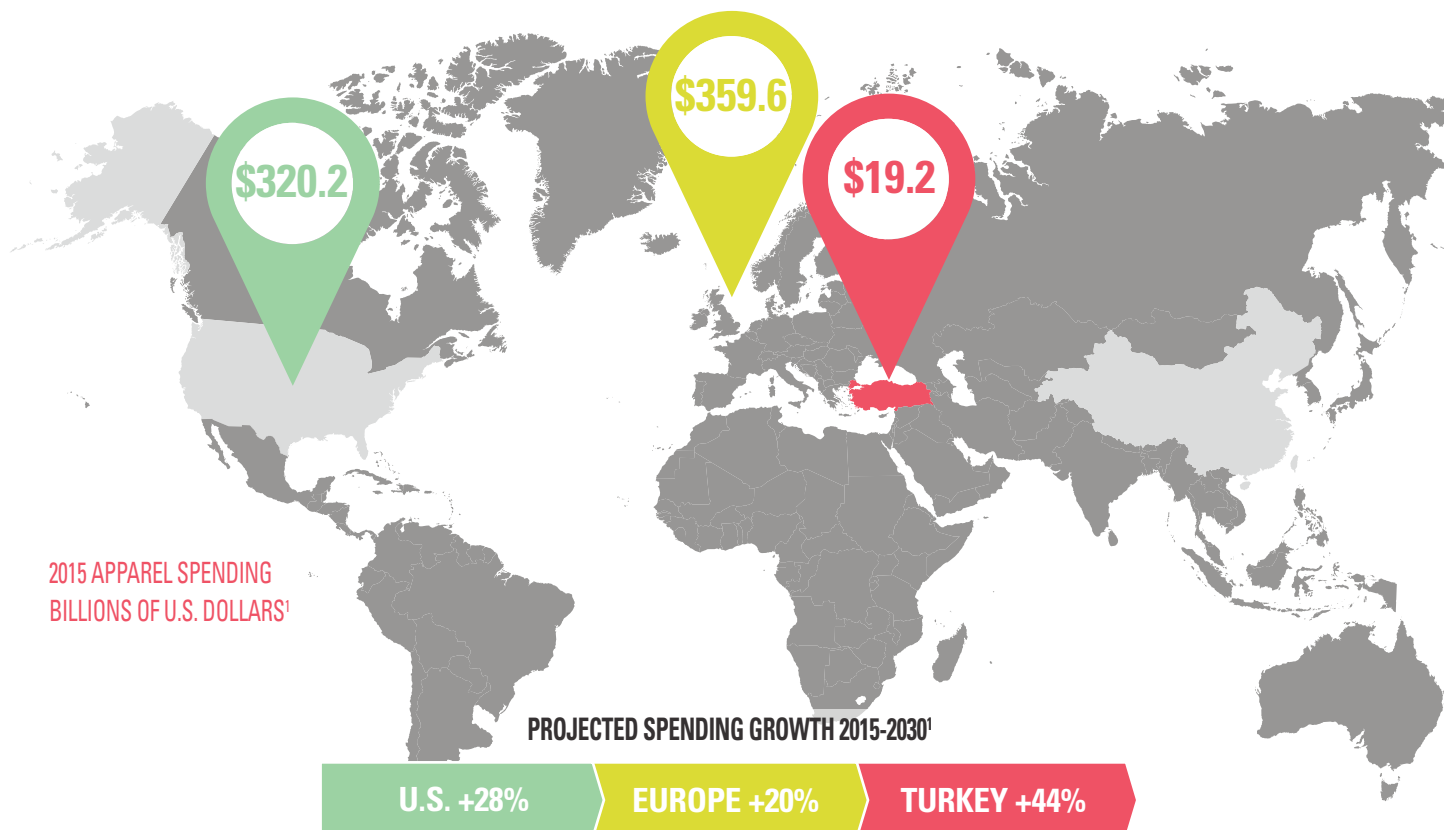


# GLOBAL CONSUMER INSIGHTS

## GLOBAL LIFESTYLE MONITOR: TURKEY



### APPAREL SPENDING



### KEY TRENDS



#### SPENDING

Apparel spending in Turkey is projected to grow nearly 50% over the next 15 years.



#### SHOPPING

Trends toward organized retailers, increased shopping frequency, and willingness to trade-up in purchases bode well for spending on clothes.



#### OMNICHANNEL

Apparel brands and retailers can develop digital experiences that provide detailed product information to help alleviate shoppers' tactile concerns.



#### SUSTAINABILITY

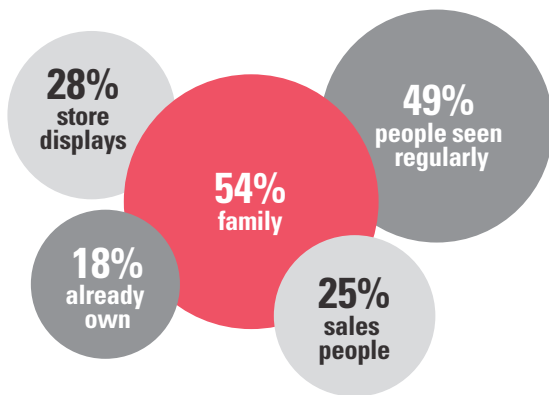
Turkish shoppers find cotton clothing as best able to meet their needs for comfort, reliability, and sustainability.

## GLOBAL LIFESTYLE MONITOR: TURKEY

## APPAREL SHOPPING ATTITUDES &amp; HABITS

Due to intense retail development over the past fifteen years, Turkish shoppers have shifted away from unorganized outlets such as independent stores and street markets towards specialty retailers. Contrary to the U.S. and Europe, Turkish consumers have increased their shopping frequency and desire to trade-up. These trends bode well for apparel brands willing to market their products' quality and luxury features to Turkey's modern shoppers.

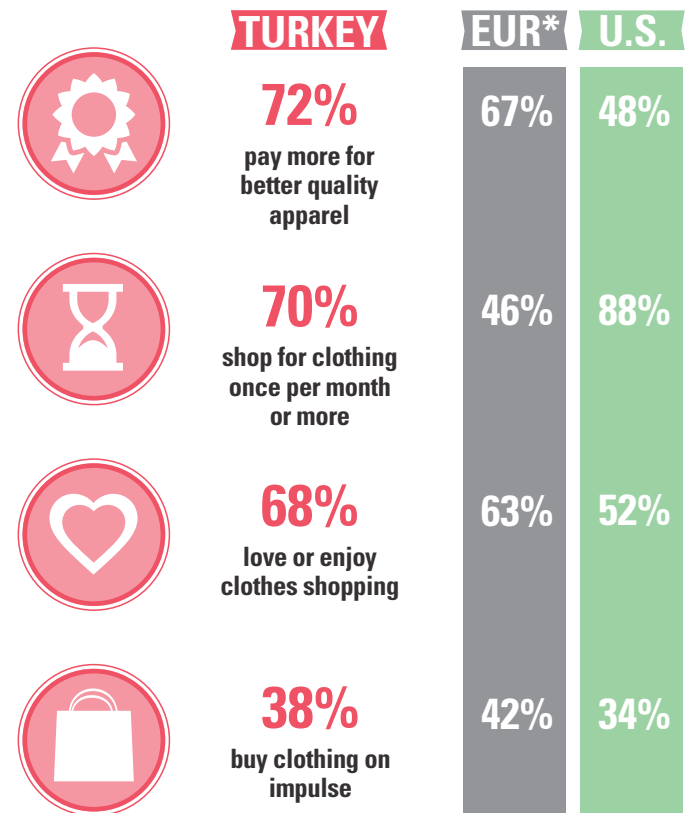
## TOP SOURCES OF CLOTHING IDEAS



## RETAIL CHANNELS SHOPPED MOST OFTEN

	TUR	EUR*	U.S.
SPECIALTY STORES	58%	19%	10%
DEPARTMENT STORES	16%	11%	15%
INDEPENDENT STORES	13%	7%	1%
STREET MARKETS	4%	0%	0%
CHAIN STORES	2%	24%	23%
OTHER	7%	40%	51%

## APPAREL SHOPPING HABITS



\* INCLUDES FIGURES FOR U.K., GERMANY & ITALY

 7 in 10 consumers say blogs are their top online source of clothing inspiration.

## TOP 5 CLOTHING PURCHASE DRIVERS

comfort



price



durability



fit



color



## OMNICHANNEL SHOPPING

Although online shopping frequency and internet penetration remain low in Turkey compared to other markets, online apparel and footwear spending is projected to nearly double in the coming years. As online apparel shopping remains in its infancy in Turkey, traditional apparel brands and retailers can develop digital experiences that provide detailed product information to help alleviate shoppers' tactile and security concerns regarding online shopping.

### TOP CONCERNS WHEN SHOPPING FOR CLOTHES ONLINE



**86%**

information  
privacy



**85%**

card security



**85%**

clothing quality



**81%**

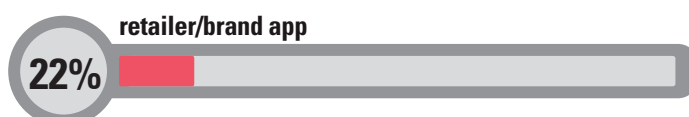
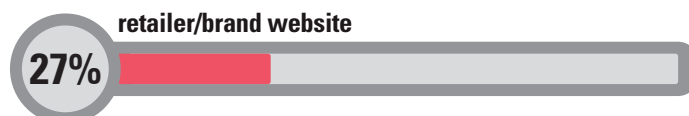
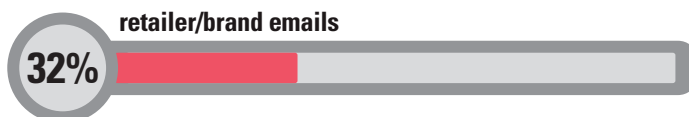
return policies



**78%**

shipping time

### WHERE CONSUMERS BEGIN THEIR ONLINE SHOPPING JOURNEY



### FACTORS THAT COULD INFLUENCE ONLINE SHOPPING DECISIONS

**66%** detailed size information

**64%** fiber content information

**62%** customer reviews

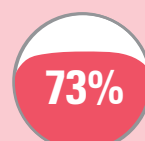
**60%** detailed fit information

**60%** laundering information



Online apparel & footwear sales are projected to grow 81% from \$492MM in 2015 to \$889MM by 2020<sup>1</sup>.

### 35% SHOP ONLINE & USE THE INTERNET TO...



research clothing



compare prices



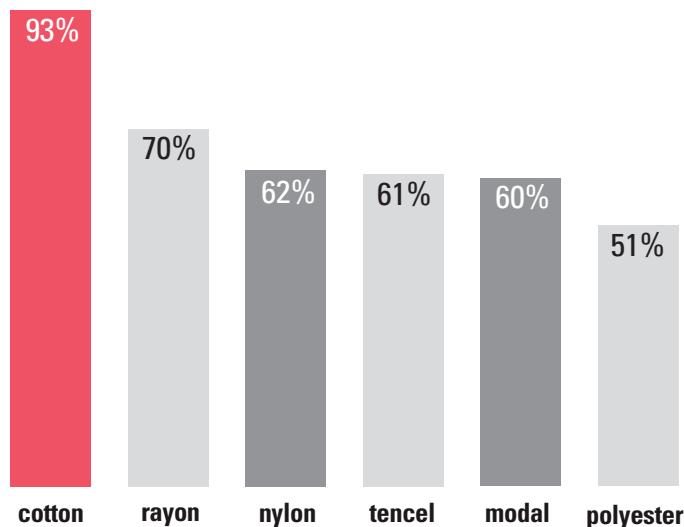
browse styles

## GLOBAL LIFESTYLE MONITOR: TURKEY

## SEEKING SUSTAINABLE APPAREL

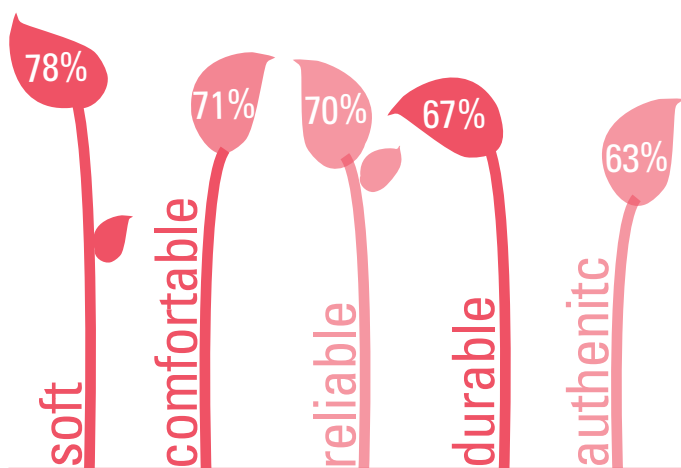
Consumers in Turkey are more likely than European and U.S. consumers to seek out sustainable clothing and more likely to blame the industry for non-sustainable apparel. They also find cotton clothing as best able to meet their needs for comfort, reliability, and sustainability. In fact, Turkish consumers are significantly more likely to consider cotton as safe for the environment when compared to manmade fibers such as polyester and rayon.

## % SAYING THE FOLLOWING FIBERS ARE SAFE FOR THE ENVIRONMENT



73% of consumers prefer cotton-rich clothing.

## COMPARED TO CLOTHING FROM MANMADE FIBERS, COTTON IS VIEWED AS THE MOST...



## TOP SUSTAINABILITY/SOCIAL CONCERNS



CHILD  
LABOR



FOOD  
ADDITIVES



WATER  
SCARCITY



GLOBAL  
WARMING

## SUSTAINABILITY...

when it's lacking, I blame the industry.

82%

is something I seek out in my apparel.

64%

is important in my apparel purchase.

57%

## TOP CONCERNS REGARDING COTTON PRODUCTION

1. Amount of chemicals & pesticides used
2. Amount of water used
3. Greenhouse gas emissions



## COTTON SUSTAINABILITY FACTS

U.S. cotton farmers have reduced pesticide applications by **HALF** over the past 30 years.

Over the past two decades, U.S. cotton farmers have improved water efficiency by approximately 80%.

DISCOVER WHAT COTTON CAN DO<sup>SM</sup> at [CottonToday.CottonInc.com](http://CottonToday.CottonInc.com).



**Source:** Cotton Council International and Cotton Incorporated's *Global Lifestyle Monitor Survey*, a biennial consumer research study. In the 2016 survey, approximately 10,000 consumers (i.e., 1,000 consumers in 10 countries) were surveyed. Cotton Incorporated's *Lifestyle Monitor*<sup>TM</sup> Survey, an ongoing consumer survey that interviews 6,000 U.S. consumers annually. External Source: Euromonitor International<sup>1</sup>