

BBG Research Series

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Contemporary Media Use in Turkey



Turkey at a Glance

Findings from the World Poll

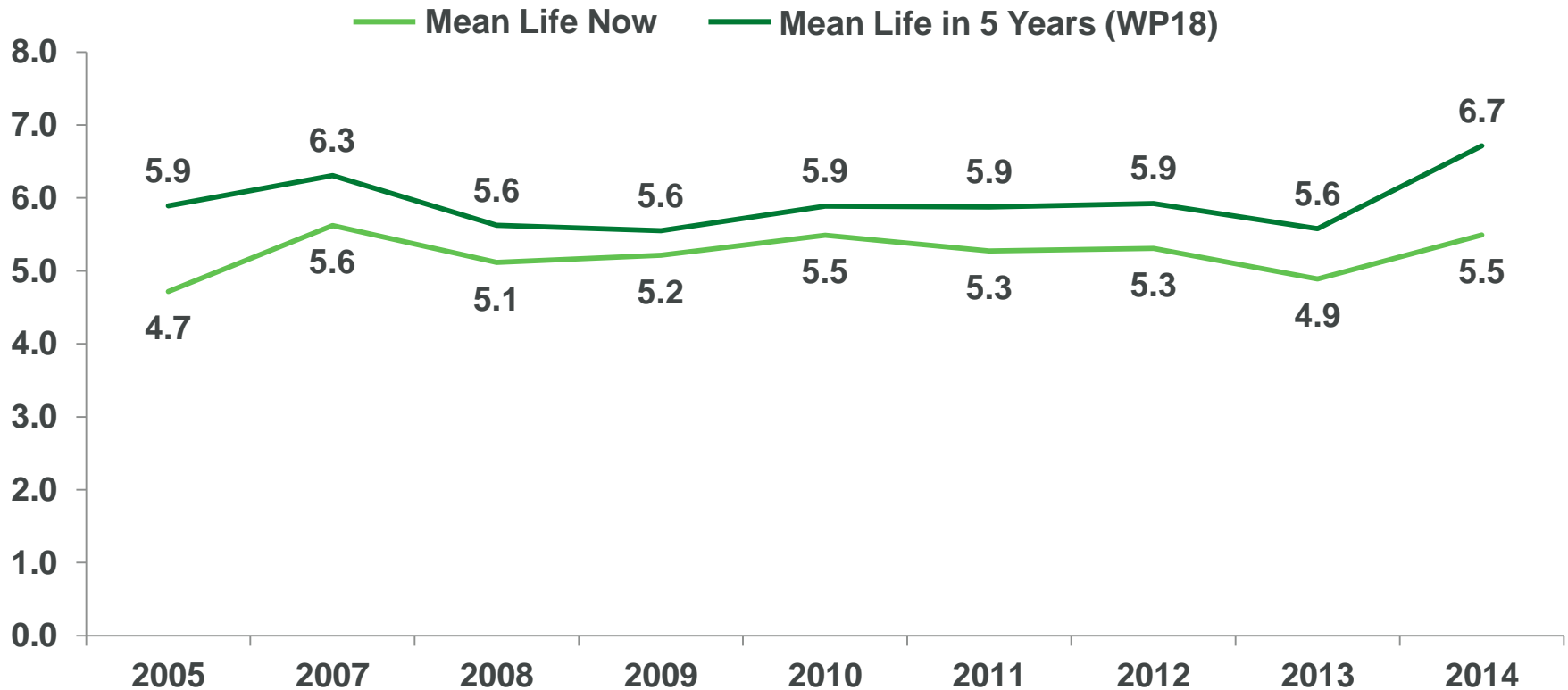
Gallup World Poll Methodology

- 10 surveys since 2005
- Last survey: 16 May – 24 June 2014
- Nationally representative of Turks 15 years or older (approximately 57 million people).
- Sample size: Approximately 1,000 per survey
- Mode: Face-to-Face until 2013, 2014 Landline (79%) & Cell Phone (21%)
- 2 survey waves in 2012 were combined for this presentation



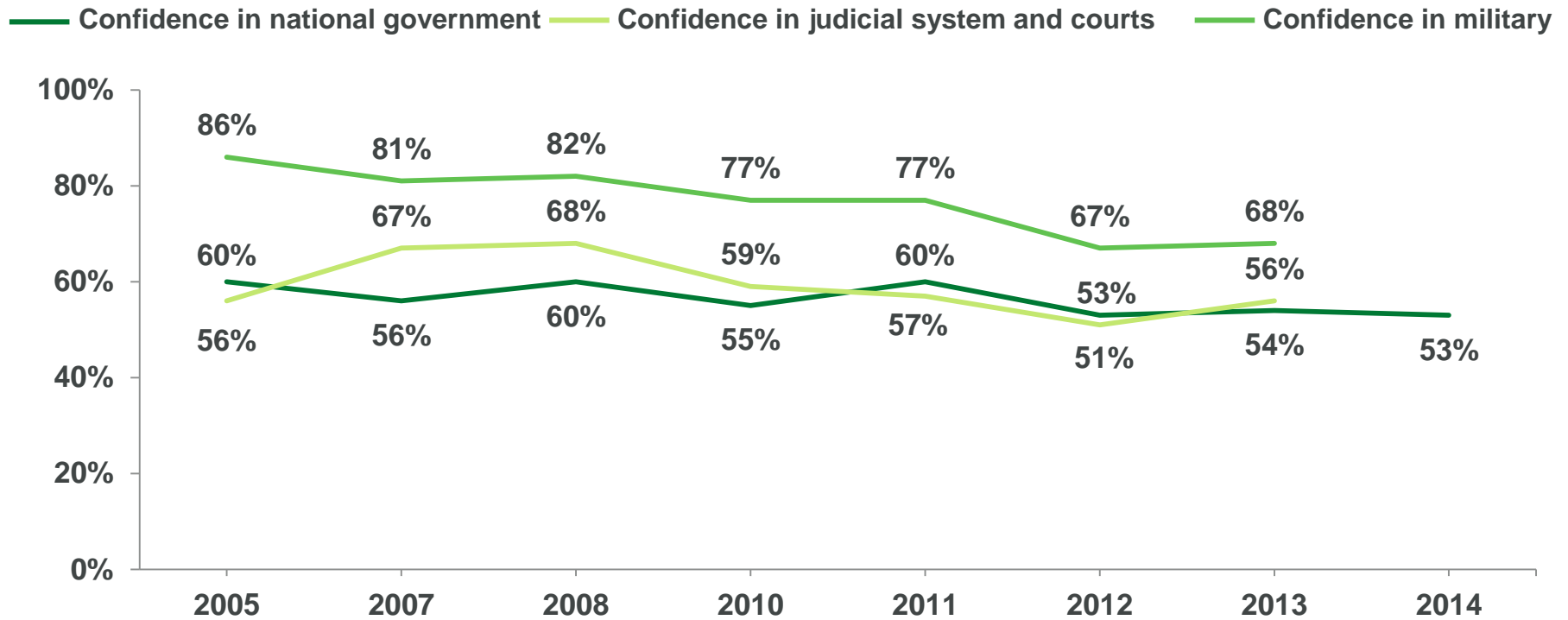
Turkish Adults More Optimistic About the Future in 2014

On which step of the ladder would you say you personally feel you stand at this time? Just your best guess, on which step do you think you will stand in the future, say about five years from now?



Majority of Turks Continue to Have Confidence in the Government

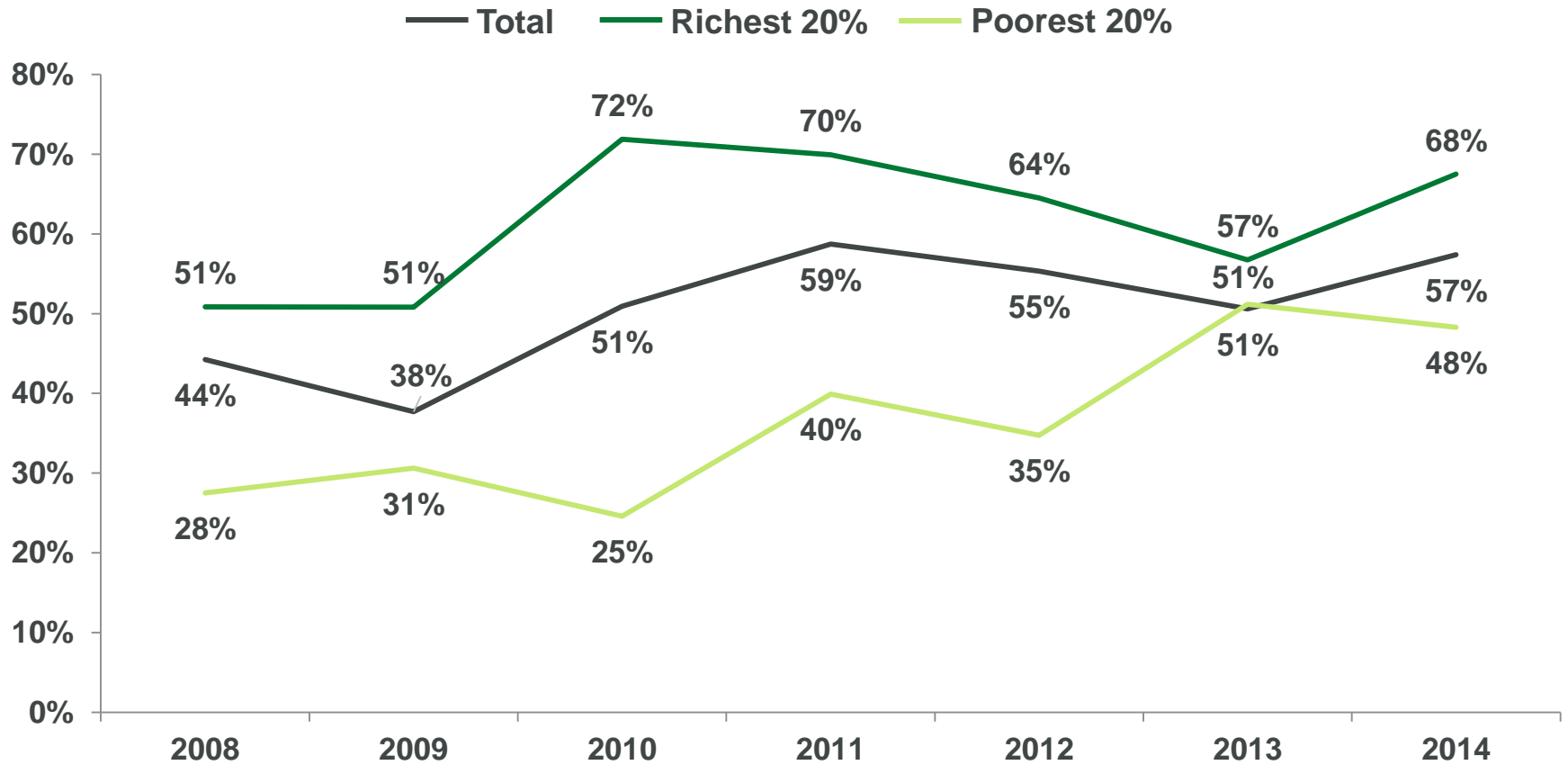
In this country, do you have confidence in each of the following, or not? How about the national government, the judicial system and courts, the military?



*Question not asked in 2009. 2014 questionnaire only asked about confidence in national government.

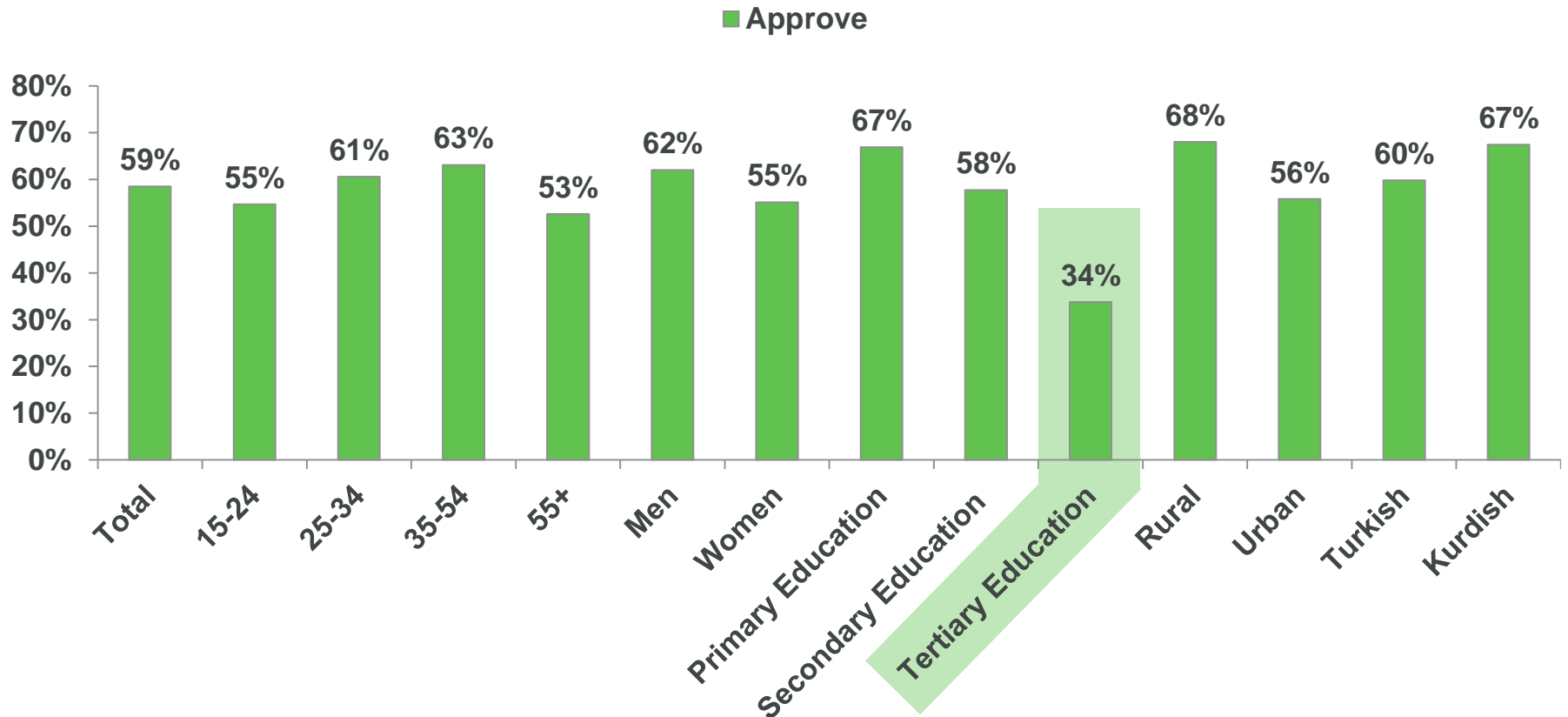
Satisfaction with Standard of Living Among the Country's Poorest Shows Consistent Increase Over Time

Are you satisfied or dissatisfied with your standard of living, all the things you can buy and do?



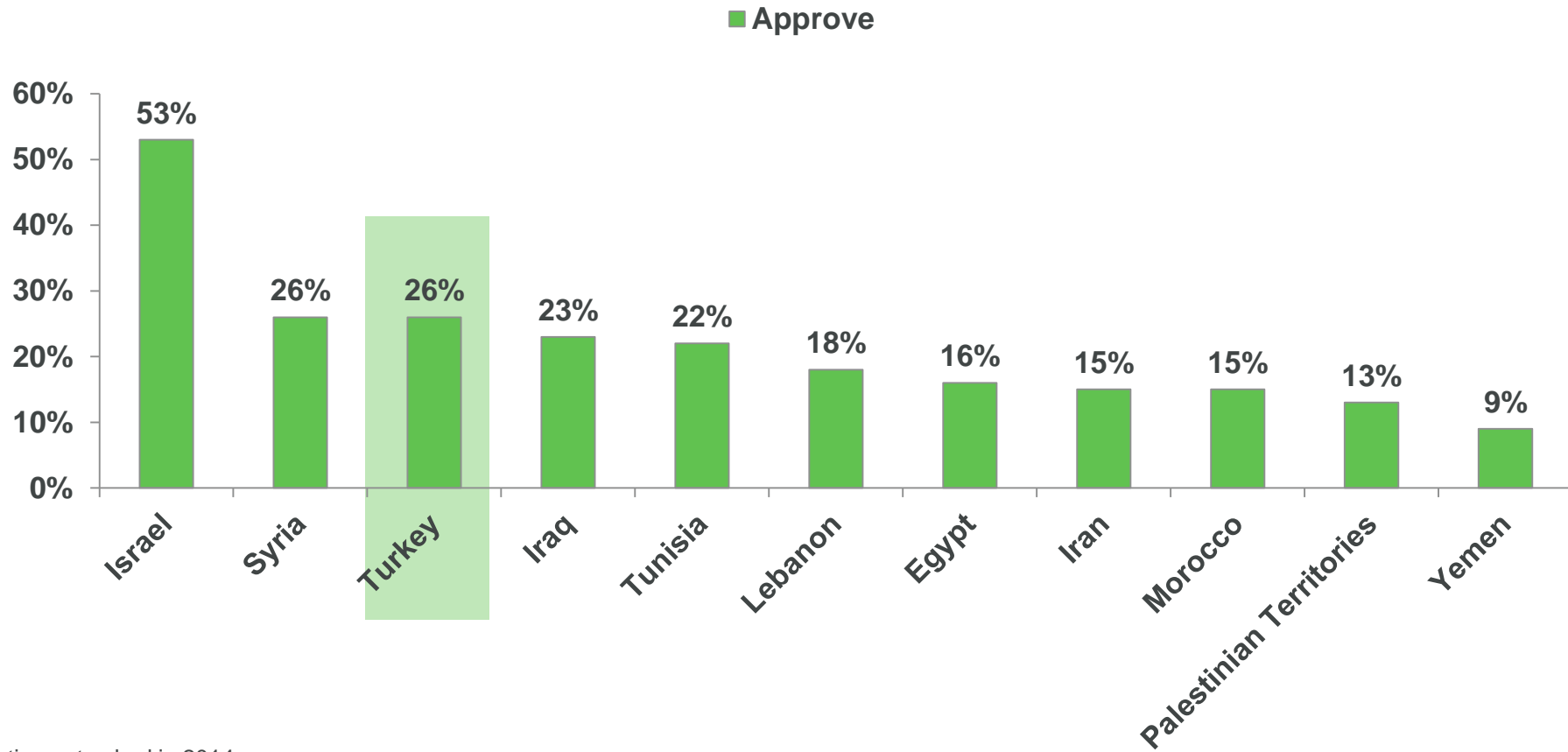
Higher Educated Turks Least Likely to Approve of Erdoğan's Job Performance

Do you approve or disapprove of the way Recep Tayyip Erdoğan is handling his job as prime minister?



Approval of US Leadership in 2013 on Par With Neighboring States

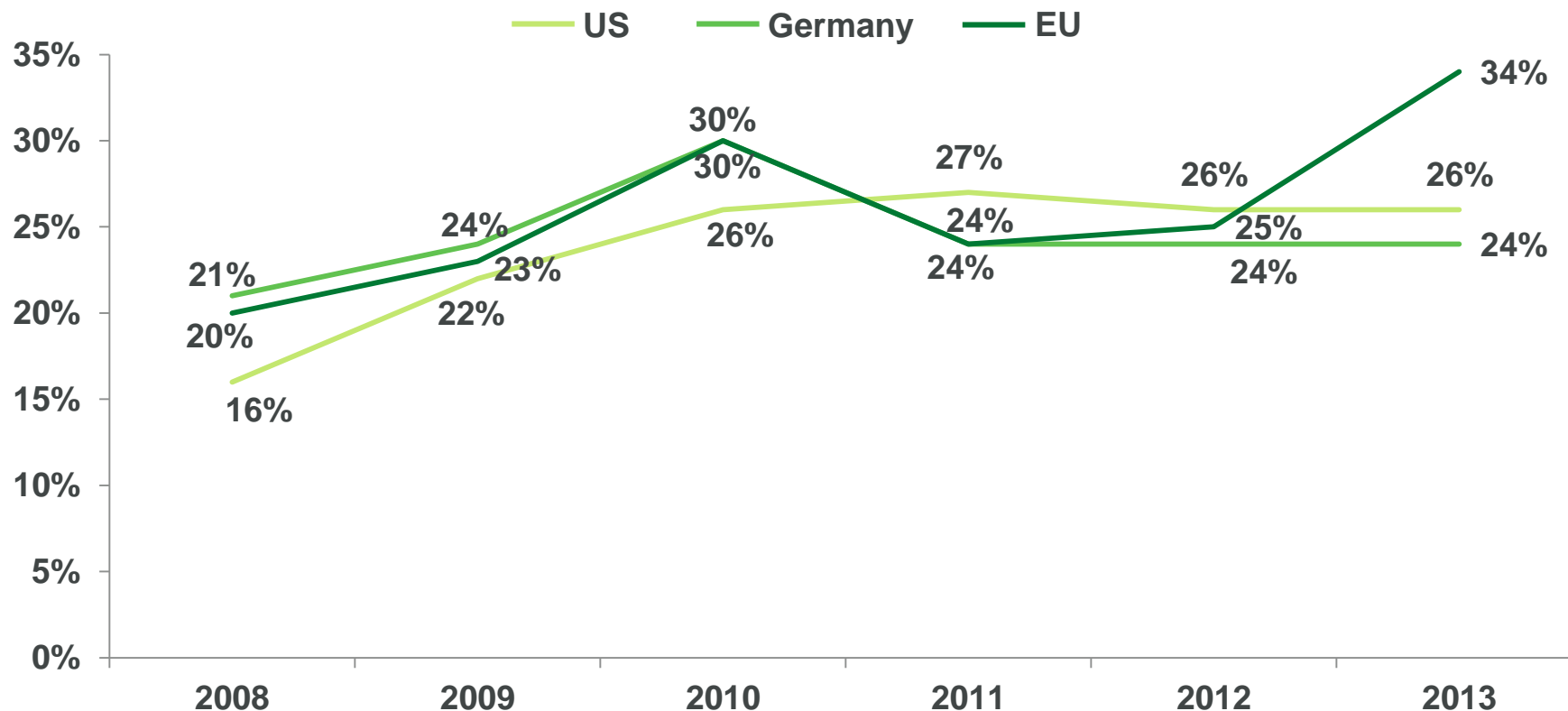
Do you approve or disapprove of the job performance of the leadership of the United States?



*Question not asked in 2014

Few Turks Approve of Foreign Powers' Leadership

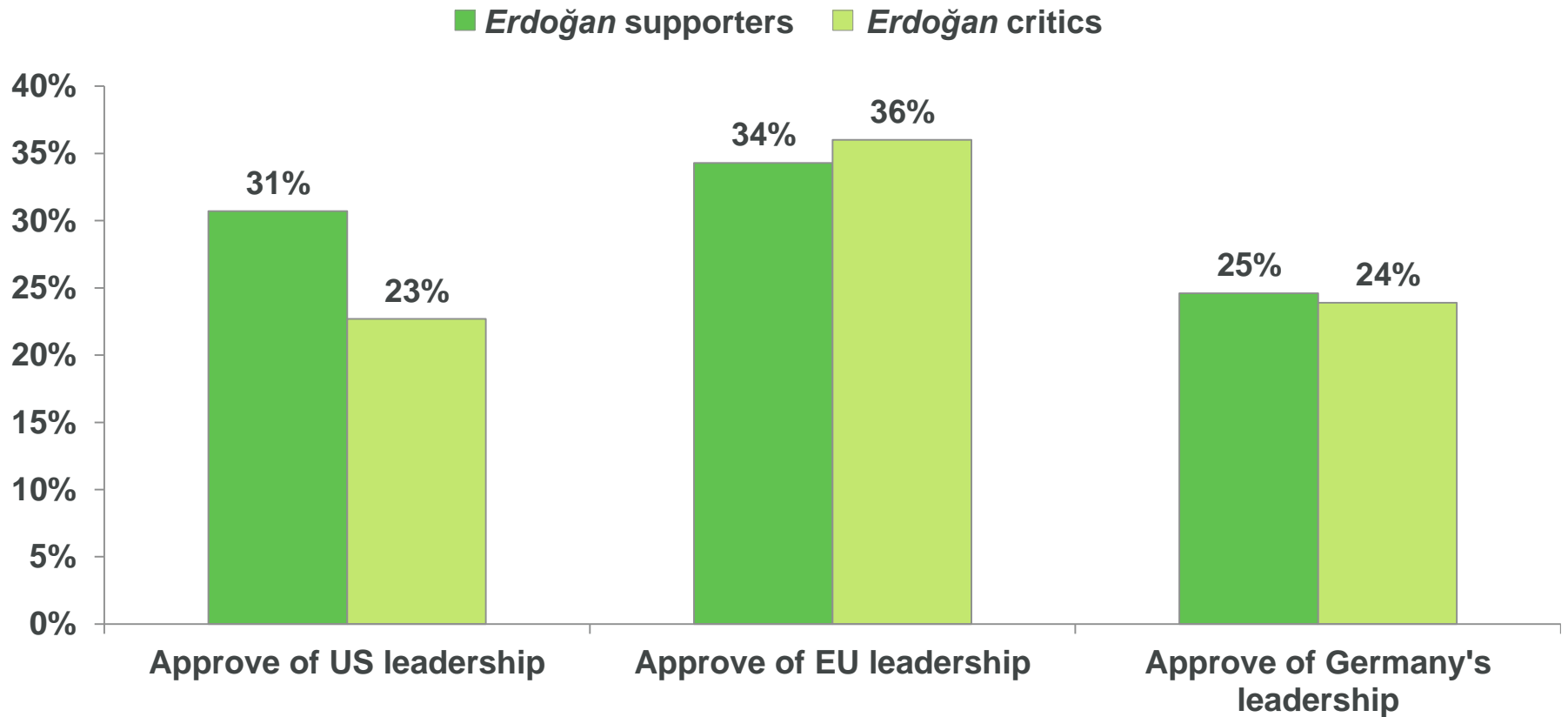
Do you approve or disapprove of the job performance of the leadership of _____?



*Question not asked in 2014

Erdoğan's Supporters More Likely to Approve of US Leadership in 2013 Than His Critics

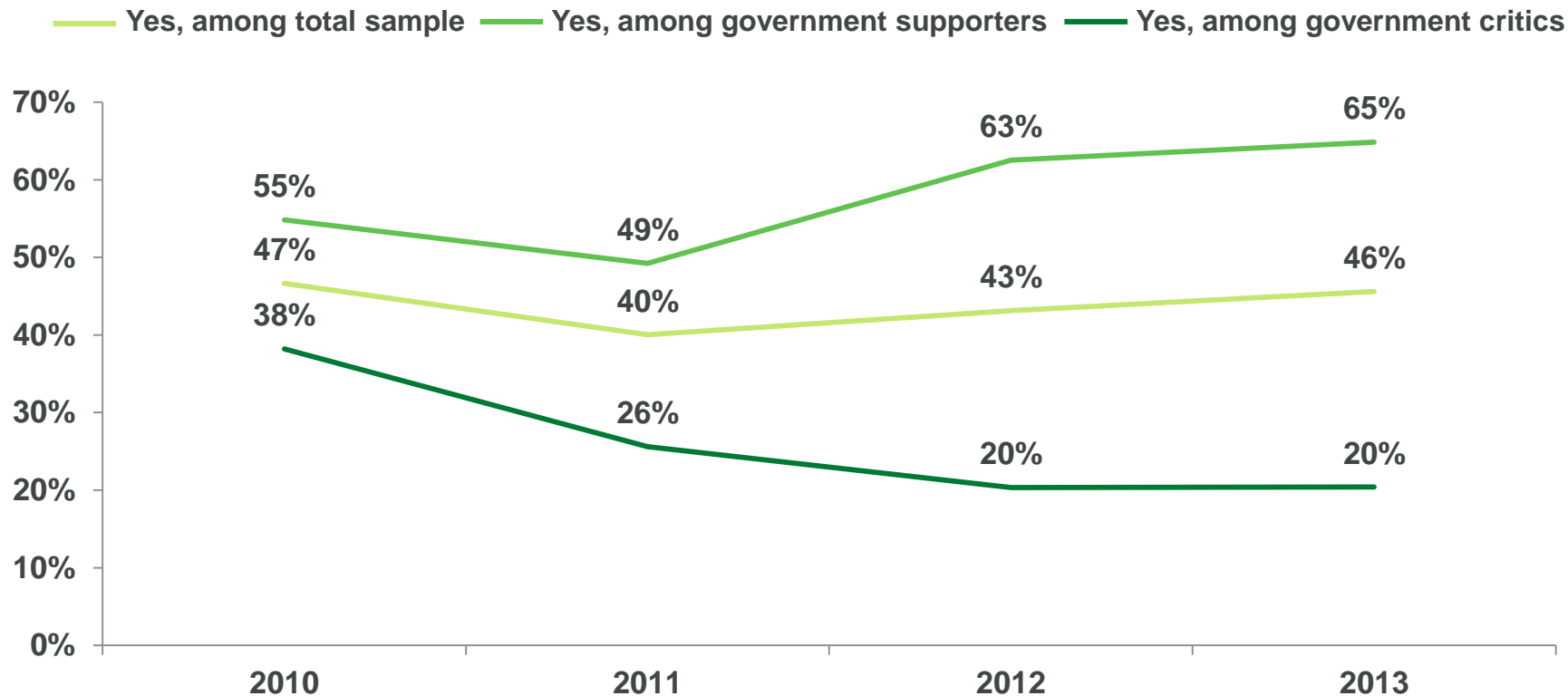
Do you approve or disapprove of the job performance of the leadership of _____?



*Question not asked in 2014

Turks' Perceptions of Media Freedom Increasingly Divided

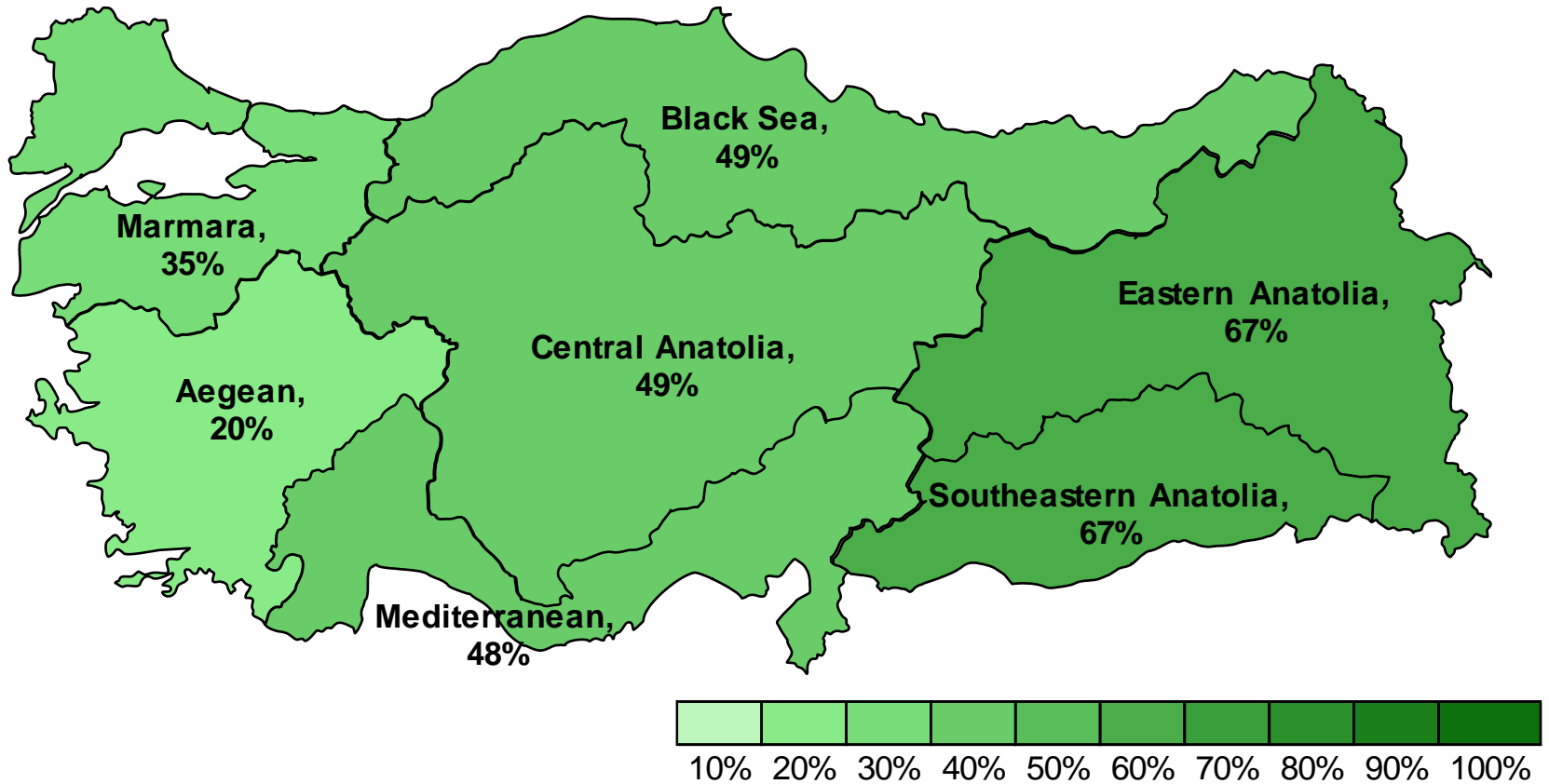
Do the media in this country have a lot of freedom, or not?



* Question about media freedom not asked in 2014.

Two in 10 Residents of the Aegean Region Regarded Media as Free in 2013

Do the media in this country have a lot of freedom, or not? %Yes



* Question about media freedom not asked in 2014.

Media Use in Turkey

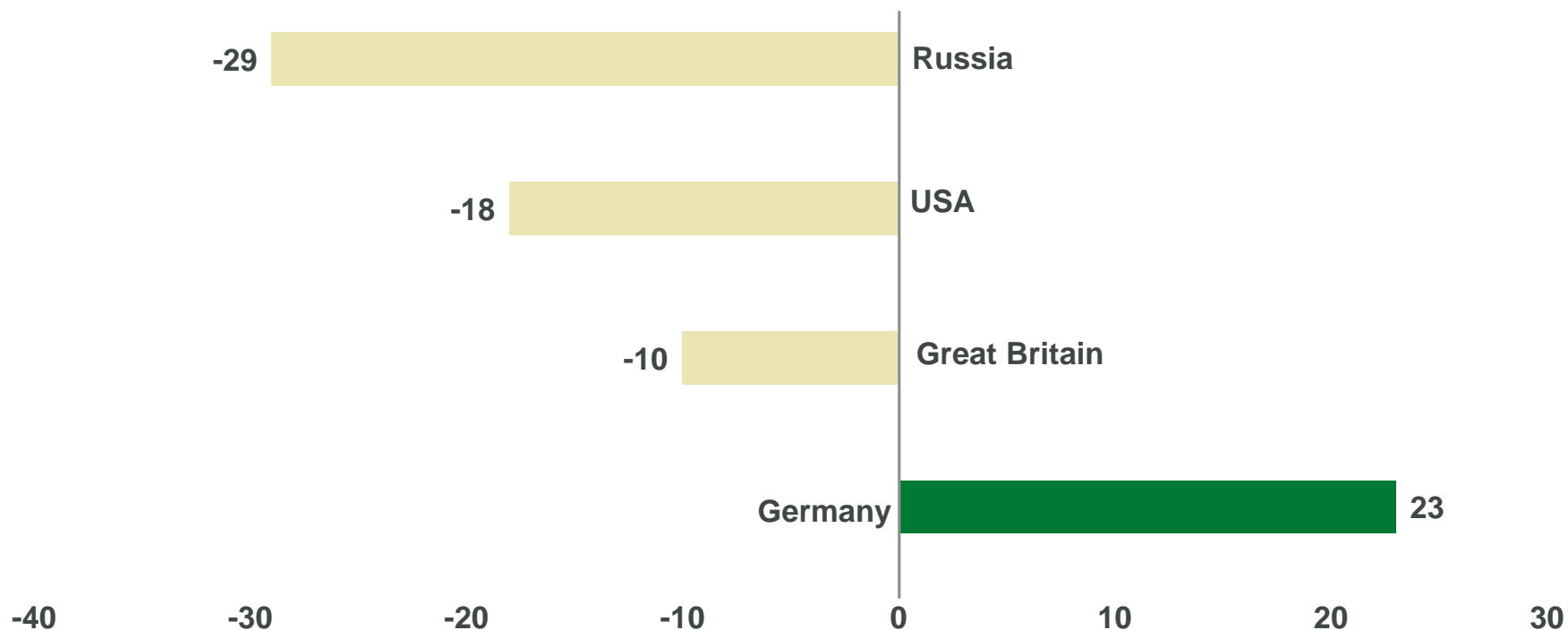
Turkey Media Survey Methodology

- National survey of Turkey, Fieldwork: 11 November through 25 December 2013
- CATI methodology, n=2020, nationally representative
- Sampling frame 80% landline; 20% mobile
- Oversample of Kurdish population; in addition to 255 Kurds “naturally” captured in national sample, additional interviews of Kurdish speakers brought the total to 1001.
- “National” analysis based on “n” of 1255; analysis of Kurds based on “n” of 1001

Turkish Views of Key Countries

Please tell me your opinion of each of the following countries...

Net Approval in % (very favorable + somewhat favorable – somewhat unfavorable – very unfavorable)

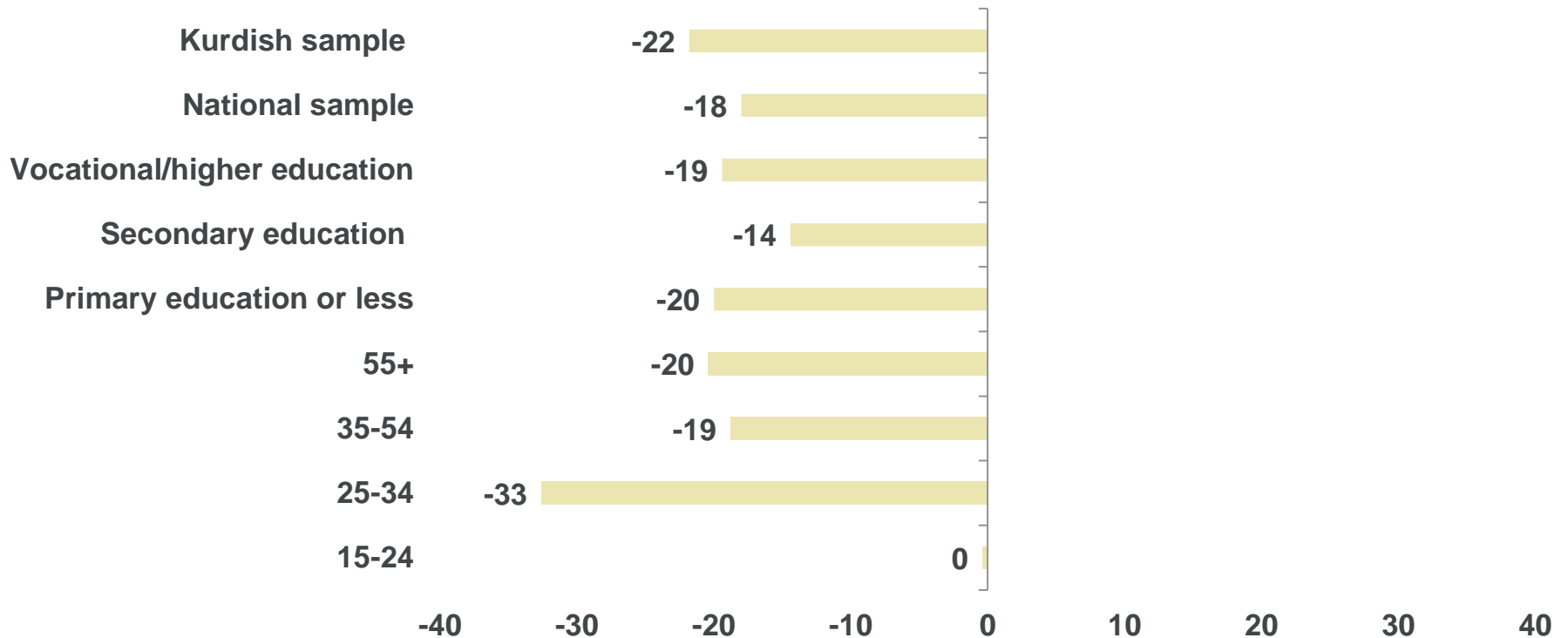


Percentages for DK/Refused are excluded.

Less Negative Views of the U.S. Among Younger Turks

Please tell me your opinion of each of the following countries...

Net Approval in % (very favorable + somewhat favorable – somewhat unfavorable – very unfavorable)



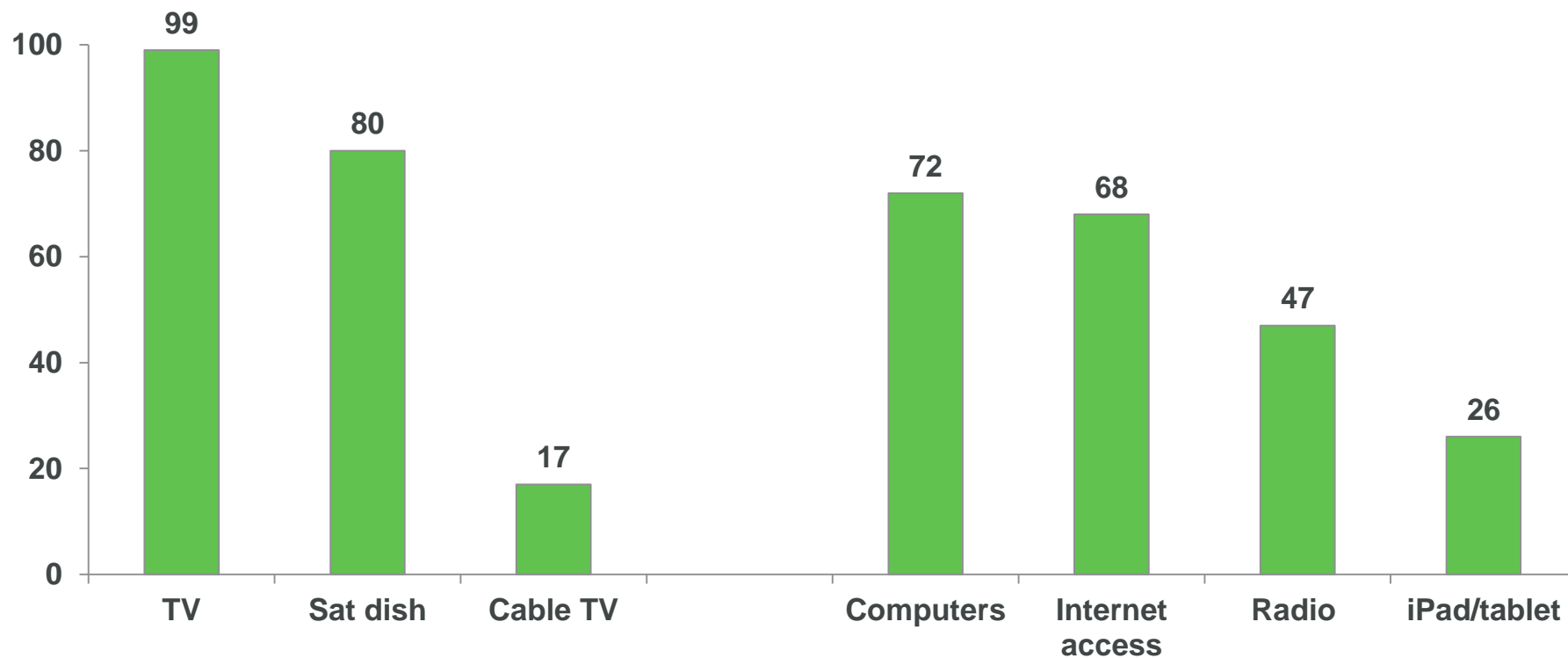
Percentages for DK/Refused are excluded.

Overview of Turkish Media

- Highly developed relative to most other BBG markets ...
- In terms of technological sophistication of most households and;
- In terms of a large number of media alternatives
- But this doesn't mean that all Turks are satisfied with the available choices...

Household Ownership of Media Devices

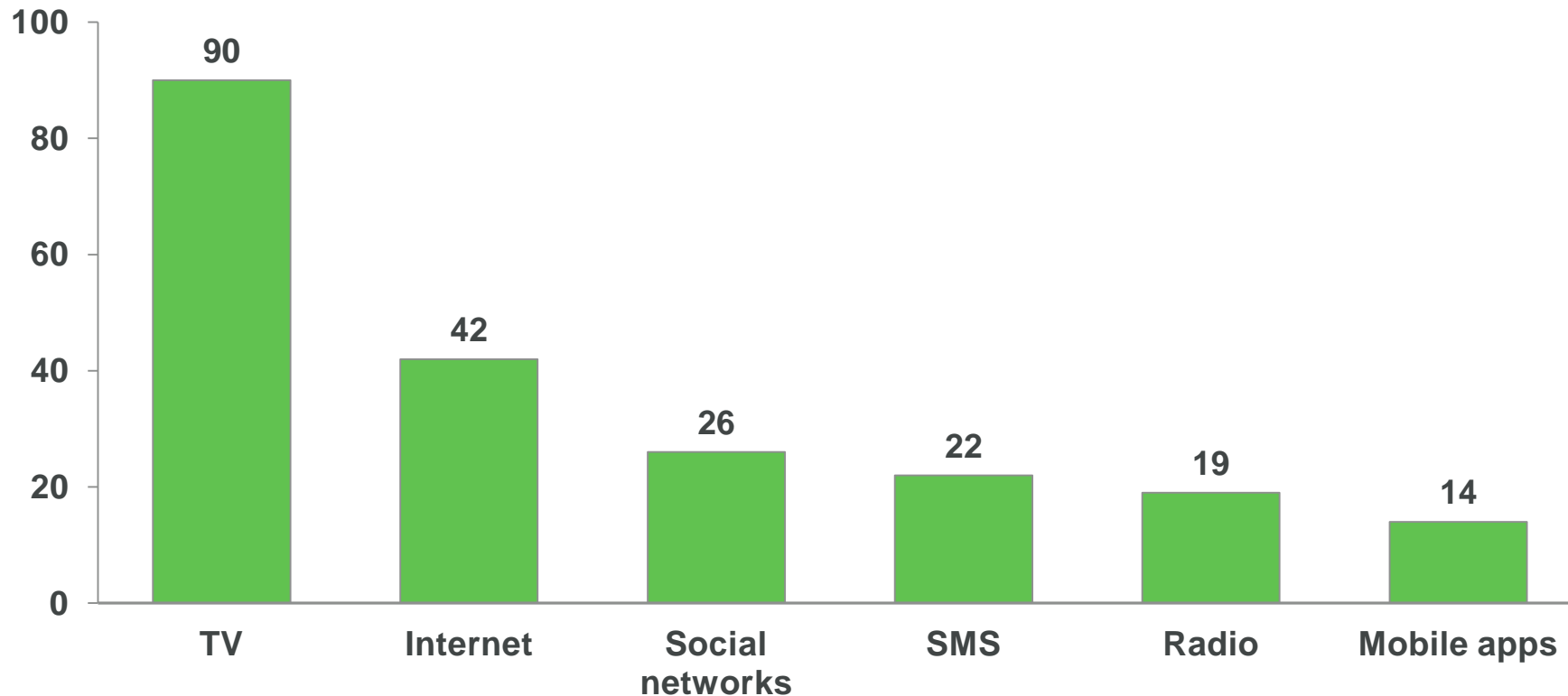
Which, if any, of the following do you have working in your household?



Base: "National" sample, n=1255; figures show percentage of HHs with each device

Media Platforms Used Daily for News

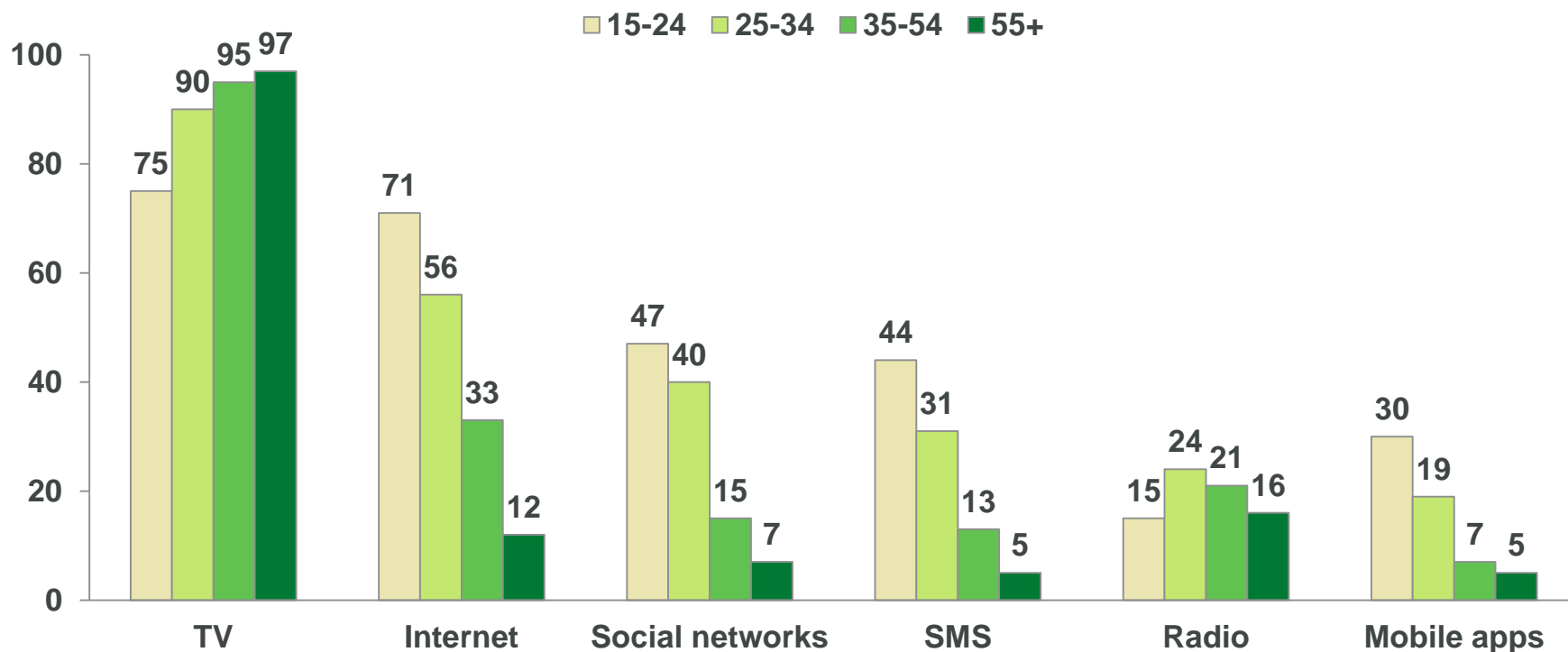
People get news from many different sources. For each one of the sources I mention, please tell me whether you use that source to get news daily or most days per week, at least once a week, at least once a month, less than once a month, or never. How about ?



Base: "National" sample, n=1255; figures show percentage of respondents using each platform daily for news

Media Platforms Used Daily for News, by Age

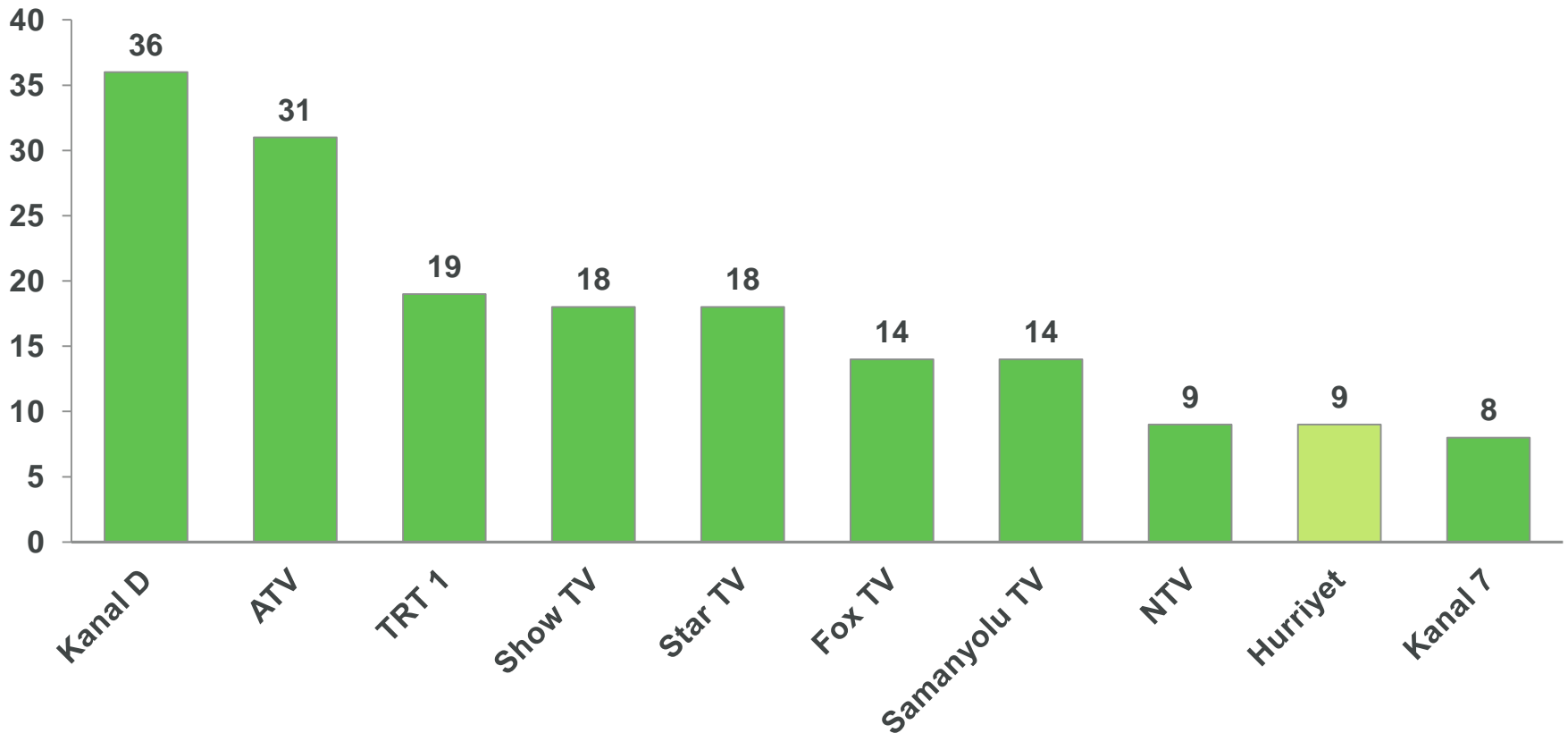
People get news from many different sources. For each one of the sources I mention, please tell me whether you use that source to get news daily or most days per week, at least once a week, at least once a month, less than once a month, or never. How about ?



Bases: all survey respondents from national sample in each age group. Figures show percentage in each group using platforms daily for news.

Top News Sources

Which stations, publications, or sites are your three MOST important sources of information?

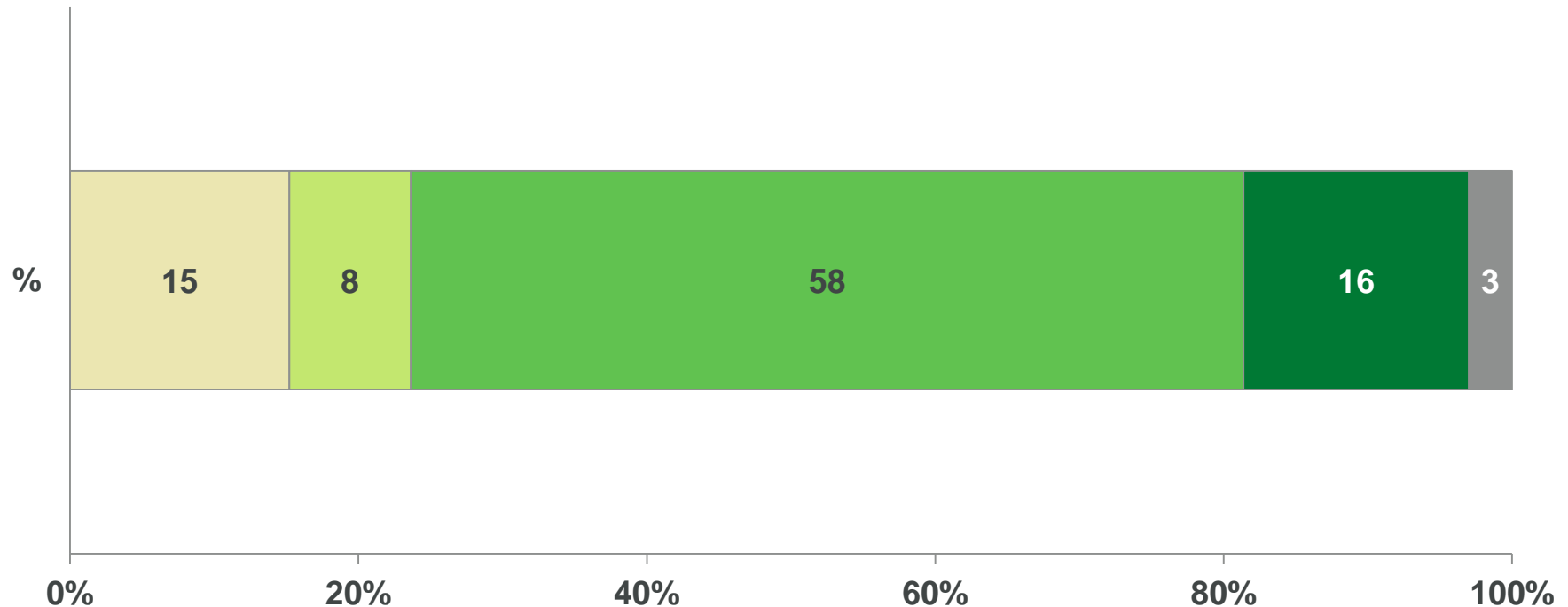


Base: "national" sample, n=1255. Percentages naming each channel as one of top three news sources.

Satisfaction with Media

How satisfied are you with the information provided by the media?

■ Very dissatisfied ■ Somewhat dissatisfied ■ Somewhat satisfied ■ Very satisfied ■ DK/Refused



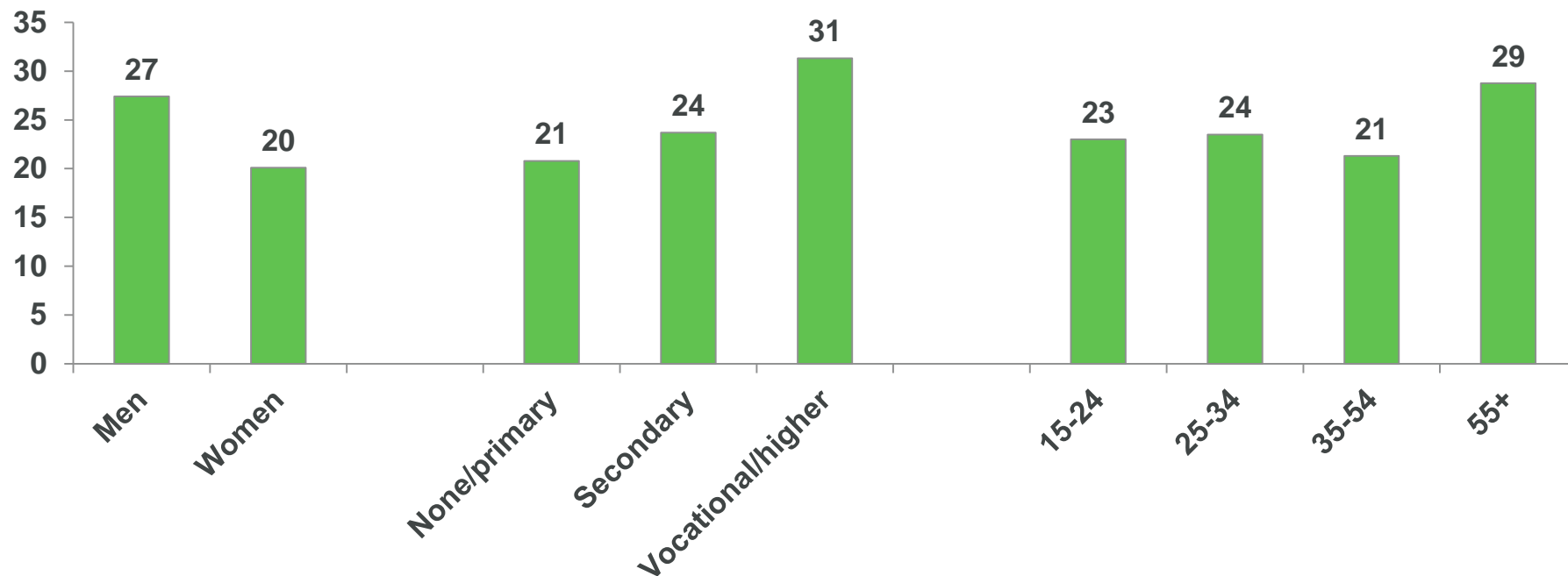
Some Context...

- RSF now puts Turkey at #154 in media freedom, between Iraq and Gambia.
- (Lack of) coverage of Gezi Park protests in 2013 showed extent of self censorship.
- Major impetus for turning to social media.
- New Internet blockage measures.
- Attempts to rein in social media in wake of leaked high level conversations.

Dissatisfaction with Media, by Demographics

How satisfied are you with the information provided by the media?

■ Very/somewhat dissatisfied

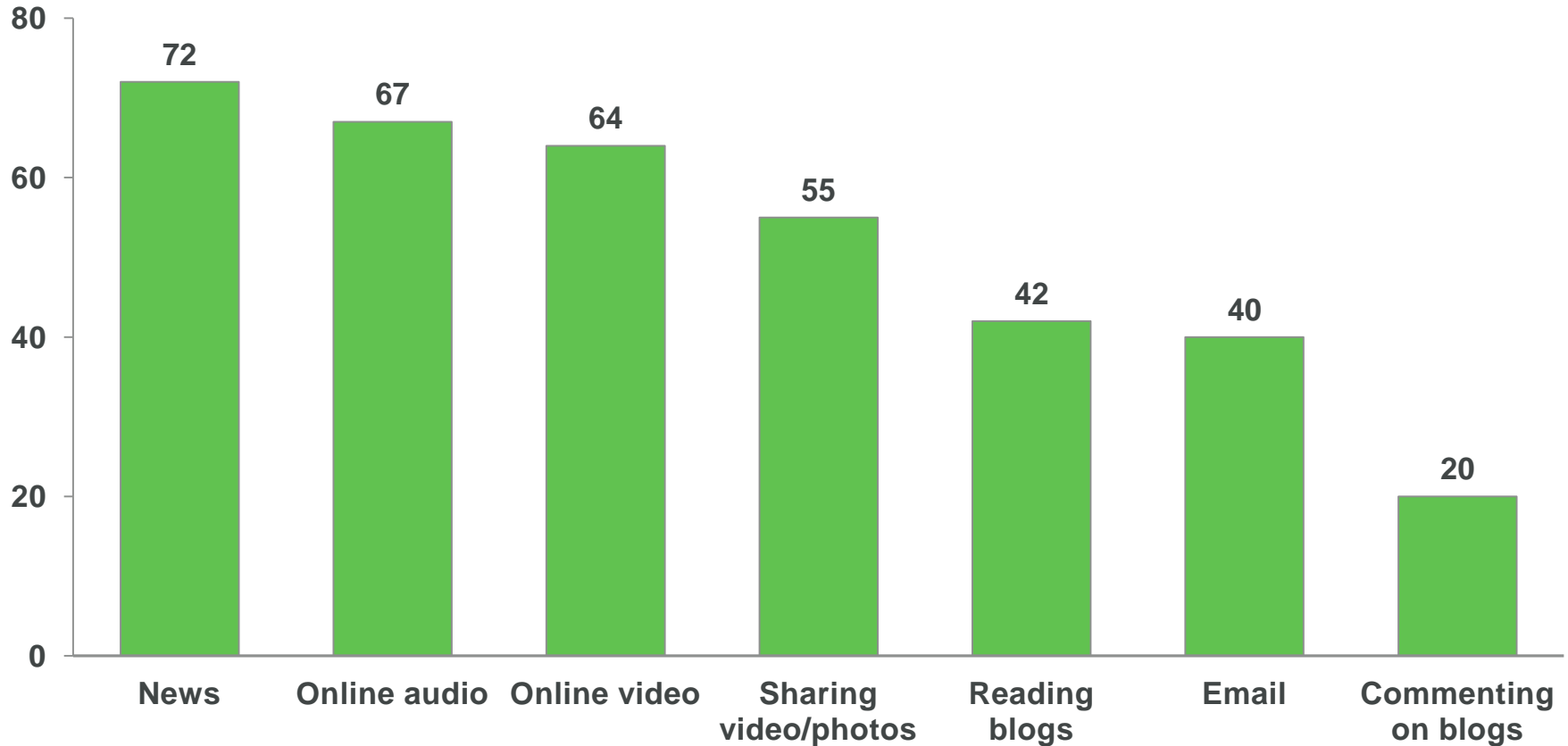


Percentage of respondents in each group saying they are "not very" or "not at all" satisfied with Turkish media

Turkey's Digital Universe

What Turkish Internet Users Do Online

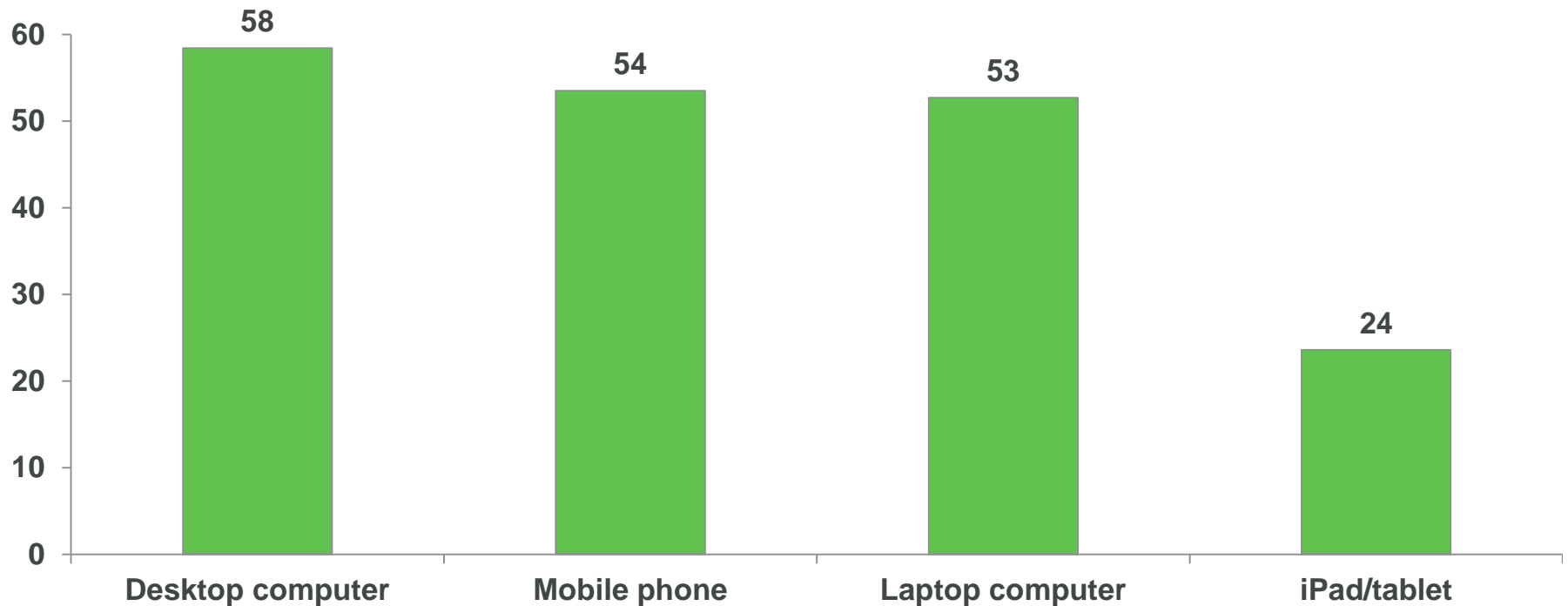
In the last 7 days, which of the following activities have you used the Internet for?



Base: All past-week Internet users (n=798)

How Internet Users Access the Internet

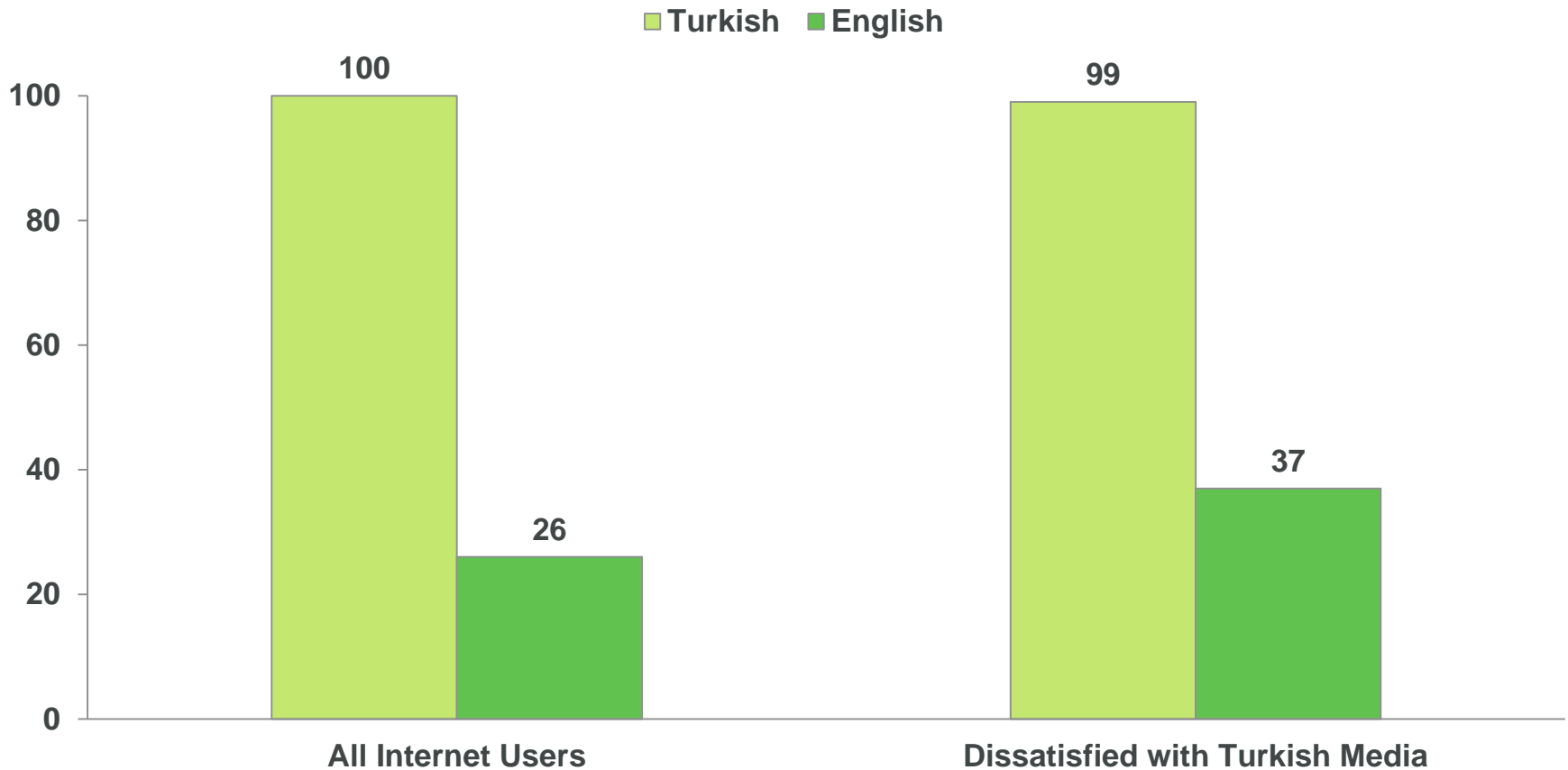
In the last 7 days, which of the following devices have you used to access the Internet?



Base: Past-week Internet users (n=798)

Most Users Access the Internet in Turkish

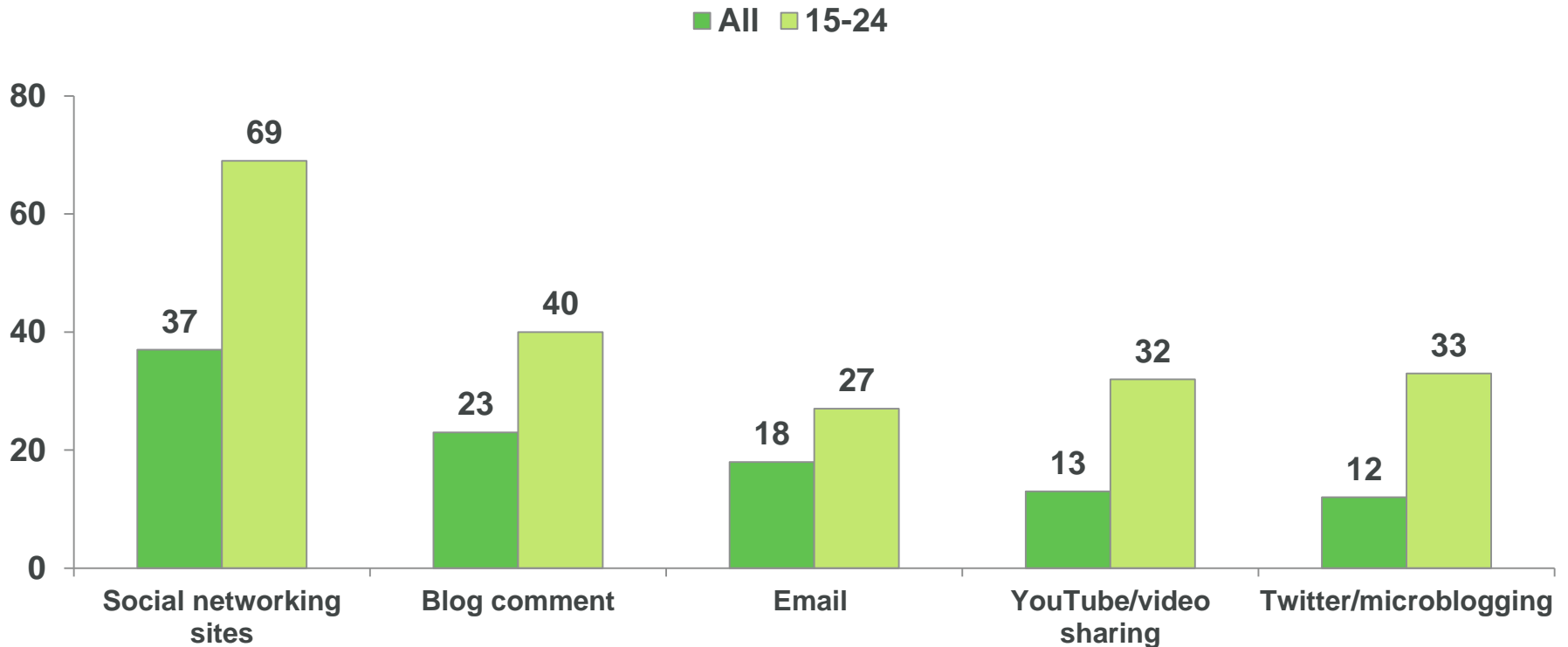
Do you access the Internet in any of the following languages?



Base: Past-week Internet users (n=798). Base: Past-week Internet users being dissatisfied with Turkish media (n=225)

News Sharing Methods

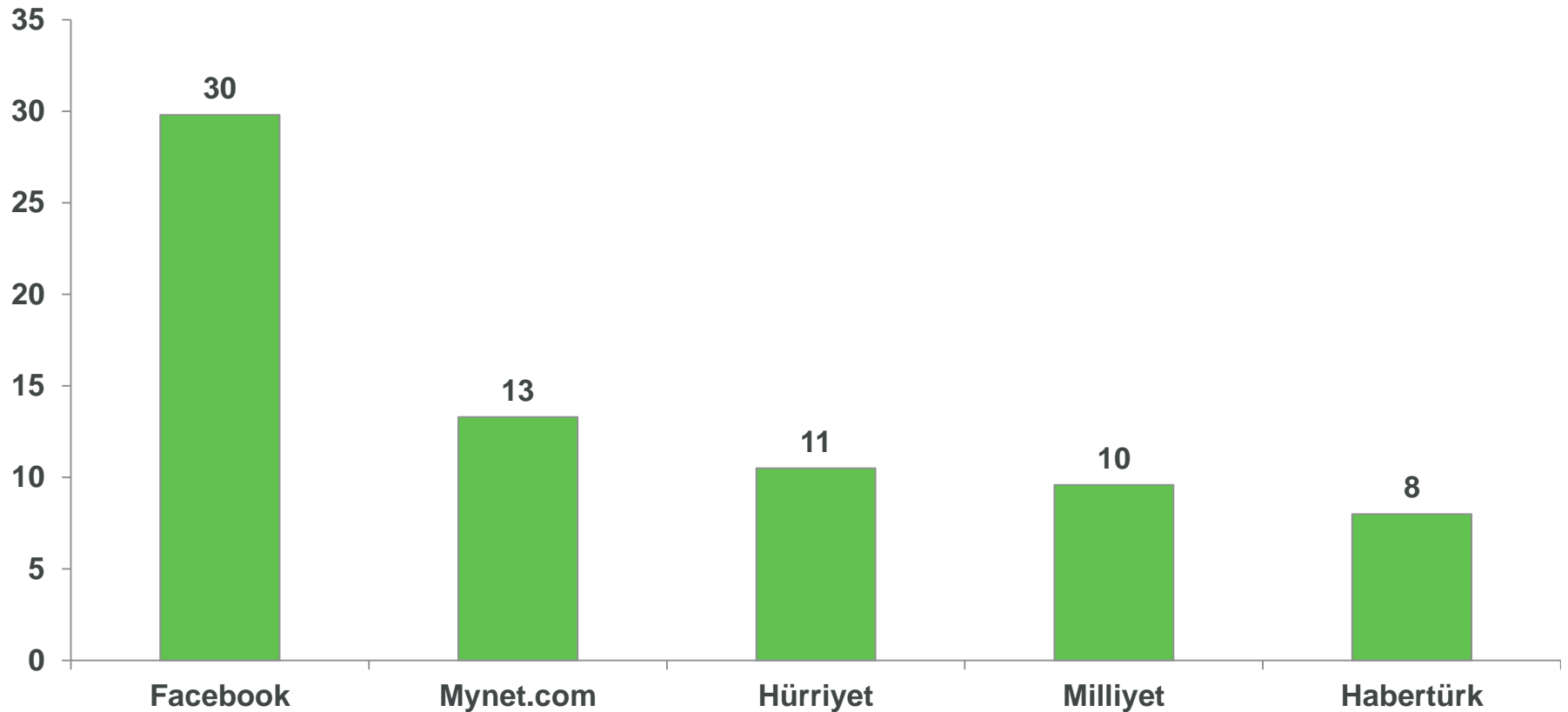
Please tell me if you share news with your family, friends, or other relatives in any of the following ways.



Base: "national" sample (n=1255). Percentages using each platform to share news.

Top Internet News Sources

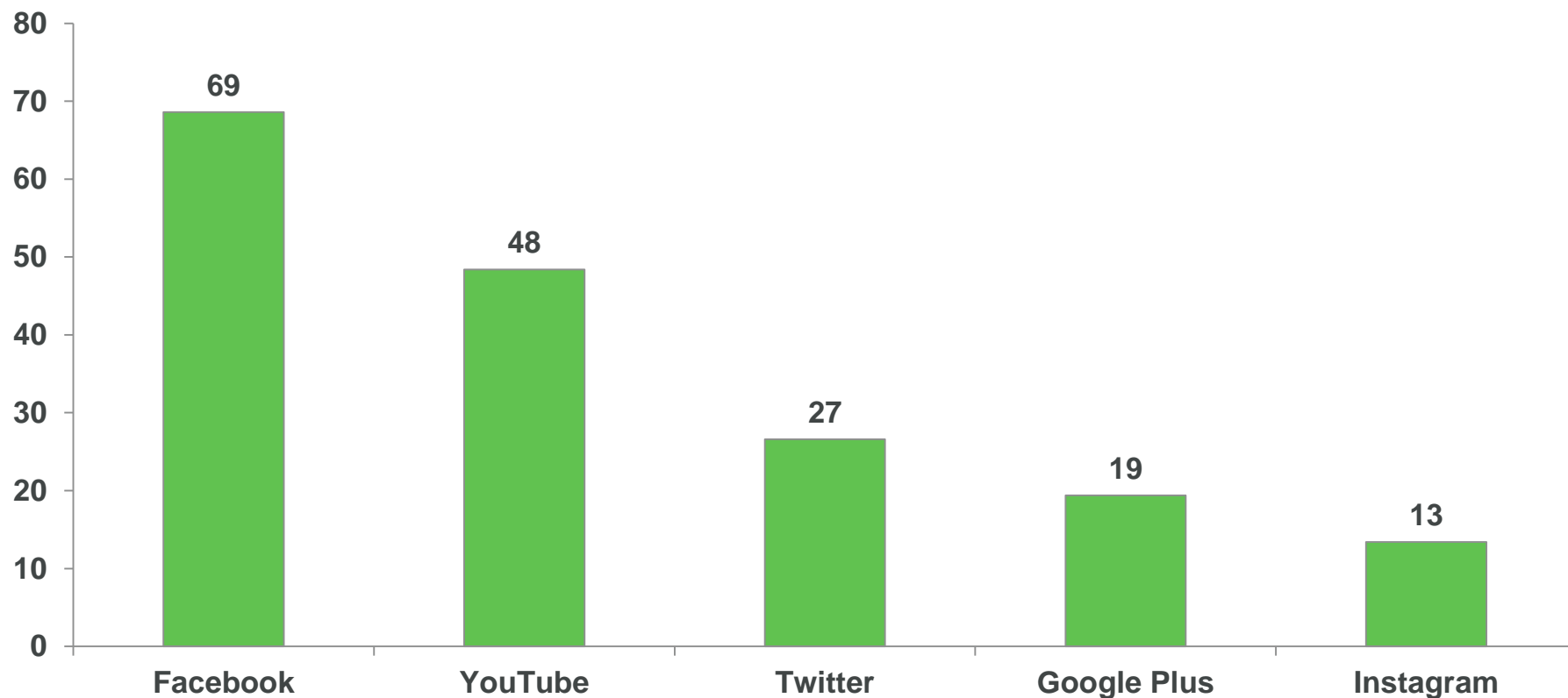
What are the websites you use most frequently to get news and information?



Base: Past week Internet users (n=798) Figures show percentages naming each source as one of top three sites used for news

Top Social Networking Platforms

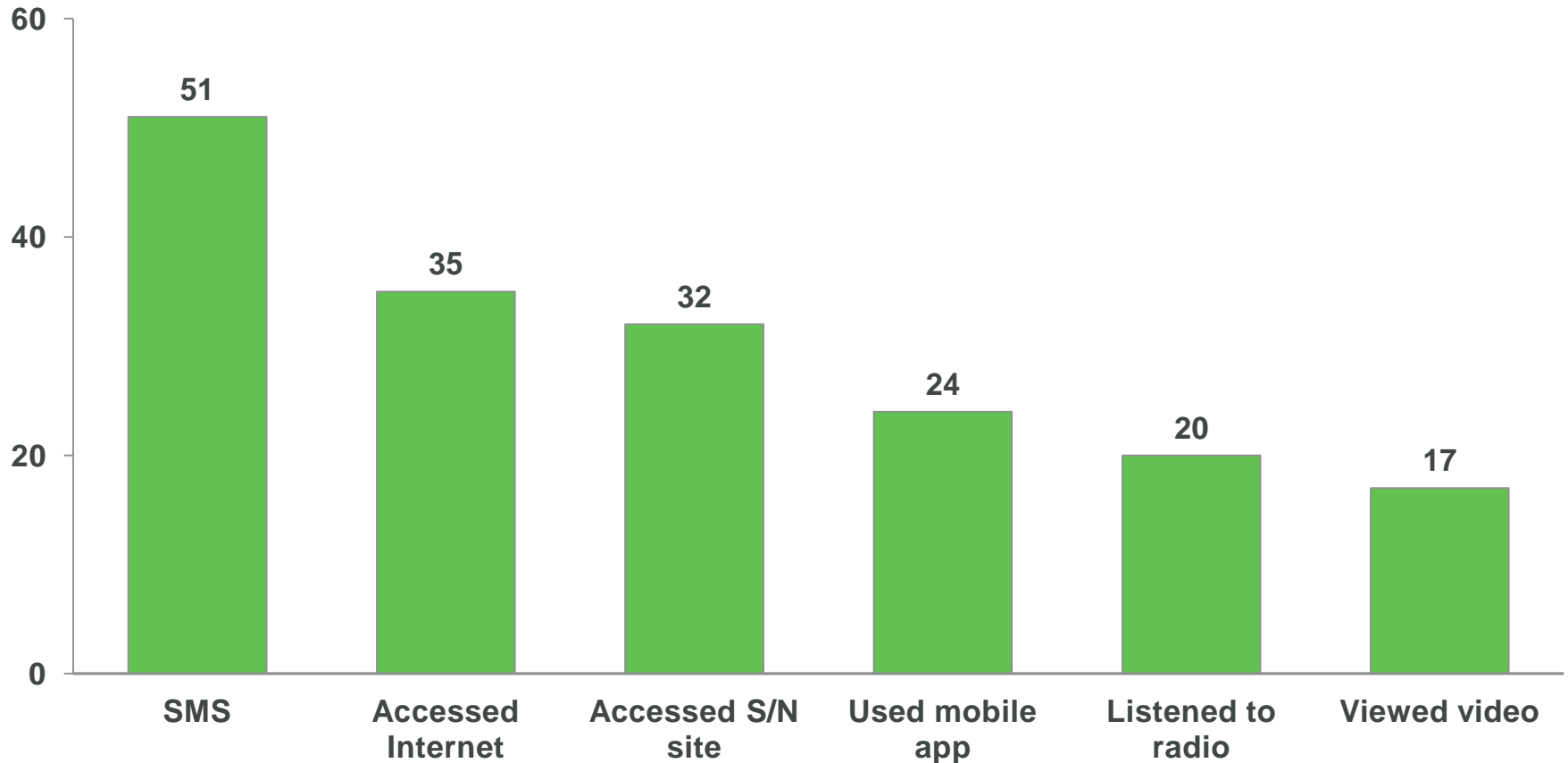
Which of the following services have you used in the past 7 days for social networking?



Base: Past week Internet users (n=798)

Mobile Phone Usage

Which, if any, of the following have you done on a mobile phone in the past 7 days?



Base: All mobile phone owners (N=975)

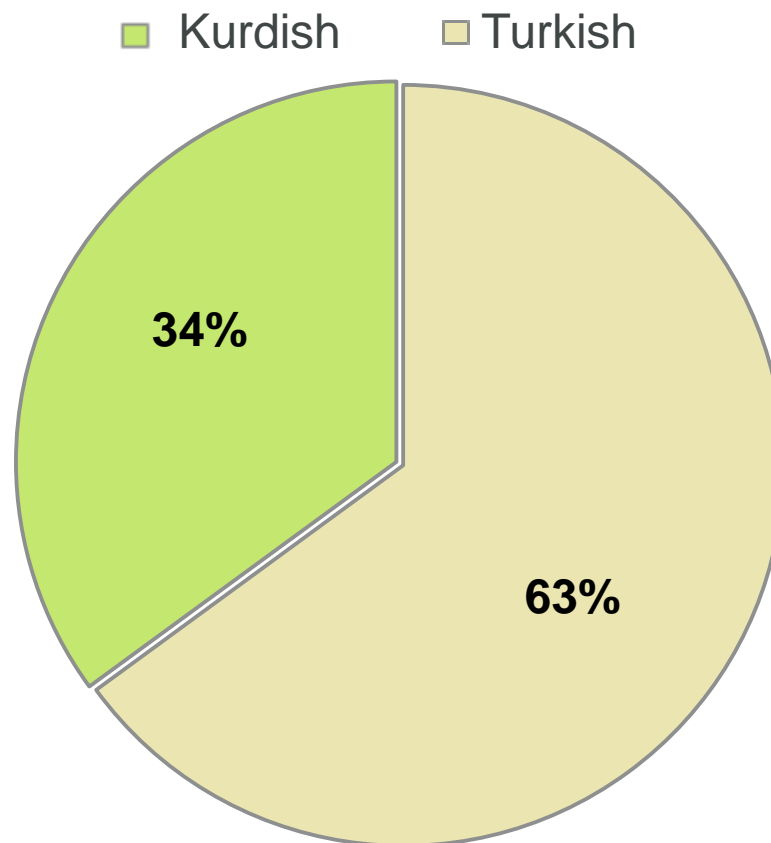
Media Consumption Among Turkey's Kurdish Population

Identifying Kurds

To help us understand the people in our survey, can you please tell me ALL of the languages you may speak at home whether with family, other relatives, or friends?”

Kurdish Speakers' Main Home Language

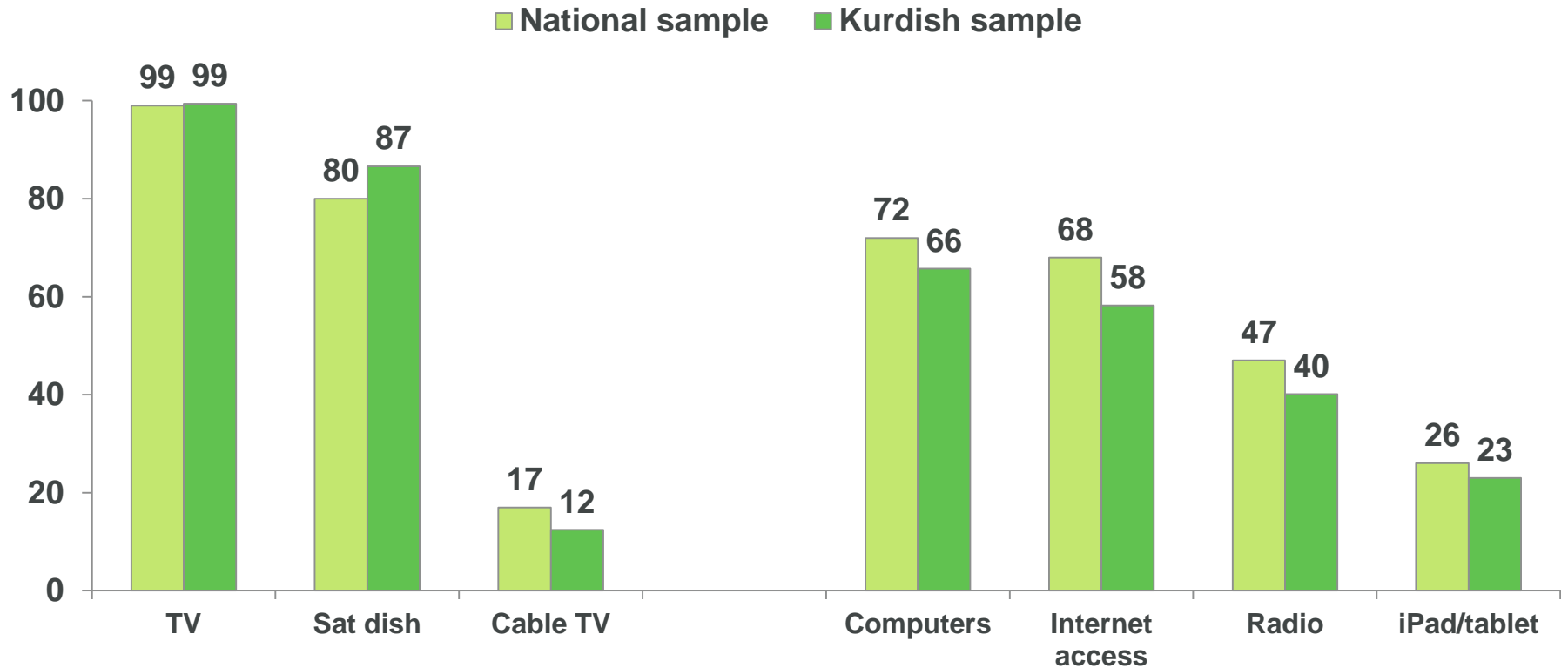
Which language do you speak most at home?



Base: All Kurdish speakers (n=1001)

Household Ownership of Media Devices

Which, if any, of the following do you have working in your household?

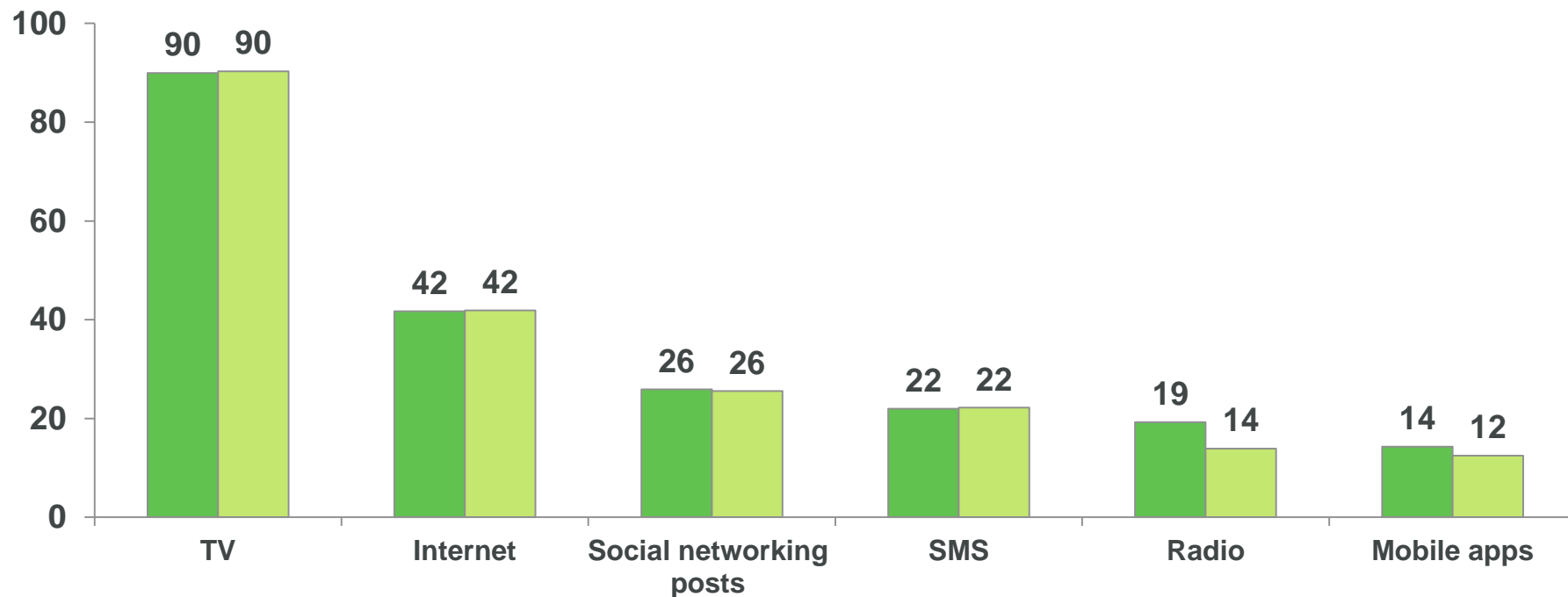


Base: National sample (n=1,255), Kurdish sample (n=1001)

Media Platforms Used for News

For each one of the sources I mention, please tell me how much you use that source to get news.

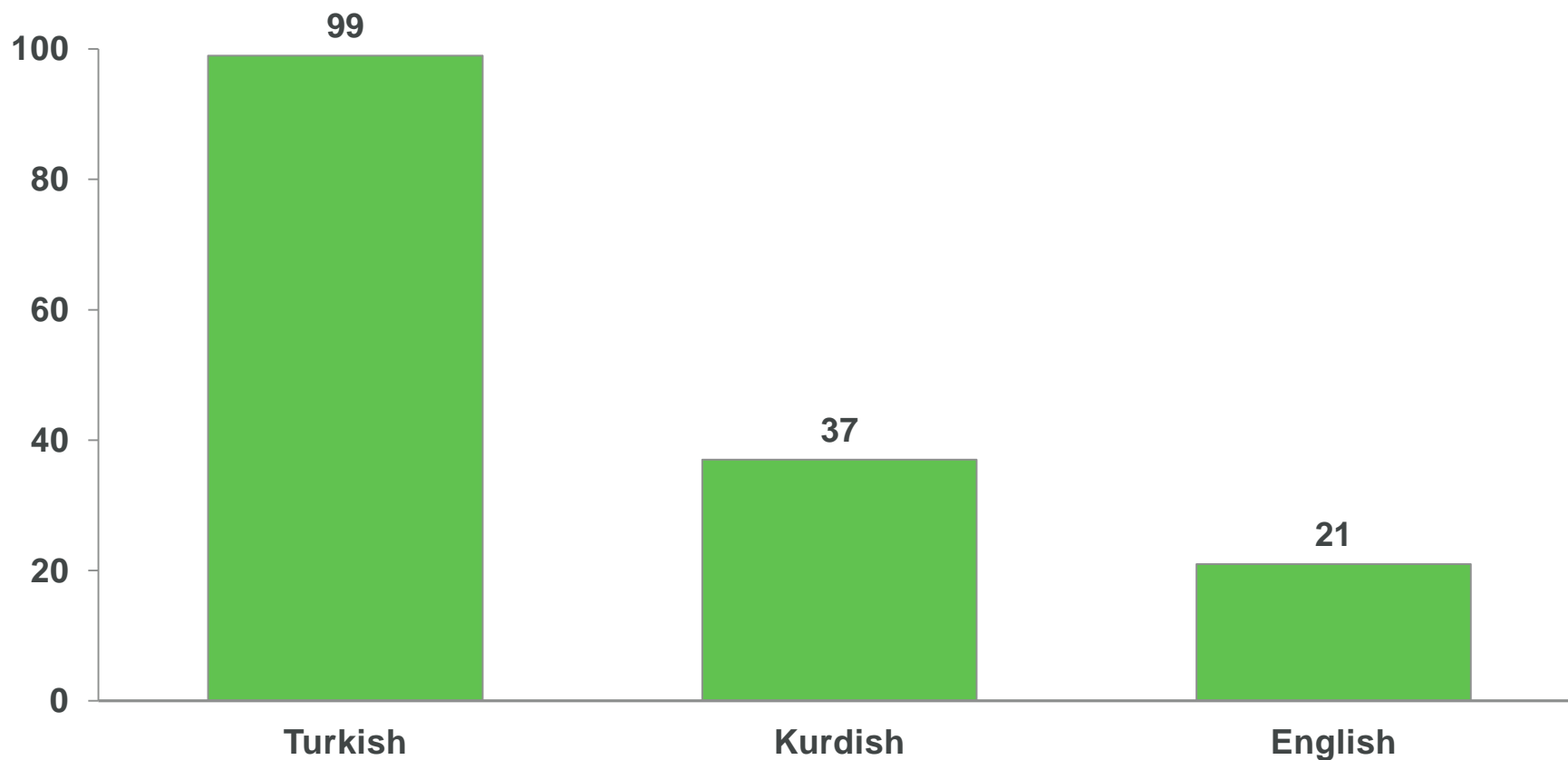
■ National sample ■ Kurdish sample



Base: National sample (n=1,255), Kurdish sample (n=1001)

Turkish is the Most Popular Language Used on the Internet.

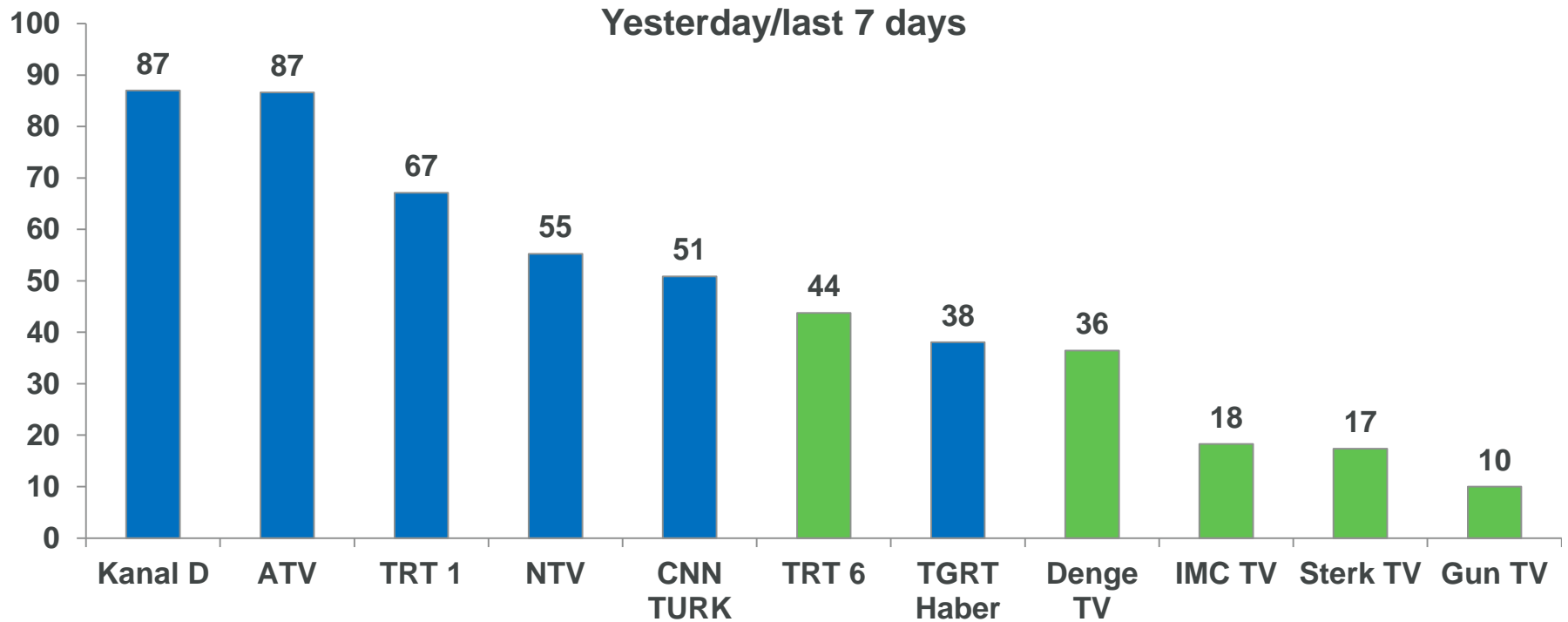
Do you access the Internet in any of the following languages?



Base: Kurdish sample, past-week Internet users (n=557)

Past Week Viewing of TV Channels Among Kurds

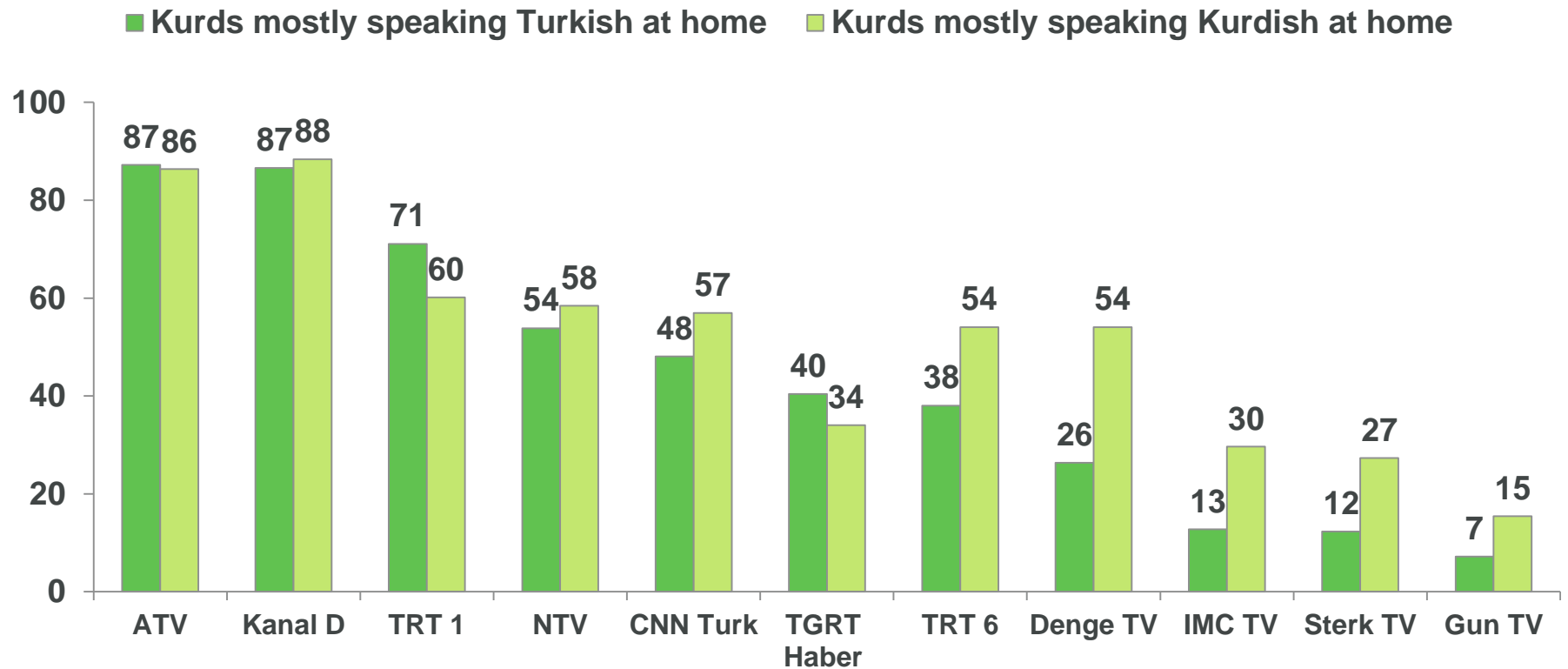
Apart from today, when was the last time you watched this channel or any programs made by this channel?



Base: All Kurdish speakers (n=1001). Percentages viewing each channel in previous week. Channels shown in green are Kurdish language channels.

Past Week Viewing of TV Channels: “Main Home Language” Kurdish Speakers

Apart from today, when was the last time you watched this channel or any programs made by this channel?



Base: Kurds mostly speaking Turkish at home (n=626), Base: Kurds mostly speaking Kurdish at home (n=344)

Reasons for Using Kurdish Media (Qualitative Research)

- Kurdish media seen as promoting language, cultural identity
 - *“Kurdish culture is promoted and supported by the Kurdish media” (Depth interview, Simak)*
- Distrust of Turkish media (though some complain about bias in Kurdish media too)
- Means of allowing dispersed Kurdish populations to understand each other
 - (but dialectical variations make “unified” broadcasts challenging)

Conclusion

- Turkish media market is highly sophisticated but media outlets are subject to severe political pressure
- Young Turks are turning increasingly to the Internet and social media to compensate; Internet already rivals TV as key information source
- Kurdish speakers use the same outlets as other Turks, but with addition of Kurdish language media
- A communications strategy for Turkey's Kurds will depend on the goal; as knowledge of Turkish is virtually universal



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Upcoming BBG Research Series events:

- Tuesday, September 23: Women and Media

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