

A woman with long dark hair, wearing a tan leather jacket over a blue and white striped shirt and dark pants, stands in a crowd. She has her hands pressed against her face, covering her eyes and nose, suggesting a sense of overwhelm or distress. The background is blurred, showing other people in a public space.

SOCIETAL BURNOUT, TRUST AND EXPECTATIONS FOR 2026

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SOCIETAL BURNOUT, TRUST AND EXPECTATIONS FOR 2026

In this section, we aimed to render Türkiye's societal mood at the end of 2025 measurable and analytically tractable by focusing on three core areas:

1. Societal burnout and psychological strain,
2. Trust and social support networks,
3. Sense of belonging, emigration intent, and expectations for 2026.

Why did we focus on this issue?

In recent years, the combined impact of economic pressures and an intensified political agenda has made debates around a "tired society" increasingly visible. Across sectors, consumer behaviour can no longer be interpreted solely through income levels; it must also be understood in relation to the prevailing psychological climate.

From the perspective of politics and public governance, citizens' engagement with the national agenda, levels of institutional trust, and sense of belonging are directly linked to questions of representation and legitimacy. For this reason, we developed Societal Burnout and Trust Indices, enabling the systematic monitoring of a wide range of seemingly fragmented emotions and perceptions within a single analytical framework.

What did we do?

We constructed a Societal Burnout Index combining indicators of agenda fatigue, future anxiety, feelings of helplessness and hopelessness, and difficulties in long-term planning. In parallel, we calculated separate Trust Indices for close social circles, unfamiliar individuals, and institutions, as well as composite trust and burnout profiles derived from these indices.

By cross-analysing these profiles with indicators such as perceived need for psychological support, sources of support relied upon in times of hardship, sense of social belonging, preference for living in Türkiye versus another country, and expectations for 2026, we generated segment-based insights.

SOCIETAL BURNOUT, TRUST AND EXPECTATIONS FOR 2026

What Did We Find?

- On a 0–100 scale, Türkiye falls within the high societal burnout range. A large majority of the population reports feeling overwhelmed by the national agenda and anxious about the future.
- One in two respondents states that they have felt a need for psychological support over the past year. Despite this expressed need, support networks remain largely family- and close-circle-based, while institutional and professional support channels appear weak and underutilised.
- The trust landscape reveals moderate to high trust in close relations, limited trust in institutions, and very low trust in unfamiliar individuals. Approximately half of the electorate falls into a “low trust across all domains” cluster. Smaller segments can be identified as “institution-reliant trusters” and “interpersonally trusting but institutionally distant” profiles.
- As societal burnout intensifies, both institutional trust and sense of social belonging decline. Groups exhibiting the lowest levels of belonging and the highest emigration intent are simultaneously the most burned out and the most distrustful segments of society.
- Among younger and more educated groups, the response “I would prefer to live in another country if given the opportunity” has become mainstream. Notably, personal expectations for 2026 are more positive than expectations regarding the country as a whole: while respondents are pessimistic about Türkiye’s future, they remain cautiously optimistic about their own immediate lives.

What Does This Mean?

These findings indicate that, as Türkiye enters 2026, the country’s primary risk is not solely economic but also a deepening societal burnout and trust crisis.

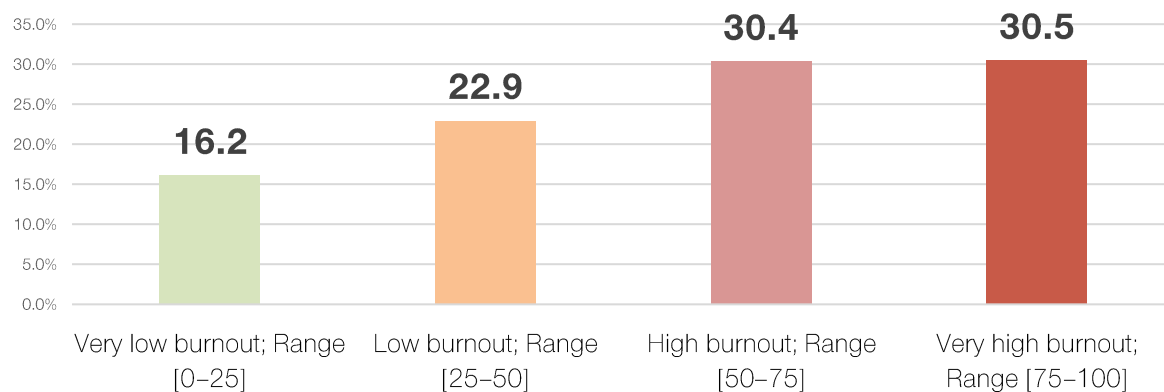
For the private sector, this implies a consumer profile that, under conditions of high burnout and low trust, increasingly prioritises risk avoidance, gravitating toward reliable, reassuring, burden-reducing, simple, and transparent solutions.

For politics and public governance, the priority should shift away from grand and abstract promises toward predictable, fair, and tangible policies that concretely improve everyday life, particularly for young people and vulnerable groups. Reducing societal burnout and rebuilding institutional trust emerge as critical prerequisites for restoring social cohesion and democratic legitimacy.

SOCIETAL BURNOUT INDEX

The Societal Burnout Index was designed to monitor Türkiye's emotional climate at the end of 2025 within a single, coherent, and interpretable framework. The index jointly captures the extent to which the national agenda is perceived as overwhelming, the general emotional experience of living in Türkiye, difficulties in anticipating the future, and feelings of helplessness and hopelessness. Within this scale, lower scores correspond to a relatively calmer and more resilient societal mood, while higher scores indicate more intense emotional fatigue. As of 2025, Türkiye's national average stands at **59 points (out of 100)**, placing the country firmly within the high societal burnout range. An examination of the distribution reveals that 30.4% of respondents fall into the high burnout category, while 30.5% are classified as experiencing very high burnout. In other words, approximately 61% of the population is navigating daily life under conditions marked by pronounced emotional fatigue, sustained agenda pressure, and heightened anxiety about the future. Taken together, both the national average score of 59 and the breadth of the high-burnout segments point to a critical risk area that warrants close attention from public policy-makers as well as private sector strategists.

Distribution by Burnout Level (%)



Methodology: The Societal Burnout Index was constructed using responses to the following five survey questions:

Overall, how does living in Türkiye make you feel?, To what extent has following the national agenda recently made you feel tired or overwhelmed?, How hopeful are you that Türkiye's problems will gradually be resolved?, When making plans for your life, to what degree do you find it difficult to anticipate the future?, How often do you feel helpless or hopeless?

All items were measured using Likert-type scales and aggregated into a single composite indicator. To assess whether the scale was statistically coherent and unidimensional, Principal Component Analysis (PCA) was applied. The analysis yielded a Kaiser–Meyer–Olkin (KMO) measure of sampling adequacy of 0.82, while Bartlett's test of sphericity was statistically significant ($\chi^2 = 1,562$; $p < 0.001$). A single factor emerged, explaining approximately 57% of the total variance.

For ease of analysis and reporting, the index was divided into four equal categories: 0–25 points: Very low burnout, 25–50 points: Low burnout, 50–75 points: High burnout, 75–100 points: Very high burnout

POLITICS: IS BURNOUT MOST CONCENTRATED WITHIN THE OPPOSITION BLOC?

Politics: Is Burnout Most Concentrated within the Opposition Bloc?

An examination of voter groups reveals that societal burnout is sharply differentiated along the political divide.

The least fatigued electorate is found within the AK Party–MHP axis. Approximately one third of voters supporting the AK Party fall into the high/very high burnout range, while the majority are clustered in the very low and low burnout categories. A similarly more composed profile is observed among supporters of the MHP*. This suggests that voters within the governing bloc perceive daily life as more manageable and, at least at the emotional level, remain more reconciled with the existing system.

The most fatigued electorate consists of supporters of the CHP, İYİ Party, and DEM Party. Among voters of the CHP, İYİ Party, and DEM Party*, the share classified as experiencing very high burnout ranges between 40% and 50%. In other words, nearly half of these electorates report feeling extremely emotionally exhausted, frustrated, and hopeless. By contrast, the proportion falling into the very low burnout category is almost negligible. This constitutes a strong signal that opposition voters are carrying not only a political burden but also a substantial psychological one.

Implications for Political Actors

For the governing bloc, the findings indicate engagement with a relatively more emotionally stable electorate, whose primary expectations centre on risk avoidance and stability.

The opposition, by contrast, is addressing a constituency that is deeply fatigued and discouraged. For this audience, amplifying anger is likely to be less effective than articulating a credible narrative of hope, recovery, and viable pathways forward.

According to party vote cast in May 14, 2023 parliamentary election -%

	Very low burnout	Low burnout	High burnout	Very high burnout
AK Party	38.9	27.2	20.7	13.2
CHP	1.6	14.5	35.7	48.2
MHP	24.1	27.6	32.2	16.1
İYİ Party	4.6	13.8	32.2	49.4
DEM Party	2.4	30.5	26.8	40.2
Other	4.2	27.4	31.6	36.8
AVERAGE	16.2	22.9	30.4	30.5

DEMOGRAPHICS: WHO IS MORE BURNED OUT?

BY GENDER - %

	Very low burnout	Low burnout	High burnout	Very high burnout
FEMALE	13.1	21.1	32.0	33.8
MALE	19.2	24.6	28.8	27.4

BY AGE - %

	Very low burnout	Low burnout	High burnout	Very high burnout
18-34	13.2	26.9	32.7	27.2
35-54	18.2	22.8	30.4	28.6
55 and above	16.6	18.8	28.0	36.6
AVERAGE	16.2	22.9	30.4	30.5

Women and older adults as an “emotional risk group”

Burnout levels are systematically higher among women. Approximately two thirds of women (66%) fall within the *high/very high societal burnout* range, a noticeably higher proportion than among men. This gap suggests that workload, caregiving responsibilities, and economic pressure are experienced more intensely by women, cumulatively increasing their emotional burden.

Very high burnout peaks among older age groups. Among those aged 55 and above, the share classified as experiencing *very high societal burnout* stands at around 37%, exceeding that of all other age groups. While younger adults (18–34) also report high levels of fatigue, burnout among older respondents appears to take the form of deeper and more entrenched hopelessness, rather than situational exhaustion.

Income: Minimum-wage earners and deep burnout

In households relying on a single minimum wage income, the combined share of high and very high societal burnout exceeds 70%. In other words, nearly everyone in this group experiences significant emotional strain, with the proportion reporting very high burnout being the highest across all income categories.

As household income rises to the equivalent of two to three minimum wages, the shares of very low and low burnout increase, indicating greater emotional resilience. In the three to four minimum wage bracket, the overall distribution becomes more balanced.

Even in the highest income group, burnout does not disappear entirely; however, the prevalence of very high societal burnout declines markedly.

BY INCOME -%

	Very low burnout	Low burnout	High burnout	Very high burnout
1 x minimum wage	10.4	19.1	29.1	41.5
1-2x minimum wage	13.2	26.4	29.8	30.6
2-3x minimum wage	23.7	21.0	30.1	25.3
3-4x minimum wage	14.8	32.0	26.6	26.6
4 above minimum wage	22.4	23.1	34.6	19.9
AVERAGE	16.2	22.9	30.4	30.5

DEMOGRAPHICS: WHO IS MORE BURNED OUT?

Implications for Banks and Corporations

When discussing pricing strategies, debt restructuring, instalment schemes, and access to essential products, the dual burden of economic pressure and societal burnout faced by households living on one or multiple minimum wages must be explicitly taken into account.

Within this segment, any simplifying or risk-reducing product or service—such as easing debt burdens, deferring bill payments, or offering more flexible instalment structures—delivers not only economic relief but also a tangible sense of psychological alleviation. Such interventions carry a high potential to foster strong gratitude and loyalty toward the brand, extending well beyond transactional benefits.

From a public policy perspective, these findings once again underscore the need to prioritise minimum-wage households within social assistance and support programmes, as they are simultaneously exposed to heightened economic vulnerability and elevated levels of societal burnout.

DISTRIBUTION BY EMPLOYMENT STATUS - %

	Very low burnout	Low burnout	High burnout	Very high burnout
Self-employed	21.4	32.0	25.2	21.4
Employees working for others	12.4	22.1	36.3	29.2
Civil servant	32.3	25.8	19.4	22.6
Unemployed	22.2	23.6	13.9	40.3
Retired	12.1	18.5	29.5	39.9
Student	9.5	38.1	9.5	42.9
Homemaker	16.7	18.5	33.3	31.5
AVERAGE	16.2	22.9	30.4	30.5

Employment Status: Who Is Least and Most Burned Out?

The lowest levels of societal burnout are observed among civil servants and the self employed, while the highest levels are found among students, the unemployed, retirees, and homemakers. Burnout is lowest among civil servants and the self employed. Among civil servants, more than half are classified within the low burnout category, indicating that job security and the perception of a stable income function as protective factors. The self employed also display a relatively balanced distribution. Although they are exposed to higher levels of economic risk, a stronger sense of control and autonomy appears to limit the intensity of societal burnout. Burnout is highest among students, the unemployed, retirees, and homemakers. Among students, the share experiencing very high societal burnout exceeds 40 percent. Future uncertainty, concerns about unemployment, and economic pressure combine to place this group under significant emotional strain. Similarly high levels of very high burnout are observed among the unemployed and retirees, at around 40 percent. In these groups, income insecurity on the one hand and rising living costs on the other create a substantial emotional burden. Among homemakers, the proportion reporting high societal burnout reaches approximately 65 percent. This reflects the cumulative impact of unpaid and invisible labour, social isolation, and sustained economic pressure. Employees working for others in the private sector are also far from comfortable. The combined high and very high burnout category exceeds 65 percent. Long working hours, performance pressure, and income insecurity operate simultaneously to intensify emotional fatigue.

Key Messages for Employers

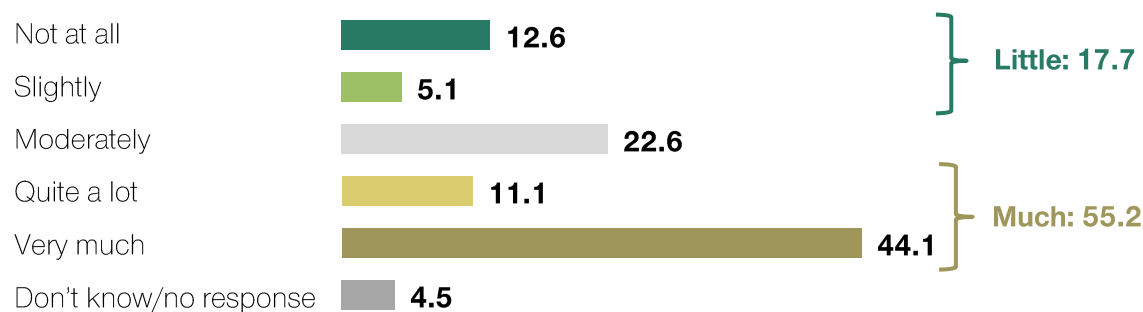
The elevated burnout levels observed among private sector employees and students indicate that those entering, or preparing to enter, the labour market are doing so under conditions of pronounced emotional exhaustion. As a result, human resources policies must move beyond a narrow focus on wages and place greater emphasis on working conditions, flexibility, access to psychological support, and a sense of meaning at work. For civil society organisations and local governments, the implications are equally clear. Vulnerable groups are highly identifiable. Students, the unemployed, retirees, homemakers, and single minimum wage households should be prioritised in the design of psychosocial support initiatives, solidarity networks, and targeted micro intervention programmes.

THE AGENDA HAS BECOME A SOURCE OF STRESS RATHER THAN A SOURCE OF INFORMATION

The question is simple, yet the answer is weighty: “To what extent has following the national agenda recently made you feel tired or overwhelmed?”

One in two respondents (55%) report that following the agenda is “quite” or “very” overwhelming. Only 18% say that it affects them “not at all” or “slightly”, while the remainder indicate a moderate level of strain. In other words, news consumption is no longer a neutral process of information gathering for the majority of society. It has become an activity with a high emotional cost. This pattern is consistent with Reuters Institute 2025 findings, which show that globally around 40% of people report frequently or occasionally avoiding the news on purpose. In Türkiye, this figure exceeds 60%, pointing to a markedly more intense level of agenda fatigue.

To what extent has following the national agenda recently made you feel tired or overwhelmed?



What Does This Mean for Sectors and Decision Makers?

Media and Content Producers

The relationship audiences establish with news content is increasingly emotional rather than purely rational. Instead of a perpetual “one more crisis” framing, there is a growing demand for agenda narratives that offer perspective, solutions, and a regulated emotional tone. Particularly among younger audiences and women, demand is likely to increase for content that provides short, restorative escapes from an overwhelming agenda, such as *micro moments of well being*, *life simplifying information*, and *practical guidance*.

Brands and Banks

Agenda fatigue increasingly translates into decision fatigue. Consumers are filtering out long, complex messages, making simple, reassuring, and cognitively light communication and product design a clear competitive advantage. Women, young people, and lower income groups are the segments most affected by both economic pressure and agenda intensity. Strengthening a brand perception that actively reduces burden is therefore particularly effective when engaging these audiences.

Politics and Public Institutions

High levels of agenda fatigue, especially within opposition constituencies, have evolved into a sentiment of “*I no longer want to hear it.*” This dynamic has the potential to affect both political participation and electoral motivation. The tone and frequency of public messaging require careful recalibration. Rather than sustaining a constant state of alarm, there is a clear need to emphasise incremental solutions, predictability, and tangible small scale gains.

THE AGENDA IS OVERWHELMING. THE CORE BURDEN: VIOLENCE, POLITICS, THE ECONOMY, AND “MORAL DECAY”

The fact that the national agenda feels “quite” or “very” overwhelming to more than half of society cannot be attributed to a single issue. Rather, four primary sources of stress stand out. Crime and violence rank first (29%), followed by politics (21%) and the economy (19%). A further prominent driver is the perception of “social or moral decay” (18%). In Türkiye, agenda fatigue is therefore shaped primarily around debates concerning security, livelihoods, and values.

This distribution is broadly consistent with international findings. Global surveys similarly show that, in recent years, people report feeling most exhausted by news related to economic crises, crime and violence, and political conflict. In Türkiye, however, the picture is more acute than the global average: crime and violence, politics, and economic crisis simultaneously exert a high emotional toll on a much larger share of the population.

The pattern also holds when examining responses by level of perceived agenda fatigue. Among those who say the agenda is “not at all” or “slightly” overwhelming, political and economic news remain relatively manageable. Among those who report being “quite” overwhelmed, crime and violence come to the fore. For respondents who say the agenda is “very” overwhelming, politics and the economy escalate simultaneously, reinforcing each other as dominant sources of emotional strain.

Which types of news make you feel the most tired or overwhelmed?

Politics	20.7
Economy	18.8
Violence and crime	29.2
Natural disasters and environmental issues	2.8
Social and moral decay	18.1
Other	1.1
All	6.8
No response	2.5

Distribution by Level of Feeling Overwhelmed by Following the National Agenda (%)

	Politics	Economy	Violence and crime	Natural disasters and environmental issues	Social and moral decay
Not at all	12.9	10.1	26.6	10.8	25.9
Slightly	12.5	23.2	33.9	3.6	16.1
Moderately	21.5	18.3	33.3	2.4	18.7
Quite a lot	15.4	19.5	35.0	1.6	20.3
Very much	25.4	21.9	22.9	0.8	15.7

0-9%

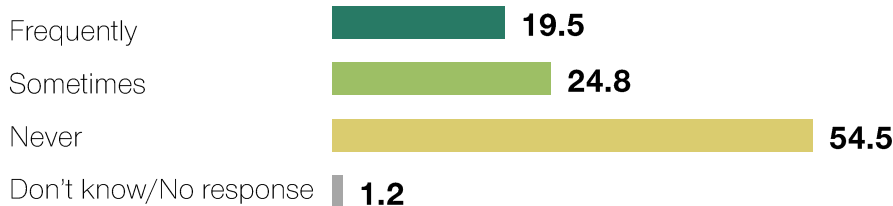
10-19%

20-29%

30+ %

ONE IN TWO PEOPLE HAS FELT A NEED FOR PSYCHOLOGICAL SUPPORT

Have you needed psychological support at any point over the past year?



Comparative Table - %

	December 2023	December 2024	December 2025
Frequently	15.6	22.0	19.5
Sometimes	19.9	26.5	24.8
Never	63.6	48.6	54.5
Don't know/No response	0.9	2.9	1.2

Findings from the **Societal Burnout Index** indicate that, with a national average score of **59**, society is positioned within the **high burnout range**, and that **two out of every three individuals** fall into the *high* or *very high* burnout categories. Within such an emotional climate, it is hardly surprising that one of the most visible manifestations of societal burnout is the **growing need for psychological support**.

When asked whether they had needed psychological support over the past year, **19.5%** of respondents reported needing it **frequently**, while **24.8%** said **sometimes**. In other words, nearly **half of society (44.3%)** indicates that at some point during the year they felt a need for **professional or organised psychological support**. An examination of the **2023–2025 trend** further suggests that this is no longer a temporary fluctuation, but rather a **new normal**.

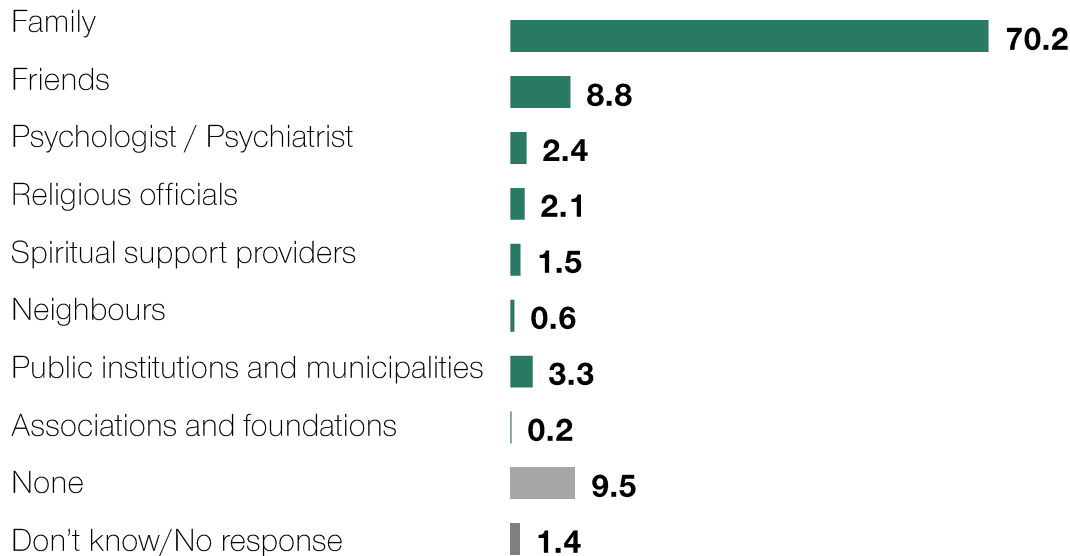
Within this broader picture, the groups identified as most vulnerable in terms of burnout also stand out clearly. **Fifty one percent of women** report having needed psychological support in the past year, a substantially higher share than among men. Among men, the proportion stating *"I did not need psychological support at all"* rises to **62%**.

Income-based disparities are similarly pronounced. In households living on a **single minimum wage**, the share reporting a **frequent** need for psychological support reaches **28–29%**. As income levels increase, this proportion declines gradually, and in the **highest income groups** the share of those saying *"I did not need psychological support"* approaches **60%**.

Psychological support is no longer a niche concern; it has become a **mainstream societal need**. When half of society reports having needed psychological support within a single year, this demand can no longer be addressed at the level of isolated *helplines* alone. It must instead be treated as a **structural priority** within both **public policy frameworks** and **private sector strategies**.

WHO DO PEOPLE TURN TO FOR SUPPORT?

Who do you primarily turn to for support in difficult times?



The **Societal Burnout Index** and the reported **need for psychological support** demonstrate the extent to which people are struggling. This section, however, reveals **whose door is actually knocked on** in moments of strain. The picture is unequivocal. In difficult times, the primary point of recourse is, by a wide margin, **the family**. While **70%** of respondents state that they first turn to their family, only **9%** report seeking support from friends.

Psychologists and psychiatrists (2%), religious officials and other providers of spiritual support (4% in total), and **public institutions and municipalities** (3%) appear largely as **supplementary actors** rather than central pillars of support. At the same time, there is a sizeable group who say they would turn to **no one at all** (10%). In other words, **one in ten individuals** chooses to face periods of hardship entirely alone.

This structure indicates both that **social solidarity in Türkiye continues to be organised primarily around the household**, and that a significant share of the growing psychological burden is being carried **quietly and invisibly within families**. When intra-family relations weaken or economic pressure intensifies, the absence of alternative support networks creates a vulnerability that can allow distress to escalate rapidly into crisis.

The limited recourse to **professional support mechanisms** points to a clear **gap between need and utilisation**. This gap represents a critical area for intervention, both in terms of **public policy design** and in the development of **employee and customer support programmes** within the private sector.

The **trust indices and trust profiles** discussed in the next section complete the logic of this picture. People turn most readily to their families in times of difficulty because **trust is highest within close social circles, lowest toward unfamiliar individuals, and restricted toward institutions**. In Türkiye, societal burnout, the need for psychological support, and the trust landscape thus constitute **interconnected layers of the same underlying dynamic**, mutually reinforcing one another.

THE TRUST MAP IN TÜRKİYE

The Trust Indices provide a clear picture of which layers of Türkiye's social fabric remain resilient and where fragilities have deepened. Across the three dimensions examined, the results are as follows: trust in close relations scores 50, trust in institutions 39, and trust in distant or unfamiliar others only 18 (on a 0–100 scale, where higher scores indicate higher trust).

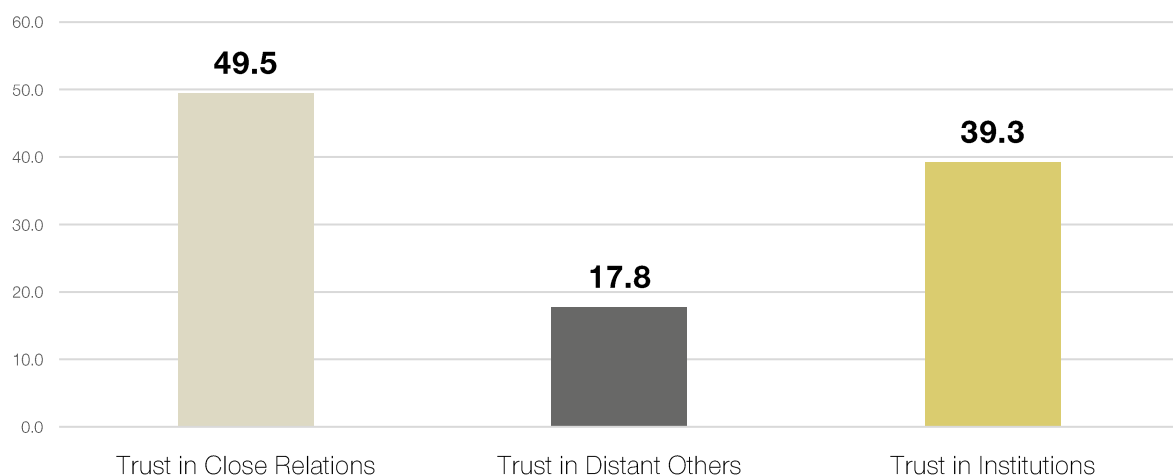
This pattern shows that trust in Türkiye continues to be concentrated primarily within the family–friends–neighbours circle. A score of 50 suggests that the immediate social environment remains an important source of trust and solidarity, yet it also signals a gradual weakening. Social bonds have not collapsed, but there is a growing perception that this sphere no longer functions as an automatic or unconditional safety net.

The most striking finding is the extremely low level of trust in distant others, with an index score of just 18. Derived from responses to the question *“How much do you trust someone you do not know at all?”*, this result places Türkiye well below high-trust societies. According to the World Values Survey, around six out of ten people in Nordic countries say that *“most people can be trusted”*, compared with roughly 25% in countries such as France and Italy, and as low as 5% in Colombia and Peru. Türkiye's overall trust profile aligns more closely with the group of upper-middle-income but low-trust societies.

In practical terms, this means that a new brand, a new political movement, or a new digital platform enters the public sphere as an actor that is not trusted by default. Gaining trust therefore requires exceptionally strong mechanisms of transparency, consistency, and credible reference points.

The institutional trust index, at 39 points, sits between these two extremes. Based on responses to questions such as *“Do state or official institutions provide sufficient support to citizens in difficult times?”*, this score indicates that institutional trust remains in the lower-middle range. According to the OECD Trust Survey (2023), the average share of people across member countries who report high or moderate trust in the national government is around 39%. Türkiye's institutional trust score is broadly consistent with this global picture. The state is not perceived as an entirely excluded actor, yet in moments of crisis the dominant reflex remains not *“institutions will protect me”*, but rather *“I will first rely on my family and close circle.”*

Trust Index Scores



THE TRUST MAP IN TÜRKİYE

When these three indices are read together, they outline a clear framework for Türkiye:

Trust is anchored at the micro level.

Family, friends, and close social circles remain the primary sources of trust. This helps explain why strategies built around peer recommendations, referrals, neighbourhood ties, and family networks continue to be highly effective for banks and brands.

At the macro level, trust is cautious and selective.

Institutions are neither fully excluded nor readily trusted. Transparency, fairness, and performance during times of crisis are decisive factors that can rapidly move institutional trust upward or downward.

Generalised trust is weak.

The extremely low level of trust in unfamiliar others is one of the key drivers of both social polarisation and the toxic climate in digital spaces. Building new forms of social consensus, revitalising shared public spaces, and fostering hybrid communities that combine physical and digital interaction will be among the most critical policy priorities in the period ahead.

Methodological Notes

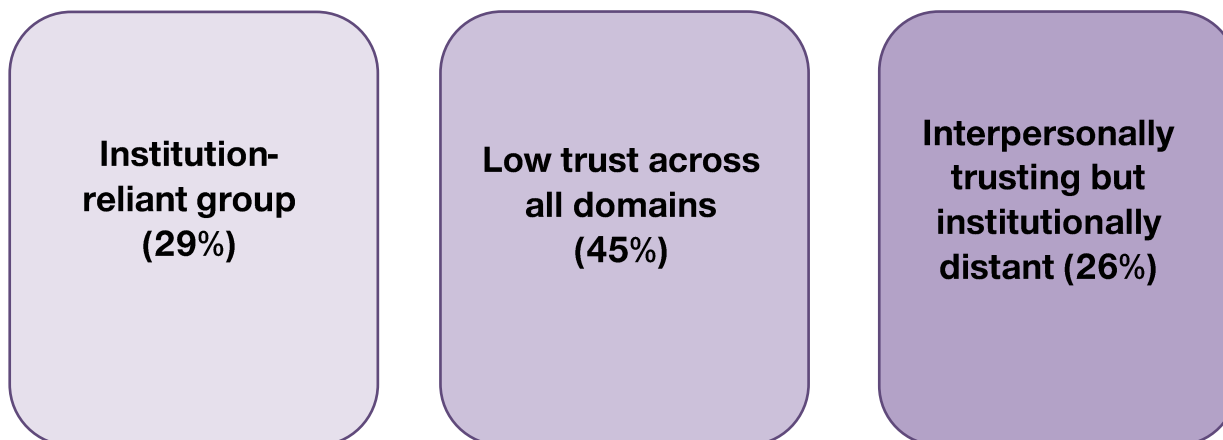
The Trust in Close Relations Index was constructed as a composite indicator combining responses to questions measuring trust in people within one's immediate environment, perceived weakening of friendship, neighbourhood, and kinship ties, ability to receive help in times of difficulty, and having people with whom one can share personal feelings. To assess whether the scale was statistically coherent and unidimensional, Principal Component Analysis (PCA) was applied. The analysis yielded a Kaiser–Meyer–Olkin (KMO) measure of sampling adequacy of 0.65, while Bartlett's test of sphericity was statistically significant ($\chi^2 = 588$; $p < 0.001$). A single factor emerged, explaining approximately 47% of the total variance.

The Trust in Distant Others Index was calculated by rescaling responses to the question *"How much do you trust a person you have never met before?"* onto a 0–100 scale.

Similarly, the Trust in Institutions Index was derived by rescaling responses to the question *"Do state or official institutions provide sufficient support to citizens in difficult times?"* onto the same 0–100 scale.

TRUST PROFILES: THREE CORE TYPES OF TRUST IN TÜRKİYE

When the three indices trust in close relations, trust in distant others, and trust in institutions—are evaluated jointly, we conducted a clustering analysis that groups voters into three main trust profiles.



1. Institution-reliant group - (29%): This group exhibits moderate trust in close social circles and relatively high trust in institutions. For these voters, the primary actor deemed trustworthy is the state and official institutions. In times of crisis, their dominant reflex is shaped by the belief that *“the state will take care of it”* and that *“the system will provide a solution.”*

2. Low trust across all domains - (45%): This is the largest cluster. The prevailing sentiment within this group is *“I cannot trust anyone.”* Trust in family and friends is weak, trust in unfamiliar individuals is almost nonexistent, and the state and institutions are viewed with pronounced scepticism.

3. Interpersonally trusting but institutionally distant - (26%): This group exhibits relatively high trust in people, including unfamiliar individuals, while expressing limited trust in the state and official institutions. The dominant sentiment can be summarised as *“I trust society and individuals, but not the system.”*

Methodology: How Were the Trust Profiles Segmented?

Respondents were segmented using k-means clustering analysis based on their scores on the Trust in Close Relations, Trust in Distant Others, and Trust in Institutions indices.

The resulting cluster centroids were then examined, and the clusters were labelled as follows:

- 1. Institution-reliant,**
- 2. Low trust across all domains,**
- 3. Interpersonally trusting but institutionally distant.**

TRUST PROFILES BY VOTER GROUPS

Among AK Party voters, 56.6% fall into the *institution-reliant* cluster. This indicates that this electoral base continues to view the state and official institutions as the primary anchors of trust. Supporters of the MHP display a broadly similar, though somewhat more fragmented, pattern. At the core of the governing bloc lies a strong constituency whose dominant belief is that “*the state will resolve problems*” and that institutions can be relied upon. The emotional needs of this group centre on order, stability, and the protective role of the state.

Among CHP voters, 60.6% are clustered within the *low trust across all domains* group. A comparable pattern is observed among DEM Party voters. These electorates live with low levels of trust not only toward the government, but also toward the state, institutions, and often toward one another. For this audience, conventional rhetoric centred on “*strengthening institutions*” may resonate poorly, as institutions themselves are widely perceived as already compromised. The frames most likely to gain traction are those emphasising accountability, transparency, justice, and concrete, everyday micro-solutions.

The İYİ Party, by contrast, presents a hybrid profile, simultaneously reflecting *two different Türkiyes*. This suggests that the party brings together two distinct constituencies: one that is broadly disenchanted and sceptical, characterised by low trust in institutions; and another that trusts society and individuals but remains distant from the state and political parties, expressing a preference for a more civic, horizontal, and less hierarchical form of politics.

According to party vote cast in May 14, 2023 parliamentary election -%

	Institution-reliant	Low trust across all domains	Interpersonally trusting but institutionally distant
AK Party	56.6	24.7	18.8
CHP	10.2	60.6	29.3
MHP	30.2	43.0	26.7
İYİ Party	8.2	45.9	45.9
DEM Party	13.8	58.8	27.5
Other	15.1	58.1	26.9
AVERAGE	29.1	44.5	26.4

TRUST PROFILES: THREE CORE TYPES OF TRUST IN TÜRKİYE

Institution-reliant group (29%)

General Profile

This group places relatively high trust in the state and official institutions, while remaining cautious in its trust toward people. It is primarily driven by a search for order and stability. In times of crisis, the dominant reflex is the belief that *"the state will resolve the problem."*

Demographic Tendencies

Gender: Balanced distribution between women and men.

Age: Concentrated mainly among the 35–54 and 55+ age groups.

Income: More prevalent among households earning two minimum wages or above, with the highest concentration in the two to four minimum wage bracket.

Education: Present across all education levels from lower secondary school to university, with a slight increase among university graduates.

Employment status: The strongest concentration is observed among civil servants (63%), followed by the self-employed, the unemployed, and homemakers.

Core Mindset

If there is a structure that can be trusted, it is the state and official institutions. This group values rules and hierarchy, and tends to be uncomfortable with uncertainty and sudden change. It remains distant toward unfamiliar individuals, and requires strong references, formal credentials, visible logos, or licences before extending trust to new actors.

Low trust across all domains (45%)

General Profile

This group trusts neither people nor institutions, representing Türkiye's "chronically sceptical" segment. Trust is low at both the micro level (family and friends) and the macro level (the state and institutions).

Demographic Tendencies

Gender: Slightly higher representation among women (Women: 47% – Men: 42%).

Age: High across all age groups, with particularly strong concentrations in the 35–54 and 55+ cohorts, both around the 45% range.

Income: Highly concentrated among households earning one to two minimum wages (50–55%). The prevalence of this profile declines gradually as income levels rise.

Education: Distrust decreases as educational attainment increases.

Employment status: Most prevalent among employees working for others, the unemployed, retirees, and homemakers.

Core Mindset

A pervasive belief that "no one can be trusted" characterises this group, applying equally to the state, companies, and individuals. It is marked by high levels of burnout and resentment, coupled with low expectations for the future and a strong sense that "nothing will ever change." This creates a fertile ground for conspiracy narratives and the notion that "everyone is only looking out for their own interests."

Interpersonally trusting but institutionally distant (26%)

General Profile

This group places relatively high trust in society and individuals, while remaining distant from the state and official institutions. It represents a community oriented trust profile.

Demographic Tendencies

Gender: Slight male predominance (Men: 28.5% – Women: 24.0%).

Age: Most prevalent among the 18–34 age group (31%).

Income: Participation in this cluster increases as income levels rise.

Education: Particularly pronounced among university graduates and above (32.8%), with a strong presence also among high school graduates (29.6%).

Employment status: Most dominant among students (59%), followed by the self-employed.

Core Mindset

This group places strong trust in interpersonal relationships and communities. Friendships, neighbourhood ties, and online communities play a central role. It remains cautious toward the state and traditional institutions, with a tendency to distance itself from bureaucratic and political structures. It is more open to innovation, entrepreneurial initiatives, the platform economy, and civic initiatives.

TRUST PROFILES BY DEMOGRAPHIC CHARACTERISTICS

BY GENDER- %			
	Institution-reliant	Low trust across all domains	Interpersonally trusting but institutionally distant
FEMALE	28.6	47.3	24.0
MALE	29.6	41.8	28.5
AVERAGE	29.0	45.0	26.0
BY AGE- %			
	Institution-reliant	Low trust across all domains	Interpersonally trusting but institutionally distant
18-34	26.3	42.8	31.0
35-54	31.0	45.4	23.6
55 AND ABOVE	29.7	45.3	25.0
AVERAGE	29.0	45.0	26.0
BY INCOME -%			
	Institution-reliant	Low trust across all domains	Interpersonally trusting but institutionally distant
1 x Minimum wage	26.2	54.9	18.9
1-2x Minimum wage	25.2	50.8	24.0
2-3x Minimum wage	34.1	38.0	27.9
3-4x Minimum wage	32.8	36.0	31.2
4 above Minimum wage	29.7	29.0	41.3
AVERAGE	29.0	45.0	26.0
BY EDUCATION - %			
	Institution-reliant	Low trust across all domains	Interpersonally trusting but institutionally distant
Ortaokul mezunu ve altı	28.8	50.5	20.7
Lise mezunu	28.6	41.8	29.6
Üniversite mezunu ve üzeri	30.2	37.0	32.8
AVERAGE	29.0	45.0	26.0
BY EMPLOYMENT STATUS - %			
	Institution-reliant	Low trust across all domains	Interpersonally trusting but institutionally distant
Self-employed	34.0	37.9	28.1
Employees working for others	24.4	49.9	25.7
Civil servant	63.3	20.0	16.7
Unemployed	34.3	47.1	18.6
Retired	24.2	47.3	28.5
Student	9.1	31.8	59.1
Homemaker	32.0	43.1	24.8
AVERAGE	29.0	45.0	26.0

SENSE OF BELONGING TO SOCIETY

Looking at society as a whole, while a substantial share of the population still considers itself “*part of this society*,” approximately two out of every five people report that they rarely or never feel a sense of belonging in Türkiye. However, this sense of belonging is far from evenly distributed. As trust profiles and levels of societal burnout shift, the feeling of being “*inside*” or “*outside*” society diverges sharply.

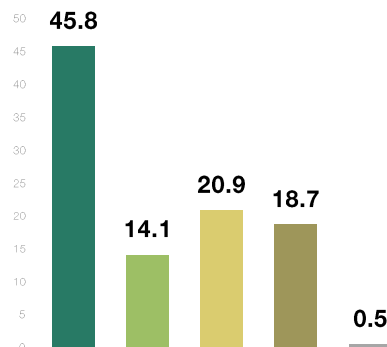
The institution-reliant group emerges as the most “*inside*” cohort in this regard. Those who place trust in the state and official institutions tend to position themselves in a more organic and integrated relationship with the country’s social core. Among the low trust across all domains group, the pattern is reversed. In this cluster, the share of respondents saying “*I always feel that I belong*” falls to around one third, while the proportion stating “*I do not feel a sense of belonging at all*” rises to nearly one third.

When burnout levels are taken into account, the relationship with belonging becomes even more pronounced. Among those experiencing very low societal burnout, almost everyone reports a strong sense of belonging, with no respondents stating that they feel no attachment to society. As burnout intensifies, this pattern gradually inverts. Individuals who are emotionally exhausted, overwhelmed by the national agenda, and unable to anticipate their future increasingly loosen not only their ties to the system, but also their connection to society as a whole.

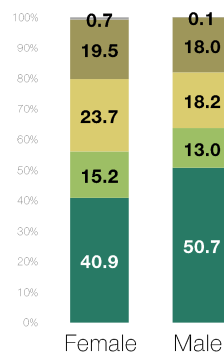
This part of the research serves as a critical warning for all actors, from politics to the private sector. Belonging is not a sentiment that can be explained solely by identity or party preference. It is directly shaped by where trust is directed and how burdensome everyday life has become. Repairing social bonds, rebuilding trust in institutions, and easing the individual’s emotional and material burden will be decisive in the period ahead, both for democratic resilience and for market strategies.

Do you feel like a part of society?

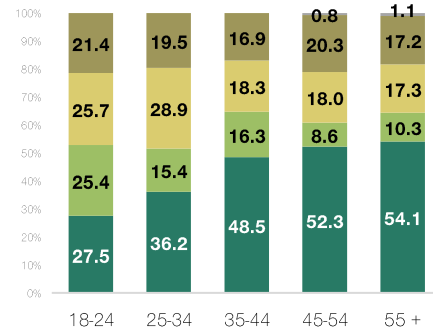
All voters - %



By gender-%



By age-%

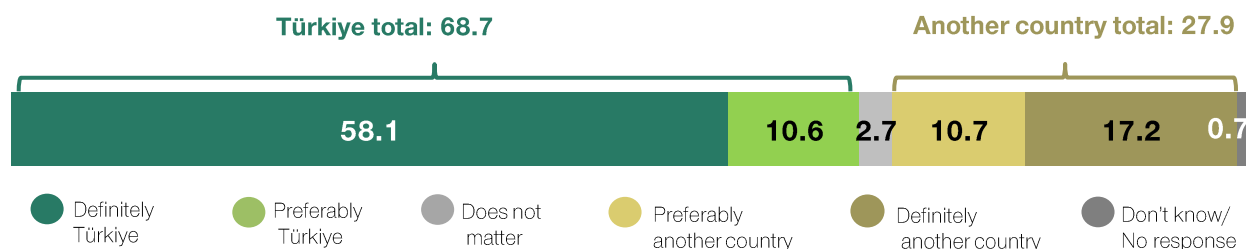


● Always
 ● Most of the time
 ● Rarely
 ● Never
 ● Don't know/No response

		Always	Most of the time	Rarely	Never	Don't know/No response	
TRUST PROFILES	Institution-reliant	67.5	15.9	12.7	3.6	0.3	100
	Low trust across all domains	32.1	10.8	26.5	30.1	0.4	100
	Interpersonally trusting but institutionally distant	46.4	18.3	20.5	14.7		100
BURNOUT LEVEL	Very low burnout	81.9	11.9	6.2			100
	Low burnout	56.3	23.8	12.7	7.1		100
	High burnout	38.1	14.7	30.3	16.8		100
	Very high burnout	26.6	7.5	25.4	39.5	0.9	100
	AVERAGE	45.9	14.1	20.9	18.8	0.3	100

PREFERRED COUNTRY OF RESIDENCE

If you had the opportunity, would you prefer to live in Turkey or in another country?



By age - %

	Türkiye total	Does not matter	Another country total	Don't know/No response	Total
18-24	47.1	9.6	43.3		100
25-34	52.5	3.3	44.2		100
35-44	76.4	2.3	21.3		100
45-54	73.5	0.6	24.3	1.6	100
55+	80.1	1.0	17.5	1.4	100
AVERAGE	68.7	2.7	27.9	0.7	100

		Türkiye	Does not matter	Another country	Don't know/No response	Tot.
TRUST PROFILES	Institution-reliant	88.7	0.6	10.7		100
	Low trust across all domains	52.3	1.9	45.3	0.5	100
	Interpersonally trusting but institutionally distant	73.7	4.0	20.9	1.4	100
BURNOUT LEVEL	Very low burnout	96.6		3.4		100
	Low burnout	87.3	4.7	8.0		100
	High burnout	67.9	3.9	28.2		100
	Very high burnout	40.9	1.2	55.8	2.1	100
	AVERAGE	68.7	2.7	27.9		100

In the overall picture, although two-thirds of society still state that they prefer to live in Turkey, the age breakdown reveals a very clear generational divide.

Among those aged 18–34, the share of respondents who want to stay in Turkey and those who would prefer to live in another country are almost evenly split. After the age of 35, the picture changes rapidly: in the 35+ groups, those who prefer to remain in Turkey form a clear majority. In other words, within the country's most productive and mobile generation, the sentiment of "I would leave if given the opportunity" is no longer an exception; it has become a mainstream option.

The trust profile table places this inclination toward migration within a meaningful analytical framework. **The tendency to consider leaving the country increases in parallel with institutional distrust and a broader sense of disenchantment.** While a core group that maintains trust in the state continues to preserve its attachment to the country, those with low confidence in institutions and a more sceptical outlook keep the "exit" option far more open.

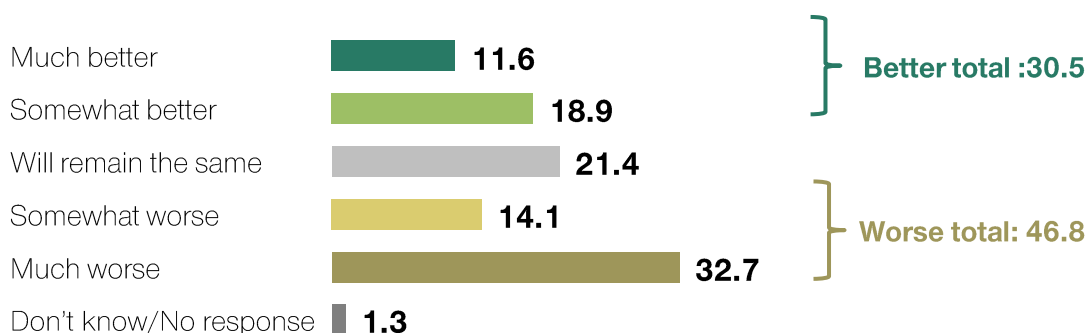
When levels of burnout are added to the analysis, the picture becomes even clearer. **Burnout emerges as a key variable shaping the future of the social contract between individuals and the country.** The implication for policymakers and the business community is straightforward: if Turkey seeks to retain its young and educated population and to repair social belonging, it must address not only economic indicators but also the deepening burnout and crisis of trust with equal seriousness. Indeed, data from TurkStat on brain drain among higher-education graduates show that the rate of emigration increased from 1.6% in 2015 to 2% in 2023, indicating that two out of every 100 university graduates leave the country within a short period of time.

WHAT KIND OF YEAR WILL TURKEY HAVE IN 2026?

Expectations regarding the country's trajectory in 2026 confirm the generally pessimistic public mood. Only 30.5% of respondents believe that Turkey will experience a better year in 2026, while 46.8% expect it to be a "bad year." A sizeable remaining group anticipates stagnation, stating that "not much will change."

In other words, the collective outlook points not toward improvement but toward a continuation of deterioration or entrapment. This expectation is most strongly differentiated by trust profiles and levels of burnout. As burnout intensifies, optimism about the country declines in an almost linear fashion. Similarly, pessimism rises markedly among lower-income groups, while higher income levels are associated with a more cautious optimism; nevertheless, in no income group do optimists constitute a majority.

In your opinion, how will 2026 be for Turkey's overall situation?



		Better	Will remain the same	Worse	Don't know/No response	Tot.
TRUST PROFILES	Institution-reliant	65.5	18.6	15.0	1.0	100
	Low trust across all domains	13.8	18.3	67.5	0.4	100
	Interpersonally trusting but institutionally distant	22.7	26.3	50.0	1.1	100
BURNOUT LEVEL	Very low burnout	84.2	10.2	2.8	2.8	100
	Low burnout	49.4	26.9	22.9	0.8	100
	High burnout	14.4	28.7	56.3	0.6	100
	Very high burnout	3.9	16.1	79.1	0.9	100
	AVERAGE	30.5	46.8	32.7	1.3	100

By income - %

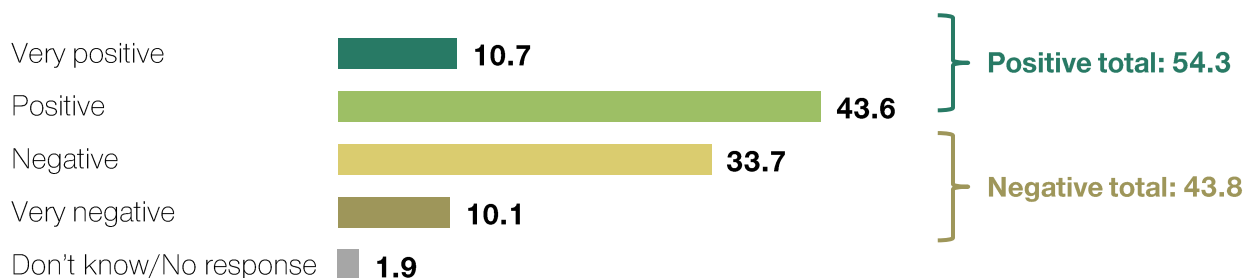
	Better Total	Will remain the same	Worse Total	Don't know/No response	Tot.
1 x minimum wage	23.3	20.9	54.6	1.2	100
1-2x minimum wage	31.6	24.6	42.8	1.0	100
2-3x minimum wage	32.8	21.0	44.9	1.3	100
3-4x minimum wage	34.2	17.0	48.8		100
4 above minimum wage	35.5	21.9	41.9	0.7	100
AVERAGE	30.5	21.4	46.8	1.3	100

PERSONAL EXPECTATIONS FOR 2026

When it comes to 2026, the picture differs from the national outlook and reflects a more personal sense of optimism. Just over half of society (54%) believe that the new year will be positive for their own lives. In other words, even when people are pessimistic about Turkey's overall trajectory, they still perceive room for manoeuvre and a potential for recovery within their own micro-worlds.

Among those earning the minimum wage or less, personal expectations remain negative. As income levels rise, however, the sentiment of *"I can somehow manage on my own"* becomes increasingly pronounced. Within this framework, 2026 is not seen as a year of recovery for the country, but rather as a year of recovery and renewed attempts for individuals. For politics and the business community, this points to a clear implication: macro-level narratives of improvement must be supported by tangible micro-level gains that are directly felt in individuals' daily lives.

How would you describe your expectations for your own life in 2026?



		Positive	Negative	Don't know/ No response	Tot.
TRUST PROFILES	Institution-reliant	85.1	12.7	2.3	100
	Low trust across all domains	34.0	65.3	0.6	100
	Interpersonally trusting but institutionally distant	56.3	43.0	0.7	100
BURNOUT LEVEL	Very low burnout	96.0	3.4	0.6	100
	Low burnout	86.9	11.1	2.0	100
	High burnout	47.4	50.2	2.	100
	Very high burnout	14.4	83.5	2.1%	100
	AVERAGE	54.2	43.8	1.9	100

By income - %

	Positive total	Negative total	Don't know/ No response	Tot.
1 x minimum wage	39.1	58.5	2.4	100
1-2x minimum wage	53.6	43.7	2.7	100
2-3x minimum wage	59.1	40.9		100
3-4x minimum wage	71.3	27.8	0.9	100
4 above minimum wage	64.9	33.3	1.8	100
AVERAGE	54.3	43.8	1.9	100

CONCLUSION: WHAT DO SOCIETAL BURNOUT AND TRUST TELL US?

The picture that emerges at the end of 2025 indicates that a distinct “emotional climate” has taken shape, extending beyond economic indicators. With a score of 59, Turkey falls within the high-burnout range; roughly two-thirds of society live under the combined pressure of an overwhelming agenda, anxiety about the future, and a pervasive sense of helplessness. This burden is particularly pronounced among women, young people, low-income groups, students, and the unemployed. The national agenda has increasingly become a source of stress rather than information; one in every two individuals reports a need for psychological support, yet this need is largely met within the family and remains mostly invisible.

The trust map is characterised by relatively high trust in close social circles, limited trust in institutions, and very low trust in strangers; nearly half of voters fall into the category of those who are “distrustful of almost everything.” This fragile ground also weakens the sense of belonging and the desire to remain in the country: among the young and educated, the sentiment of *“I would leave if given the opportunity”* is no longer an exception but a mainstream option. Nevertheless, while individuals tend to preserve a moderate optimism regarding their own lives, they view the country's future with considerably greater pessimism.

For this reason, the primary task for policymakers and the private sector is not merely to focus on growth or inflation targets, but to design interventions that reduce burnout, strengthen trust and predictability, and deliver small yet tangible improvements in everyday life.