

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

Public Opinion Survey – 2015



Economic Development Foundation
Publication No: 277

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ISTANBUL, JUNE 2015



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ISBN: 978-605-5984-70-0

Preparation for Publication



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CONTENT

FOREWORD	5
1. EXECUTIVE SUMMARY	8
2. BACKGROUND	11
3. PROFILE	12
4. KEY FINDINGS	17
4.1. How well do we know the EU?	17
Awareness of the EU	17
Level of knowledge on the EU	18
Sources of information on the EU	19
4.2. How much do we support EU membership?	19
Support to Turkey's EU membership	19
Belief that Turkey will become a member of the EU	20
Expectations with regard to Turkey's EU membership	22
4.3. Why do we want to join the EU?	23
The reasons why respondents support Turkey's EU membership	23
Reasons for non-supporters of EU membership	25
4.4. What do we understand from the EU?	25
The contributions of EU membership to Turkish Citizens	25
The economic need for the EU	26
The meaning of Europe for survey respondents	27
5. CONCLUSIONS	28

LIST OF ABBREVIATIONS

EEC:	European Economic Community
EU:	European Union
TÜİK:	Turkish Statistical Institute

FOREWORD

In 2013, Turkey and the EU marked 50 years of relations following the signature of the Ankara Agreement establishing the legal basis of the relations between Turkey and the then EEC. In 2015, we are celebrating the 10th anniversary of Turkey's EU accession negotiations.

The EU accession process has undoubtedly played a significant role in increasing Turkey's economic and societal dynamism, advancing the level of democracy and human rights in Turkey and contributing to Turkey's emergence as a key regional power and economic actor. Turkey's relations with the EU have served as a lever that has pushed Turkey forward. Turkey's application for membership in 1987, the entry into force of the Turkey-EU Customs Union in 1996, the official recognition of Turkey's candidacy in 1999 and the formal launch of accession negotiations in 2005 have all been regarded as milestones in Turkey-EU relations. The ambitious reforms undertaken by the government have enabled Turkey to elevate itself to a higher level in terms of welfare and development.

The current state of affairs in which accession negotiations have reached is a cause of concern. As Turkey-EU relations are getting ready to leave behind the 10th anniversary of the accession negotiations, so far only 14 chapters have been opened for negotiations while only 1 chapter has been provisionally closed. On the other hand, Croatia, which had started accession negotiations the same day as Turkey, has joined the EU as its 28th Member State in July 2013.

In addition to the current deadlock in the negotiations, some EU Member States' approaches slowing down the process and the unilateral vetoes on some of the *acquis* chapters as well as the visa requirements imposed on Turkish citizens for the last 30 years, the Cyprus issue and the debates on the Customs Union, being the key step enabling Turkey's economic integration with Europe, have all played a part in preventing the accession process from progressing to desired level.

Despite the fact that the negotiation process is often perceived as a technical one carried out on the basis of the fulfilment of relevant opening/closing benchmarks, the implementation of

reforms to meet these benchmarks as well as the mobilization of public support for EU membership lie at the heart of the process. The announcement of 2014 as the “Year of the EU in Turkey” and the adoption of a new EU Strategy encompassing communication as a key element show clearly that Turkey’s EU membership objective continues to be a priority in Turkey’s political agenda. A key issue in this regard is the extent to which this political will and efforts initiated are accepted and internalized by the Turkish public.

Public opinion surveys related to various aspects of the EU are being conducted regularly by the European Commission. These “Eurobarometer” surveys, already well-known by researchers not only analyze the support in EU Member States, but also provide comprehensive data on Turkey and other candidate countries.

In 2001 the outcomes of the Eurobarometer survey indicated that the Turkish public’s support for EU membership was 59 % (positive answer to the following question “Turkey’s EU membership would be a good thing”). The support for EU membership in Turkey continued to increase; reaching a peak of 71 % in 2004, the year in which the decision to start accession talks was taken. After 2004, a sharp decline in the support for EU membership was observed in Turkey. Indeed, the support for EU membership declined to the level of 59 % in 2005 and continued to decline further, falling below 50 % in 2007 and 2008. According to the outcomes of the same survey, the Turkish public’s support for EU membership over the last couple of years continues to fluctuate around 50 %.

If one needs to make an assessment with regards to the Turkish public’s perception of Turkey’s EU membership in light of public opinion surveys conducted by various sources that include the European Commission, it should be noted that despite of the relative stability observed in the support for EU membership, in the last couple of years the general trend has been characterized by a decline. In parallel to this decline, there has also been a decline in the belief and the expectation that Turkey will become a member of the EU in the future.

In Turkey’s relations with the EU which dates back more than 50 years, the last 10 years of which have been proceeding in

the framework of accession negotiations, the presence of a consensus among the Turkish public on EU membership is the central element that has undoubtedly contributed positively to the process. In this context, it is of utmost importance that the support for EU membership is ensured while technical negotiations are ongoing. Ultimately, the membership process will be realized based not only on the bureaucratic consensus reached between the relevant institutions, Member States and candidate countries, but also on the consent of the public opinion of both sides.

From this perspective, in its 50th anniversary, IKV commissioned a public opinion survey on Turkish public's support for EU membership and its perceptions on the EU. In this publication, IKV is pleased to present the main findings of this survey conducted in April 2015 by Realta Research Company. This survey is based on the participation of 2,489 respondents above 18 years of age from all over Turkey (TÜİK's random sampling data).

For sure the survey's results contain striking outcomes. Although the technical negotiations are not proceeding at the desired level, it is important to note that support among the Turkish public for EU membership exceeds 60 %. However, Turkish citizens who expect that Turkey's EU membership will actually take place in the near future is low and has been gradually declining over time.

Within the scope of this public opinion survey, unlike the similar surveys conducted previously, IKV has reached interesting conclusions on various issues, such as the main reasons for supporting/opposing Turkey's EU membership; the main sources of information on EU in the Turkish public opinion; perceptions of Europe and perceived benefits of EU membership. We strongly believe that this publication will be a useful source of information for relevant institutions both in Turkey and in the EU and will contribute to pave the way forward to Turkey's EU membership.

Ömer Cihad Vardan
Chairman, IKV



1. EXECUTIVE SUMMARY

BACKGROUND

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

PROFILE

The public opinion survey was conducted on 4-5 April 2015 in 18 provinces of Turkey with TÜİK's random sampling method. A total of 2,489 persons among which 45.6 % were women participated to this survey, all representing the eligible voters in Turkey with at least 18 years of age. The quantitative research and face to face interviewing method were used. When taking into consideration the profile of the persons that participated to the survey, the 45 years and above age group represents the largest group among the respondents with 36.8%.

As regards to the level of education, it can be observed that high school graduates represent the largest group among the respondents with 38%. Besides this group, 16 % of the respondents are university; 17% secondary school and 21% primary school graduates.

When taking into consideration the profession of the respondents, it can be observed that while housewives rank first with 25.7%, workers rank second with 15.3% and retired persons rank third with 11.8%. In the sample of the survey, 44.6% of respondent are employees (employed or self - employed). 86.4% of respondents have never travelled to an EU Member State. For almost half of the 13.6% respondents who have travelled to the EU Member State; the main purpose of such visits is touristic.

32.5% of respondents have a relative or an acquaintance living in Europe and almost half of them are first or second degree relatives.

KEY FINDINGS

While 4 out of 5 respondents to the survey have stated that they have heard of the EU before, 85% of respondents declared that they have “none” or “a little” knowledge of the EU. This indicates a lack of general information with regards to the EU in general in the Turkish public opinion.

In geographical terms, the level of knowledge on the EU decreases from West to East. It can also be observed that the level of knowledge on the EU is higher among the young population (18-30 age group) in contrast to older age groups (such as the 45 years and above age group).

The survey shows that the main sources of information on the EU are traditional media tools such as television, newspapers and radio. The internet is also a widely used tool to find information related to the EU. In contrast, public institutions in Turkey and in the EU are not considered as primary sources of information by Turkish citizens.

61.8% of the Turkish public opinion supports Turkey's EU membership.

The expectation for Turkey's EU membership has decreased for 73% of the respondents in the public opinion survey. Furthermore, while 30% of the respondents believe that Turkey will become a member of the EU, only 23% expect Turkey joining the EU in the next five years.

As regards to the level of support given to Turkey's EU membership, there is a rather mixed picture over Turkey's geography. With a rate of 47.7%, South Eastern Anatolia is the region with the highest rate of expectation for Turkey's EU membership while the Central Anatolian region has the lowest rate of expectation with 22.8%. In all the geographical regions, it can be observed that the expectation for EU membership is below 50%.

Taking into consideration the age range, it can be observed that the population under 45 years old shows more support and has a higher rate of expectation for Turkey's EU membership. Nonetheless, when one takes into consideration all age groups, less than 30% expect Turkey to become an EU member within the next five years.



Among the main reasons behind the support for Turkey's EU membership are the prospects of more welfare and further economic development as well as free movement, right of settlement and educational opportunities. These are followed by democratic consolidation and human rights. For the 18-30 age group, the expectation of increased opportunity for free movement is higher. As for the respondents of 30 and above age group, democracy and human rights ranks second in the list of the main reasons for supporting EU membership. Among the reasons cited for supporting Turkey's EU membership, the argument of more welfare and economic development comes to the forefront in every region.

On the other hand, when analyzing the reasons for opposing Turkey's EU membership, the EU's double-standard approach to Turkey (26%) and the fear that Turkish culture and identity would be weakened with EU membership (26%) are among reasons coming to the forefront.

1 out of 4 respondents indicates that "free movement" would be the most important contribution of EU membership to Turkey while 1 out of 5 points out to "new job opportunities" as the main significant contribution of EU membership. On the other hand, those who believe that EU membership would present no benefit to Turkey ranks third (15%).

65.2% of respondents believe that Turkey needs the EU economically. The region where this rate is the highest is the South Eastern Anatolia Region (78.3%).

Similarly, for 23% of the respondents, Europe is synonymous with welfare and economic development; while for 21% Europe signifies free movement and removal of borders.

2. BACKGROUND

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

The survey was conducted on 4-5 April 2015 in 18 provinces of Turkey with the participation of a total of 2,489 persons, all representing the eligible voters in Turkey with at least 18 years of age (based on TÜİK's random sampling method). Almost half of the respondents to the survey were women. The quantitative research and face-to-face interviewing methods were used.

The stratified sampling method has been used for this survey. Quotas on gender and age group were applied in the sampling technique. The analysis on this publication is based on 2,007 respondents who have said that "they have heard about the EU before".

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 1.5% which is situated within the limits of confidence interval.

The results of the survey have been interpreted by IKV Expert Team.

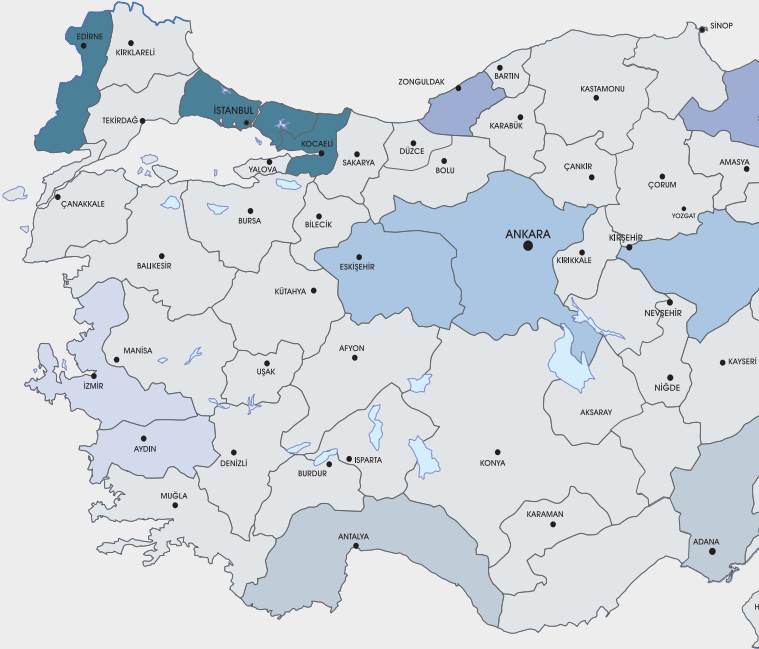


3. PROFILE

3.1. Geography

By taking into account TÜİK's random sampling method, the public opinion survey was conducted in 18 provinces of Turkey with 2,489 persons representing the eligible voters in Turkey with at least 18 years of age. The 18 provinces have been selected all across the country. The geographical regions where the survey was conducted are as follows:

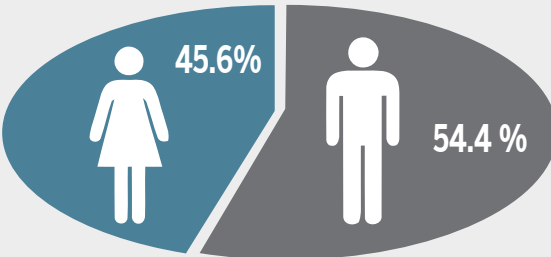
Figure 1: Geographical distribution



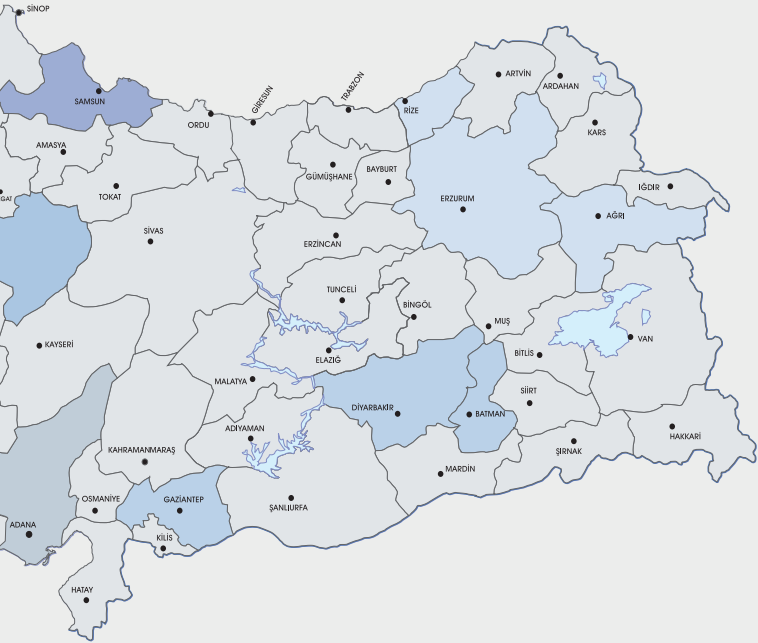
3.2. Gender

Of a total of 2,489 respondents, 54.4% are male; 45.6% are female. (TÜİK's 2014 data on Turkish population: 50.2% male; 49.8% female).

Figure 2: Distribution by gender (in percentage)



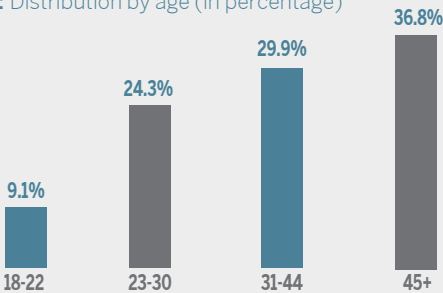
GEOGRAPHICAL REGION	NUMBER OF PROVINCES	PROVINCES
Marmara Region	3	Edirne -İstanbul-Kocaeli
Aegean Region	2	Aydın -İzmir
Black Sea Region	3	Rize-Samsun-Zonguldak
Mediterranean Region	2	Adana-Antalya
Central Anatolia Region	3	Ankara-Eskişehir-Yozgat
Eastern Anatolia Region	2	Ağrı-Erzurum
South Eastern Anatolia Region	3	Batman-Diyarbakır-Gaziantep



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, 63.3% of the respondents are under the age of 45.

Figure 3: Distribution by age (in percentage)

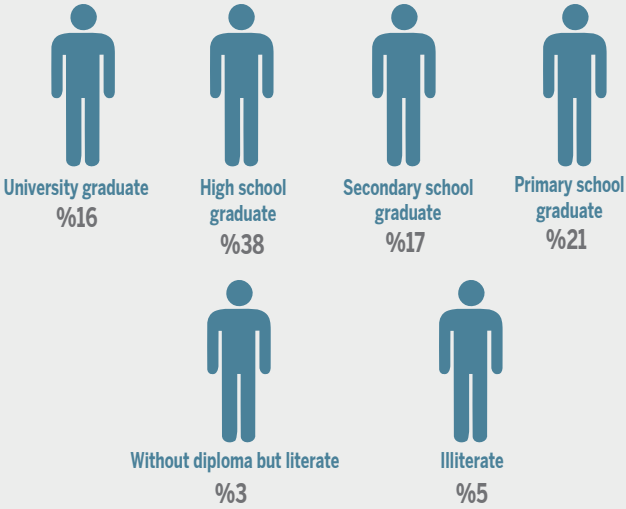




3.4. Education

High school graduates represent the largest group among the respondents with 38%. Regarding the rest of the respondents, 21% of them are primary school, 17% of them are secondary school and 16% of them are university graduates (see Figure 4).

Figure 4: Distribution by education (in percentage)



3.5 Occupation

In regard to the occupational distribution of the respondents, it can be observed that while housewives rank first with a rate of 25.7%, workers rank second with 15.3% and retired persons rank third with 11.8% (see Table 1). In this survey, almost half of the respondents (45.3%) are working (employed or self-employed).

Table 1: Distribution by occupation (in percentage)

Government employee	5.5
Private sector	9.8
Worker	15.3
Artisan	8.3
Merchant	0.7
Self - employment	2.8
Marginal	0.7
Farmer	2.2
Retiree	11.8
Housewife	25.7
Student	9.1
Unemployed	8.1

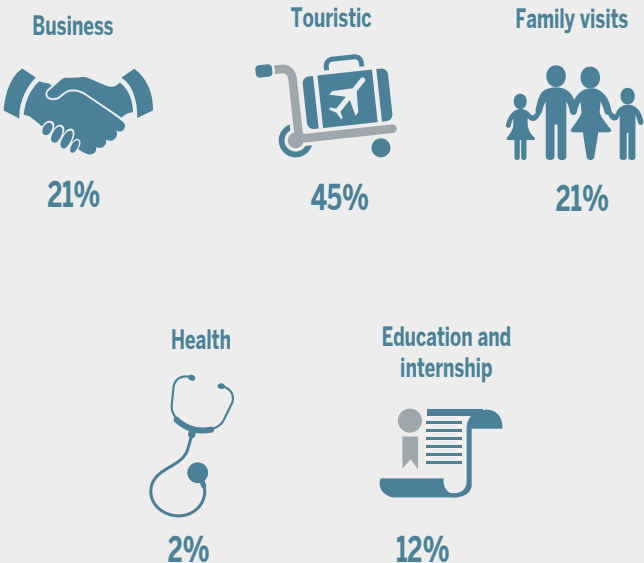
3.6 Contact with the EU

86.4% of the respondents stated that they have never travelled to an EU Member country (see Figure 5). For almost half of the 13.6% who have travelled to the EU the main purpose of visit is touristic. This is followed by business (21%) and family visits (21%) (see Figure 6).

Figure 5: The share of survey's respondents who have visited Europe (in percentage)



Figure 6: The reasons why respondents visited Europe previously (in percentage)





67.5% of respondents say they have no close relatives in Europe (see Figure 7). Almost half of the remaining 32.5% have first or second degree relatives living in an EU Member State (see Figure 8).

Figure 7: Distribution of the survey's respondents that have a relative or an acquaintance living in Europe (in percentage).

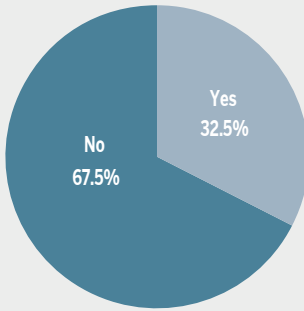
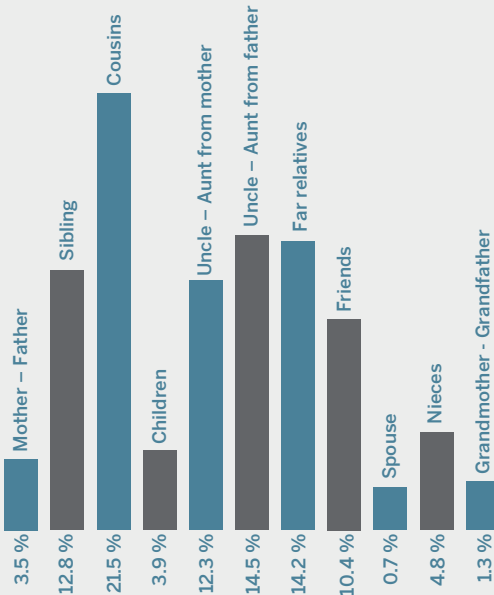


Figure 8: The distribution according to the level of closeness of family ties between the respondents and relatives or acquaintances living in Europe (in percentage)



4. KEY FINDINGS

4.1. How well do we know the EU?

Awareness of the EU

While 80.3% of the respondents to the survey have stated that they have heard of the EU before, the level of awareness is the highest in the Mediterranean Region (see Figure 9). Marmara Region (85.2%) and Black Sea Region (83.5%) follow the Mediterranean Region in this ranking. The level of awareness is the lowest in the South Eastern Anatolia Region (51.1%) (see Figure 10).

Figure 9: Distribution of the answers of the respondents concerning their self-perceived knowledge of the EU beforehand (in percentage)

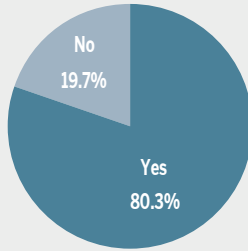
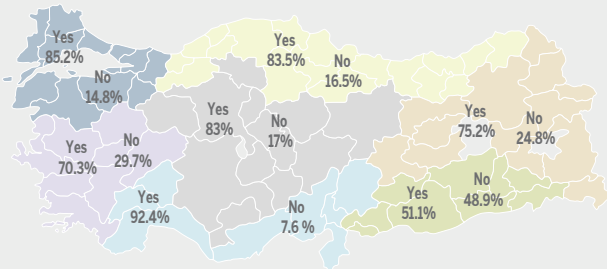


Figure 10: The relation between the respondents' self-perceived knowledge of the EU and the region of their residence (in percentage)



According to the survey, the level of awareness is the highest among the 18-22 age group (86.3%). On the other hand, the level of awareness is the lowest among the age group of 45 years and above (70.9%) (see Table 2).

Table 2: The relation between the respondents' awareness of the EU and their age (in percentage)

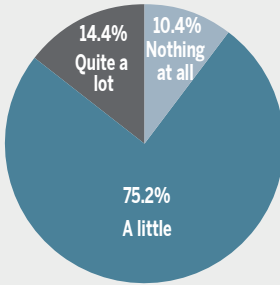
Have you heard about the EU?	18-22 Age Group	23-30 Age Group	31-44 Age Group	45 Years and Above Age Group
Yes	86.3	86.1	85.4	70.9
No	13.7	13.9	14.6	29.1



Level of knowledge on the EU

While 75.2% of the respondents to the survey declared that they have “little” knowledge on the EU, only 14.4% of the respondents consider themselves to have “quite a lot” of knowledge on the EU. The rate of the respondents who has “no” idea on the EU is 10.4% (see Figure 11).

Figure 11: How much do you know about the EU? (in percentage)



Analyzing the relation between the respondents' self-perceived level of knowledge of the EU and their geographies, the region where the level of knowledge is the highest is the Marmara Region. 21% of the respondents in the Marmara Region said that they have “quite a lot” of knowledge on the EU. On the other hand, when analyzing the regional breakdown of the respondents declaring that they have “no” knowledge of the EU, it can be observed that South Eastern Anatolia Region (22.8%), Eastern Anatolia Region (16.4%) and Aegean Region (14.6%) hold respectively the highest shares (see Table 3).

Table 3: Relation between the respondents' level of self-perceived knowledge of the EU and the region of their residence (in percentage)

	Nothing at all	A little	Quite a lot
Marmara Region	8.2	70.8	21
Aegean Region	14.6	76.8	8.5
Mediterranean Region	8.9	82.3	8.9
Central Anatolia Region	8.4	81.9	9.7
Black Sea Region	9.3	73.6	17.1
South Eastern Anatolia Region	22.8	63	14.1
Eastern Anatolia Region	16.4	72.4	11.2

Sources of information on the EU

According to the survey, the main sources of information on the EU are the written and audiovisual media (50%). These are followed by internet (30%). According to the survey, the public institutions on both sides including Turkey's Ministry for EU Affairs are not considered as the primary source of information (see Table 4).

Table 4: The distribution regarding the sources of information about the EU (in percentage)

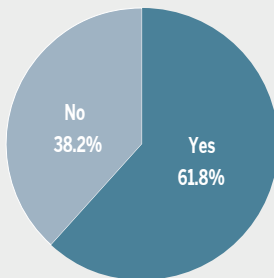
Media (Newspaper/TV/Radio)	50
Internet	30
Family and acquaintances	11
Relatives and acquaintances living in EU countries	2.2
Foreign friends	1.3
Sources of foreign news	1.5
EU institutions	0.6
Ministry for EU Affairs and other public institutions	1
Civil society institutions	1.5

4.2. How much do we support EU membership?

Support to Turkey's EU membership

61.8% of the respondents; in other words, 6 out of 10 respondents to the survey support Turkey's EU membership (see Figure 12).

Figure 12: Do you believe that Turkey will become a member of the EU? (in percentage)

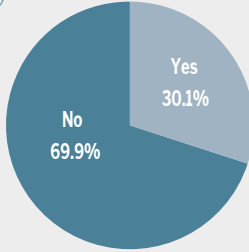




Belief that Turkey will become a member of the EU

While 70% of the respondents to the survey do not believe that Turkey will join the EU, 30% of the respondents believe that Turkey will become a member of the EU (see Figure 13).

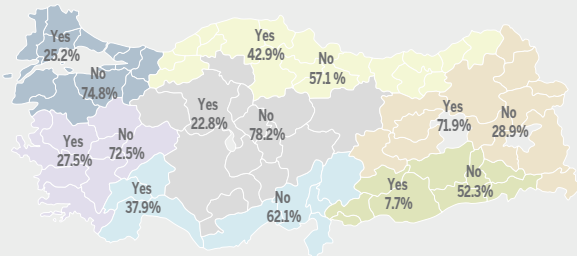
Figure 13: Do you believe that Turkey will become a member of the EU? (in percentage)



Analyzing the geographical distribution of the responses to the question “Do you believe that Turkey will become a member of the EU?”, the belief that Turkey’s EU membership will actually take place is the strongest in the South Eastern Anatolia Region. It is followed by the Black Sea Region (42.9%) and the Mediterranean Region (37.9) respectively. In contrast, the lowest rate of belief that Turkey will become a member of the EU is found in the Central Anatolia Region of Turkey (22.8%).

As a whole, in all the geographical regions with the exception of South Eastern Anatolia, the share of the people who believe that Turkey will join the EU fell behind the share of those who do not believe that it will take place. (see Figure 14).

Figure 14: The relation between the respondents’ belief that Turkey will become a member of the EU and the region of their residence (in percentage)



Analyzing the response on belief that Turkey’s EU membership will take place by age, it can be observed that the young population believes that Turkey will actually join the EU more than older age groups. While the share of the 45 years and above age group who believes that Turkey’s EU membership will actually take place is 23.3%, this share in all other age groups is above the threshold of 30% (see Table 5).

Table 5: Relation between the respondents' belief that Turkey's EU membership will take place and their age (in percentage)

	18-22 Age Group	23-30 Age Group	31-44 Age Group	45 Years and Above Age Group
Yes	33.3	36.7	30.7	23.3
No	66.7	63.3	69.3	76.7

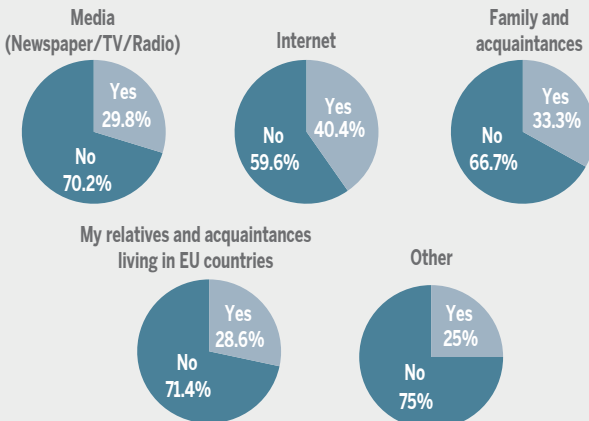
Analyzing the relation between the respondents' belief in Turkey's EU membership and their level of knowledge of the EU, it can be observed that the level of knowledge the respondents have on the EU does not change their belief that Turkey will join the EU. 26.4% of the respondents who do not have any knowledge of the EU; 30.5% of those who have "a little" knowledge of the EU; and 29.8% of those who have "quite a lot" knowledge of the EU believe that Turkey's EU membership will actually take place. (see Table 6).

Table 6: The relation between the respondents' belief that Turkey will become a member of the EU and their level of knowledge of the EU (in percentage)

	Nothing at all	A little	Quite a lot
Yes	26.4	30.5	29.8
No	73.6	69.5	70.2

Analyzing the relation between the respondents' belief that Turkey's EU membership will take place and their sources of information, the belief of the respondents who obtained information about the EU on the internet is stronger than those who use other sources of information (40.4%) (see Figure 15).

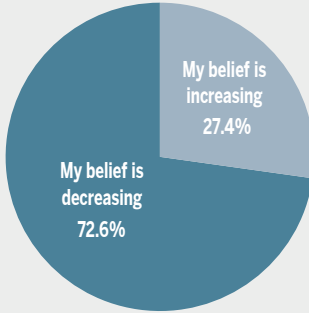
Figure 15: Relation between the respondents' belief that Turkey's EU membership will take place and their sources of information about the EU (in percentage)





72.6% of the respondents to the survey express that their belief that Turkey's EU membership will take place has decreased (see Figure 16).

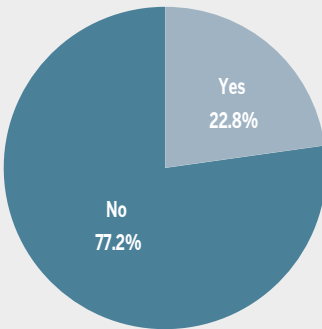
Figure 16: Is your belief that Turkey will join the EU increasing? (in percentage)



Expectations with regard to Turkey's EU membership

77.2% of the respondents do not expect Turkey to become a member of the EU in the next five years (see Figure 17).

Figure 17: Do you expect Turkey to become an EU member within the next five years? (in percentage)



When examining the relation between respondents' expectations for Turkey to become an EU member in the next five years and their age, it can be observed that the respondents of 45 years and above constitute the group that least expects Turkey to become a member of the EU in the near future (see Table 7). The expectation that Turkey will become an EU member in the next five years is higher among the younger population.

Table 7: Relations between respondents' expectations for Turkey to become EU member within the next five years and their age (in percentage)

	18-22 Age Group	23-30 Age Group	31-44 Age Group	45 Years and Above Age Group
Yes	21.3	28.7	23.1	18.2
No	78.7	71.3	76.9	81.8

4.3. Why do we want to join the EU?

The reasons why respondents support Turkey's EU membership

Analyzing the reasons why respondents support Turkey's EU membership, the first reason that comes to the forefront is the prospect for the improvement in the level of welfare and economic development (25.3%). Free movement, the right of settlement and educational opportunities comes as the second reason for supporting with 22.7% (see Table 8). 20.1% of the respondents say that they support Turkey's EU membership because of its connotations for a more advanced democracy and respect to human rights.

Table 8: Why do you support Turkey's EU membership process? (in percentage)

Improvement in the level of welfare and economic development	25.3
Free movement, right of settlement and educational opportunities in Europe	22.7
Reinforcement of democracy and human rights	20.1
Increase in the level of education and culture	19
Improvement in Turkey's respect and influence in the world	12.8

Analyzing the reasons for the respondents' support for EU membership in relation to their ages, it can be observed that in all age groups, the first reason that comes to the forefront is prospects for the improvement in the level of welfare and economic development (see Table 9) while the second reason for the young population (18-30 age group) is free movement, right of settlement and educational opportunities in the EU; it is the reinforcement of democracy and human rights for the population aged 30 and above.



Table 9: The relation between the reasons for respondents to support Turkey's EU membership and their age (in percentage)

	18-22 Age Group	23-30 Age Group	31-44 Age Group	45 Years and Above Age Group
Improvement in the level of welfare and economic development	41.1	51.9	48.2	44.1
Reinforcement of democracy and human rights	14.3	11.9	24.8	28.1
Free movement, right of settlement and educational opportunities	28.6	21.3	16.6	16
Improvement in Turkey's respect and influence in the world	7.1	7.7	6.1	3,8
Increase in the level of education and culture	8.9	7.1	4.3	8

Analyzing the respondents' support for EU membership according to the region of their residence, it can be observed that in all geographical regions the first reason to support Turkey's EU membership is prospect for the improvement in the level of welfare and economic development. Moreover, in all geographical regions with the exception of two (Marmara Region and Central Anatolia Region), this reason represents a share of more than 50% (see Table 10).

Table 10: The relation between the reasons for respondents to support Turkey's EU membership and the region of their residence (in percentage)

	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	Improvement in Turkey's respect and influence in the world	Increase in the level of education and culture
Marmara Region	34.2	33.6	17.4	7.2	7.5
Aegean Region	58.6	19.1	9.2	8.6	4.6
Mediterranean Region	51.1	4.5	31.2	0,9	12.2
Central Anatolia Region	41	18.7	23.5	10.8	6
Black Sea Region	67.8	17.8	8.9	3.3	2.2
South Eastern Anatolia Region	52.1	25.4	19.7	1.4	1.4
Eastern Anatolia Region	67.5	20	5	7.5	0

Reasons for non-supporters of EU membership

Taking into consideration the reasons why the respondents do not support Turkey's EU membership, it can be observed at first glance that there is a rather balanced distribution among these reasons. In this regard, the EU's alleged application of double standards to Turkey (26%) and the fear that Turkish culture and identity would be weakened by possible EU membership (26%) are among the reasons coming to the forefront. Furthermore, 20% of the respondents who do not support Turkey's EU membership share the view that the EU project does not have a future. (see Table 11).

Table 11: Why one does not support Turkey's EU membership? (in percentage)

EU's application of double standards towards Turkey	26
Harming Turkish culture and identity with EU membership	26
No future for EU	20
Harming Turkey's sovereignty and independence	14
Negative impact on the economy	10
Weakening Turkey's relations with third countries	4.1

4.4. What do we understand from the EU?

The contributions of EU membership to Turkish Citizens

According to the results obtained from the survey, "free movement" is considered to be the most important contribution of Turkey's potential membership to the EU (26%). This is followed by those who believe that EU membership will present "new job opportunities" (21%). 15% of the respondents who consider that EU membership will have "no contributions" ranks third on the list. According to this survey, "the participation in EU institutions and EU decision-making process" is considered to be the advantage to which EU membership will contribute the least (4.2%) (see Table 12).

Table 12: What are the possible contributions of EU membership to Turkey? (in percentage)

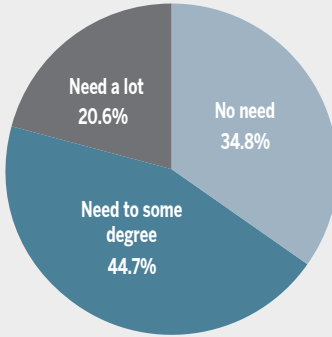
Free movement	26
New job opportunities	21
No contribution	15
A more democratic Turkey	12
Respect and power in international arena	11
Possibility to benefit from EU budget and funds	9.5
Participation in EU institutions and EU decision-making process	4.2



The economic need for the EU

65.2% of the respondents believe that Turkey needs the EU economically (see Figure 18).

Figure 18: Does Turkey need the EU economically? (in percentage)



Analyzing the relation between the perceptions of respondents on how much Turkey needs the EU economically and their age, the 18-30 age group and the 45 and above age group believe that Turkey needs the EU economically “much more”. While around 70% of the 18-30 age group believe Turkey needs the EU economically; this share is around 60% for those of 45 years and above age group (see Table 13).

Table 13: The relation between the respondents’ perception on how much Turkey needs the EU economically and their age (in percentage)

	No need	Need to some degree	Need a lot
18-22 Age Group	30.1	51.8	18.1
23-30 Age Group	29.4	50.4	20.2
31-44 Age Group	34.5	42.7	22.9
45 Years and Above Age Group	40.5	40.5	19

When evaluating the results according to the geographical distribution of the respondents to survey, South Eastern Anatolia is the region where respondents believe that Turkey needs the EU economically the most with a share of 78.3%. This region is followed by the Black Sea Region with 73.7% and the Aegean Region with 71.6%. On the other hand, 45.4 % of the respondents in the Central Anatolia Region believe that Turkey does not need the EU economically (see Table 14).

Table 14: The relation between the respondents' perception on how much Turkey needs the EU economically and the region of their residence (in percentage)

	No need	Need to some degree	Need a lot
Marmara Region	34.9	42.1	23
Aegean Region	28.4	48.3	23.3
Mediterranean Region	36.1	54.2	9.7
Central Anatolia Region	45.4	32.3	22.4
Black Sea Region	26.3	51	22.7
South Eastern Anatolia Region	21.7	59	19.3
Eastern Anatolia Region	36.4	44.5	19.1

The meaning of Europe for survey respondents

According to the results of the survey, the EU is first of all associated with a high level of welfare and economic development (23%). With a small margin, this statement is followed by those who believe that the EU is equivalent to free movement and removal of barriers (21%). The share of the respondents who consider the EU as representing democracy and freedom is 16%. The respondents who expressed the EU's characteristics of being an entirety of standards share 12% of the survey, thus standing at the end of the list (see Table 15).

Table 15: What does Europe mean for you? (in percentage)

High level of welfare and economic development	23
Free movement and removal of barriers	21
Democracy and freedom	16
Culture and civilisation	12
Other	9.3
Regression and decline	6.5
Domination and oppression	6.3
Common standards and alignment	6



5. CONCLUSIONS

“We hear about the EU; but we are not informed about it.”

While 4 out of 5 respondents have stated that they have heard of the EU before, 85% of respondents said that they have “none” or “little” knowledge about it. This indicates a lack of general information on the EU in Turkey.

In geographical terms, the level of knowledge of the EU decreases going from West to East of the country. 1 out of 5 respondents in the Marmara Region consider him/herself as having a “high level” of knowledge on the EU.

When analyzing the level of respondents’ self-perceived knowledge of the EU according to their age group, it can be observed that the level of knowledge on the EU is higher among the young population while the level of knowledge decreases with age.

“We know the EU through the media and the Internet”

The survey reveals that the main sources of information on the EU are traditional media tools (television, newspapers, radio) and the internet. These two channels together constitute approximately 80% of the sources of information. This clearly shows that the traditional media instruments and internet contribute in raising the awareness of the EU in Turkey and this also proves that these are efficient instruments that can be used in increasing the level of awareness.

Another striking result is the fact that public institutions on both sides do not constitute a primary source of information for Turkish citizens. It can be observed that EU institutions, the Ministry for EU Affairs and other public institutions are the sources of information that are the least referred; the low share is also valid for civil society organizations.

“We support Turkey’s EU membership; but we don’t believe that Turkey will actually join the EU”

The survey reveals that while Turkish public opinion supports Turkey’s EU membership, the belief that it will take place is decreasing. According to the results of the survey, while 61.8% support Turkey’s EU membership, the share of the people who believes that Turkey will become a member of the EU is only 30%. In other words, 6 out of 10 people support Turkey’s EU membership but only 3 out of 10 people believe that Turkey will join the EU. Similarly, 73% of the survey’s respondents declared that their belief that Turkey

would become a member has declined; further supporting the finding that only 30% believe that Turkey will actually join the EU.

We support Turkey's EU membership but we do not expect it to become a member"

One of the striking results in the survey was that while respondents support Turkey's EU membership, 77% of them do not expect Turkey becoming a member of the EU in the next five years. In other words, a large majority of the Turkish public do not expect that Turkey will join the EU in the short term.

"Young generation is more optimistic about EU membership"

When analyzing the shares of Turkish public opinion supporting and believing in EU membership and their expectation that Turkey will become an EU member, it can be observed that younger Turkish citizens, i.e. population below 45 years of age are more optimistic about EU membership.

"The reasons for supporting the EU: Increasing the level of economic development and free movement"

Almost half of the respondents to the survey support Turkey's EU membership because it will raise Turkey's level of welfare and economic development and provide the opportunity to benefit from free movement. When looking at the meaning of Europe for respondents, it can be observed that the same arguments have been put forward. These two findings are clear indications that the main expectations of Turkish citizens from Turkey's potential EU membership are free movement and economic development.

"Main concern: Double standards and identity"

The results of the survey show that the main reason for non-supporting the EU membership are derived from EU's double-standards stance towards Turkey. At the same time, while 1 out of 4 respondents is concerned that Turkish identity and culture will be harmed by Turkey's EU membership.

"Turkey needs the EU economically"

Around 65% of the survey's respondents consider that Turkey's EU membership is economically beneficial. On the other hand, 1 out of 3 respondents believes that Turkey does not need the EU economically. This share has reached 1 out of 2 persons in the Central Anatolia Region.

