



GLOBAL CONSUMER INSIGHTS

GLOBAL LIFESTYLE MONITOR: TURKEY

APPAREL SPENDING

Turkish consumers spent \$28.3 billion on clothing in 2017, or \$349 per person. Despite current economic issues, clothing spending is expected to grow 91% by 2030, outpacing population growth. Seize opportunities in this expanding market with clothing made from natural fibers and investment in online shopping resources.



KEY TRENDS



How They Shop: Combine in person experiences with investment in digital platforms to meet a growing interest in online shopping.

What They Shop: Meet demands for quality and comfort with clothing made from natural, cotton-rich fabrics.

Spotlight on Child-Free Consumers: As fertility rates in Turkey shrink, target this growing market segment with performance clothing made of natural fibers.

FINANCIAL OUTLOOK



OPTIMISTIC

Turkey

Global

50%

56%

PESSIMISTIC



Turkey

Global

9%

11%

*"Neither Optimistic/Pessimistic" not shown

GLOBAL LIFESTYLE MONITOR: TURKEY

HOW THEY SHOP

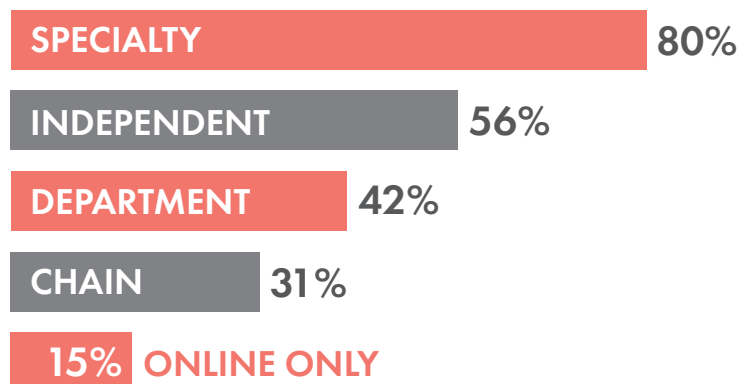
Turkish consumers have a growing interest in shopping online. Over two-thirds (69%) have used the internet to browse or buy clothing, but with just 58% of the population using the internet regularly (weekly or more)¹ lack of internet access stops many from shopping online. Researching clothing (75%) and comparing prices (42%) are the top uses of the internet for shopping, as consumers gather inspiration in person from other people (80%) and prefer to make purchases in-store. Invest in online resources to help plan in-store shopping trips.

SHOPPING JOURNEY

Consumers who prefer shopping in-store vs. online



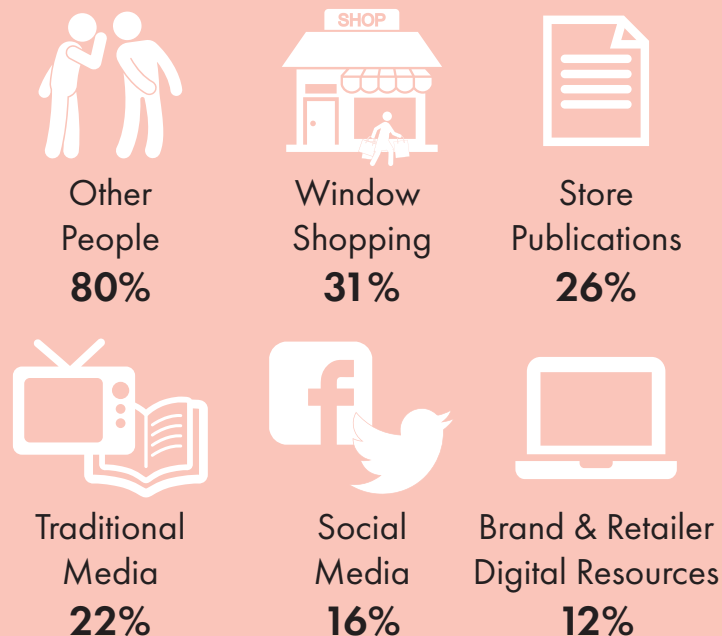
RETAIL STORES SHOPPED FOR CLOTHING



49%

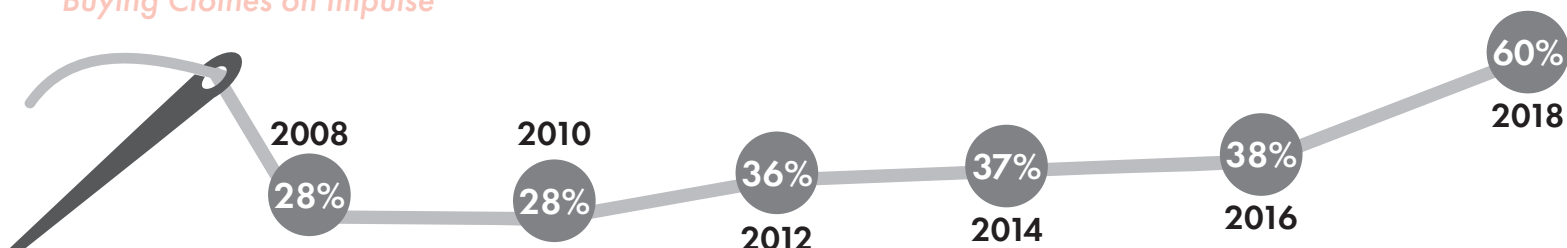
Shop online at least once per month.

SOURCES FOR CLOTHING IDEAS



APPAREL SHOPPING HABITS

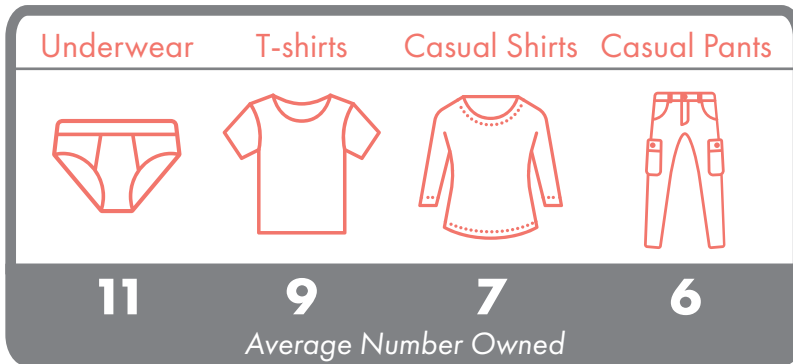
Buying Clothes on Impulse



WHAT THEY SHOP

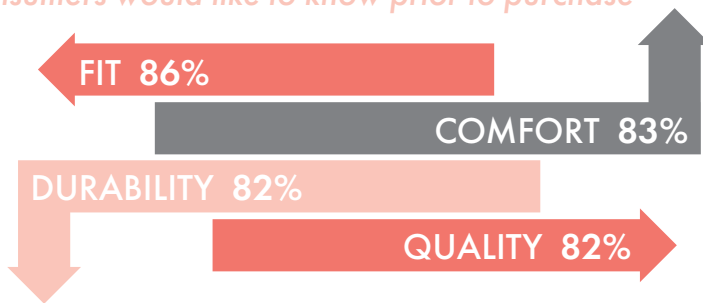
Turkish consumers look for casual clothing that provides fit, comfort, durability, and quality. Three-quarters will pay more for quality, up from 55% just four years ago. Natural fibers are important to Turkish consumers, as over two in three prefer cotton-rich fabrics for their most-worn clothing, and many prefer natural fibers such as cotton, silk, and linen for dress shirts, pants, and pajamas. Promote natural and cotton-rich fabrics with the comfort, durability, quality, and fit Turkish consumers seek.

TOP ITEMS OWNED

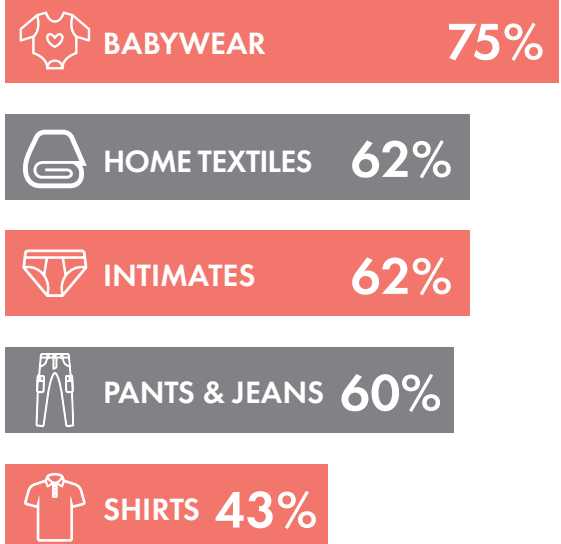


PRIMARY PURCHASE DRIVERS

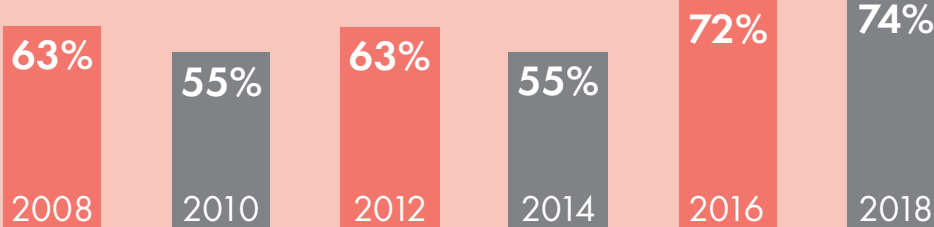
Consumers would like to know prior to purchase



COTTON AS PREFERRED FIBER



PAY MORE FOR BETTER QUALITY

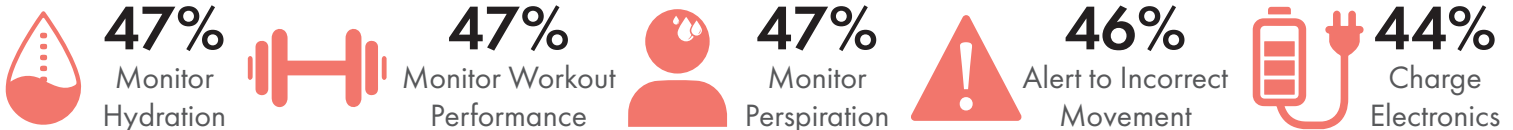


68%

prefer cotton or cotton blends for their most-worn clothing

PERFORMANCE APPAREL

Likely to Purchase




SPOTLIGHT

CHILD-FREE HOUSEHOLDS




32%
HOUSEHOLDS
WITHOUT
CHILDREN²

FERTILITY RATE



5.8
1967

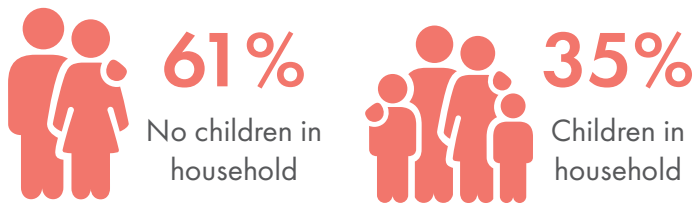


2.1
2017

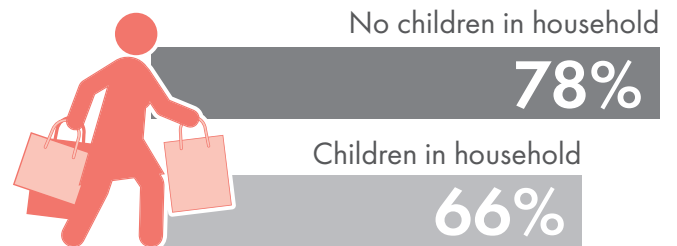
births per woman³

As Turkey has modernized, its fertility rate has seen a sharp decrease for 5.8 births per woman in 1967 to 2.1 births in 2017. Increased educational and career opportunities for Turkish women has led many – particularly those in urban areas – to delay or forego parenthood, such that one-third (32%) of Turkish households do not include children. Despite fertility declines, 27% of Turkey's population is under 15, higher than E.U. and U.S. proportions³, indicating that children remain a strong presence in Turkish society and in the lives many consumers in these child-free households. These consumers are much more optimistic about their finances and are more likely to love or enjoy clothes shopping. Target this growing consumer base with performance clothing made with high quality, natural fibers such as cotton.

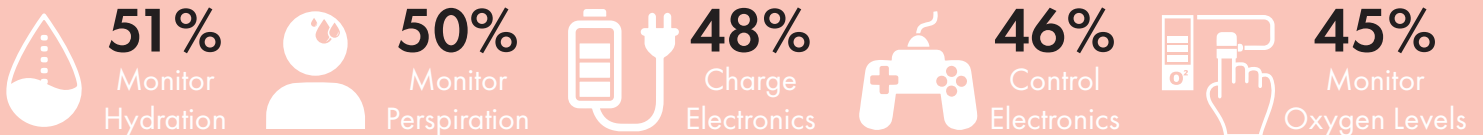
OPTIMISTIC ABOUT PERSONAL FINANCES



LOVE OR ENJOY CLOTHES SHOPPING



PERFORMANCE APPAREL Likely to Purchase



RETAIL STORES SHOPPED FOR CLOTHING Households without children prefer:



58%

OF CONSUMERS IN CHILD-FREE HOUSEHOLDS AGREE THAT BETTER QUALITY CLOTHES ARE MADE FROM NATURAL FIBERS, SUCH AS COTTON.

Source: Cotton Council International and Cotton Incorporated's Global Lifestyle Monitor Survey, a biennial consumer research study. In the 2018 survey approximately 10,000 consumers (i.e. 1,000 consumers in 10 countries) were surveyed.
External Source: ¹Euromonitor International, ²Turkish Statistical Institute, ³World Bank.

