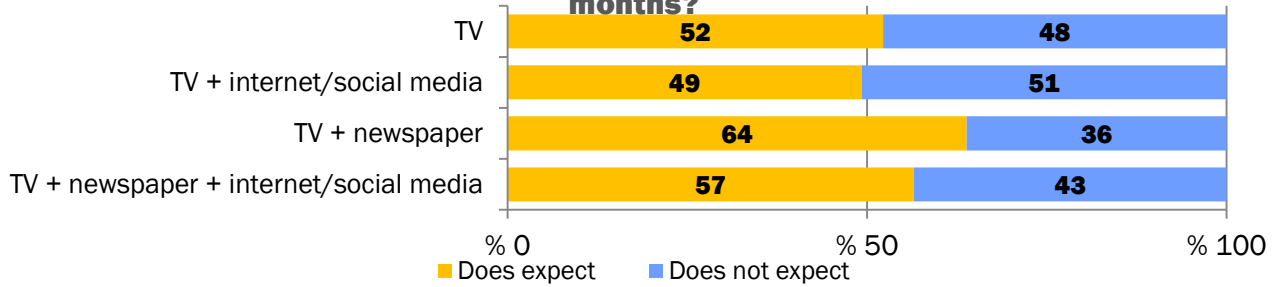
Opinion on the current state of affairs in the country

	The country is making good progress	I do not think there are any problems	Recent developments are a sign of a serious political crisis
TV	26	16	57
TV + internet/social media	31	10	59
TV + newspaper	21	7	72
TV + newspaper + internet/social media	24	9	68

% 0   % 50   % 100

■ The country is making good progress, it is expected to experience growth pains.

■ I do not think there are any problems, things are running their normal course.

■ Recent developments are a sign of a serious political crisis.

Those who expect an economic crisis in the upcoming months in Turkey at the highest rate both watch TV and read the newspaper. 64 percent of this cluster expect a crisis, while crisis expectation is half this rate among those who only watch TV, and those who both watch TV and use the internet/social media.
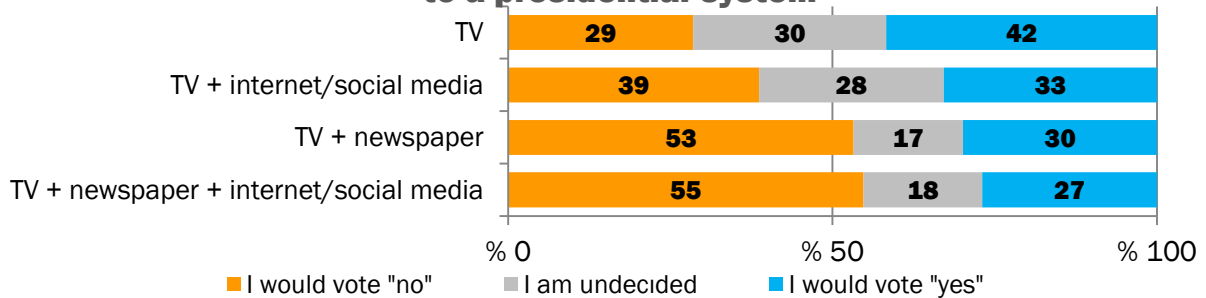
Do you expect an economic crisis in Turkey in the upcoming months?

	Does expect	Does not expect
TV	52	48
TV + internet/social media	49	51
TV + newspaper	64	36
TV + newspaper + internet/social media	57	43

% 0   % 50   % 100

■ Does expect   ■ Does not expect

When we group the respondents we have interviewed about their preference in a hypothetical referendum on the presidential system by their use of mass communication tools, we observe that those who only watch TV have the highest support for the presidential system. As demonstrated by the graph below, the biggest differentiation is reflected by newspaper readership. The two clusters including those who do not read the newspaper say "No" to the presidential system at 29 percent and 39 percent, while the corresponding rates for the two clusters including newspaper readers is 53 percent and 55 percent.

Your vote in referendum on the transition to a presidential system

	I would vote "no"	I am undecided	I would vote "yes"
TV	29	30	42
TV + internet/social media	39	28	33
TV + newspaper	53	17	30
TV + newspaper + internet/social media	55	18	27

% 0   % 50   % 100

■ I would vote "no"   ■ I am undecided   ■ I would vote "yes"

When we analyze people's opinions on current politics by their use of mass communication tools, we observe that those who only receive the news through TV have opinions that are in affinity with the ruling party, or the power steers the media to the greatest extent. However, it is not possible to talk about a stark opposition in opinion between those who only watch TV and those who also receive news through other means. Therefore, it looks like the perception that there are individuals who are "brainwashed" because of watching the news on TV and who are not aware of what is going on in the country has no foundation. In addition, using the internet or the social media does not by itself lead to a considerable shift in political views. Therefore, the extent restricting access to certain sites is effective on steering political preferences appears to be questionable.

The relation between being in opposition to the ruling party and reading the newspaper, and using the internet/social media is quite evident. However, it is not possible to suggest a causality relationship and state that using mass communication tools *leads to* "opposing" views.

2.10. Conclusion & Evaluation

With 46 million internet users, Turkey is ranked 14th among 201 countries worldwide. Even so, Turkey is 82nd and lags behind given that only 58 percent of its total population uses the internet. When we look at the bright side, it is evident that internet is a market with significant potential and presents the opportunity for expansion.

We can draw three main conclusions from this month's research conducted in order to understand the internet and social media habits in Turkey: First of all, internet and social media habits of individuals demonstrate how they identify their lifestyle. As we mentioned many times in previous KONDA Barometers, the respondents who identify themselves as modern do not necessarily base this self-perception on the universal definition of "being modern". "Being modern" is usually associated with access to the latest technology. In this context, as we mentioned earlier in this report, it is difficult to suggest that the respondents who identify themselves as modern use the internet more frequent in comparison to the individuals in the other lifestyle clusters. However, we can state that those who have access to the latest technology and who, in particular, have internet access are more likely to identify themselves as modern.

Second, the respondents' internet and social media habits provide clues on their opinions on current political developments. Moreover, the respondents' political preferences are influential on how they think the internet should be (for instance, whether it should be restricted by the state of not). In any case, political opinions go hand in hand with socioeconomic and demographic characteristics of individuals, and socioeconomic and demographic characteristics are also critical in terms of whether the respondents have access to the internet or not. Therefore, the respondents who enjoy a broad access to the internet may end up being inclined towards certain political views.

Access to the internet is the most critical factor in identifying individuals' internet habits. Therefore, those who enjoy a higher socioeconomic status can access the internet more frequently and have fewer prejudices about the internet. For instance, men in comparison to women, single in comparison to married, those between 18-28 years of age in comparison to those who are 29 or older, moderns in comparison to traditional and religious conservatives, those who are less religious in comparison to the more religious have a rather positive attitude towards the influences of the internet and believe that the internet should be less restricted. Similarly, those who fear that they would not be able to protect their private life and their privacy on the internet have rare access to the internet.

When we take a look at the relation between internet use and current politics, it is evident that the respondents who are more likely to vote "yes" in a potential referendum on the presidential system hold rather negative opinions on the internet and advocate restrictions on the internet to a greater degree. It is also noteworthy that the respondents who think that the state performs its essential function by carrying operations in South Eastern Turkey use the internet less frequently and agree that

the state may impose a broadcast ban after certain incidents to preserve law and order.

When we analyze the responses by political preference, it is evident that Ak Parti and HDP voters use the internet less frequent than the countrywide average. CHP and MHP voters use the internet more frequently. While the average rate of internet users in Turkey is 72 percent, the corresponding rate is 66 percent among Ak Parti voters, 77 percent among CHP voters, 79 percent among MHP voters, and 66 percent among HDP voters. These figures can be justified with the different socioeconomic and demographic characteristics of the voter groups given that these characteristics are critical in having access to the internet. It is also worth noting that these very characteristics that specify internet habits also influence political preferences.

Third, mass communication platforms become more diversified day by day, and the platform(s) (certain combination of multiple platforms) individuals use imply certain socioeconomic characteristics, certain lifestyle clusters and certain political preferences, and provide clues on the transformation, dissolution and unification within these clusters. As we have mentioned before, 72 percent of the adult population in Turkey (58 percent of the entire population) uses the internet. At first sight, almost all of those who are between the ages of 18-28, as well as students, high school or university graduates, private sector employees and moderns seem to be using the internet. However, we can draw three more conclusions that shed more light on the overall internet habits and on the current political issues. To begin with, TV is an indispensable tool for society in Turkey. For instance, one third of the respondents who indicate that they do not watch TV state that they would first check the TV for a breaking news story. Second, newspaper readership proves to be more deciding on one's political preference and stance in terms of freedom on the internet in comparison to other mass communications tools. Third, the respondents who only use Facebook make up a distinct group among those who use social media. It looks like the respondents who only use Facebook began using social media at a later stage; and therefore, they are less educated and less affluent, and they had internet access much later than other groups. This group also differs from those who use several social media platforms when it comes to political preferences and opinions on the freedom on the internet.

Based on the findings of the research, we could classify the voters in Turkey into three groups: voters who only watch the TV (17 percent), voters who never read the newspaper (31 percent), and voters who watch the TV, read the newspaper and use the social media (28 percent). Considering the fact that these three groups are different from each other, it is possible to suggest that there are three potential scenarios. First of all, older, more religious and more conservative voters who recently began to explore the internet and only have a Facebook account so far (this group differs from other social media users in terms of socioeconomic and demographic characteristics) will explore other social media platforms in the near future. Therefore, this groups should be taken into account when the future of the internet and the social media platforms in Turkey is argued. Second; it is evident that the rate of the respondents who use Twitter has remained the same, while

other social media platforms gained further popularity. Twitter's heavy reliance on written content and its complex structure may have caused it to reach a point of saturation among higher educational attainment groups. Third; the difference between the rate of educated women who use the internet and educated men who use the internet has significantly decreased, although the rate of women who use the internet is way below than men. Consequently, women and particularly housewives deserve further attention as they hold a great potential for the future social media use in Turkey.

3. RESEARCH ID

3.1. Overall Description of the Survey

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

The field survey was conducted on April 2-3, 2016. 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, 2544 respondents were interviewed face-to-face in 147 neighborhoods and villages of 96 districts - including central districts - of 28 provinces.

Provinces visited	27
Districts visited	96
Neighborhoods/villages visited	147
Number of respondents	2544

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, Mersin
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, Van
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			19.4	19.4
2	Western Marmara	1.7	2.8		4.5
3	Aegean	4.2	6.4	5.6	16.2
4	Eastern Marmara	1.5	2.8	5.7	9.9
5	Western Anatolia	0.7		10.4	11.1
6	Mediterranean	3.6	2.9	6.4	12.9
7	Central Anatolia	1.2	2.1	1.4	4.7
8	Western Black Sea	1.5	2.1		3.6
9	Eastern Black Sea	1.5	2.1		3.6
10	Northeastern Anatolia	1.4			1.4
11	Middle Eastern Anatolia	1.4	1.4		2.8
12	Southeastern Anatolia	2.1	3.5	4.2	9.9
	Total	20.7	26.2	53.1	100.0

4. FREQUENCY TABLES

4.1. Profile of the Respondents

Gender	Percentage
Female	49.1
Male	50.9
Total	100.0

Age	Percentage
Between 18-28	26.1
Between 29-43	36.6
44 or above	37.3
Total	100.0

Educational attainment level	Percentage
Illiterate	5.4
Literate without degree	2.1
Primary school degree	27.5
Secondary school degree	18.0
High school degree	30.5
University degree	14.6
Masters/PhD	1.9
Total	100.0

Household size	Percentage
1-2 person(s)	18.8
3-5 people	67.1
6-8 people	12.3
9 people or more	1.8
Total	100.0

Birthplace (region)	Percentage
İstanbul	7.6
Western Marmara	5.4
Aegean	14.4
Eastern Marmara	7.4
Western Anatolia	8.3
Mediterranean	10.9
Central Anatolia	7.4
Western Black Sea	9.7
Eastern Black Sea	6.0
Northeastern Anatolia	4.1
Middle Eastern Anatolia	5.4
Southeastern Anatolia	13.1
Abroad	0.3
Total	100.0

Father's Birthplace (region)	Percentage
İstanbul	2.2
Western Marmara	5.7
Aegean	13.8
Eastern Marmara	6.4
Western Anatolia	7.3
Mediterranean	10.2
Central Anatolia	8.7
Western Black Sea	10.6
Eastern Black Sea	7.4
Northeastern Anatolia	6.1
Middle Eastern Anatolia	6.4
Southeastern Anatolia	13.7
Abroad	1.5
Total	100.0

Employment status	Percentage
Civil servant	4.9
Private sector	7.9
Worker	9.0
Small retailer	5.9
Merchant/businessman	0.7
Self-employed	2.1
Farmer, agriculturist, stock breeder	4.2
Employed, other	5.9
Retired	12.7
Housewife	30.3
Students	10.8
Unemployed	4.4
Disabled	1.3
Total	100.0

Lifestyle Cluster	Percentage
Modern	26.0
Traditional conservative	46.0
Religious conservative	28.0
Total	100.0

Head cover status	Percentage
No head cover	25.9
Headscarf	48.6
Turban	8.2
Chador	1.0
Bachelor male	16.3
Total	100.0

Ethnic identity	Percentage
Turkish	84.9
Kurdish	10.0
Zaza	1.5
Arab	1.5
Other	2.2
Total	100.0

Religion / sect	Percentage
Sunni Muslim	91.9
Alevi Muslim	5.4
Other	2.7
Total	100.0

Piety	Percentage
Non-believer	2.4
Believer	25.5
Religious	60.8
Pious	11.2
Total	100.0

Monthly household income	Percentage
TRY 700 or less	4.9
TRY 701 - 1200	13.6
TRY 1201 - 2000	41.6
TRY 2001 - 3000	21.0
TRY 3001 - 5000	15.1
TRY 5001 or more	3.9
Total	100.0

Economic class	Percentage
Lower	18.7
Lower middle class	34.0
New middle	31.3
Upper	16.1
Total	100.0

TV channel preferred to watch the news	Percentage
Does not watch	18.6
A Haber	14.0
ATV	13.1
CNNTürk	7.2
Fox TV	6.7
Habertürk	4.7
Halk TV	4.2
İMÇ	4.0
Kanal 7	3.4
Kanal D	2.6
Kanaltürk	2.5
NTV	2.0
Roj/Nuçe/Sterk	1.6
Samanyolu	0.4
Show TV	0.2
Star	0.1
TRT	0.0
Ulusal	4.4
Local channels	6.3
Other channels	14.9
Total	100.0

TV channel preferred when the TV is turned on	Percentage
A Haber	2.9
ATV	14.7
Documentary channels	1.6
CNNTürk	1.8
Other channels	9.4
Fox TV	10.7
Does not watch	2.6
Kanal 7	3.0
Kanal D	13.4
NTV	2.4
Show TV	9.7
Sports channels	2.7
Star	10.1
TRT	9.3
TV8	4.7
Total	100.0

Marital status	Percentage
Single	23.9
Engaged	1.7
Married	68.7
Widow	4.7
Divorced	1.0
Total	100.0

Type of housing	Percentage
Squatter / apartment without external plastering	4.4
Single family, traditional house	36.1
Apartment	51.9
Housing complex	7.4
Very luxurious apartment, villa	0.3
Total	100.0

Newspaper preference	Percentage
Posta	9.1
Sabah	6.1
Sözcü	6.1
Hürriyet	5.8
Milliyet	2.7
Cumhuriyet	2.5
Habertürk	2.2
Sports newspapers	1.1
Local newspapers	1.1
Türkiye	1.0
Takvim	0.8
Star	0.7
Yeni Şafak	0.6
Güneş	0.4
Vatan	0.3
Akşam	0.1
Other	9.3
Does not read newspaper	49.9
Total	100.0

4.2. Mass communication tools and social media

Which of the below do you have in your household?	Percentage
Computer	61.4
Fixed internet connection	47.4
Mobile internet connection	44.5
Subscription to a TV platform such as Digiturk, D-Smart, KabloTV, Teledünya, Tivibu etc.	20.4

Which do you own personally?	Percentage
Smartphone	72.6
Tablet	28.3
Subscription to a paid music service such as Apple Music or Spotify	3.7
Data/internet subscription on smartphone or tablet	33.2
Subscription to paid film service platform such as Netflix or Digiturk Play	2.6
Smartphone	72.6
Tablet	28.3

Do you have an e-State password? Do you use it?	Percentage
Yes, I use it.	30.4
Yes, but I don't use it.	17.3
No, I don't use it	52.4
Total	100.0

When you first hear about a breaking news or something important happen, which news source do you refer to first?	Percentage
TV	62.1
Facebook	16.2
Web site	10.1
Online newspaper	7.4
Twitter	3.3
Radio	0.9
Total	100.0

Is there a newspaper that you buy (or pay a subscription fee for online) to read? Which one?	Percentage
Yes	13.3
No	86.7
Total	100.0

Do you access the internet, and if yes, how do you access the internet?	Percentage
From smartphone	57.6
From computer at home	38.6
From computer at work / school	9.5
From tablet (iPad, etc.)	6.8
Internet cafe, etc.	2.9
Do not access the internet	27.8

How frequently do you access the internet?	Percentage
It is always open on my smartphone or computer	17.2
More than 3 hours per day	10.4
2-3 hours per day	16.7
1 hour or less per day	17.6
Once every 2-3 days	3.3
Once a week	2.9
Less frequently	4.6
Never	27.3
Total	100.0

Which social media platforms do you access frequently?	Percentage
Facebook	54.3
Whatsapp	40.8
Youtube	25.7
Instagram	23.7
Twitter	17.5
Skype	4.2
Periscope	1.9
Vine	1.8
Telegram	0.5
Tinder	0.5
Other	5.2

Have you done any online shopping in the last 3 months, and if yes, what have you bought?	Percentage
Clothes, accessories	13.6
Electronics	7.4
Household items	4.5
Airline ticket	4.1
Bus ticket	2.7
Food	2.5
Concert ticket	1.4
I have not done any online shopping in the last 3 months.	10.7
I have never done any online shopping.	57.0

The internet is the first place I would look to find an information I need.	Percentage
Strongly disagree	31.3
Disagree	8.3
Somewhat disagree	7.2
Somewhat agree	8.7
Agree	14.5
Strongly agree	30.1
Total	100.0

I believe that the internet does more harm than good in society.	Percentage
Strongly disagree	23.3
Disagree	11.3
Somewhat disagree	14.1
Somewhat agree	13.2
Agree	13.3
Strongly agree	24.7
Total	100.0

The government should ensure freedom of speech on the internet.	Percentage
Strongly disagree	12.4
Disagree	7.3
Somewhat disagree	9.3
Somewhat agree	10.3
Agree	18.7
Strongly agree	42.0
Total	100.0

I fear that I would not be able to protect my private life and my privacy on the internet.	Percentage
Strongly disagree	22.7
Disagree	10.4
Somewhat disagree	8.9
Somewhat agree	8.8
Agree	15.8
Strongly agree	33.4
Total	100.0

The state should be able to restrict access to some of the web sites on the internet.	Percentage
Strongly disagree	18.3
Disagree	6.6
Somewhat disagree	6.8
Somewhat agree	9.3
Agree	20.2
Strongly agree	38.9
Total	100.0

Social networks such as Twitter, Facebook are a menace to society.	Percentage
Strongly disagree	27.4
Disagree	12.2
Somewhat disagree	10.5
Somewhat agree	10.6
Agree	12.2
Strongly agree	27.0
Total	100.0

The state may impose a broadcast ban after certain incidents to preserve law and order.	Percentage
Strongly disagree	28.6
Disagree	8.5
Somewhat disagree	7.6
Somewhat agree	8.6
Agree	15.4
Strongly agree	31.3
Total	100.0

Have you ever met someone you first met online?	Percentage
Yes	14.0
No	86.0
Total	100.0

How do you feel yourself when sharing or posting a comment on social media?	Percentage
I can share freely, I feel relaxed.	28.4
Sometimes I feel concerned and I watch out for what I am sharing.	30.4
I do not share or post a comment, I only follow.	41.3
Total	100.0

Have you ever been subject to insult, swearing or intimidation due to a post of comment you shared on social media?	Percentage
Yes	10.1
No	89.9
Total	100.0

Online banking	Percentage
Never	64.0
Rarely	4.0
Seldom	4.9
Sometimes	5.7
Frequently	7.1
Always	14.3
Total	100.0

Looking for a job, applying for a job	Percentage
Never	70.3
Rarely	5.9
Seldom	6.3
Sometimes	4.9
Frequently	4.5
Always	8.1
Total	100.0

Watching TV series	Percentage
Never	57.9
Rarely	5.3
Sometimes	6.6
Seldom	8.3
Frequently	7.5
Always	14.3
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 whose income per capita is in the 60 percent segment but which do not own a car
Lower class:	Households whose income per capita is in the lowest 20 percent segment
Arab:	A person who identifies his/her ethnic origin as Arab
Headscarf:	A woman who wears a headscarf or a man whose spouse wears a headscarf
Chador:	A woman who wears chador or a man whose spouse wears a chador
Religious:	A person who tries to fulfill the requirements of the religion
Religious conservative:	A person who identifies his/her lifestyle as religious conservative
Traditional conservative:	A person who identifies his/her lifestyle as traditional conservative
Ideological:	A person who states that it is the party 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/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 these parties represent him/her
Pious:	A person who completely fulfills the requirements of the religion
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 completely fulfills the requirements of the religion

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