



TURKISH PERCEPTIONS SURVEY

2015

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TURKISH PERCEPTIONS SURVEY 2015

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Introduction

Turkey is going through challenging times. On the political front, the governing Justice and Development Party (AKParty) lost its majority in the parliament in the elections that took place on June 7, 2015, resulting in a hung parliament. As the parties in the parliament failed to form a government, President Recep Tayyip Erdoğan used his authority to call for early elections in November 2015. Meanwhile, Turkey is still feeling the effects of the economic crisis: growth rates remain low, around 2.5% annually, and the Turkish lira continues to devalue. Consumer Confidence Index (CCI) has declined to levels last seen during the 2009 financial crisis.

Things are not any brighter on the foreign policy and security front. The turmoil in Iraq and Syria continues to challenge Turkey with spillover effects. The self-proclaimed Islamic State group (ISIS) has started to conduct terrorist attacks in Turkey, and the cease-fire between Turkey and the Kurdistan Workers Party (PKK) has been broken. In response to these developments, Turkey opened the Incirlik airbase to the U.S. air force for airstrikes against ISIS, agreed to actively join the fight against ISIS in coordination with the United States, and launched airstrikes against ISIS in Syria and the PKK in Iraq. The refugee crisis is another major challenge for Turkey: the official number of Syrian refugees Turkey currently hosts has increased to 1.7 million, and Turkey has spent \$5.6 million for the Syrian refugees.

The *Turkish Perceptions Survey* shows the impact of these breathtaking developments on the perceptions of Turkish citizens on both domestic and foreign policy issues. While it is a stand-alone survey, many of the *Turkish Perceptions Survey* findings are comparable with the *Transatlantic Trends Survey*, which GMF conducted annually between 2003 and 2014. The findings of this survey will also be examined extensively by the On Turkey Series, which GMF publishes with contributions from on-the-ground Turkish experts as well as in-house experts at GMF. We hope that this survey will be a valuable contribution to analyzing developments in Turkey.

1 Methodology

The Turkish Perceptions Survey 2015 was conducted by The German Marshall Fund of the United States with financial support from the U.S. Embassy in Ankara. Survey questions were developed by the project team, which included the GMF Ankara Office staff members and Infakto RW, an Istanbul-based independent research organization.

Survey fieldwork was carried out between July 4 and July 13, 2015, through face-to-face interviews with 1,018 respondents. The sampling framework was designed to represent a cross-section of Turkish adults and was conducted in 16 provinces and 125 neighborhoods through a multi-stage stratified sampling scheme. Under the assumption of simple random sampling, this sample size led to a margin of error of ± 3 percentage points.

DISTRIBUTION OF THE SAMPLE ACROSS REGIONS

NUTS1 Code	Regions	NUTS2 Code	Sub Regions	Selected Province	Number of Interviews
TR1	İstanbul			İstanbul	188
TR2	Western Marmara			Tekirdağ	45
TR3	Aegean	TR31 (SRU)	İzmir	İzmir	48
		TR32 & TR33	Aydın & Manisa	Manisa	80
TR4	Eastern Marmara	TR41	Bursa	Bursa	101
TR5	Western Anatolia	TR51 (SRU)	Ankara	Ankara	64
		TR52	Konya	Konya	32
TR6	Mediterranean	TR61	Antalya	Antalya	31
		TR62 & TR63	Adana & Hatay	Adana	88
TR7	Central Anatolia			Kayseri	56
TR8	Western Black Sea			Samsun	58
TR9	Eastern Black Sea			Trabzon	32
TRA	N. Eastern Anatolia			Erzurum	32
TRB	C. Eastern Anatolia			Malatya	58
TRC	S. Eastern Anatolia	TRC1	Gaziantep	Gaziantep	41
		TRC2 & TRC3	Şanlıurfa & Mardin	Diyarbakır	64
TR	TURKEY	Total			1,018

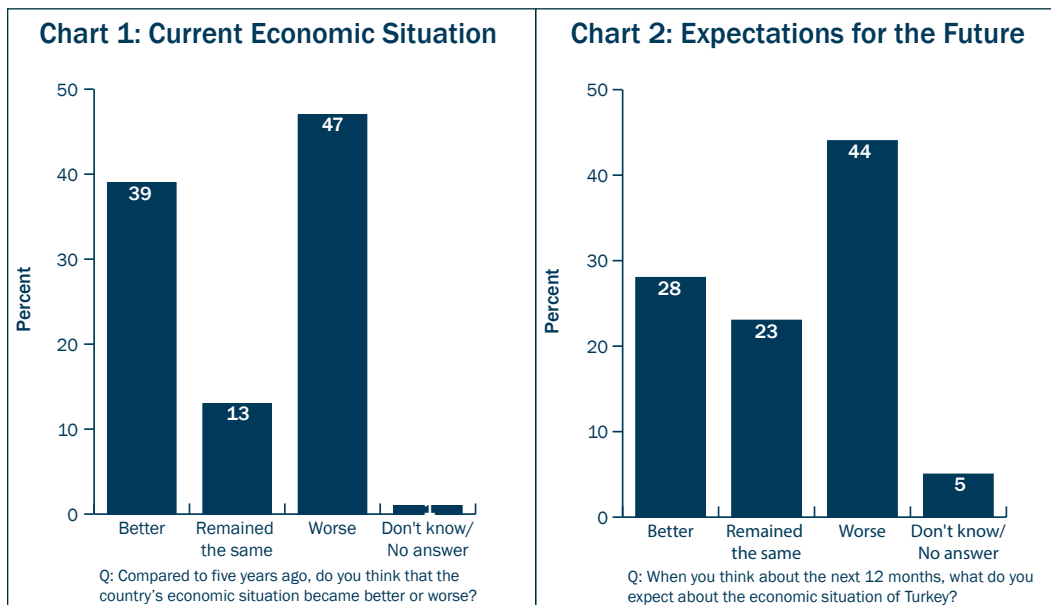
2 The Economy and Domestic Issues

The mood in Turkey is gloomy. Facing stuttering economic growth for its third year, currency devaluation, violent chaos on its borders, and domestic conflict, Turks have many reasons to feel unsatisfied. This dissatisfaction was reflected in the Gezi Park Protests in June 2013 and the furor over the alleged high-level corruption case in December 2014.

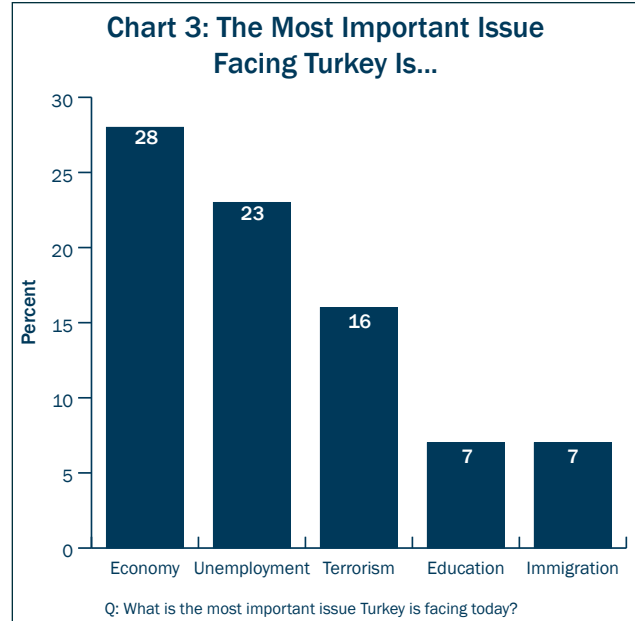
Public pessimism about the state of the country saw the ruling Justice and Development Party lose 9 percentage points during the June 7, 2015, parliamentary election, compared to the nearly 50% of the votes it received in the 2011 parliamentary elections. When asked their opinion about the overall direction of the country, 42% of respondents said that Turkey was headed in the right direction, but a majority of 55% said that the country was going in the wrong direction. Moreover, 67% of respondents said that they were negatively affected by the current economic crisis, as opposed to 30% who said they were not.

Both perceptions about the economy's past performance and expectations of it in the near future were rather dark. Forty-seven percent of respondents said that the economy got worse over the last five years; 39% said it got better. When asked about the specific economic situation of their family, 43% said it got worse over the last five years as opposed to 29% who said it got better.

When asked about the next 12 months, 44% of respondents said that they expected Turkey's economic situation to get worse whereas 28% expected it to get better. Similarly, 38% of respondents expected their family's economic situation to get worse over the next 12 months; 24% expected it to get better.



When asked about the most important issue facing Turkey, a plurality of respondents named either the economy (28%) or unemployment (23%). Terrorism came third with 16%, followed by education (7%) and immigration (7%).

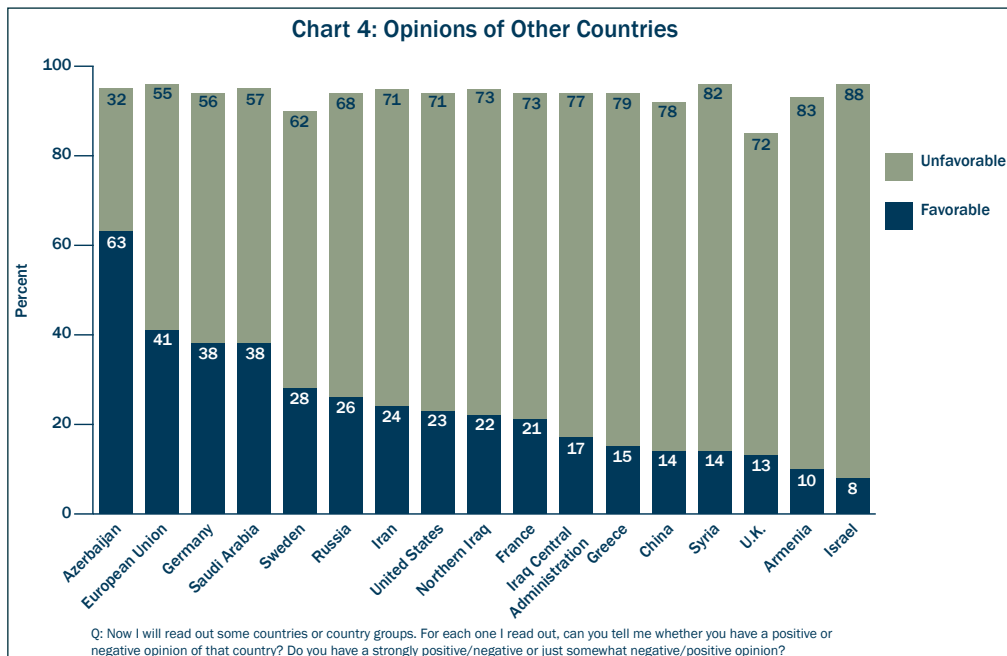


3 International Relations

Turkey has been a NATO member since 1952 and a candidate for membership in the European Union (then the European Economic Community) since 1963. However, the majority of respondents has negative opinions of almost all other countries, including allies and international organizations. This gives some credence to the idea of “Turkey’s loneliness,” familiar in international affairs circles. When asked to cite Turkey’s most important partner, 50% of respondents failed to give a definite answer, 41% said they did not know, and 9% said Turkey did not have one.

The respondents of the survey had generally unfavorable opinions of other countries except those with which there are kinship ties such as Azerbaijan. That country was seen favorably by 63% of respondents. Azerbaijan was followed by the European Union and Germany, which enjoyed the favorable views of 41% and 38% of respondents, respectively. The United States, a strategic ally, was only seen favorably by 23%.

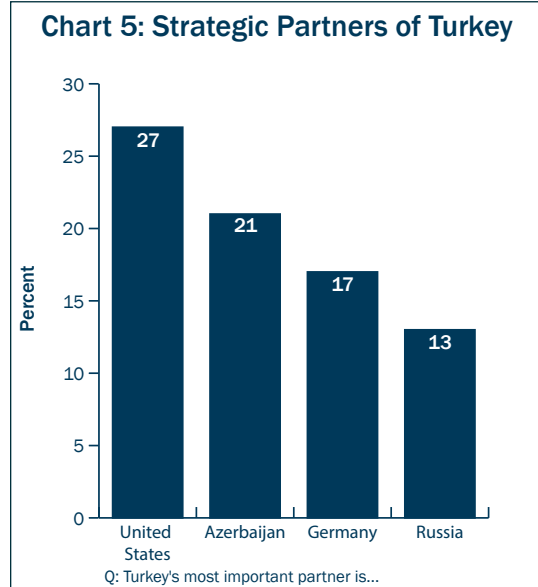
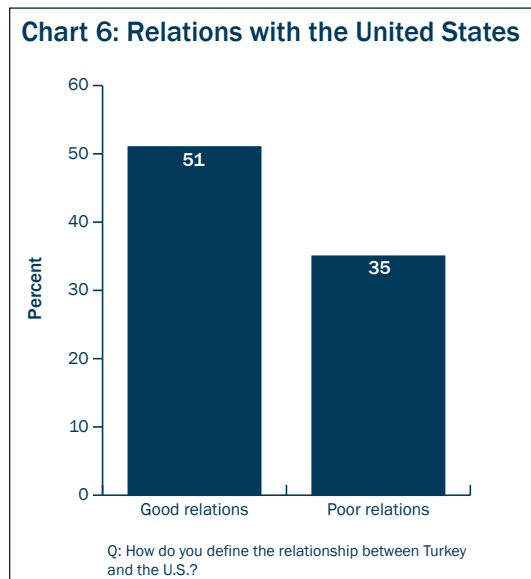
The unfavorable opinions of other countries among the Turkish public included most of the country’s neighbors as well. Russia, the most positively perceived neighboring country after Azerbaijan, was viewed favorably by 26% of respondents. Iran and Northern Iraq were very close to Russia’s score, above 20%. The Kurdistan Regional Government of Iraq was viewed favorably by 22% of respondents, slightly above the Central Government of Iraq, which was viewed favorably by 17% of respondents. Two other neighboring countries, Greece and Syria were viewed with disfavor at similar levels (15% and 14%, respectively). Two countries in Turkey’s immediate neighborhood, Armenia and Israel, were seen the least favorably by respondents (10% and 8%, respectively).



TRUST IN INTERNATIONAL INSTITUTIONS

In addition to widely unfavorable views about other countries, Turks generally distrusted international institutions. The most trusted institutions were the European Court of Human Rights (44%) and the Organization of Islamic Cooperation (39%). The European Union was the third most trusted international institution (39%). Two major international institutions, NATO and the United Nations, were found trustworthy only by one-third of respondents, a slightly better position than that of the Organization for Security and Cooperation in Europe, which was found trustworthy by only 26% of respondents. Trust of international financial institutions was even lower. Only one-quarter of respondents said that they trusted in the World Bank, and when asked about the IMF, this number declined to 16%.

Though the majority of Turks cannot identify one of their country's strategic partners, among those respondents who could name one, the United States received the highest score (27%), followed by Azerbaijan (21%), Germany (17%), and Russia (13%). This shows that when the question was framed to ask about strategic relations instead of personal impressions, respondents tend to change their answers and so less-favored countries such as the United States may be regarded as the most important partner.



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The survey also revealed how many Turks view global leadership by the United States, EU, or Russia as undesirable. Only 29% of Turks found the EU's leadership in world affairs desirable, while desirability of U.S. and Russian leadership was 26% and 22%, respectively.

TURKEY-U.S. RELATIONS

The support for Obama's foreign policies in Turkey was no higher than the trust level he enjoyed. When asked, just 29% of respondents said that they approve of his admin-

istration's foreign policies. The level of approval declined to 22% when asked about managing relations with Russia, 17% when asked about managing relations with the Middle East in general, and 13% when asked about handling the Israel/Palestinian issue specifically.

While favorability of the United States and approval of President Obama's foreign policies are low in Turkey, perceptions about the state of U.S.-Turkey relations remain relatively positive.

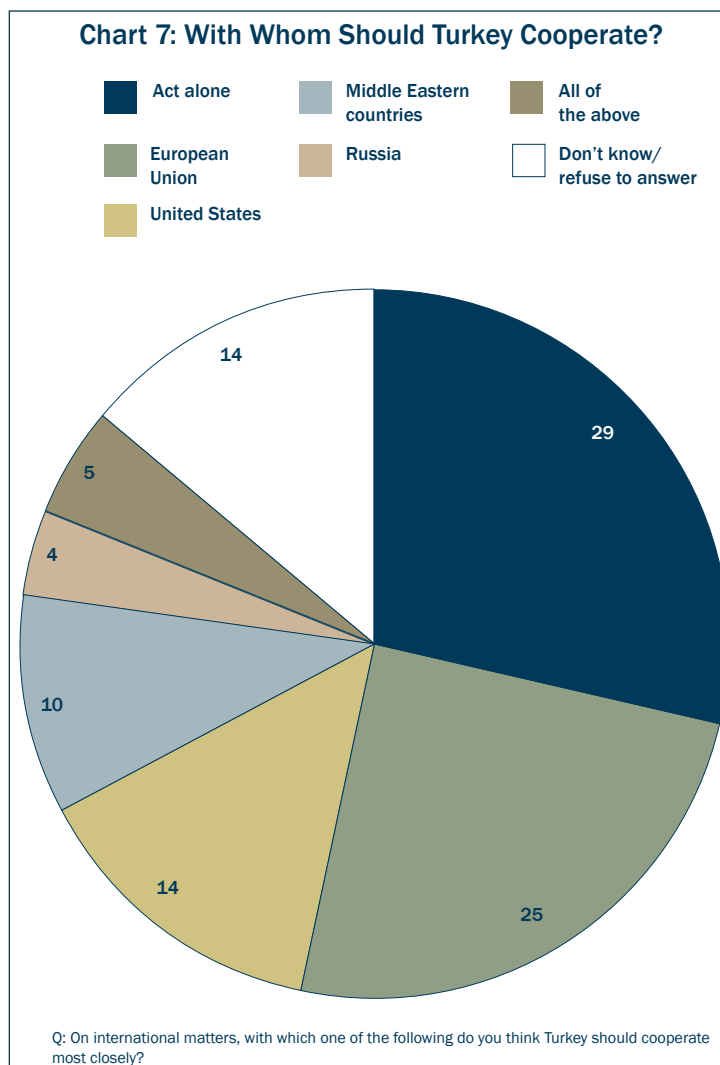
Just over half (51%) of respondents think that U.S.-Turkey relations can be characterized as good, as opposed to 35% who have a negative perception about the nature of the relationship.

DIVIDED ON INTERNATIONAL LEADERSHIP

Respondents also displayed a significant preference for Turkish unilateralism in international relations. When asked with whom Turkey should cooperate on international matters, 29% said that Turkey should act alone. On the other hand, 25% said it should cooperate with the countries of the European Union and 14% preferred the United States, adding up to a plurality (39%) that prefers cooperating with western countries. Ten percent of respondents said Turkey should cooperate with countries of the Middle East; only 4% gave the nod to Russia. Ten percent of respondents said Turkey should cooperate with countries of the Middle East; only 4% gave the nod to Russia.

IS NATO STILL IMPORTANT?

Respondents were divided over whether NATO was still essential for Turkey's security: 38% of respondents said it was still essential and 35% said it no longer was. A relatively high level of the "no idea/don't know" answer (27%)



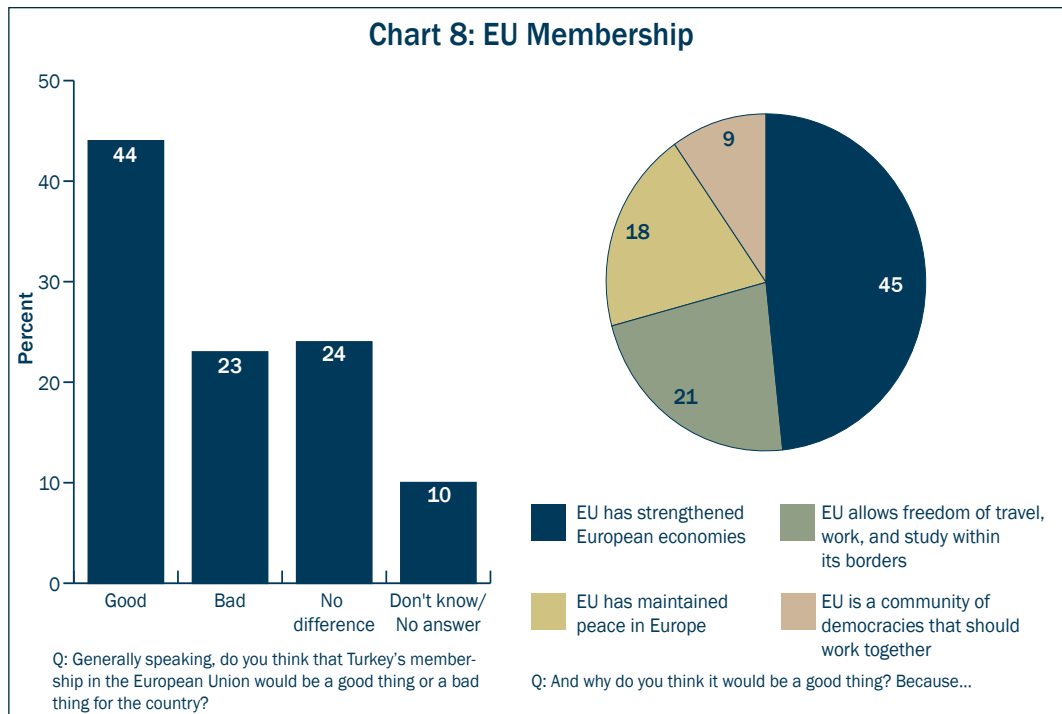
may be an indicator of a lower level of awareness among Turkish public about the role of NATO.

The survey also highlighted that there is little support for NATO operations outside Europe. While 41% of respondents supported NATO's role in territorial defense of Europe, the support level decreased to 35% in the case of "attempting to establish stability in places like Afghanistan," 32% in the case of "providing arms or training to help other countries defend themselves," and 30% in the case of conducting military operations outside of the United States and Europe.

OPINIONS OF EU MEMBERSHIP REMAIN POSITIVE

As mentioned earlier, Turks have generally unfavorable opinions of other countries and groups of countries, but this was less so in the case of the European Union, which was viewed favorably by 41% of respondents. Likewise 44% of respondents think that full-membership in the EU would be beneficial for the Turkish economy; 23% think it would be bad.

Those who said that membership in the European Union would be good for the Turkish economy were then asked about their reasoning. Given a list of possible choices, 45% chose "the European Union has strengthened European economies"; 21% said that "the European Union allows freedom of travel, work, and study within its borders"; 18% said "the European Union has maintained peace in Europe"; and 9% chose "the EU is a community of democracies that should act together."



Similarly, those who said that membership in the European Union would be bad for the Turkish economy were asked about their reasons. Given a list of possible choices, 32% chose “the European Union has harmed Turkey’s economy”; 23% chose “the EU has undermined Turkey’s culture”; 20% said “the EU is undemocratic”; and 12% said “there is too much authority in Brussels.”

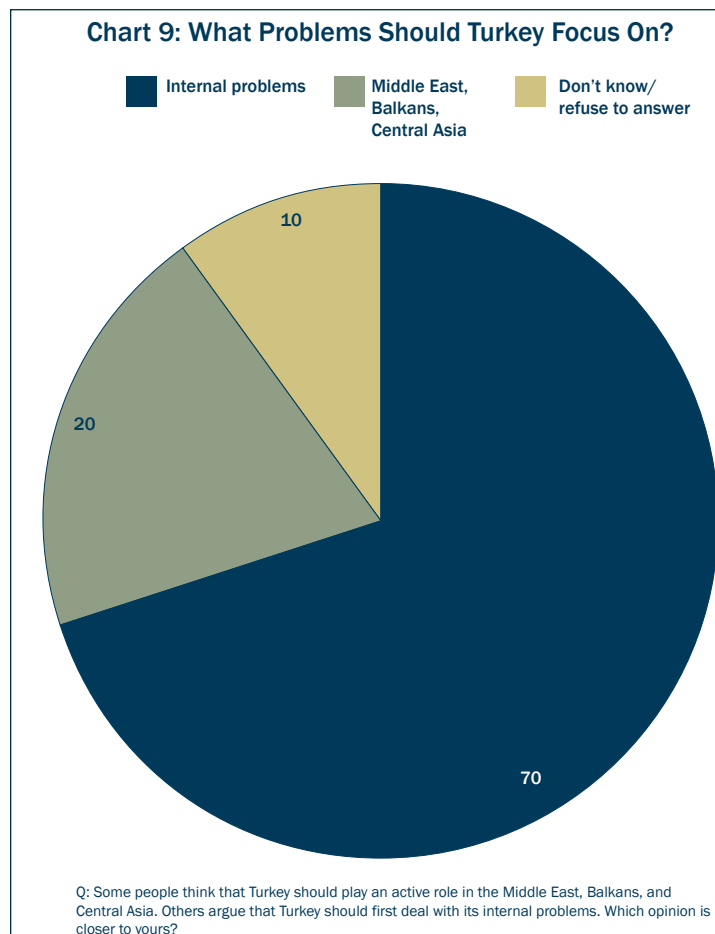
FOREIGN POLICY AND SECURITY

Turkey has gone through a period of foreign policy activism during the last decade and foreign policy has become one of the top issues in the overall political debate. During this time, Turkey has aspired to be a regional soft power and a source of inspiration for the Islamic World. But since the beginning of the Arab Spring, the previous relatively stable and peaceful strategic environment around Turkey was replaced by a region in conflict, with serious implications for Turkey’s own security.

The survey highlighted a strong isolationist tendency among the Turkish public on foreign policy. Seventy percent

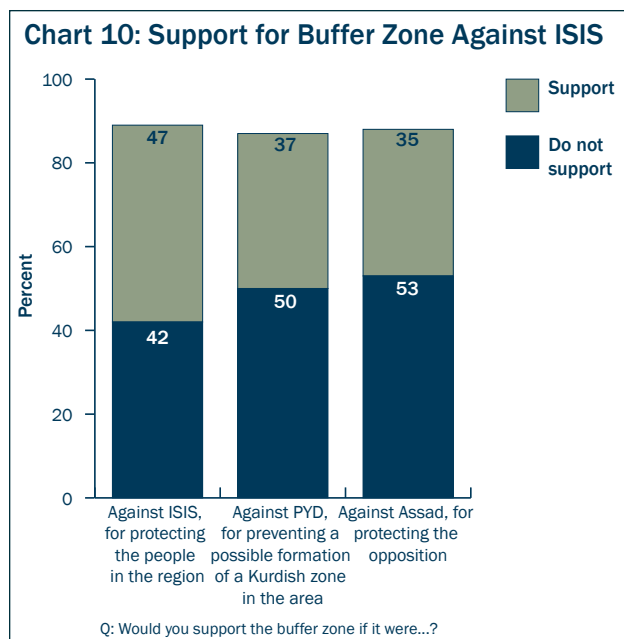
of respondents said that Turkey should deal first with its internal problems; only 20% said that Turkey should play a more active role in the Middle East, Balkans, and Central Asia. A majority (51%) of respondents disapproved of the current foreign policy, while 41% approved of it. The approval rate further declined as specific foreign policy areas were mentioned. The way Turkey’s government is handling relations with Russia was approved of by 38% of respondents, policies toward neighboring countries was approved of by 35%, and immigration policy was approved of by 32% of respondents.

When asked about the contribution of Turkish



foreign policy to specific outcomes, 40% of respondents said it has improved business opportunities for Turkish companies, but 51% disagreed. Thirty-eight percent of respondents said that the government's foreign policy had contributed to Turkey's leadership role, but 53% said it did not. Thirty-eight percent said that the government's foreign policy contributed to Turkey's security, but 54% disagreed. Finally, 36% said that the government's foreign policy improved relations with the Western world, but 55% said it did not.

SYRIA AND ISIS: MIXED OPINIONS ON ENGAGEMENT



A majority (57%) of respondents were against a military intervention in Syria to support the forces fighting against the Assad regime; 29% would support military intervention. When asked about what Turkey should do if there is such an intervention, 37% said that Turkey should stay out completely; 30% said Turkey should support the intervention in non-military ways and 17% said Turkey should join the coalition actively.

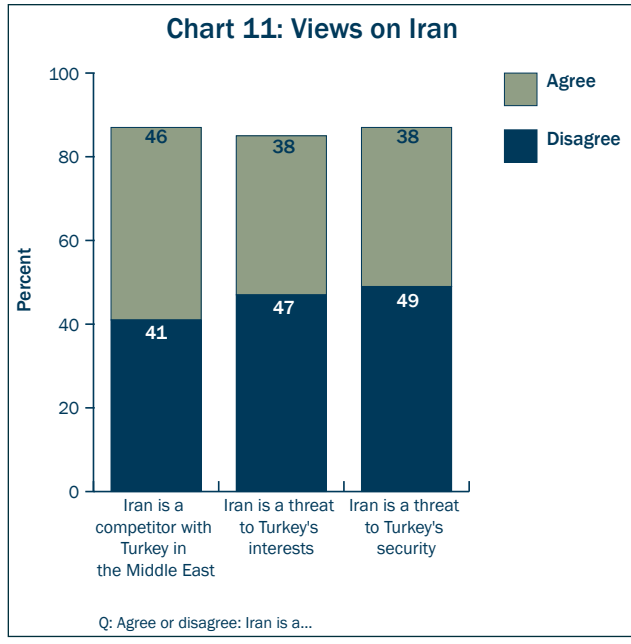
The idea of Turkey sending troops to form a buffer zone in Syria is not supported by the Turkish people, except if it is to protect the people in the region from the self-proclaimed Islamic State group (ISIS). When asked in general, only

29% of respondents supported the buffer zone idea. When asked more specifically, 35% said they would support Turkish troops participating in a buffer zone to protect the Syrian opposition from the Assad regime and 37% said they would support a buffer zone against the Democratic Union Party (PYD) to prevent the formation of a Kurdish zone in the region. While majorities were against sending troops under all other scenarios, a plurality (47%) supported the idea of sending troops to form a buffer zone to protect the people in the region from ISIS; 42% were not in favor.

The survey shows that there is a broad consensus against ISIS, among the Turkish society. When asked, 91% of respondents said that ISIS was a terrorist organization and 82% of them said that it was a threat to Turkey. However, there was a diversity of opinion on whether Turkey should join the coalition against ISIS and in what way. Thirty-eight percent of respondents said that Turkey should stay out of the coalition completely, 24% said Turkey should join the coalition actively, and 23% said Turkey should support the coalition in non-military ways.

IRAN: FRIEND OR FOE?

While a plurality of respondents agreed that Iran is a competitor with Turkey, pluralities disagreed that it is an actual threat. Forty-six percent of respondents agreed that Iran was a competitor with Turkey in the Middle East and 41% disagreed. Only 38% of respondents said that Iran was an actual threat to Turkey's interests while 47% said it is not; 38% of respondents said Iran was a threat for Turkey's security while 49% said it was not.

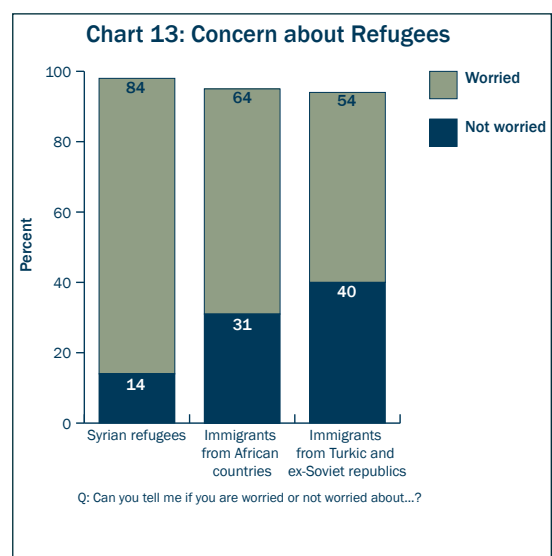
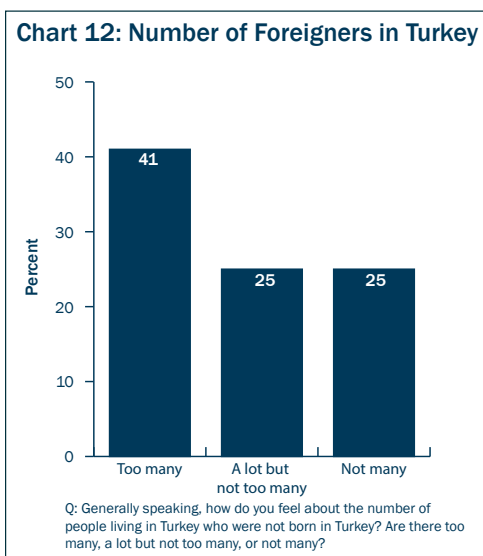


4 Immigration

The Syrian refugee crisis has accelerated Turkey's ongoing transition from a country of emigration to a transit and host country. A 911-kilometer land border with Syria and an open border policy toward refugees from its southern neighbor have led to Turkey hosting an officially estimated 1.7 million Syrian refugees as of September 2015; unofficial figures go as high as 2 million. Two-hundred-sixty-thousand of these refugees live in 25 "temporary protection centers" located in 10 cities across Turkey; the others have chosen to live outside these centers. Turkey has spent \$5.6 billion on Syrian refugees since the beginning of the crisis.

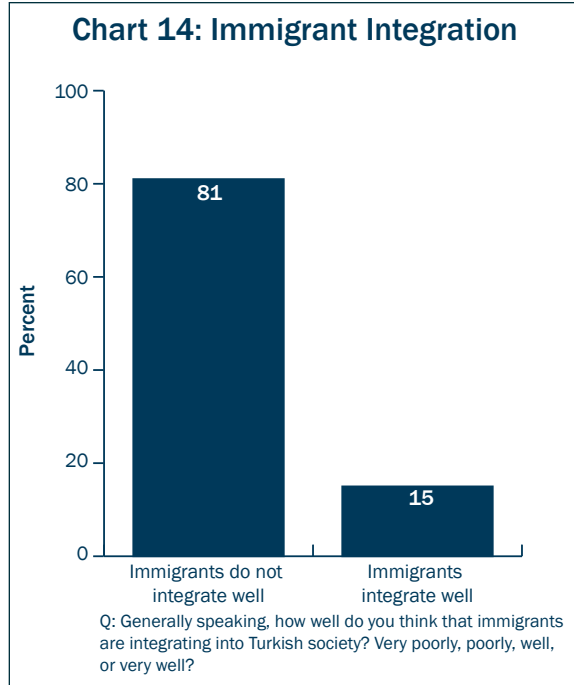
Turkish Perceptions survey indicates a negative attitude toward immigrants in Turkey, though given the scale of the refugee crisis in Turkey, the results could be considered moderate. An overwhelming majority (76%) of respondents thought that immigrants came to Turkey mainly to seek asylum, 32% said they came to work, 23% thought they came to seek social benefits, and 21% felt they came to be united with family members. A plurality (41%) of respondents said that there were "too many" foreigners in Turkey and 25% said there are "a lot but not too many." A further 25% of respondents said that there were "not many" foreigners in Turkey. Given that Turkey has taken in nearly 2 million Syrians in the past few years, one could also say that a response whereby 50% think there are many, but not too many, is rather balanced.

Majorities are concerned about refugees from various home regions, but particularly with those coming from Syria. Fifty-four percent of respondents said that they were worried about refugees coming from Turkic and ex-Soviet Republics, while 40% said they were not. Sixty-four percent of respondents said that they were worried about the refugees coming from African countries, while 31% said they were not. An overwhelming majority of 84% said that they were worried by refugees coming from Syria; only 14% said they were not. A similarly overwhelming majority of 81% of respondents thought that immigrants have not integrated



well into Turkish society; only 15% said they actually do integrate well.

When asked about Turkey's policies toward refugees, 68% of respondents wanted more restrictive policies. When asked about immigrants who are currently living in Turkey, 73% said that the existing immigrants should be asked to go back home, whereas 17% said it depended on the circumstances and 8% said they should be offered legal status in Turkey.



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