

PERCEPTION OF EUROPE AND SUPPORT FOR EU MEMBERSHIP IN TURKISH PUBLIC OPINION

Public Opinion Survey – 2017



Economic Development Foundation
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ABBREVIATIONS

- EU:** European Union
- TURKSTAT:** Turkish Statistical Institute
- CSOs:** Civil Society Organisations
- Eurostat:** European Union Statistical Office

FOREWORD

2017 has taken its place in history as a year of important developments in both Turkey and the EU, and also the year in which we witnessed the most serious crises in bilateral relations since the launch of Turkey's EU accession talks. While Turkey embarked on a new path by changing its political system with the referendum which took place on 16 April 2017, its relationship with EU was affected significantly.

As a matter of fact, during the referendum campaign period the tension with various European countries, including the Netherlands, has occupied the political agenda tremendously. Even though the elections in leading EU countries played a crucial role in shaping the future of the EU, the tensions with Turkey during the electoral process have deepened the fracture in Turkey-EU relations. The tension with Germany was the most noteworthy example of this. The German elections in September created an atmosphere in which not only bilateral relations between Turkey and Germany, but also the relations between Turkey and the EU as a whole were affected negatively. Unfortunately, it was a year without any tangible progress with regards to the topics that were expected to have a positive impact on the Turkey-EU relationship and to be beneficial for both parties, like the modernisation of the Customs Union and visa liberalisation. However, the announcement that a Turkey-EU Summit was to take place in early 2018 has revived the hopes for increasing dialogue and putting bilateral relations back on track.

Without a doubt, both Turkey and the EU are passing through a period in which they need to concentrate their efforts to overcome both internal and external problems. Nevertheless, the public opinion survey, which we started three years ago in the 50th anniversary of IKV, points to an important fact. For the last three years, Turkish public has shown growing support for EU membership. This publication

comprises of the details of this support namely; the reasons behind support for EU membership, distribution by region, age and gender. Beyond all the data, the picture that emerges is that the strong support for EU membership incentivizes the decision-makers and the civil society on both sides to spend more effort to gain a better understanding of each other and to leave a more liveable future for all.

We strongly wish that this publication will be useful for promoting a better understanding and ownership of Turkey's EU membership process.

Economic Development Foundation

1. EXECUTIVE SUMMARY

BACKGROUND

The public opinion survey was conducted by Realta Research Company upon IKV's request with the aim of identifying the level of knowledge and awareness among the Turkish public opinion on EU and further analysing the support for Turkey's EU membership.

PROFILE

The public opinion survey was conducted on 18-19 November 2017 in 18 provinces of Turkey with TURKSTAT's random sampling method. A total of 1,311 persons participated in this survey, all representing eligible voters in Turkey with at least 18 years of age. Quantitative research and face-to-face interviewing were the methods used for this survey.

When taking into consideration the profile of the persons that participated in the survey, the 45 years and above age group represents the largest group among the respondents with a rate of 34.7%.

With regard to the level of education, it can be observed that high school graduates represent the largest group among the respondents with 43.7%. Besides this group, 13.6% of the respondents are university graduates; 11.6% secondary school graduates and 25.8% primary school graduates.

When taking into consideration the occupational groups of the respondents, it can be observed that while those working in the private sector rank first with 23.5%, housewives rank second with 20.6%. In the sample of the survey, 52.1% of the respondents are employees (employed or self-employed).

87.8% of respondents have never travelled to an EU Member State. For almost half of the 12.2% respondents, who have travelled to an EU Member State; the main purpose of their visits was touristic. 22.3% of the respondents on the other hand, travelled for business-related purposes.



KEY FINDINGS

While 9 out of 10 respondents to the survey have stated that they have heard of the EU beforehand, 87.9% of respondents declared that they have “no” or “little” knowledge of the EU. Despite the high level of awareness about the EU, there is a lack of general information with regard to the EU among the Turkish public.

It is also observed that the awareness about the EU is the highest in the Southeast Anatolia Region with 16.5%, whereas the level of knowledge about the EU is the lowest in the Mediterranean Region, with 11.8%.

The survey shows that the main sources of information about the EU are traditional media tools such as television, newspapers and radio along with the internet. 9 out of 10 respondents have resorted to traditional media tools to access information on the EU whereas every 1 out of 2 respondents used the internet. Public institutions in Turkey and in the EU are not considered as a primary source of information by Turkish citizens.

78.9% of the Turkish public supports Turkey’s EU membership. The ratio of the support for EU membership has increased by 3.4 percentage points compared to the previous year.

It can be observed that there has been a decline in terms of the expectation for Turkey to become an EU member over the last year. While the ratio of respondents who expected that Turkey would become an EU member was 35.6% in 2016, it has decreased by 4 percentage points reaching 31.2% in 2017.

As regards the level of support given to Turkey’s EU membership, the geographical distribution presents a rather mixed picture. With a rate of 56.2%, Southeast Anatolia is the region with the highest rate of expectation for Turkey’s EU membership while the Eastern Anatolia Region has the lowest rate of expectation with 25.5%. With the exception of Southeast Anatolia, in all the geographical regions, it can be observed that expectation for EU membership is below 50%.

The respondents who state that they have “little” knowledge about the EU have the highest level of expectation that Turkey will join the EU, with 38.9%. 70% of the respondents declaring that they have “quite a lot of” knowledge about the EU, do not believe in the membership prospect of Turkey.

As regards to the level of expectation for Turkey’s EU membership, taking into consideration the occupations of the respondents, those working in the private sector are more optimistic compared to other occupational groups. Over half of the respondents from the private sector believe in Turkey’s EU membership.

While assessing the relationship between the expectations of Turkey’s EU membership and the level of knowledge on the EU, those, who use the internet as their primary source of information on the EU, have the lowest level of expectation.

When examining the relation between respondents’ expectations for Turkey to become an EU member and their gender, it can be observed that 27.4% of women and 41.3% of men believe that Turkey will become a member of the EU. In this respect, it can be concluded that women are more sceptical than men regarding Turkey’s EU membership.

Among the main reasons behind the support for Turkey’s EU membership are the prospect of more welfare and further economic development as well as the free movement, right of settlement and educational opportunities. These are followed by democratic consolidation and human rights.

When analysing the geographical distribution of the support for Turkey’s EU membership, the main reasons for support are again the prospect of more welfare and further economic development for all regions. These two reasons for support are the highest in the Black Sea Region with 71.4%.

On the other hand, when analysing the reasons for opposing Turkey’s EU membership, the fear that Turkish culture and identity would be weakened with EU membership (25.2%), the views that the EU has no future (24.6%) and the EU’s double-



standards vis-à-vis Turkey (23.5%) are the reasons coming to the forefront.

When analysing the possible obstacles ahead of Turkey's EU accession process, economic reasons rank the first with 46.6% and EU's double standards vis-à-vis Turkey rank the second with 44.3%.

For 4 out of every 10 participants EU represents high level of welfare and economic development while for 3 out of every 10 participants EU implies democracy and freedom.

According to the survey results, Turkey's most important economic partner is the EU (27.8%). Russia and Central Asian Republics rank second (19.3%) and developing countries like China and India rank third (18.9%) among the most important economic partners of Turkey.

When analysing the perception regarding Turkey's political associations, Russia and Central Asian Republics rank the first (24.9%) and are followed by the EU (24.1%).

When asked about the most important subject in Turkey-EU relations, visa liberalisation ranks first with 32.8%, Customs Union ranks second with 31.3% and cooperation in addressing the refugee crisis ranks third with 27.9%.

2. BACKGROUND

This public opinion survey was conducted by Realta Research Company upon IKV's request with the aim of identifying the level of knowledge and awareness among the Turkish public opinion on the EU as well as further analysing the support for Turkey's EU membership.

The survey was conducted on 18-19 November 2017 in 18 provinces of Turkey, with the participation of a total of 1,311 persons, all representing the eligible voters in Turkey with at least 18 years of age (based on TURKSTAT's random sampling method). Almost half of the respondents to the survey were women. Quantitative research and face-to-face interviewing were the methods used for this survey.

The stratified sampling was the sampling technique preferred for this survey. Quotas on gender and age group were applied in the sampling technique.

The results of the survey have been controlled both in the field and on digital computation. The results obtained are considered to be accurate. The margin of error for this survey is 2.5% which is situated within the limits of confidence interval.

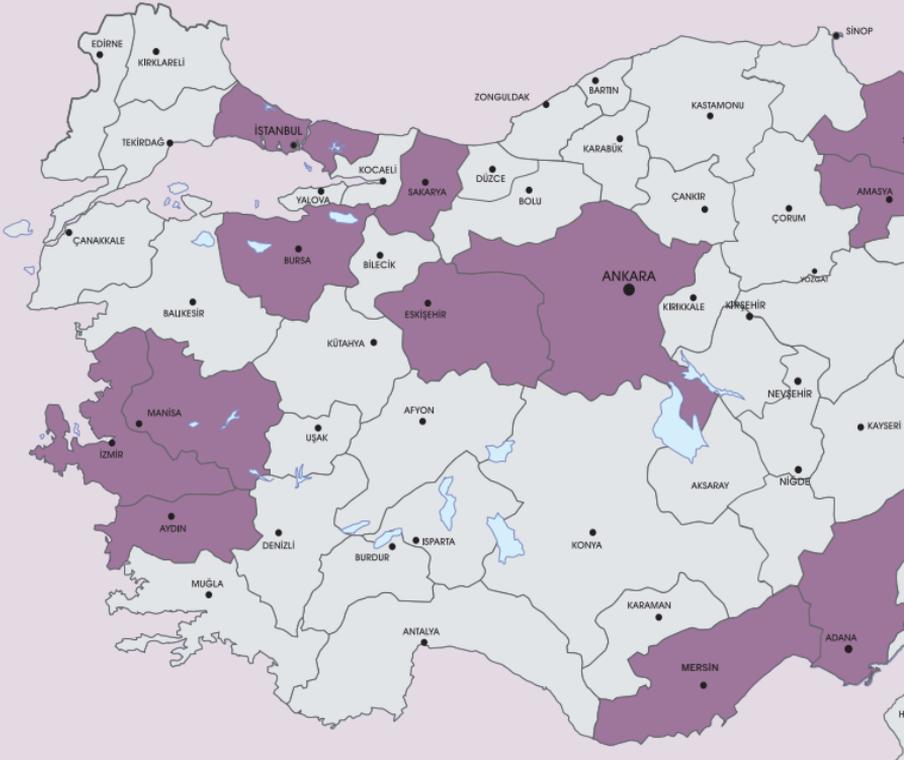


3. PROFILE

3.1. Geography

By taking into account TURKSTAT's random sampling method, the public opinion survey was conducted in 18 provinces of Turkey with 1,311 persons representing the eligible voters in Turkey with at least 18 years of age. The 18 provinces have been selected all across the country (see Figure 1). The geographical regions where the survey was conducted are as follows:

Figure 1: Geographical distribution

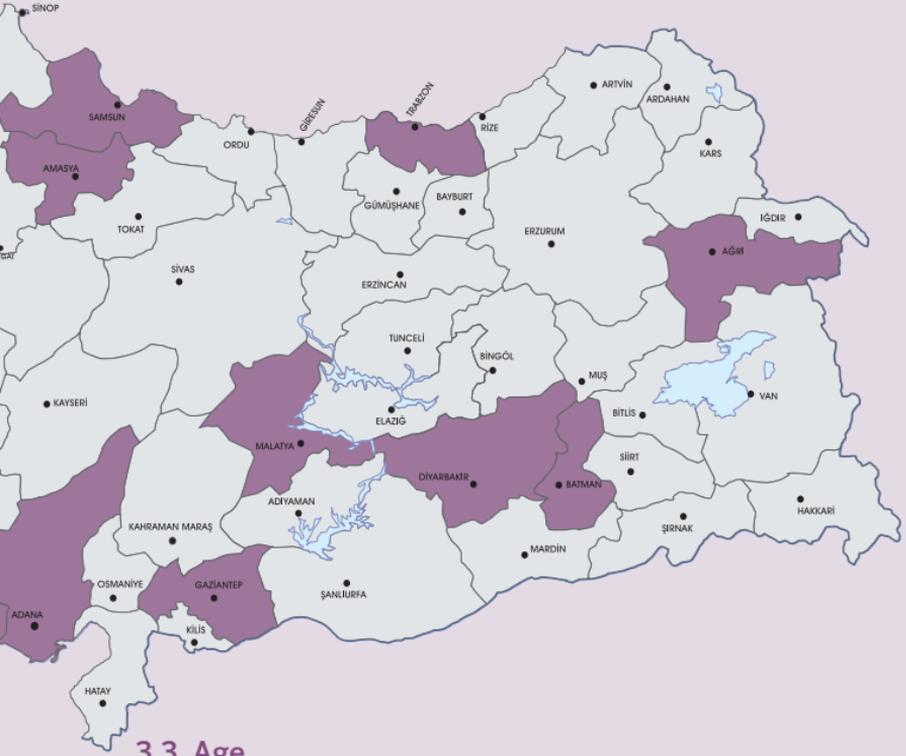


3.2. Gender

Of a total of 1,311 respondents 53.8% reported their gender as male and 46.2% as female. According to TURKSTAT data, 50.2% of the Turkish population are men and 49.8% are women.



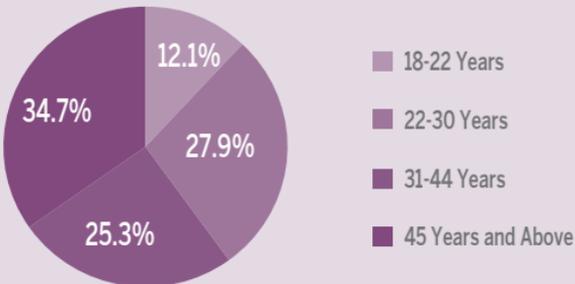
GEOGRAPHICAL REGION	NUMBER OF PROVINCES	PROVINCES
Marmara Region	3	Istanbul-Bursa-Sakarya
Aegean Region	3	Izmir-Aydın-Manisa
Black Sea Region	3	Samsun-Trabzon-Amasya
Mediterranean Region	2	Adana-Mersin
Central Anatolia Region	2	Ankara-Eskişehir
Eastern Anatolia Region	2	Ağrı-Malatya
Southeast Anatolia Region	3	Gaziantep-Diyarbakır-Batman



3.3. Age

This survey was conducted among respondents who are eligible voters in Turkey with at least 18 years of age. Within this framework, 65.4% of the respondents are under the age of 45 (see Figure 2).

Figure 2: Distribution by age group (%)

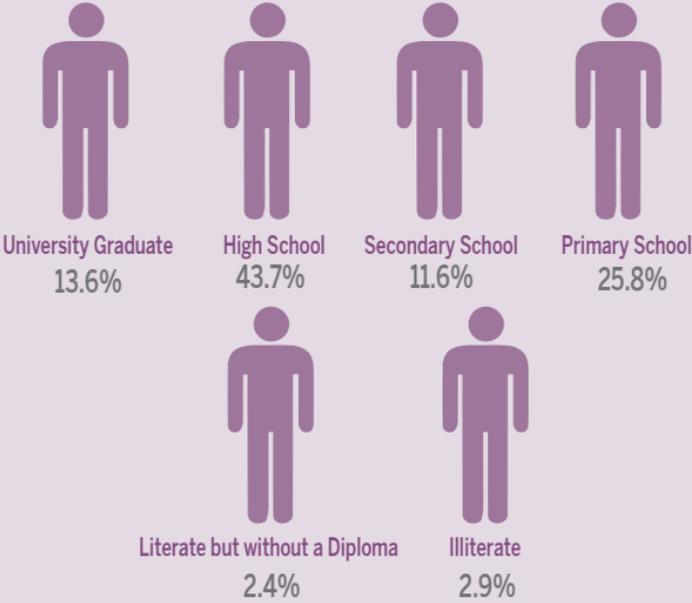




3.4. Education

High school graduates represent the largest group among the respondents with 43.7%. They are followed by primary school (25.8%), university (13.6%) and secondary school graduates (11.6%) (see Figure 3).

Figure 3: Distribution by education level



3.5. Occupation

In regard to the occupational distribution of the respondents, it can be observed that respondents from the private sector rank the first with a rate of 23.5%, while housewives rank second with 20.6% (see Table 4). In this survey, almost half of the respondents (52.1%) are working (employed or self-employed).

Table 4: Distribution by occupation (%)

Public Servant	3.8
Private Sector	23.5
Worker	8.3
Artisan	10.4
Merchant	0.3
Self-Employment	4.3
Farmer	1.5
Retiree	9.9
Housewife	20.6
Student	5.1
Unemployed	12.3

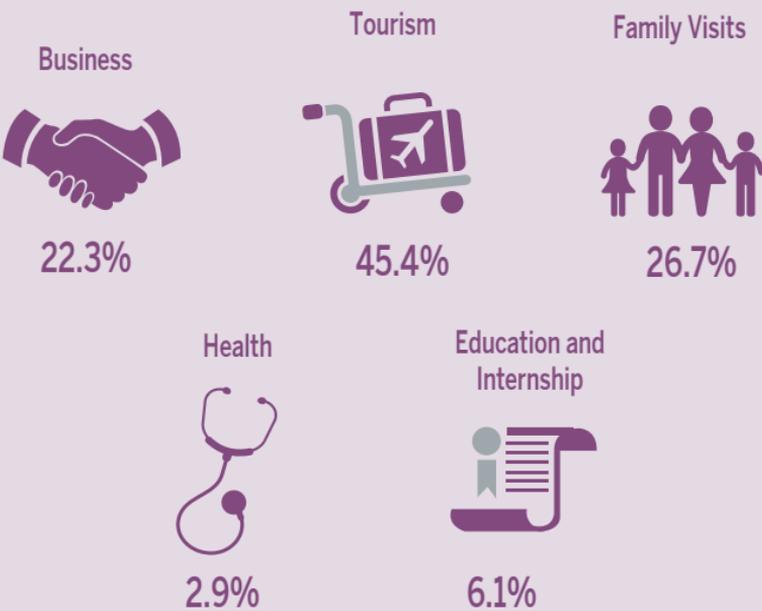
3.6. Contact with the EU

87.8% of the respondents stated that they have never travelled to an EU member country (see Table 5). For almost half of the 12.2% who have travelled to EU, the main purpose of visit was touristic. This is followed by family (26.7%) and business (22.3%) visits (see Table 6).

Table 5: The share of survey's respondents who have visited Europe



Table 6: The reasons why respondents visited Europe previously*



*The respondents to the survey have selected more than one answer.



48.2% of the respondents state that they have no close relatives in Europe (see Table 7). A significant part of the remaining 51.8% has second-degree relatives living in an EU Member State (see Table 8).

Table 7: Distribution of the survey's respondents who have a relative or an acquaintance living in Europe

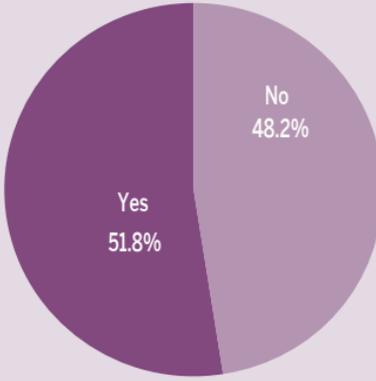
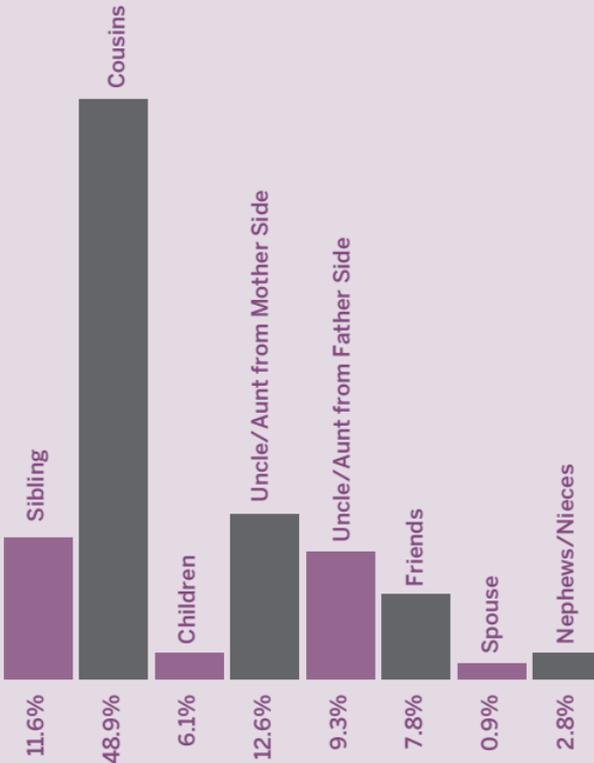


Table 8: The distribution according to the level of closeness of family ties between the respondents and relative or acquaintance living in Europe



4. KEY FINDINGS

4.1. How well do we know the EU?

Awareness of the EU

While 94.2% of the respondents to the survey have stated that they have heard of the EU beforehand (see Table 9), the level of awareness is the highest in the Marmara Region. Black Sea Region (93.6%) and Mediterranean Region (92.1%) follow the Marmara Region in this ranking. The level of awareness is the lowest in Southeast Anatolia Region (87.2%) (see Table 10).

Table 9: Distribution of the answers of the respondents concerning their self-perceived knowledge of the EU beforehand

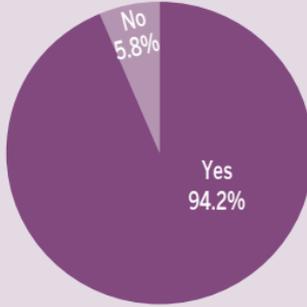
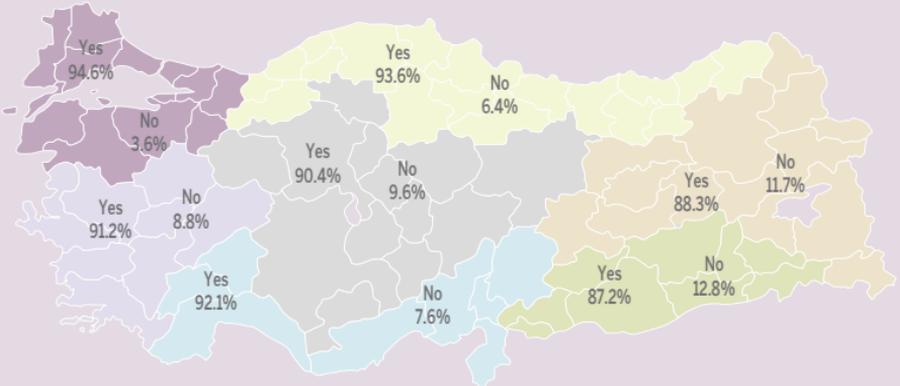


Table 10: Relation between the respondents' self-perceived knowledge on the EU and their region of residence





According to the survey, the level of awareness is the highest among the 23-30 year age group (98.9%). On the other hand, the level of awareness is the lowest among those aged 45 years and above (86.8%) (see Table 11).

Table 11: Relation between the respondents' self-perceived knowledge of the EU and their age (%)

	18-22 Years	23-30 Years	31-44 Years	45 Years and Above
Yes	95.3	98.6	95.1	86.8
No	4.7	1.4	4.9	13.2

The level of awareness of the EU increased by 0.5 percentage points compared to last year reaching 94.2% (see Figure 1).

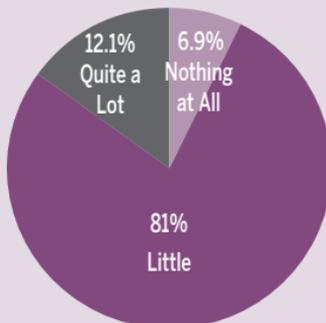
Figure 1: Distribution over the years of the answers of the respondents concerning their self-perceived prior knowledge on the EU (%)



Level of knowledge on the EU

While 81% of the respondents to the survey declared that they have “little” knowledge on the EU, only 12.1% of the respondents consider themselves having “quite a lot” of knowledge on the EU. The share of the respondents declaring they have “no” knowledge on the EU is 6.9% (see Table 12).

Table 12: How much do you know about the EU?



When comparing the results of the respondents' self-perceived level of knowledge on the EU with the results of last year's survey, it can be observed that the level of knowledge has increased. The share of the respondents to the survey, who declared having "quite a lot" of knowledge on the EU, decreased by 2.9 percentage points, while the share of the respondents stating that they have "little" knowledge on the EU increased by 3.4 percentage points. Thereby the share of the respondents declaring they have "no" knowledge declined by 0.5 percentage points (see Figure 2).

Figure 2: Respondents' level of knowledge on the EU (%)



With regard to the relation between the respondents' self-perceived level of knowledge on the EU and their region of residence, the region where the level of knowledge is the lowest is the Mediterranean Region. 11.8% of the respondents in the Mediterranean Region said that they have "no" knowledge of the EU. The level of knowledge is the highest in Southeast Anatolia Region with the rate of 16.5% (see Table 13).

Table 13: Relation between the respondents' level of knowledge on the EU and their region of residence (%)

How much do you know about the EU?	Marmara Region	Aegean Region	Mediterranean Region	Central Anatolia Region	Black Sea Region	Southeast Anatolia Region	Eastern Anatolia Region
Nothing at all	6.6	7.1	11.8	6.2	3.8	1.3	10.9
Little	78.3	81.3	82.5	80.3	81.7	82.2	81.3
Quite a lot	15.1	11.6	5.7	13.5	14.5	16.5	7.8



Sources of information on the EU

According to the survey, the main sources of information on the EU are the written and audiovisual media (89.3%). These are followed by the internet with 47.2%. The survey reveals that the European institutions and Turkish public institutions including Turkish Ministry for EU Affairs are not considered as primary sources of information (see Table 14). Compared to the previous year, the share of CSOs as a source of information about the EU has almost doubled (from 2.93% in 2016 to 4.6% in 2017).

Table 14: The distribution regarding the sources of information about the EU (%)

Media (Newspaper/TV/Radio)	89.3
Internet	47.2
Family and Acquaintances	32.4
Relatives and Acquaintances Living in EU Countries	18.3
Foreign Friends	1.9
Sources of Foreign News	3.9
EU Institutions	1.2
Ministry for EU Affairs and Other Public Institutions	1.8
Civil Society Institutions	4.6

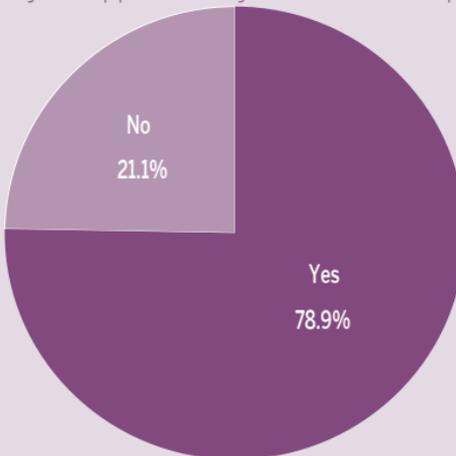
*The respondents to the survey have selected more than one answer.

4.2. How much do we support EU membership?

Support for Turkey's EU membership

78.9% of the respondents; in other words, 4 out of 5 respondents to the survey support Turkey's EU membership (see Table 15).

Table 15: Do you support Turkey's EU membership? (%)



There has been a 3.4 percentage point increase in the support for Turkey's EU membership within last year. This rate was 61.8% in 2015, 75.5% in 2016 and 78.9% in 2017 (see Figure 3).

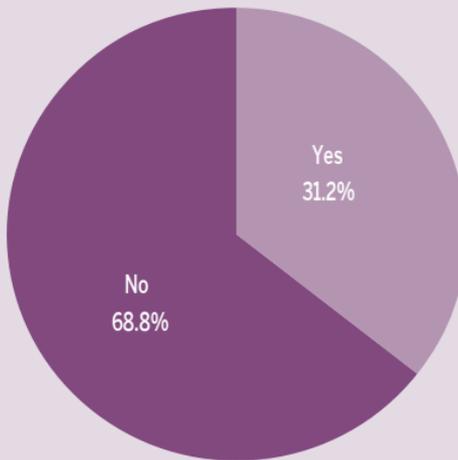
Figure 3: Support for Turkey's EU membership over the years (%)



Expectation with regard to Turkey's EU membership

While 68.8 % of the respondents to the survey do not expect that Turkey will join the EU, 31.2% of the respondents are convinced that Turkey will become a member of the EU (see Table 16).

Table 16: Do you believe that Turkey will become a member of the EU?





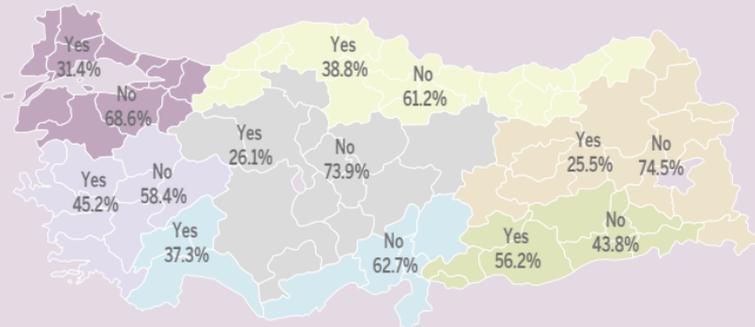
It can be observed that expectation for Turkey to become an EU member has declined over the last year. While the ratio of the respondents expecting that Turkey’s EU membership will actually take place was 35.6% in 2016, it has declined by 4.4 points reaching the level of 31.2% (see Figure 4).

Figure 4: Expectation for Turkey to become an EU member over the years (%)



Analysing the geographical distribution of the responses to the question “Do you believe that Turkey will become a member of the EU?”, the expectation that Turkey’s EU membership will actually take place is the strongest in the Southeast Anatolia Region (56.2%). It is followed by the Aegean Region (45.2%) and the Black Sea Region (38.8%). In contrast, the expectation that Turkey will become a member of the EU has been recorded at the lowest rate in the Eastern Anatolia Region (25.5%). As a whole, in all regions with the exception of the Southeast Anatolia, the share of people who believe that Turkey will join the EU fell behind the share of those who do not expect Turkey’s EU membership to materialize (see Table 17).

Table 17: Relation between the respondents’ expectation that Turkey will become a member of the EU and the region of their residence



Analysing the responses to the same question according to the age group of the respondents, it can be observed that the young population in Turkey believes that Turkey will actually join the EU more than older age groups. Over half of the people aged 23-30 years are convinced that Turkey will actually join the EU. In contrast, those aged 45 years and above have the lowest expectation regarding Turkey's EU membership. While only 25.1% of the respondents aged 45 years and above believe that Turkey's EU membership will actually materialize, this share for all the other age groups is above the threshold of 30% (see Table 18).

Table 18: Relation between the respondents' expectations that Turkey's EU membership will take place and their age (%)

	18-22 Years	23-30 Years	31-44 Years	45 Years and Above
Yes	35.2	50.9	30.3	25.1
No	64.8	49.1	69.7	74.9

When examining the relation between respondents' expectations for Turkey to become an EU member and their gender, it can be observed that 27.4% of women and 41.3% of men believe that Turkey will become a member of the EU. In this respect, it can be concluded that when it comes to Turkey's EU membership prospects, women are more sceptical than men (see Table 19).

Table 19: Relation between respondents' expectations that Turkey's EU membership will take place and their gender (%)

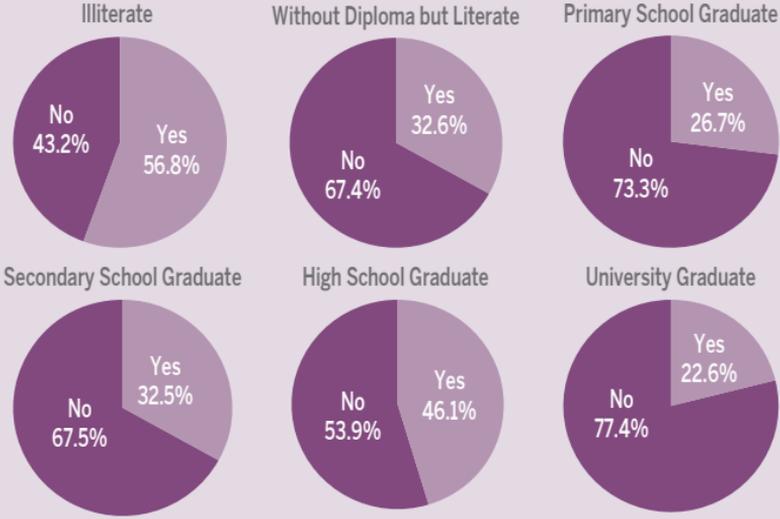
	Male	Female
Yes	41.3	27.4
No	58.7	72.6

When the relation between respondents' expectations regarding Turkey's EU membership prospects and their level of education is examined, it can be observed that the expectation that Turkey will become an EU member is the highest among the illiterate and lowest among university graduates. Whilst 56.8% of the illiterate state their belief that Turkey will become an EU member, this ratio is only 22.6% among university graduates. The ratio of respondents who expect that Turkey will become an EU member is 26.7% among primary school graduates, 32.6% among literate



respondents without a diploma, 32.5% among secondary school graduates and 46.1% among high school graduates (see Table 20).

Table 20: Relation between the respondents' expectation that Turkey's EU membership will take place and their level of education



When analysing the relation between the respondents' expectation regarding Turkey's EU membership prospects and their occupation, it can be observed that more than half of the respondents from the private sector expect that Turkey will become a member of the EU. Compared to the other occupational groups, private sector (58.1%), farmers (41.3%) and the self-employed (32.2%) are the most convinced that Turkey will become a member of the EU. Merchants (9.4%) and public servants (11.9%) on the other hand are the occupational groups among which expectation that Turkey will join the EU is the lowest (see Table 21).

Table 21: Relations between respondents' expectations for Turkey to become EU member and their occupation (%)

Occupation	Yes (%)	No (%)
Housewife	27.3	72.7
Worker	31.3	68.7
Artisan	30.9	69.1
Retiree	22.6	77.4
Private Sector	58.1	41.9
Unemployed	21.8	78.2
Student	31.6	68.4
Self-Employed	32.2	68.8
Public Servant	11.9	88.1
Merchant	9.4	90.6
Farmer	41.3	58.7

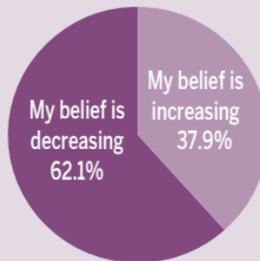
Analysing the relation between the respondents' expectation that Turkey will join the EU and their level of knowledge on the EU, it can be concluded that the level of knowledge the respondents have on the EU has a very limited influence on their expectation regarding Turkey's EU membership prospect. 19.6% of the respondents with "no" knowledge of the EU have indicated that they believe that Turkey will become an EU member, whereas this ratio is 38.9% among those with "little" knowledge of the EU, and 30% among those with "quite a lot" knowledge of the EU (see Table 22).

Table 22: Relation between the respondents' expectation that Turkey will become a member of the EU and their level of knowledge on the EU (%)

	Nothing at all	Little	Quite a Lot
Yes	19.6	38.9	30
No	80.4	61.1	70

62.1% of the respondents to the survey express that their belief that Turkey will become a member of the EU is decreasing (see Table 23).

Table 23: Is your belief that Turkey will become a member of the EU increasing?



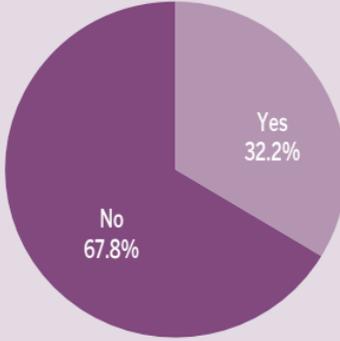
In 2016, the ratio of the respondents, who stated that their belief regarding Turkey's membership prospect has declined, fell by 11 points compared to 2015. In 2017 however, those who state that their belief in Turkey's EU membership prospect has declined recorded just a 0.5 point increase compared to the previous year.



Expectation that Turkey will join the EU within the next five years

67.8% of the respondents do not expect that Turkey will become a member of the EU in the next five years (see Table 24).

Table 24: Do you expect that Turkey will become an EU member within the next five years?



The ratio of the respondents, who have indicated that they expect Turkey to join the EU within the next five years, was 22.8% in 2015 and increased by 11 points reaching the level of 33.8%; whereas this ratio was recorded 32.2% in 2017 (see Figure 5).

Figure 5: Expectation with regard to Turkey's EU membership in the next five years over the years (%)



When the relation between the respondents' expectations for Turkey to become an EU member within the next five years and their region of residence is examined, it can be observed that those living in Southeast Anatolia, Aegean and Mediterranean Regions have higher expectations for Turkey's EU membership within the next five years (with 53.4%, 45.1% and 34.1% respectively). The regions, whose residents have the lowest level of expectation for Turkey's EU membership within the next five years, are Eastern Anatolia and Central Anatolia Regions (with 21.6% and 23.8% respectively). In all regions with the exception of Southeast Anatolia, the share of those expecting Turkey to join the EU within the next five years, is less than 50% (see Table 25).

Table 25: Relation between respondents' expectations for Turkey to become an EU member within the next five years and their region of residence (%)

	Marmara Region	Aegean Region	Black Sea Region	Central Anatolia Region	Mediterranean Region	Eastern Anatolia Region	Southeast Anatolia Region
Yes	31.8	45.1	32.8	23.8	34.1	21.6	53.4
No	68.2	54.9	67.2	74.2	65.9	78.4	46.6

When the relation between the respondents' expectations for Turkey to become an EU member within the next five years and their gender is examined, it can be observed that the expectation is higher among men than women. While 39.1% of the male respondents have indicated that they expect Turkey to become an EU member within the next five years, this ratio was 26.6% among female participants (see Table 26).

Table 26: Relation between respondents' expectations for Turkey to become EU member within the next five years and their gender (%)

	Male	Female
Yes	39.1	26.6
No	60.9	73.4



When the relation between the respondents' expectations for Turkey to become an EU member within the next five years and their occupation is examined, it can be observed that the expectation is higher among the private sector compared to other occupational groups (58.4%). The occupational groups with the least expectation regarding Turkey's EU membership to materialize within the next five years are the unemployed and public servants (11.1% and 12% respectively) (see Table 27).

Table 27: Relation between respondents' expectations for Turkey to become EU member within the next five years and their occupation (%)

Occupation	Yes	No
Housewife	25.1	74.9
Worker	24.8	75.2
Artisan	31.2	68.8
Retiree	26.7	73.3
Private Sector	58.4	41.6
Unemployed	11.1	88.9
Student	31.3	68.7
Self-Employed	27.1	72.9
Public Servant	12	88
Merchant	31.6	68.4
Farmer	34.7	65.3

4.3. Why do we want to join the EU?

Reasons why respondents support Turkey's EU membership

In parallel with last year's survey results, when analysing why respondents support Turkey's EU membership, 48.3% of the respondents point out that the level of prosperity and economic development would improve as a result of membership in the EU, 38.1% of the respondents refer to free movement, the right of settlement and educational opportunities in Europe whereas 34.5% of the respondents state that EU membership would reinforce the level of democracy and human rights (see Table 28).

Table 28: Why do you support Turkey's EU membership process? (%)

Improvement in the Level of Welfare and Economic Development	48.3
Reinforcement of Democracy and Human Rights	34.5
Free Movement, Right of Settlement and Educational Opportunities in Europe	38.1
Improving Turkey's Respect and Influence in the World	16.6
Raising the Level of Education and Culture	19.2
Other	1.3

*Respondents have chosen more than one answer.

Analysing the respondents' support for EU membership according to their region of their residence, it can be observed that in all geographical regions the first reason to support Turkey's EU membership is once again the prospect for the improvement in the level of welfare and economic development. The region with the highest support for Turkey's EU membership with respect to the improvement in the level of welfare and economic development is the Black Sea Region with 71.4%. It is followed by the Mediterranean Region with 62.2% support and Southeast Anatolia with 58.7% (see Table 29).

Table 29: Relation between the reasons for respondents to support Turkey's EU membership and the region of their residence (%)

	Improvement in the level of welfare and economic development	Reinforcement of democracy and human rights	Free movement, right of settlement and educational opportunities in Europe	Improving Turkey's respect and influence in the world	Raising the level of education and culture	Other
Marmara Region	48.3	19.2	10.7	8.1	9.2	4.5
Aegean Region	49.4	21.3	12.3	5.9	10.1	1
Mediterranean Region	62.2	14.2	7.9	3.6	9.4	2.7
Central Anatolia Region	51.1	13.1	16.7	14.6	2.2	2.3
Black Sea Region	71.4	8.1	12.6	4.3	2.6	1
Southeast Anatolia Region	58.7	26.6	5.6	1.7	4.8	2.6
Eastern Anatolia Region	49.3	31.1	12.2	1.1	6.3	0



Analysing the relation between the reasons for respondents' support for Turkey's EU membership and their gender, it can be observed that 56.7% of men and 43.3% of women state that Turkey's level of welfare and economic development would improve with EU membership. Moreover, more than half of women are indicating that the level of education and culture would increase with EU membership (see Table 30).

Table 30: Relation between the reasons for respondents to support Turkey's EU membership and gender (%)

Gender	Improve- ment in the level of wel- fare and economic develop- ment	Rein- force- ment of democ- racy and human rights	Free mo- vement, right of settle- ment and educati- onal op- portuni- ties in Europe	Improv- ing Tur- key's respect and influ- ence in the world	Raising the level of edu- cation and culture	Other
Female	43.3	44.4	41.7	47.3	55.4	56.9
Male	56.7	55.6	58.3	52.7	44.6	43.1

Reasons why non-supporters do not support EU membership

Taking into consideration the reasons why the respondents do not support Turkey's EU membership, it can be observed that the first reason which comes at the forefront is the perception that it would harm Turkish culture and identity (25.2%). This is followed by the perception that the EU has no future (24.6%) and the EU's application of double standards towards Turkey (23.5%) (see Table 31).

Table 31: Why are you not supporting Turkey's EU membership? (%)

EU's application of double standards towards Turkey	23.5
Harming Turkish culture and identity with EU membership	25.2
No future for EU	24.6
Harming Turkey's sovereignty and independence	17.2
Negative impact on the economy	8.5
Weakening Turkey's relations with third countries	6.9
Other	1

* The respondents to the survey have selected more than one answer.

4.4. What does EU membership mean?

Meaning of the EU for survey respondents

According to the results obtained from the survey, the EU is first of all associated with a high level of “welfare and economic development” (41.4%). The share of respondents considering that the EU represents “democracy and freedom” is following in the second rank (30.8%). The share of respondents, who considers that the EU refers to freedom of movement and lifting of borders, is 27%. As it can be deduced from the results of the survey, the EU is perceived as a right-based project with economic benefits. As for those who attribute a negative approach to EU, 4.7% of the respondents to the survey consider that the EU is equivalent to “regression and decline” and 2.3% to “domination and oppression” (see Table 32).

Table 32: What does EU membership mean for you? (%)

High Level of Welfare and Economic Development	41.4
Democracy and Freedom	30.8
Culture and Civilisation	26.2
Free Movement	26.5
Common Standards and Alignment	11.6
Regression and Decline	4.7
Domination and Oppression	2.3
Other	1.5

* The respondents to the survey have selected more than one answer.

Prominent issues on the agenda of Turkey-EU relations

This survey also aimed to understand which topics in Turkey-EU relations were considered important by the respondents. In this respect, 32.8% of the respondents consider that visa liberalisation constitutes the most important topic in the current relations between Turkey and the EU. This is followed by the Customs Union (31.3%) and refugee crisis (27.9%) (See Table 33).

Table 33: What kind of contributions would EU membership entail for Turkey? (%)

Refugee Crisis	27.9
Visa Liberalisation	32.8
Negotiation Process	6.1
Customs Union	31.3
A New Partnership Relationship	1.4
Other	1.8

* The respondents to the survey have selected more than one answer.



Within the scope of the public opinion survey, participants were asked about their stance towards the modernisation of the Customs Union. Accordingly, more than half of the participants declared that they had no idea of the subject (48.6%) (see Table 34).

Table 34: How do you assess the modernisation of the Customs Union? (%)

Very Positive	7.3
Positive	6.8
Neutral	29.1
Negative	4.7
Very Negative	3.5
No Idea	48.6

Obstacles ahead of EU membership

When analysing the possible obstacles ahead of Turkey's EU accession process, economic reasons rank first with 46.6%. On the other hand, 44.3 % of the respondents consider EU's application of double standards towards Turkey as the second major obstacle ahead of membership (see Table 35).

Table 35: What is the most important obstacle for Turkey's EU membership? (%)

Cultural and Religious Differences	23.6
EU's Application of Double Standards towards Turkey	44.3
Prejudice and Perception among EU Public Opinion towards Turkey	25.3
Prejudice and Perception among Turkish Public Opinion towards the EU	19.5
Economic Reasons	46.6
Cyprus Issue	4.3

* The respondents to the survey have selected more than one answer.

Political and economic partners

Regarding a question about Turkey's leading economic partners, EU ranked first with 27.8%, Russia and Central Asian Republics ranked 2nd with 19.3%, followed by developing countries such as China and India with 18.9% (see Table 36).

Table 36: Which countries or country groups are Turkey's most important economic partners? (%)

EU	27.8
USA	11.5
Developing Countries such as China and India	18.9
Russia and Central Asian Republics	19.3
Middle Eastern Countries	18.6
Other	7.7

* The respondents to the survey have selected more than one answer.

Regarding a question about Turkey's leading political allies, Russia and Central Asian Republics ranked first with 24.9% followed by the EU with 24.1%. (see Table 37).

Table 37: Which countries or country groups are Turkey's politically most important allies? (%)

EU	24.1
USA	14.3
Developing Countries such as China and India	10.1
Russia and Central Asian Republics	24.9
Middle Eastern Countries	23.6
Other	11.7

* The respondents to the survey have selected more than one answer.



5. CONCLUSIONS

“Support for Turkey’s EU membership is continuing”

According to the results obtained from the survey, 78.9% of Turkish citizens support Turkey’s EU membership. Compared to last year, support for Turkey’s EU membership has increased by 3.4 points. However, the expectation that EU membership will take place also appears to have fallen in the last year. The ratio of the respondents who believe in Turkey’s possible EU membership declined 4.4 points from 35.6% in 2016 to 31.2% in 2017. The decline in membership expectation is striking as strong support for EU membership continues in 2017. **In general, the expectation that EU membership will take place is declining compared to support for EU membership.**

There is a rather mixed picture when analysing the support for Turkey’s EU membership within the geographical perspective. Belief that membership is going to happen in the near future is highest in Southeast Anatolia with 56.2%. It is the lowest in Eastern Anatolia with 25.5%. **As a whole, in all the geographical regions with the exception of Southeast Anatolia, the share of people, who expect that Turkey will join the EU, is below 50%.**

“Low level of knowledge about the EU”

While 9 out of 10 respondents to the survey have stated that they have heard of the EU beforehand, 87.9% of the respondents declared that they have “no” or “little” knowledge of the EU. Although the level of awareness about the EU among Turkish public opinion has increased compared to last year, it can be observed that the share of the respondents having knowledge of the EU has not increased at the same rate. **This indicates that there is still a lack of general information about the EU in Turkish public opinion.**

“Traditional media tools continue to be the most important source of information on the EU”

The survey reveals that the main sources of information on the EU are traditional media tools (television, newspapers, radio). In the survey, 9 out of 10 respondents declared that they have obtained information on the EU through traditional media tools, while 1 out of 2 obtained it from the internet. It is observed that this result has not changed in the last three years of the research, and the traditional media continues to be the most powerful source of information about the EU.

As it was observed last year, the **Turkish and European public institutions do not constitute a primary source of information for Turkish citizens.** It can be observed that the EU institutions, the Ministry for EU Affairs and other public institutions are the sources of information the least referred by the Turkish public opinion in regard to European Affairs. The share for CSOs is also very low.

“Young generation and private sector workers are more optimistic about EU membership

The survey clearly shows that the population under the age of 45 has a wider support for Turkey’s EU membership and has a more optimistic view regarding the realisation of EU membership. Among those aged 23-30 years, 1 out of 2 respondents believes that Turkey will join the EU. It is the same age group who believes the most that Turkey will become a member of the EU within the next five years.

Another important point noteworthy to mention is that those from the private sector are more optimistic compared to other professional groups regarding Turkey’s EU membership. More than half of the workers of the private sector believe that Turkey will become a member of the EU.

“Reasons for supporting EU membership: Increasing the level of economic development and free movement”

The respondents to the survey are mainly supporting Turkey’s EU membership because it will raise Turkey’s level of welfare and economic development and will enable its citizens to benefit from free movement, right of settlement and education opportunities in Europe. 1 out of 2 respondents to the survey is supporting Turkey’s EU membership for the prospect of the improvement in the level of welfare and economic development, while 1 out of 3 respondents is supporting since membership will enable free movement, right of settlement and present new educational opportunities in Europe. Furthermore, 34.5% of those surveyed expressed their expectation that democracy and human rights will evolve as a result EU membership.

“Reasons for not supporting EU membership: Harming Turkish identity and concerns regarding the future of EU”

According to the results of the survey, the main reason for not supporting EU membership is derived from the fear that it will harm Turkish culture and identity. This is followed by the perception that the EU does not have a future, and that the EU is applying double standards towards Turkey. The ratios of the three primary reasons for not supporting EU membership are quite close.



“Most important issue in Turkey-EU relations: Visa liberalisation and Customs Union”

1 out of every 3 respondents in the survey stated that visa liberalisation and Customs Union are the most important issues in Turkey-EU relations. The refugee crisis, which was mentioned as the most important issue in the results of the research conducted last year, comes in the third place. Noteworthy is the fact that the Customs Union, where work is underway for its modernisation, is one of the prominent topics this year whereas in the past year it was considered important only by a small number of participants. This can be seen as a result of the increasing news coverage of the modernisation of Customs Union, especially in the mainstream media. Another striking result is that accession negotiations, which constitute the backbone of Turkey-EU relations, received very low votes.

“EU is the most important economic partner”

According to the survey, EU is perceived as Turkey’s most important economic partner however; politically the EU comes in the second place. According to the survey, EU ranked first as Turkey’s most important economic partner with 27.8%, followed by Russia and Central Asian Republics with 19.3%. Russia and Central Asian Republics rank first with 24.9% as Turkey’s leading political ally followed by the EU with little difference (24.1%).