



**mila:**

# **TURKEY**

LAND OF CONTRASTS

**2016 EDITION**

A country profile by  
**Melina F. Nardi**

in collaboration with DS Entegre İletişim Çözümleri



# ABOUT THIS WORK

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This study is the result of the compilation of more than 120 local and international sources. It balances statistical and analytical data from official institutions, research groups, recognized newspapers, expert analysis and ethnographic studies.

In an effort to create an analysis as free of objective opinions, censorship and prejudice as possible, each subject was researched respecting the following 3 principles:

- triangularity of information (soft data, hard data, comparative data)
- cross-checking of data and comparison between sources
- credibility principles: official and traceable sources only

Finally, this presentation is a work-in-progress which is intended to be constantly completed and updated. Users are welcome to make requests for an analysis of specific topics and to contribute with their own data.



**Melina F. Nardi**

Strategic Director and co-founder of Mila Branders SL

A graduate of George Mason University (USA) where she obtained her MBA, Melina also holds a Bachelor in Arts & Communication and Masters in International Cooperation from Bologna University (IT).

Melina has been working in the field of Communication and Marketing since 2006, first for NGOs in Germany, Palestine and USA. After obtaining her MBA she moved to Chile and worked as Strategic Planner for DDB, thus starting her specialization in Branding & Marketing Strategy.

Since 2011 she has established herself as an expert communication strategist for the biggest local and global brands around the world.

After working for several years in Istanbul as Strategy Director for DS Entregre İletişim Çözümleri, Melina has now settled in Valencia, Spain where she started her own consulting and creative agency, Mila Branders.



## GOVERNMENT:

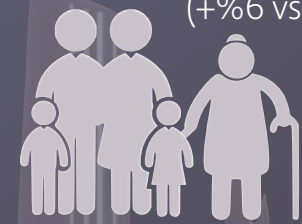
SECULAR REPUBLICAN  
PARLIAMENTARY  
DEMOCRACY

FOUNDED IN  
**1923**



**80** MILLION  
TURKISH PEOPLE

**22** MILLION  
HOUSEHOLDS  
(+%6 vs PY)



**2** MILLION  
STRAY CATS



**91%**  
URBANIZATION  
RATE

**61%**  
DIGITALIZATION  
RATE

30.000  
Döner  
shops

**#1**

FAVORITE  
FAST FOOD



**#1**

YOGURT  
EATERS



**#1**

TEA DRINKERS  
IN THE  
WORLD



3kg per  
capita  
per year

## THE RISE OF CIVILIZATION



## THE TESPIH

Much more than  
a religious item,  
the Tespih has  
become a  
cultural symbol  
of many usages



## AYASOFYA

The Byzantin Church  
that changed the face of  
Islamic architecture



## THE NAZAR BONCUGU

The blue evil  
eye charm is  
traditionally  
used against  
bad luck



"By default"  
religious  
attribution.

## THE OTTOMAN TULIP

Every year in April the Istanbul  
Tulip Festival celebrates the  
blossoming of million of tulips



# COUNTRY OVERVIEW

## BRIDGE BETWEEN TWO WORLDS



TURKEY CULTURE  
& TOURISM LOGO

**Turkey**  
Discover  
the potential

TURKEY COMMERCE  
& EXPORTS LOGO

Sources:  
[http://www.worldometers.info/  
world-population/turkey-population](http://www.worldometers.info/world-population/turkey-population)  
CIA World Factbook  
Euromonitor, World Bank





**DEMOGRAPHICS**

**DEMOGRAFIK BİLGİLER**







# ETHNIC GROUPS

!!!

This is not a DEMOGRAPHIC map. It reflects the country regional genetic pool but does not account for migrations nor represent its demographic dispersion.

AEGEAN SEA

BLACK SEA



MEDITERRANEAN SEA



UP TO  
**800.000**  
AZERIS

Azeris the 2nd most numerous Turkic ethnic group after the Turks. They are also found in Iranian Azerbaijan and the Republic of Azerbaijan. They are mostly Shi'ites

UP TO  
**15 MILLION**  
KURDS

ESTIMATED TOTAL  
based on KONDA surveys  
and TÜİK statistics

**1 MILLION**  
ZAZAS

Although they have their own language, Zazas have typically been associated with Kurds. It is estimated that they constitute up to 10% of the population registered as Kurdish.

## TURKIFICATION

relates to the process of assimilation of Turkey's indigenous population during the Seljuk and Ottoman empires through religious conversion, cultural and linguistic assimilation and interethnic relationships.



# 'TIS ALL ABOUT THE 'STACHE

## WHEN YOUR POLITICAL VIEWS ARE WRITTEN ON YOUR FACE

The Ottoman mustache and Fez have become the symbol of Turkish men, despite only being used by a very small percentage of society in the past 100 years.



### RIGHT-WING SYMBOLISM

Facial hair is not just about fashion in Turkey, where a large, thick walrus-style mustache can mark a man as a leftist and a neatly trimmed almond-shaped one can brand him a conservative.

### LEFT-WING SYMBOLISM

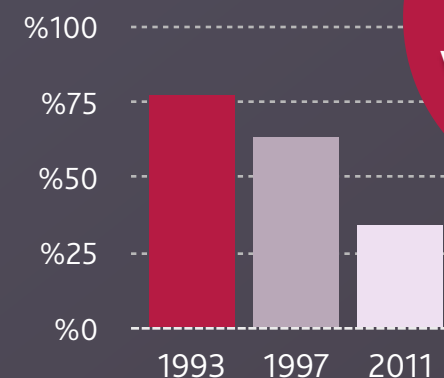
SOURCES:  
Styles of Turkish Moustaches, Margaret Hagan  
What Your Facial Hair Says About Your Politics, In Turkey, AJ+  
Facial hair in Turkish politics: A tale of mustaches and men  
Hürriyet Daily News | 8/6/2010  
[http://www.turkiyeyianlamakilavuzu.com/Turkiyeyi\\_Anlama\\_Kilavuzu\\_EKitap.pdf](http://www.turkiyeyianlamakilavuzu.com/Turkiyeyi_Anlama_Kilavuzu_EKitap.pdf)

## HAIR TOURISM

Unlike Turkish men, Middle-Eastern men are increasingly seeking mustache implants in order to appear more manly, mature and wise.

**250**  
clinics offering mustache transplants in Istanbul alone.

### THE SLOW DISAPPEARANCE OF THE 'STACHE



### PREFERRED SHAVING STYLE

OTTOMANIST

NATIONALIST  
(ÜLKÜCÜ)

CONSERVATIVE  
(ALMOND)

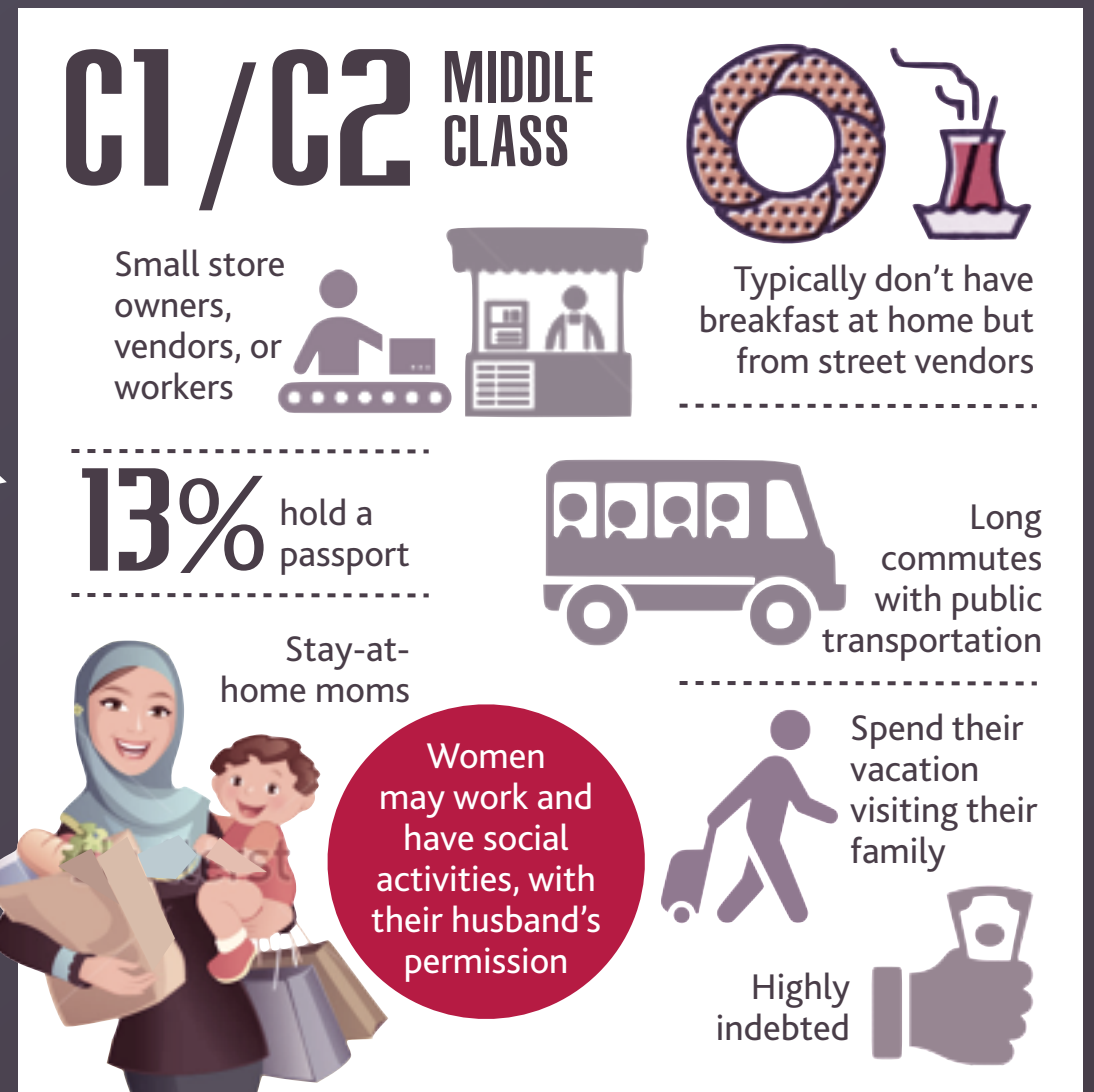
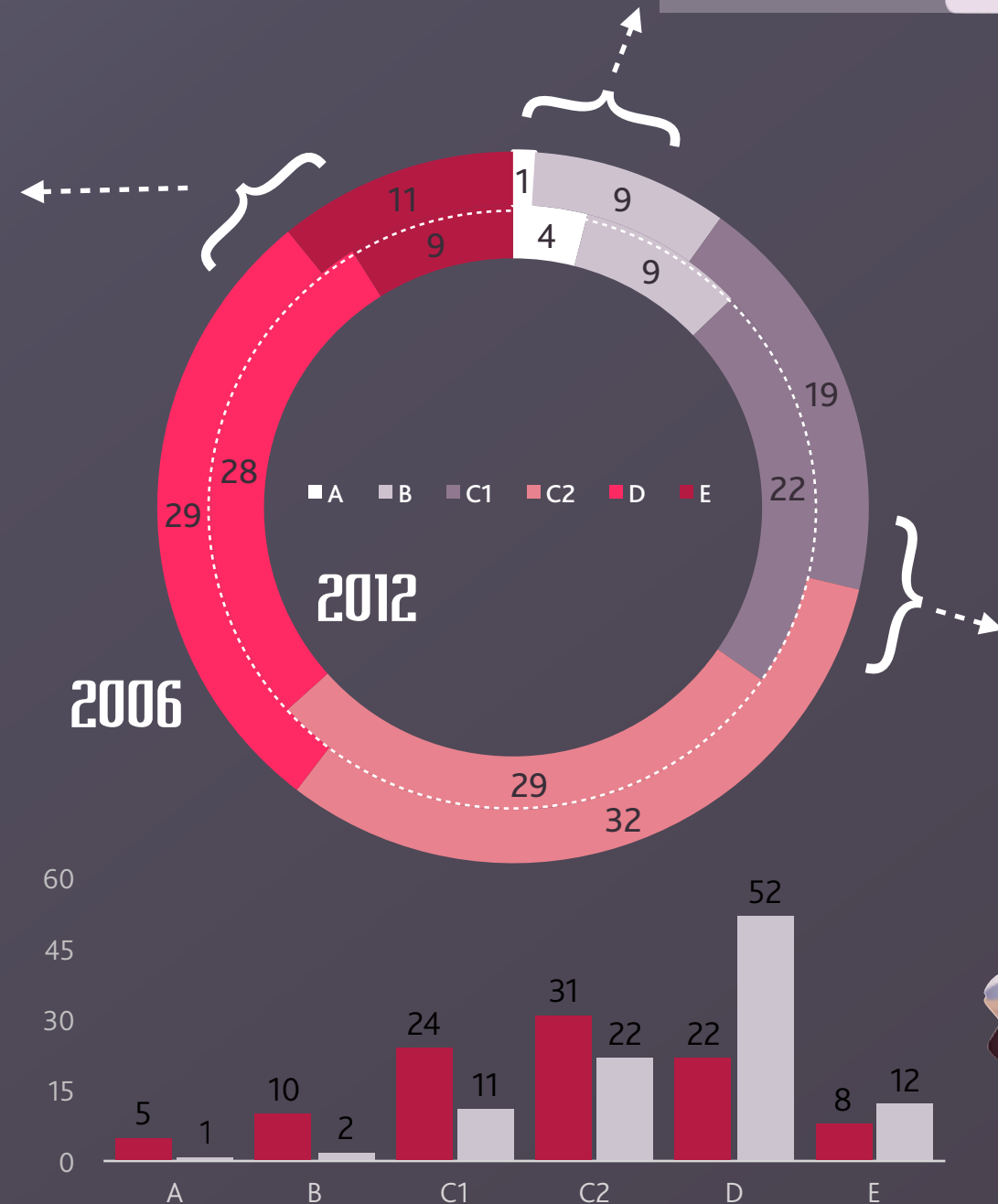
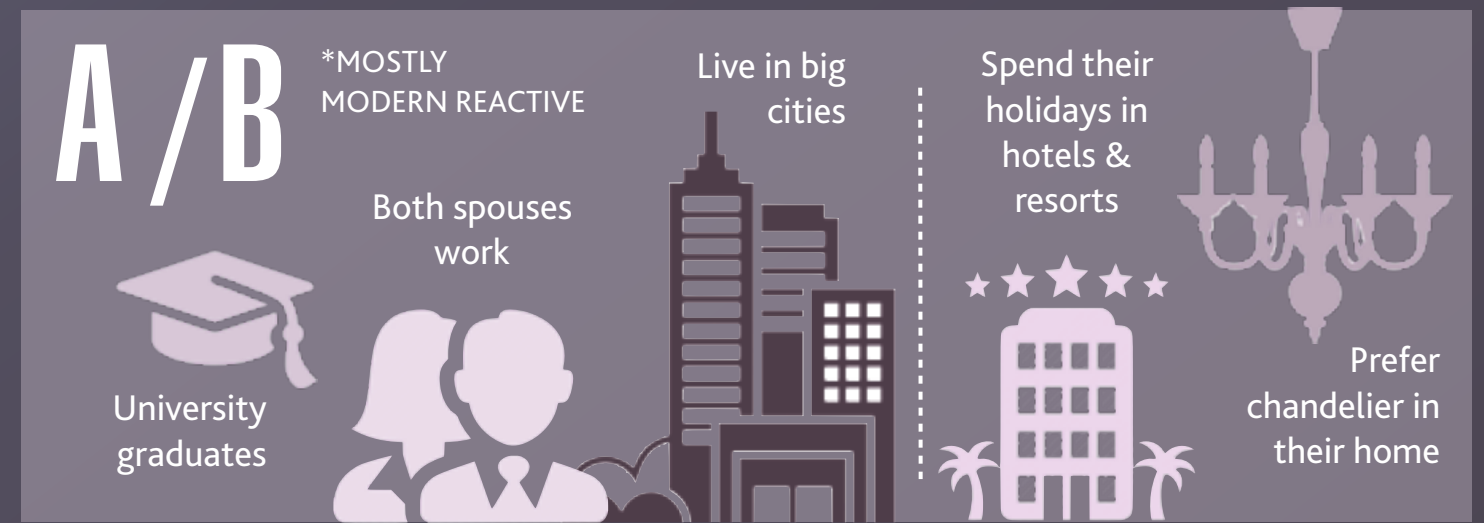
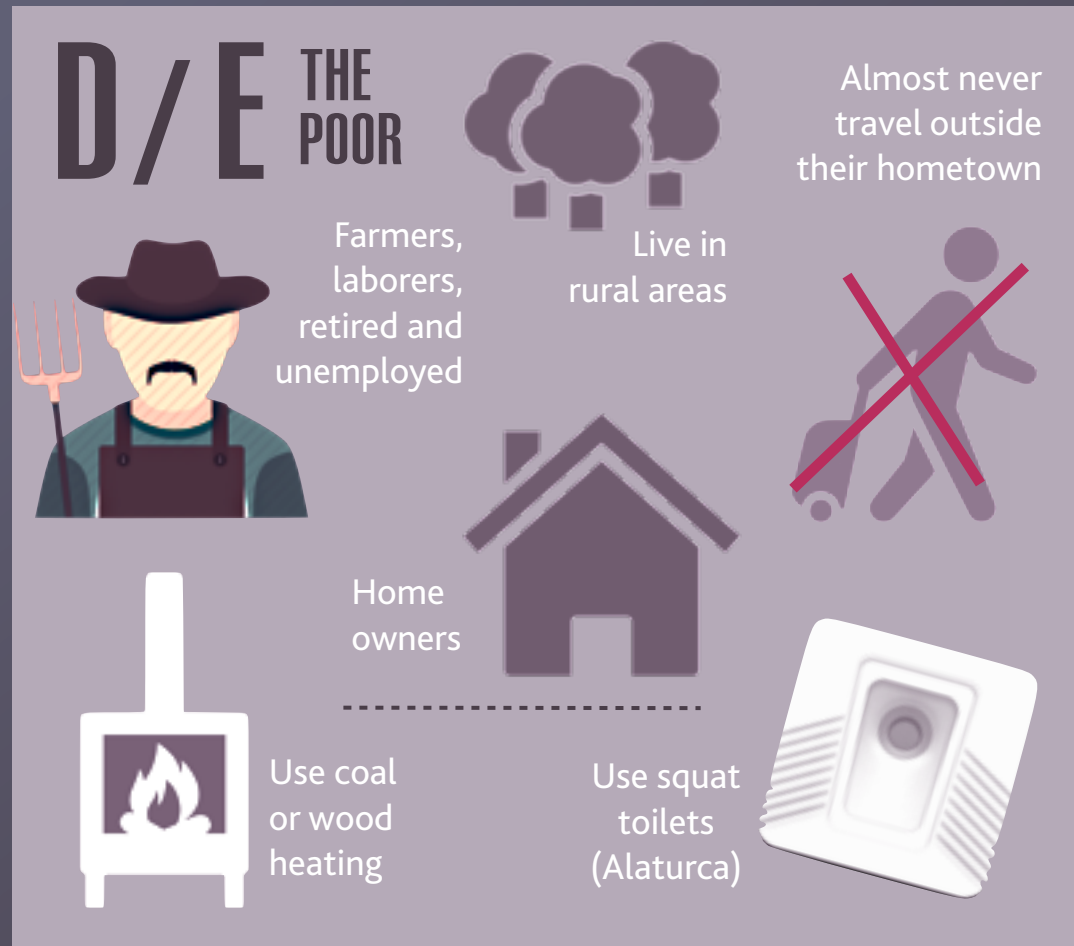
ISTANBULITE

INTELLECTUAL

OLD FASHION LEFTIST



# SES GROUPS SEGMENTATION



Sources:  
Ipsos KMG, Türkiye'yi anlama Kilavusu 2012  
Turkish Researchers' Association (TUAD) 2012 SES Groups

Urban

Rural



# SOCIOLOGICAL SEGMENTATION

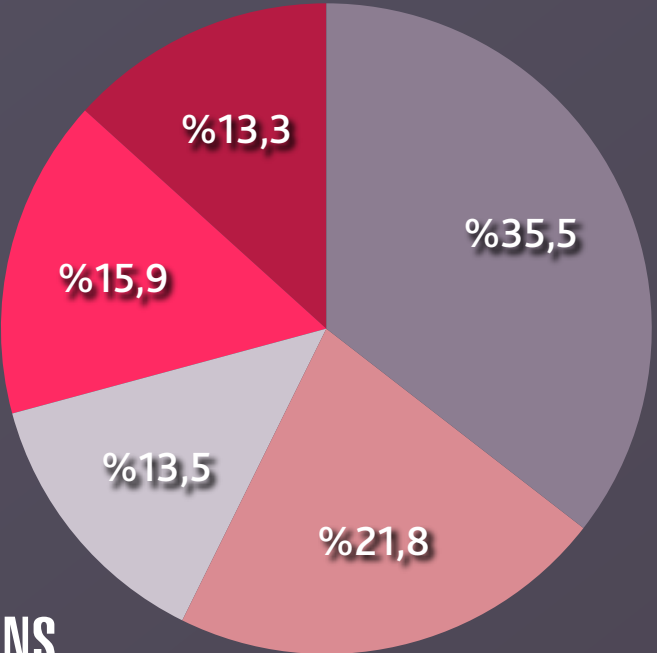
- New Conservative
- Traditionalists
- Reactive Modernists
- Nationalists
- The Poor

## TRADITIONAL NATIONALISTS

Not very please with the economic and political situation of the country. They prefer everybody to receive secular education in Turkish. They place their trust in the army (as an institution that can control the Government when needed). They advocate for the women’s right to work and tolerate the use of hijab in public sectors. They care about their appearance more than any other group.

## FAILED CITIZENS

Mostly in East and south East Anatolia as well as on the Aegean coast. They don’t trust any institutions and generally carry a pessimistic outlook on both economic and political prospects. They consider domestic violence on women to be appropriate when necessary. They do not respond to brands and advertising.



## NEW CONSERVATIVES

Pleased with the general situation of the country. More religious than other groups. They support democracy, Kurdish language education, Hydro-electric dams and nuclear centrals projects. They trust the army more than average. They support women’s right to work - with the permission of their husband. They consume and shop more than other groups and are highly sensitive to rational advertising.

## WOMEN CAN WORK

- YES ↑ Anxious moderns
- New conservative
- Traditional Nationalists
- Traditional Middle Class
- NO ↓ Failed citizens

TRUST IN THE ARMY IS QUITE STRONG (above 50%) IN ALL GROUPS, WITH NEW CONSERVATIVES LEADING THE RANKS

## PLEASED WITH THE STATE OF THE COUNTRY

- YES ↑ New conservative
- Traditional Middle Class
- Traditional Nationalists
- NO ↓ Failed citizens
- Anxious moderns

## ANXIOUS MODERNS

Mostly found in Marmara and Aegean cities. Religion holds a lesser role in their life than for other groups. They favor education to be held in Turkish for all ethnic groups. They are the most concerned with environmental issues. Mostly supporters of CHP, and highly dissatisfied with the current situation. They display high brand loyalty and mostly shop in supermarkets. They favor quality over price.

## TRADITIONAL MIDDLE CLASS

Pleased with the economical situation of the country but not with political tendencies. They do not support democratic opening and prefer strong figures - especially the Army. In their opinion, those who are discontent with the country should leave. They believe Turkey to be the strongest country in the Middle East. Do not support Kurdish language education nor women participation in the workforce. They support internet censorship measures.

## CONCERNED WITH THE ENVIRONMENT

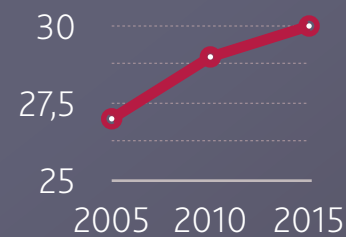
- VERY ↑ Anxious moderns
- New conservative
- Traditional Middle Class
- Traditional Nationalists
- NOT AT ALL ↓ Failed citizens

SOURCES:  
· <http://www.hurriyet.com.tr/turkiye-yasam-trendine-gore-5-e-ayrildi-yeni-muhafazak-rlar-basi-cekti-20491807>  
· Milliyet-Antalya | 1/18/2010 by Esra Özsumer  
· Ipsos KMG Türkiye’yi Anlama Kılavuzu



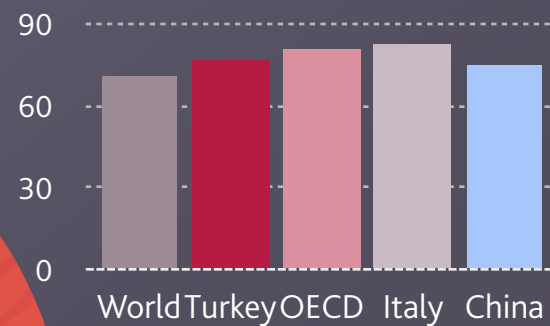
# AGE

Although its population is growing older, Turkey remains the youngest country in Europe.



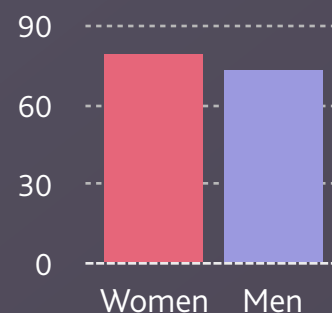
The average Turkish person is **30 Y.O.**

Life expectancy

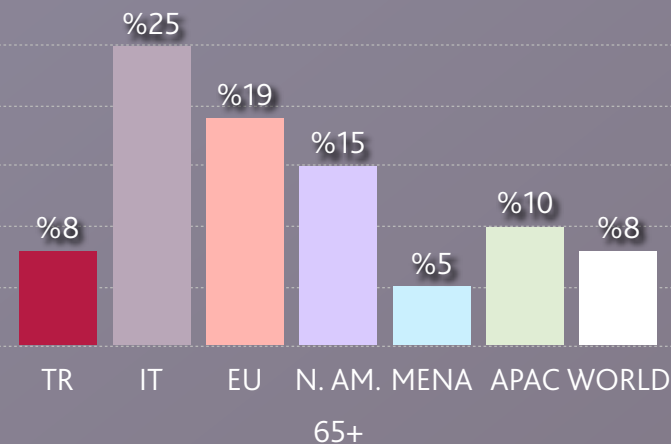


World Turkey OECD Italy China

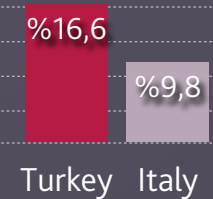
Turkey life expectancy men vs women



Percentage of elderly population Turkey vs other regions



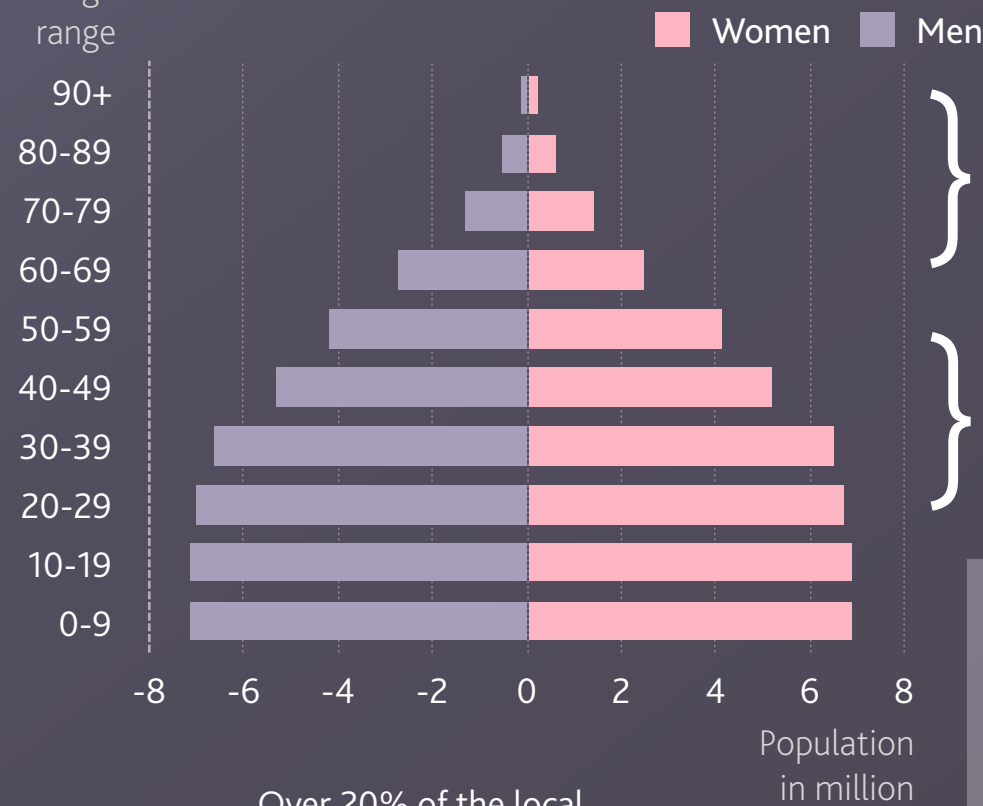
Percentage of 20 to 24 y.o.



Over 20% of the local population is 60+



Age range



Population in million

## SOCIAL CULTURE VS. PUBLIC SETTINGS

Turkish social culture holds the elderly in high esteem and they are traditionally taken good care of by their families.

Turkey ranks 75th in the Global AgeWatch Index of best places for the elderly, ranking low in the "enabling societies and environment" variable.

**63%** of seniors say they can count on relatives and friends when in trouble.

**62,8%** of seniors declare themselves as happy.

Less than 5% of the local population is 60+

Source: TÜİK 2016

Kaynak - EYHGM, Mart 2015 - ale.gov.tr

Life satisfaction survey 2014, TÜİK

Global AgeWatch Index 2016

[http://www.indexmundi.com/turkey/age\\_structure.html](http://www.indexmundi.com/turkey/age_structure.html)

TUIK, DSO World Health Statistics 2015, OECD Health Data 2015





**CULTURE**

**KÜLTÜR**



# HOFSTEDE CULTURAL DIMENSIONS MODEL



TURKEY

## LIFE GOAL

belonging  
leisure time

success  
personal fulfillment

## SOCIAL VALUES

loyalty  
trust

status  
adaptability

## RELATIONS

avoid conflicts  
reciprocal protection  
and dependence

conflictive & passionate  
equality  
decentralization of power

## OUTLOOK

honor traditions while  
embracing societal change

pessimistic  
cynical

## WORK STYLE

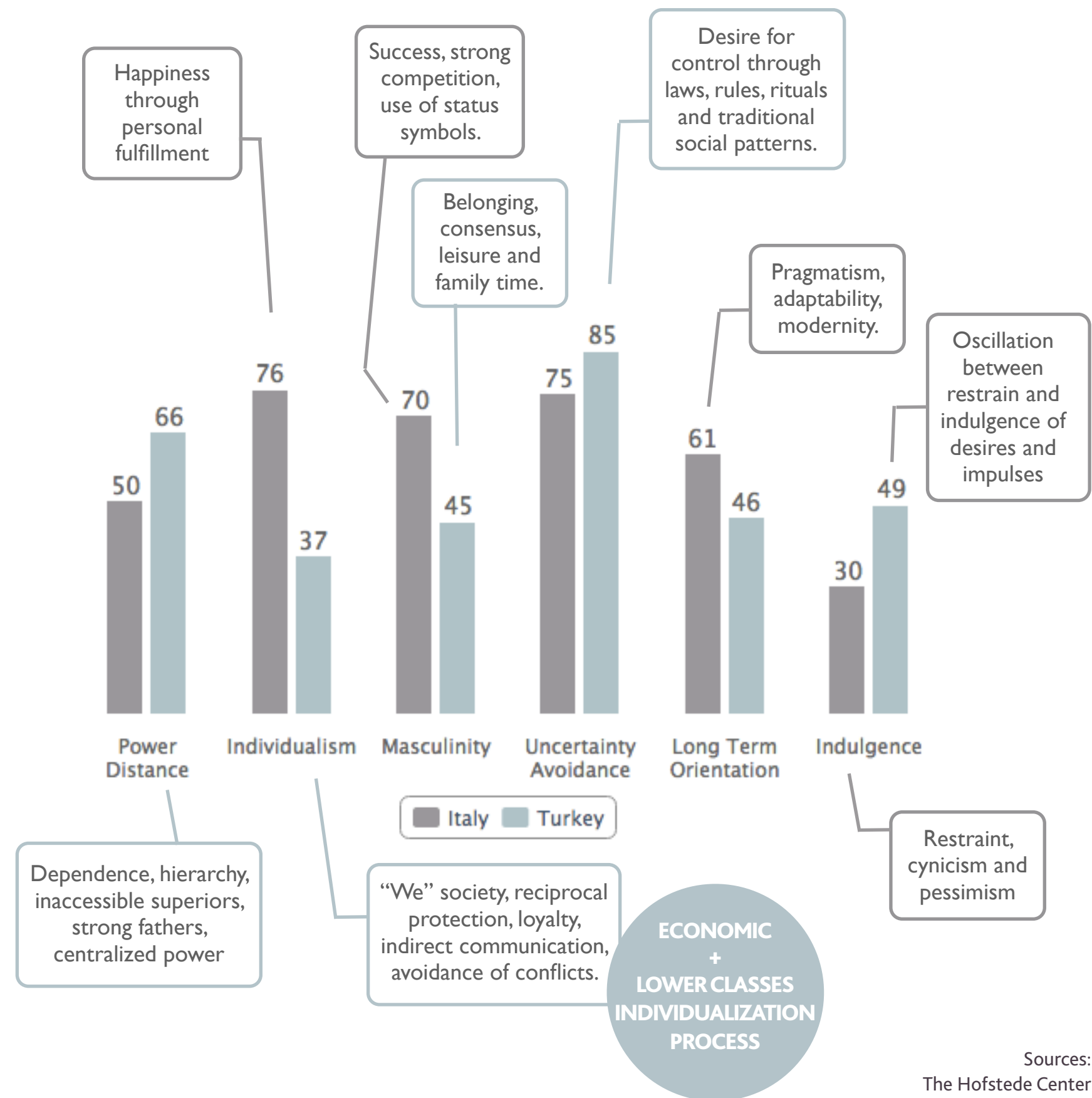
executorial  
tight management  
indirect feedback

competitive  
teamwork  
open management

ITALY



"ME" SOCIETY





# LIFESTYLE

24/7

24/7  
TRAFFIC  
JAMS

125  
HOURS

AV. TIME SPENT IN  
TRAFFIC PER YEAR

#3

MOST CONGESTED  
CITY IN THE WORLD

Down  
from #1  
spot in  
2014!

24/7  
TEA &  
SOUP

Turkish people love soup so much that they eat it at every meal, hot or cold. In Anatolia they even have soup for breakfast, followed by the compulsory cup of tea



24/7  
PATRIOTISM

IN TURKEY,  
PATRIOTISM IS  
A LIFESTYLE



In critical times, on national holidays or during sport events, Turks love to express their patriotism, never missing an occasion to bring out the flag.

## NEVER ALONE

Turks just don't know how to be alone. They constantly need to be surrounded by their peers, family, friends. Nothing stranger to them than sitting alone at home or in a café.



### OKEY

Friends gather in tea houses to chat while playing this traditional game of 4.

### TAVLA

In their free time, Turks play tavla obsessively - with a friend or their partner.



### MEYHANE

For liberal Turks, a fun evening will be spent at the Meyhane with friends or family, drinking raki and eating mezzes while listening to live traditional music



### GIRLS NIGHTS / BOYS NIGHTS

Outside of family events, Turks tend to prefer to go out among girls or boys rather than in mixed groups. A typical night out will involve dinner followed by drinks or coffee.

## I NEVER EVER...



GO TO THE  
THEATRE 80%

GO TO THE OPERA 96%

GO TO THE  
CINEMA 56%

GO TO A  
CONCERT 73%



READ A  
NEWSPAPER 29%



LISTEN TO THE  
RADIO 28%

45% READ A  
BOOK

SURF  
THE  
INTERNET 68%

GO ON A  
HOLIDAY

45%



TRAVEL  
ABROAD

94%

NEVER GO OUT  
FOR DINNER  
WITH FAMILY

PUT ON MAKE UP

38%  
of women



DO EXERCISE

46%

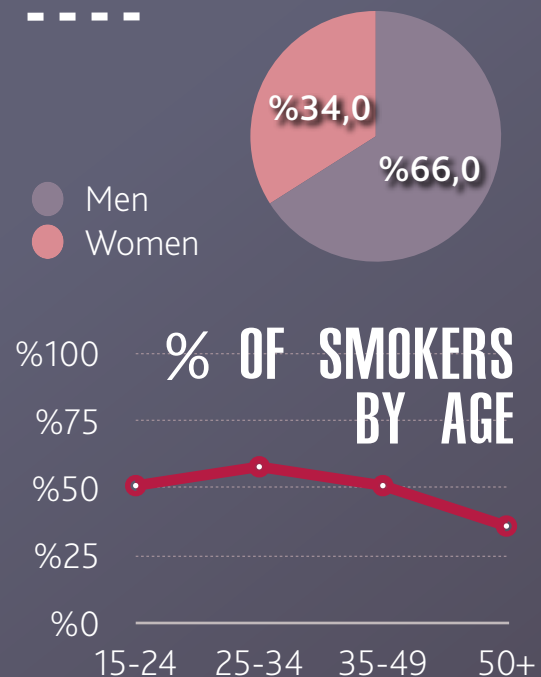


Source:

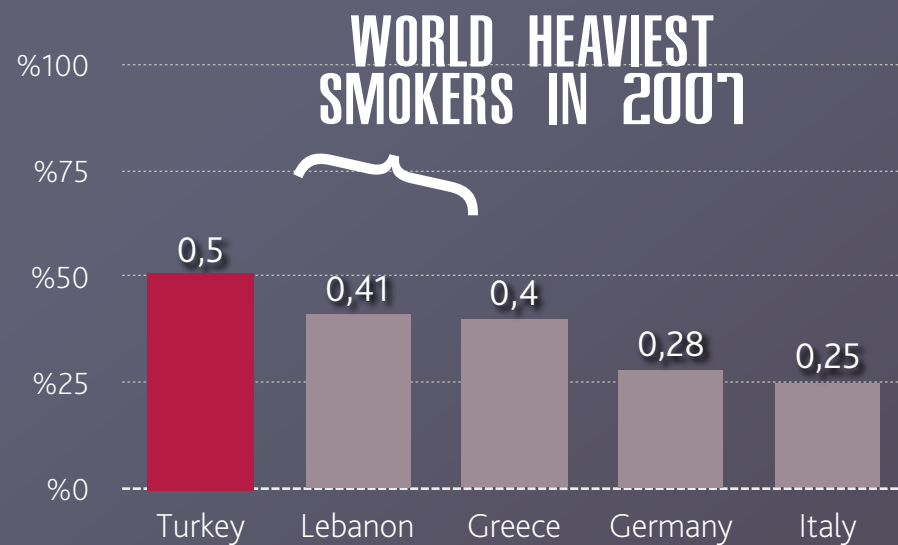
TomTom Traffic Index 2015  
[http://www.turkiyeyianlamakilavuzu.com/  
Turkiyeyi\\_Anlama\\_Kilavuzu\\_EKitap.pdf](http://www.turkiyeyianlamakilavuzu.com/Turkiyeyi_Anlama_Kilavuzu_EKitap.pdf)



In 2007, up to 1/2 of the population - predominantly men, across all ages - were smoking on a regular basis.



# TURKS SMOKE “LIKE TURKS”



“We congratulate the Republic of Turkey on its groundbreaking work to reduce the prevalence of tobacco use in their country.”

Charles Stokes  
President and CEO of the  
CDC Foundation, 2012

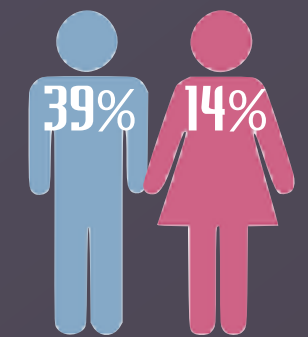
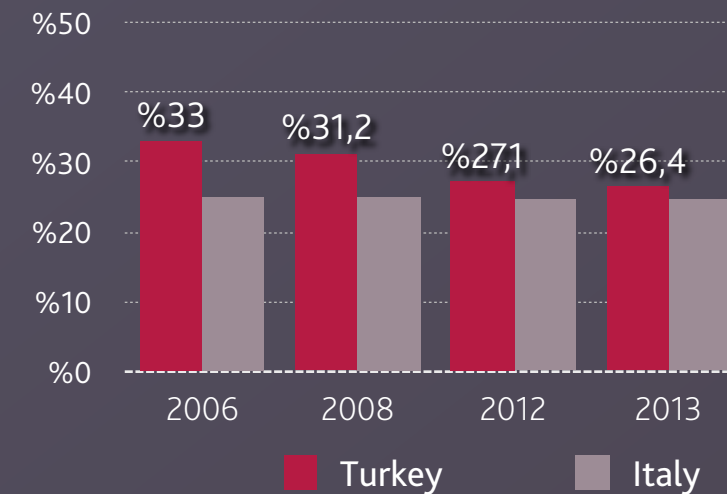
“Struggling against the use of tobacco products has become as important as our counter-terrorism struggle.”

Prime Minister R.T. Erdoğan at a meeting of the National Tobacco Control Program, 2007

## 2008: LAUNCH OF A GOVERNMENT-LED ANTI-TOBACCO PROGRAM



## EVOLUTION OF DAILY SMOKERS POPULATION

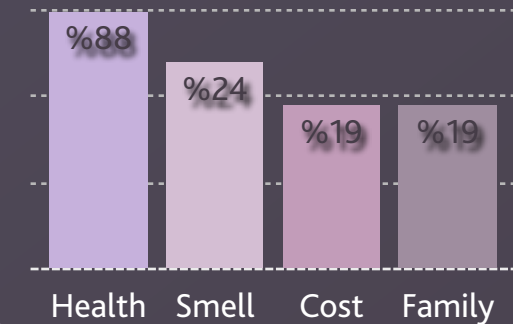


In 2017, 1 IN 7 SMOKERS is planning to quit because of:

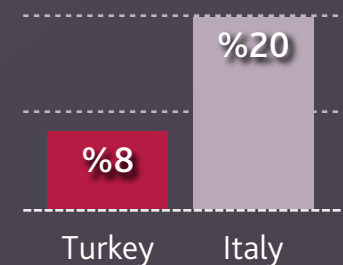
Meanwhile, the tax increase has exacerbated the market for cheap illicit cigarettes

№1 buyers of illicit cigarettes are MINORS

7.7% OF MINORS SMOKE DAILY



### CHILDREN SMOKERS



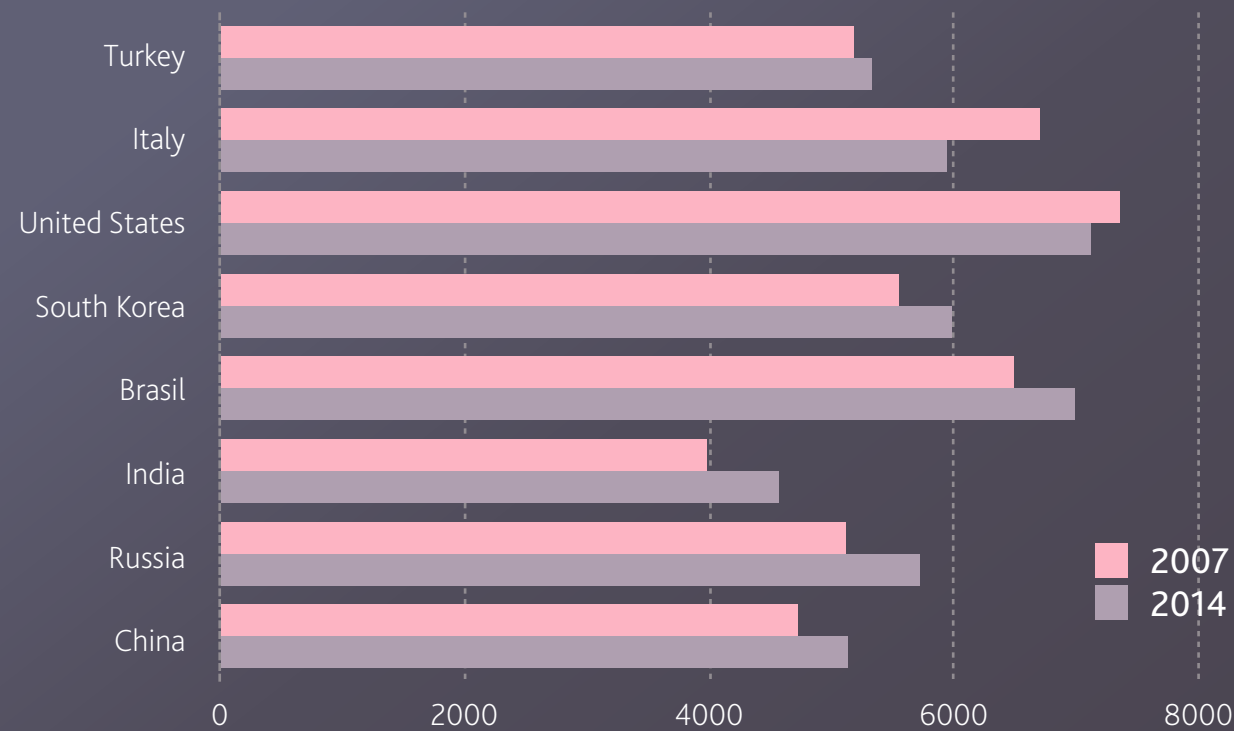
## CHALLENGES IN LAW ENFORCEMENT

Many cafés and restaurants use retractable roofs in order to escape the ban - or they straight up ignore it.

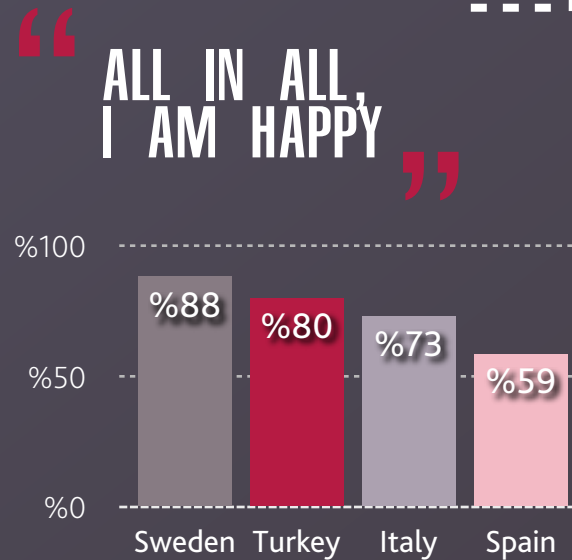




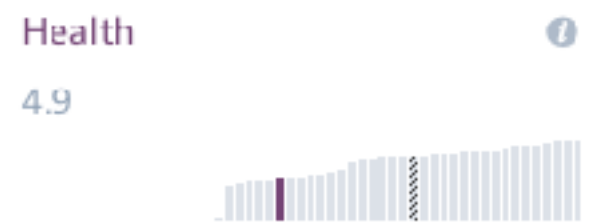
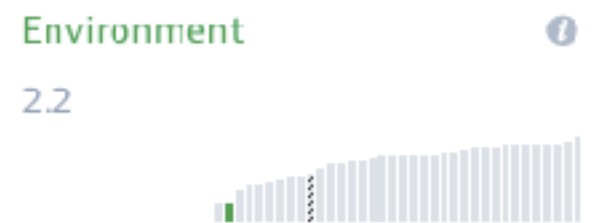
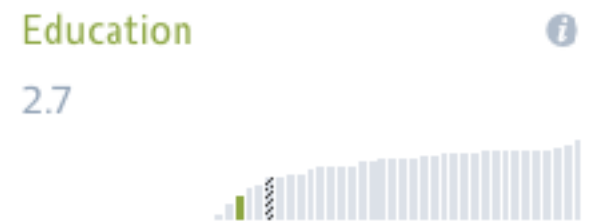
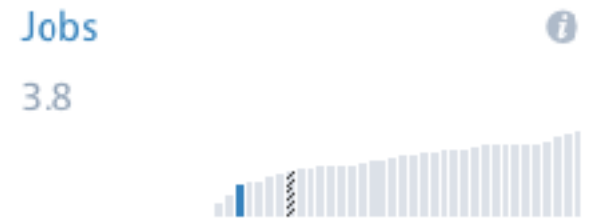
# HAPPINESS



While in the specific Turkish people still feel more dissatisfied than most developed countries, all in all, most feel pretty happy.



Turkey has made considerable progress in improving the quality of life of its citizens over the last two decades. Notwithstanding, Turkey performs well in only a few measures of well-being relative to most other countries in the Better Life Index. Turkey ranks above the average in civic engagement and below average in health status, social connections, education and skills, jobs and earnings, subjective well-being, environmental quality, work-life balance, and housing.

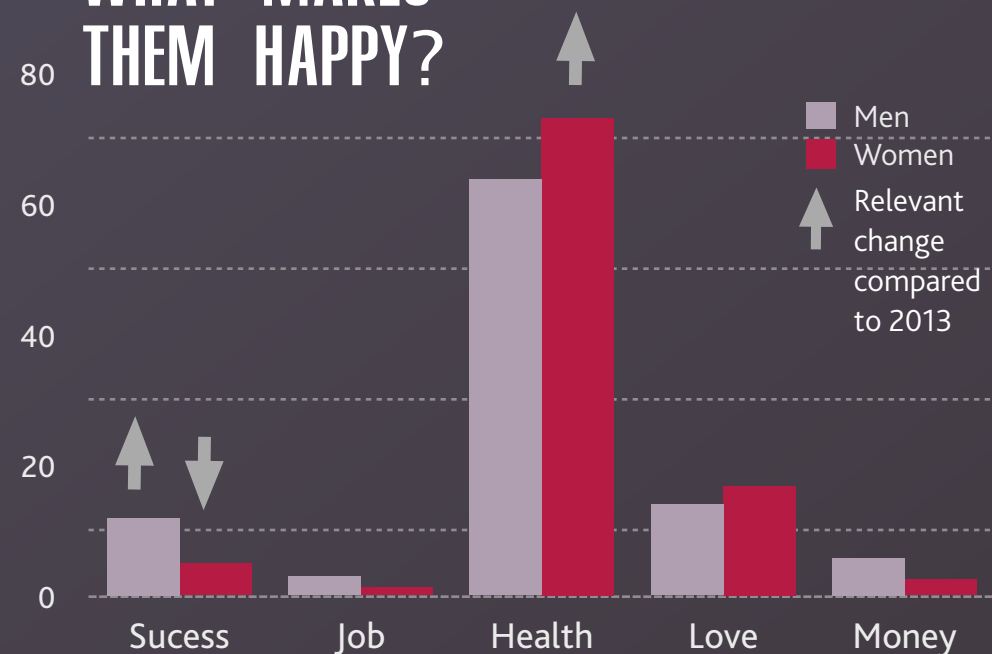


## HOBBIES

**84%** DECLARE WATCHING TV AS THEIR FAVORITE HOBBY

**77%** OF WOMEN AVIDLY FOLLOW LOCAL TV SHOWS ("DIZI")

## WHAT MAKES THEM HAPPY?





# THE MEASURE OF SUCCESS

1. OWN A HOME

63%

of families are home owners

2.

OWN A CAR

The kind of car you own reflects your success

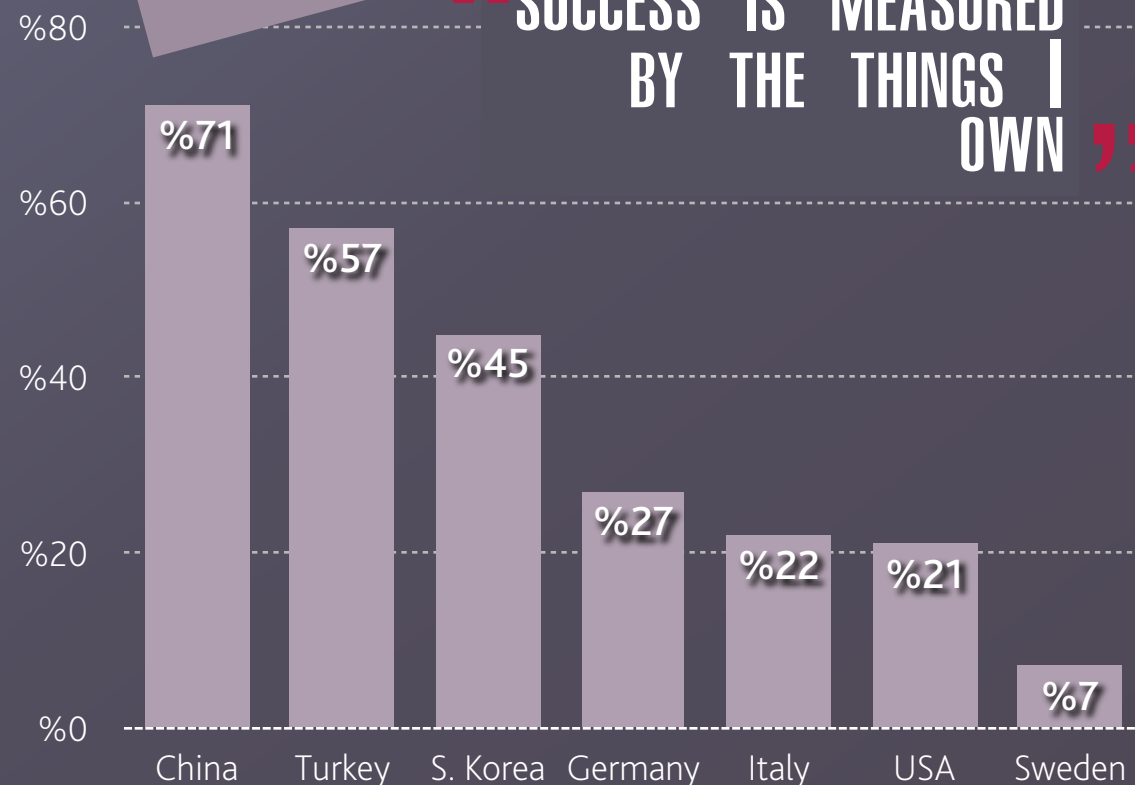
3. WORK FOR A GOOD COMPANY

i.e. A company that provides a car and long-term security

12,4%  
MORTGAGE  
INTEREST RATE

#1  
PREFERRED  
EMPLOYER  
GOVERNMENT

“SUCCESS IS MEASURED BY THE THINGS I OWN”



47%  
OF FAMILIES  
HAVE A  
CHANDELIER



## FAMILY RELATIONS

Success is measure in terms of one's contribution to the family's satisfaction

### MAKING THE PARENTS PROUD

## BUSINESS RELATIONS

In such a collective society as Turkey, relationships are as much a measure of success in the personal life as they are in the professional life.

According to Prof. Acar Baltas, good relationship with colleagues and subordinates is one of the main signs of a successful business leader.

“EMPLOYEES EXPECT THEIR LEADER TO FUNCTION AS AN ELDER WHO ADMINISTRATES OVER THE FAMILY”

- Prof. Acar Baltas -

## HONESTY

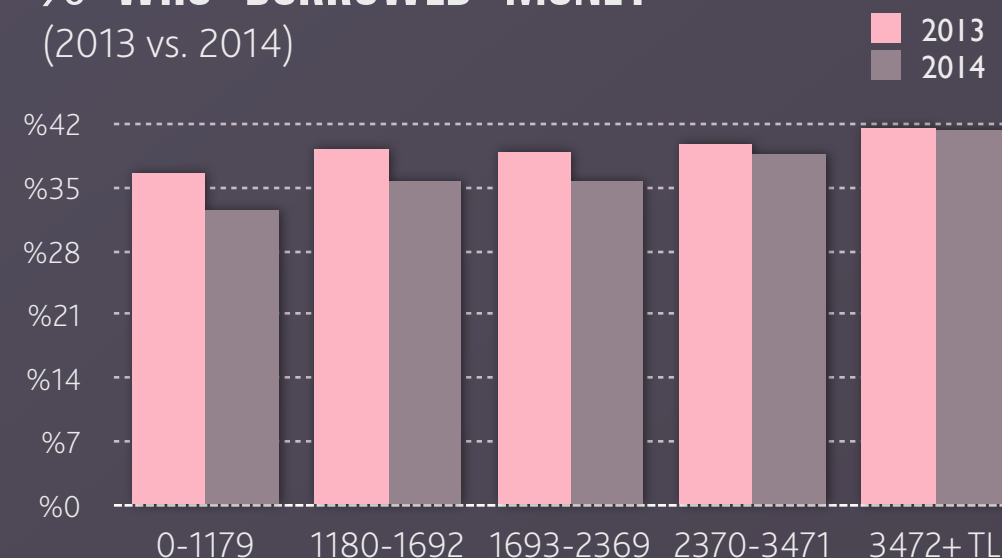
#1 most important quality in a business partner

Preferred partner to start a business:

61.5% someone honest\*  
13.3% someone with experience  
11% someone educated  
9% someone religious (muslim)

The success of a business is measured based on a relationship of trust between its partners.

## % WHO BORROWED MONEY (2013 vs. 2014)



Source:

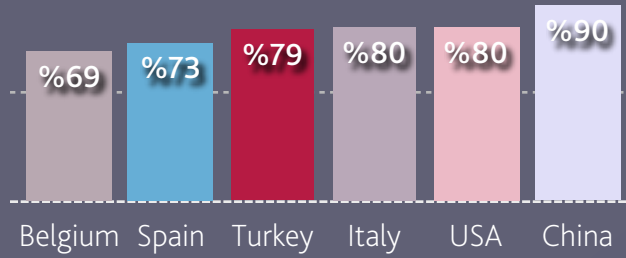
TÜİK Statistics

IPSOS MORI Global Trends 2014

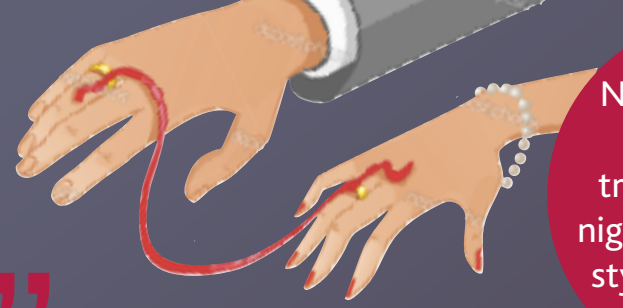
Managing in Turkish Culture, Acar Baltas, 2016 ed.

[http://www.turkiyeyianlamakilavuzu.com/Turkiyeyi\\_Anlama\\_Kilavuzu\\_EKitap.pdf](http://www.turkiyeyianlamakilavuzu.com/Turkiyeyi_Anlama_Kilavuzu_EKitap.pdf)





“  
TRADITIONS  
ARE  
IMPORTANT  
”



New generations  
combine the  
traditional henna  
night with Western-  
style bachelorette  
party

## MEVLÜT PRAYER FOR THE NEW BORN

Family and friends pray for the baby's health by reciting Mevlüt, a poem by Süleyman Çelebi praising the life of Prophet Muhammed.

## DIŞ BUĞDAYI FIRST TOOTH

Family and friends gather together to celebrate the showing of the first tooth



# CEREMONIES



## SÜNNET CIRCUMCISION

Sünnet is generally practiced before the child starts school. It is a source of joy and respectability for the family. Wealthy parents often have poorer relatives' children or orphans circumcised together with their own.

The children are dressed in Ottoman clothing and given gold and presents.

12 months  
for high school  
grads,  
6 to 8 months  
for University  
grads

## MILITARY SERVICE

When a man leaves for his compulsory military service, family and friends celebrate with a sumptuous dinner. Afterwards, the future soldier and his friends roam the streets in their cars, honking, singing with davul and zurna, and flashing the Turkish flag.

More and more  
families in urban  
centers have their  
child circumcised  
right after birth.

## KIZ ISTEME ASKING FOR HER HAND

Tradition requires the family of the groom to formally ask the parents for her hand with gifts of flowers and chocolates on a big silver tray.

## NIŞAN ENGAGEMENT

The two families throw a party for the exchange of the rings, spending almost as much money on it as on the wedding itself.



## WEDDING NIGHT

Gold is pinned on the dress of the bride or put in her purse.

## KINA GECESİ HENNA NIGHT

The night before the wedding, the bride reunites her female friends and relatives. Covered in a red veil, she is brought in the center of the room with folk songs about henna while putting henna on each others' hands. The only man allowed will be the groom who will stop by to get some henna as well.



As of  
2015....



MEAN AGE  
at 1st marriage

27

24

PREFERRED  
FOREIGN  
PARTNERS



19%  
of foreign  
brides were  
Syrian



38,4%  
of foreign  
grooms were  
German

Crude  
MARRIAGE  
rate: 7.7  
per 1000

Crude DIVORCE  
rate: 1.7  
per 1000

40%  
of DIVORCES  
occur in the  
first 5 years  
of marriage

Source:

TCF, Turkish Cultural Foundation  
IPSOS Global Trends 2014





# THOSE TIMES WHEN TURKEY STOPS

## 1. DERBY NIGHTS

67% of Turkish adults follow at least the main games.

27% of them are FANATICS

On derby nights, all televised live shows are canceled as ratings would be too low!

### ARDA TURAN

A national symbol of success since his transfer to Barcelona.



Since 2014 all game ticket must be purchased with the PASSOLIG card, for security reasons.



Turkish football fans can be so passionate about their team that it has led on various occasions to violence, including some cases of stabbing. In 2011, the Government limited the entrance to Stadiums to fans of the hosting team only.



## 3. KURTLAR VADISI

For 3 consecutive years, this Turkish TV series made the whole of Turkey stop for 80 minutes every Thursday nights as the whole family gathered to follow Polat Alemdar in his investigation of Turkish mafia and shady politics as an undercover agent.

## 2. IFTAR TIMES

Cannons and tambours announce the start of Iftar across the country.

### HURMA

All break fast by first eating dates (hurma), as Muhammed did according to the legend.



During Ramadan, people break the fast with an abundant dinner where family and neighbors come together to kiss the hands of their elders and share food. This tradition goes beyond religious customs as even non observant muslims often join in for Iftar.







**OTTOMAN  
HERITAGE**

**OSMANLI  
MIRAS**

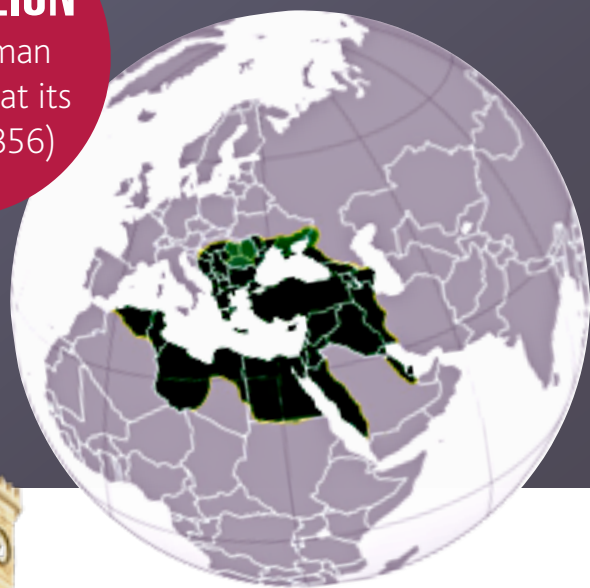


# OTTOMAN EMPIRE 1299 TO 1923

**35 MILLION**

The Ottoman population at its peak (in 1856)

THE OTTOMAN EMPIRE  
AT ITS LARGEST



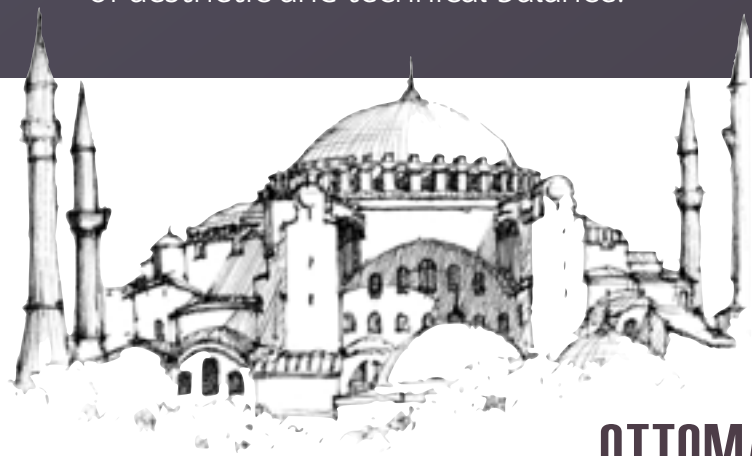
## CLOCK TOWERS

Many of the world's most magnificent clock towers were built throughout the Ottoman Empire during the 18th and 19th century.



## ARCHITECTURE

Islamic architecture, which until then consisted of simple buildings with extensive decorations, was transformed by Ottomans through a dynamic architectural vocabulary of vaults, domes, semi domes and columns. Mosques were transformed into sanctuaries of aesthetic and technical balance.



## OTTOMANS

In the Ottoman Empire, this was the central piece of family seating. It was covered in ornate fabric and was piled with cushions.



“ The art of calligraphy is rooted in Islam, uncovered by the master, and passed form hand to hand through tireless practice. ”

## CALLIGRAPHY

An art that dates back from the 8th century Turks and was magnified during the Empire.

Unique and virtually unforgeable signatures that were designed at the beginning of each Sultan's reign

## TUGHRA'



Tughra of Sultan Mehmed V

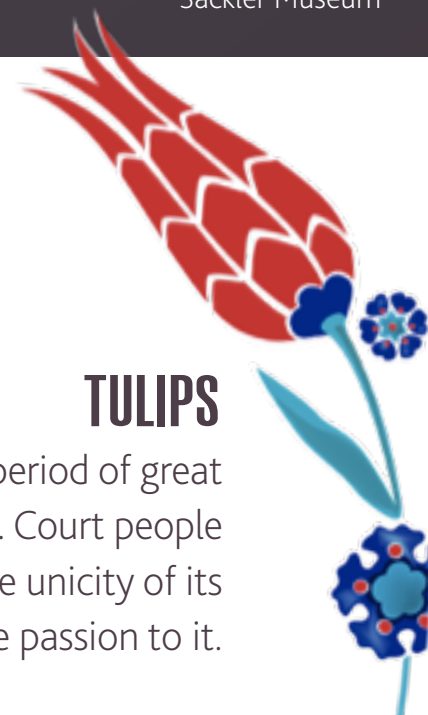


## MINIATURES

An art that dates back from the 8th century Turks and was magnified during the Empire.

Between 1713 and 1730, the Lâle Dervi was a period of great cultural and social innovation in the Empire. Court people associated the tulip to Allah for its shape and the unicity of its flowers and therefore developed an absolute passion to it.

## TULIPS



Sources:

- Daily Sabah, 'Of time and the clock tower', April 2014
- "Historian Kiel spends half century tracing history of Ottoman art" - Today's Zaman, August 2008.
- Encyclopedia Britannica 11th ed. "Ottoman"
- Antika, The Turkish Journal Of Collectable Art , July 1985
- Harvard Gazette Archives, 'Ottoman Calligraphy at the Sackler Museum'



# KARAGÖZ AND HACIVAT

Karagöz, literally Black-Eye, is the hero of this Turkish shadow play. Uneducated but with plenty of native wit, he embarks on money earning ventures which never work and inevitably gets the better of his gentile friend Hacivat.



Legend attributes the character of Karagöz to a laborer of Bursa who lived around the year 1360. He and his friend Havicat worked in the building of a mosque, but kept distracting their colleagues with their humorous repartee. As a result, construction of the mosque lagged. The Sultan eventually had them both executed. However, the pair of comedians were so sorely missed that a man named Seyh Kusteri made images of Karagöz and Hacivat from camel hide and began to give puppet shows.

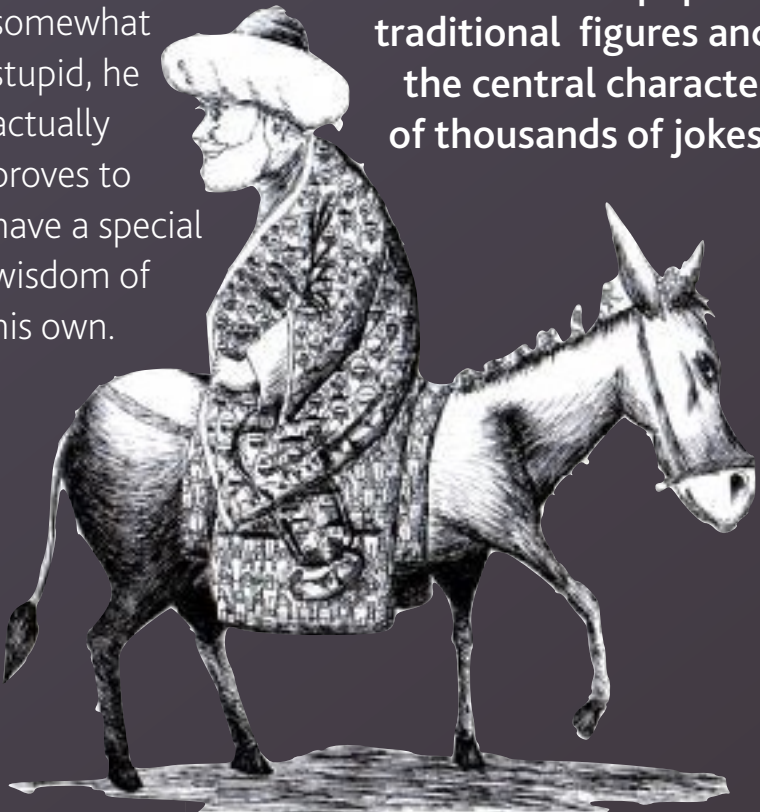


UNESCO  
INTANGIBLE  
CULTURAL  
HERITAGE

# NASREDDIN HOCA

Although seeming somewhat stupid, he actually proves to have a special wisdom of his own.

One of the most popular traditional figures and the central character of thousands of jokes.



OTTOMAN SLAP  
Osmanlı Tokadı A330-200



PLEASE DO NOT ATTEMPT TO TRY TO DO THIS SIMULATION  
LÜTFEN BU KARTIN ÜSTÜNDEKİLERİ DENEMEYİNİZ

Soldiers  
allegedly  
trained by  
slapping  
marble

## THE OTTOMAN SLAP

The Ottoman Slap is a bare handed attack which was used by the Ottoman Army when the soldier was disarmed or when his weapon was broken.

In Ottoman Culture one was never supposed to use fists in a fight as to avoid giving permanent scar or damage to the face. The first person in a fight who attacked with his fist was to be shamed by the community. Slapping - on the other side - was considered to be a display of courage and bravery. The sounds of the slaps on the battle field had a strong psychological effect.

Legend has it that a true Ottoman slap could even be lethal.



## ABDÜLCANBAZ

A Turkish comic book character whose weapon is the Ottoman slap.



# GASTRONOMY

Turkish cuisine is largely the continuation of Ottoman cuisine, which in turn borrowed many elements from Greek, Central Asian, Caucasian, Sephardi Jewish cuisine, Middle Eastern, and Balkan cuisines.

“THERE ARE AS MANY WAYS OF EATING YOGURT AS THERE ARE TURKISH PEOPLE”



96%

OF TURKISH HOUSEHOLDS KEEP YOGURT AT ANY GIVEN TIME

30KG  
PER CAPITA  
PER YEAR

## AYRAN

A mix of water and yogurt, it was declared national drink by Recep Tayyip Erdoğan in 2013



LOCAL PRODUCERS LEAD THE MARKET



However many still consider **RAKI** to be the true national drink

## TURKISH BREAKFAST

SIMIT  
sesame bread

KAYMAK  
(milk cream)



## OLIVES

## MANTI

Traditional hand-made filled pasta, covered in yogurt - of course!



'Manti' is usually made fresh and cooked immediately, but it can also be dried and stored for long periods of time. Turkic nomads from the times of Ghengiz Khan are said to have carried dried 'manti' with them as they roamed the Asian steppes on horseback.

## BEEF CHARCUTERIE

## TEA

Turks are the heaviest consumers of tea in the world



But in the afternoon, Kahve and lokum are a must

## TURKISH COFFEE



## LOKUM

An over 230 years old delight made from mastic

## MACUN



Traditional soft, sweet and colorful toffee paste served wrapped around a stick

## KOKOREÇ

roasted lamb intestine served as a sandwich



MOST CONSUMED FAST FOODS

## DÖNER KEBAP





# DANCES

## EFE / ZEYBEK

Zeybeks were guerrilla fighters under the Ottoman Empire. They acted as protectors of villagers against landlords and tax collectors. They also fought against the Greeks in the invasion of Smyrna in 1919.



Romantic songs about Efe's bravery are still popular in Turkish folk music.

This dance simulates the movements of hawks.

Entering the dance while the Efe is dancing is a sign of hostile challenge

“ A TURK ONLY KNEELS DOWN WHEN HE STARTS TO PLAY ZEYBEK ”

Mustafa K. Ataturk

a KEMENCE



A dance of Greek pagan origins, the Horon is generally danced by a chain of either men or women. Its most characteristic movements are the fast shoulder “tremoulo” and a trembling of the entire body with sudden squats, which imitate the movements of a type of anchovy fish typical of the Black Sea (the Hamsi) as it swims in the sea or struggles in the nets for its life.

## HORON



## HALAY

Horon

Lezginka (Kafkas Oyunları)

Bar

Halay

Nowadays, the dance as a mean of protest all over Turkey

Halay dancers form a circle or a line, while holding each other with the little finger or shoulder to shoulder with the last and first player holding a piece of cloth. It is a national dance in both Turkey and Azerbaijan.





# OIL WRESTLING

Turkey's national sport since 1346 and the world's oldest continually sanctioned sporting competition

*'A game of oil wrestling in the gardens of the Topkapi Palace'*

- anonymous Greek artist -  
ca. 1809

A  
'PEHLIVAN'  
(oil wrestler)



KISBET

Every round lasts 30 to 45 minutes and is won by achieving an effective hold of the kisbet

“ A DEFEATED FIGHTER NEVER GETS TIRED OF WRESTLING AGAIN ”



UNESCO  
Intangible  
Cultural  
Heritage

THE KIRKPINAR GAMES:  
3-day oil wrestling rally since 1362



Every year over 1000 pehlivan compete for the 'baspehlivan' (Chief Wrestler) title





A high-angle, low-key photograph of Whirling Dervishes performing the Sema ceremony. The dancers are seen from above, their white robes and long, thin arms creating a rhythmic pattern against the dark floor. The lighting is dramatic, highlighting the dancers' heads and the tips of their arms. The overall mood is solemn and spiritual.

**RELIGION**

**DIN**



# WHO IS WHAT

## NON-BELIEVER

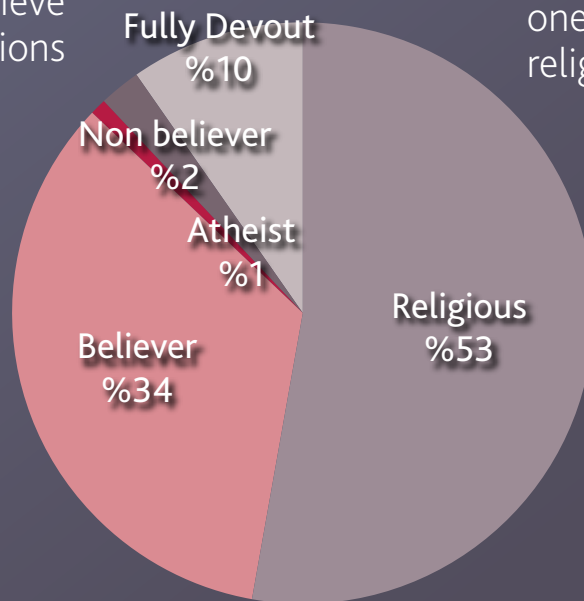
One who does not believe in religious obligations

## FULLY DEVOUT

one who fulfills all religious obligations

## BELIEVER

One who believes in but does not fulfill religious obligations

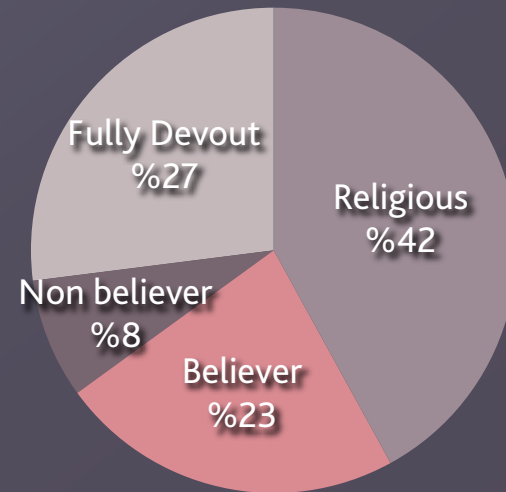


KONDA Survey 'Religion, secularism and the Veil in Daily Life', 2007

## RELIGIOUS

one who strives to fulfill religious obligations

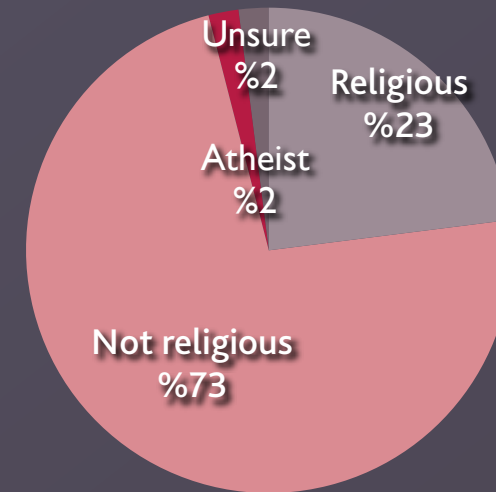
## INTERNATIONAL SURVEYS



Pew Research Center  
'The World's Muslims: Unity and Diversity' Report, 2012\*

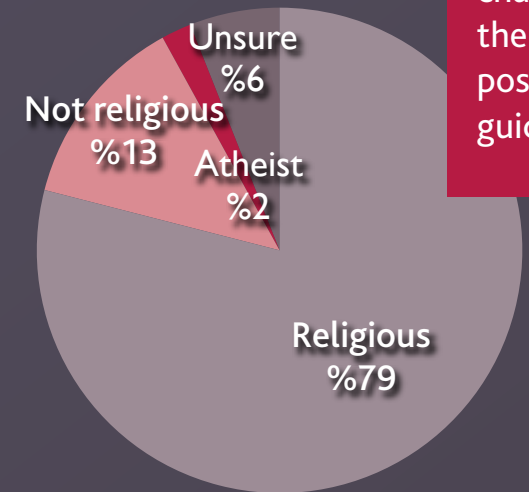
*Irrespective of whether you attend a place of worship or not, would you say you are...?*

Multiple choices



WIN/Gallup International  
Global Index of Religiosity and Atheism 2012

Open answer



WIN/Gallup International  
Survey, VOP(EOY) 2014

The difference in answers between years could be explained by a change in the way the question was posed (open vs. guided)

\*Statistics have been fitted to the KONDA classification

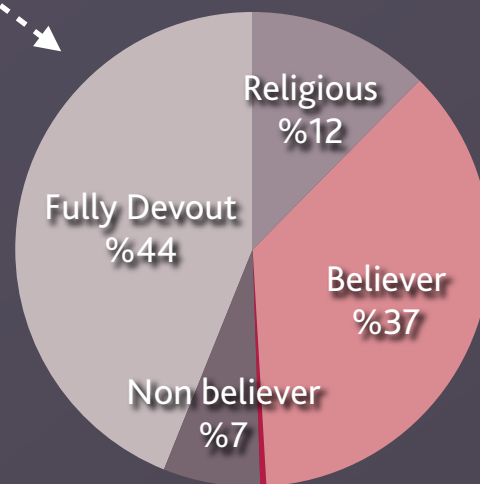
**“WHEN A TURK LOOKS TO THE WEST, HE FEELS MORE MUSLIM, WHEN HE LOOKS TO OTHER MUSLIM COUNTRIES, HE FEELS MORE LIKE A TURK.”**

- Etyen Mahçupyan -

ESTIMATES:

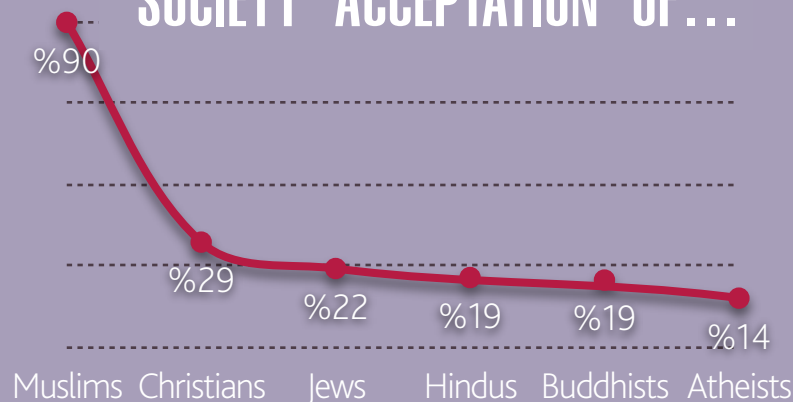
**65,000** Armenian Orthodox Christians,  
**25,000** Jews,  
**3,000** Greek Orthodox Christians.

Other religious minorities:  
**NOT ACCOUNTED FOR**



TÜİK - 'Türkiye'de Dini Hayat Araştırması', 2014\*

## SOCIETY ACCEPTATION OF...



Although other non-Muslim communities exist, only 3 are officially recognized: Greek Orthodox Christians, Armenian Orthodox Christians, and Jews.

**DATA ALL SURVEYS AGREE ON**

Over **96%** believe in Allah

Women are more devout than men

Young educated people tend to be less devout.

**84%** fast during Ramadan

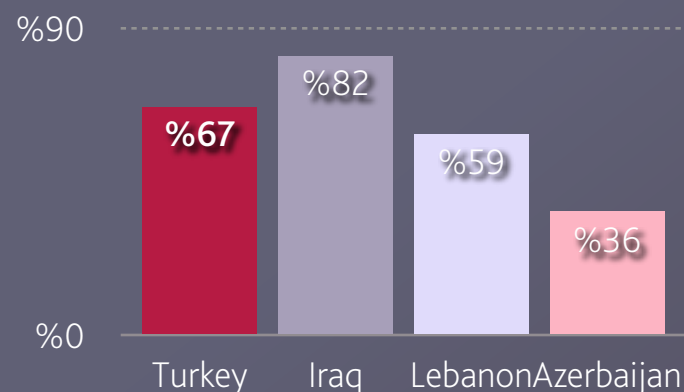
**12%** give alms (zakat) annually

**1%** from other faiths

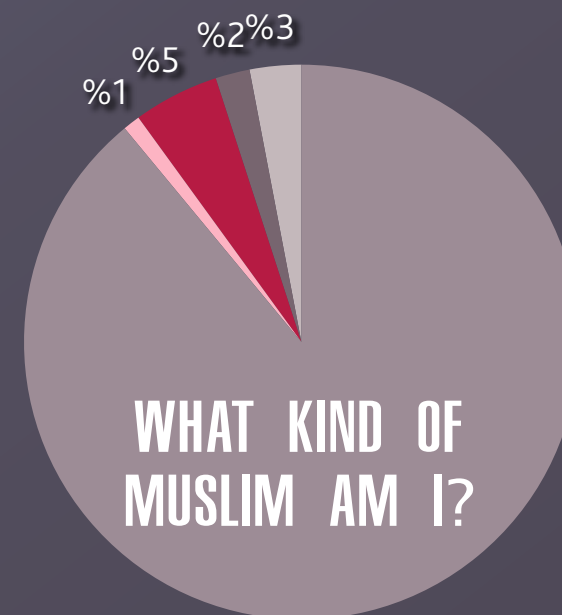
**2%** atheist (estimated)



## RELIGION IS VERY IMPORTANT IN MY LIFE



# RELIGIOUS PRACTICES



6% declare to belong to a Sufi order



12% say devotional dancing is acceptable, twice as much as in any other country

## ARE SUFIS MUSLIMS?



## ARE SHIAS MUSLIMS?

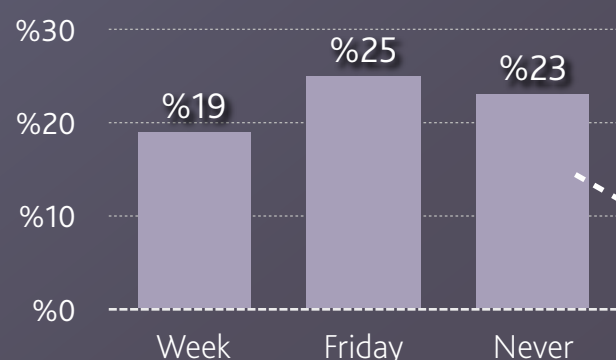


## ARE ALEVIS MUSLIMS?



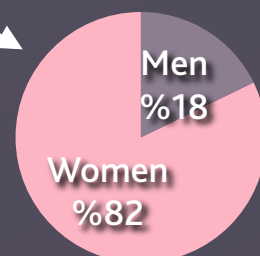
as of 2013, Turkey had **82.693** mosques, of which **3113** in Istanbul

## I GO TO THE MOSQUE EVERY...



44% of Turkish Muslims go to a mosque at least once a week

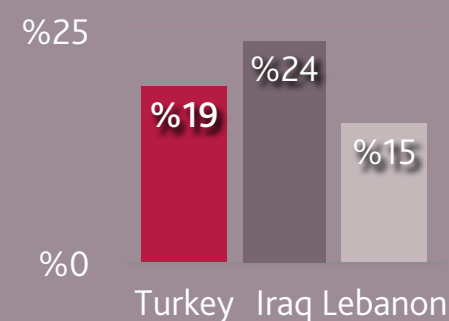
42% pray every day but only 27% of them all 5 times



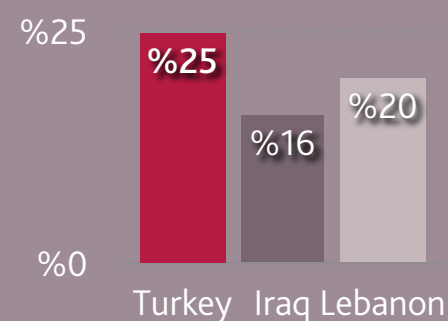
AND ONLY 9% read Quran once a day

## REGIONAL COMPARISON

### More than once a week



### Only on Fridays



Muslims in Central Asia and Eastern Europe tend to be less observant than their counterparts in other regions when it comes to mosque attendance.

“The proportion of Alevis is often estimated at between 10 and 20% of Turkey's population and that of Alevi Kurds at 1/3 of Alevis; but such estimates are at best on informed guesswork and at worst on wishful thinking.”

Paul J. White

SOURCES:  
 · Pew Research Center, The World's Muslims: Unity and Diversity, 2012  
 · Hurriyet Daily News "Istanbul home to most mosques in Turkey" 05/03/2013  
 · Diyanet Dini Hayat Raporu 2014  
 · Reflections on Turkey: Islamic Middle Classes at a glance, TESEV, Etyen Mahcupyan (2014)  
 · 'Turkey's Alevi Enigma: A Comprehensive Overview', Paul J. White and Joost Jongerden (eds)



# BELIEFS

**TURKEY IS AMONG THE MOST SUPERSTITIOUS OF ALL MUSLIM COUNTRIES**

**92%**  
believe in  
Predestination



**92%**  
believe in Heaven



**96%**  
believe in  
Angels



**25%**  
believe in  
religious  
healers



**49%**  
believe in witchcraft



**87%**  
believe in  
Hell



**69%**  
believe  
in the  
Evil Eye



**63%**  
believe in  
Jinns

**Nº 40:  
LUCKY  
NUMBER**

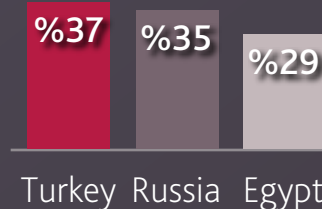
Jesus wandered the desert for 40 days, Muhammad was 40 years old when he received the Quran, and Ali Baba fought 40 thieves. The number 40 is therefore believed to be lucky in Turkey

repeat anything **40** times and it will come true

**40** years of friendship if you accept an invitation for Turkish coffee

Cracking one's finger joints is an invitation to Satan

Turkey is one of the countries with the highest amount of people keeping in their home object to ward off the evil eye.



There are many things that Turkish people do not do at night, by fear of attracting Jinns, such as clipping their nails, whistling, chewing gum, or sweeping the house.

## TURKIC MYTHOLOGY

Turkic mythology embraces Tengriist and Shamanist traditions and shares many commonalities with Mongol and Tatar mythology. Following Turkic migration the myths evolved to include Zoroastrian beliefs and Islamic symbols.



Diagram of the Tengriist World on a shaman's drum: the World-Tree is growing in the centre and connecting the 3 worlds: Underworld, Middleworld and Upperworld

The **Tree of Life** is a central symbol in Turkic mythology as Altai Turks believed that human beings descended from trees.

Dragons, wolves and horses occupy an important place in Turkic mythology.



Nowadays, it appears on Turkey's 5 cents coin, similar to the representation found in the Urartu tombs around Van.



Sources:

- Pew Research Center, The World's Muslims: Unity and Diversity, 2012
- Daily Sabah 'Turkish superstitions, rituals and myths', Dec. 30, 2014
- Ministry of Culture and Tourism - kulturturizm.gov.tr - 'Superstitions'
- Tempora magazine, "Urartu, el imperio olvidado de Anatolia"
- Hurriyet Daily News, "Millenia-old Urartian site in Van still has secrets", 2015





**WOMEN**

**KADINLAR**



# TURKISH MOTHERS

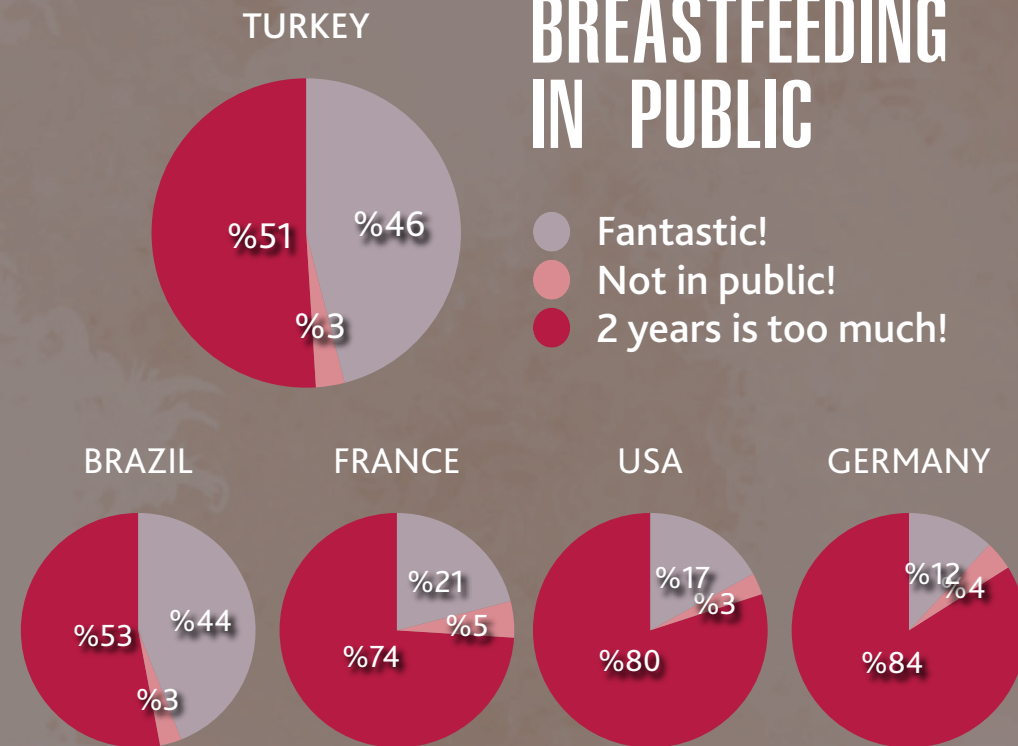
There is a strong need for parents' training. Few parents focus on early-stage education, from politeness to self-sufficiency. As a consequence Turkish kids have shown to lag in terms of reading, speaking and social skills compared to other OECD countries.

Most parents do not allocate playtime with their kids.

OECD report

Sources:  
Türkiye Halk Sağlığı Kurumu, DSO World Health Statistics 2015  
2014 Lansinoh Global Breastfeeding Survey  
OECD annual report  
Turkish Statistical Institute  
UNICEF, State of the World's Children Report  
World Bank, 2017 Update  
IndexMundi (using CIA World Factbook data)

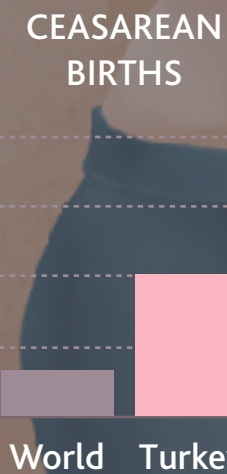
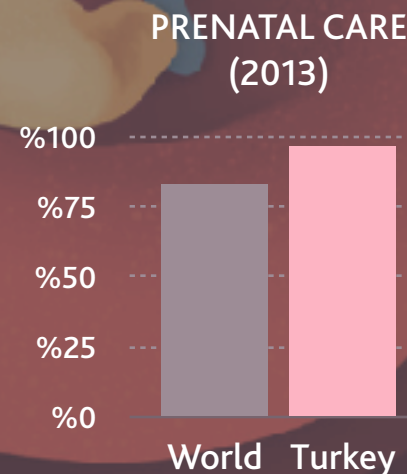
## BREASTFEEDING IN PUBLIC



MOTHER'S MEAN AGE AT 1st BIRTH (2010 est.) **22.3 Y.O**

MOTHER'S AVERAGE AGE AT CHILDBIRTH (2010 est.) **29 Y.O**

**61%** of Turkish women demand better daycare



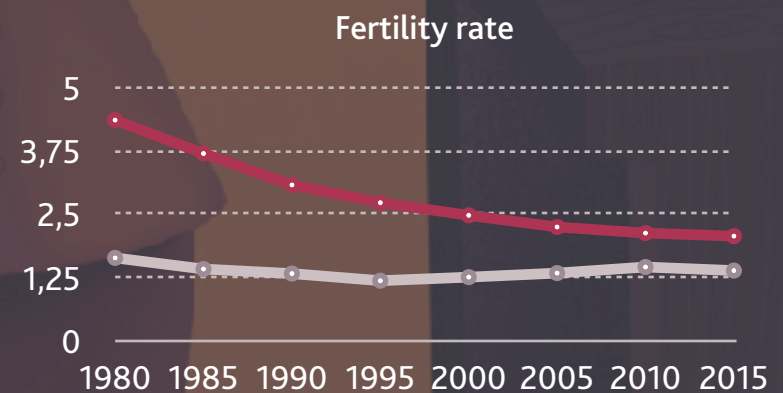
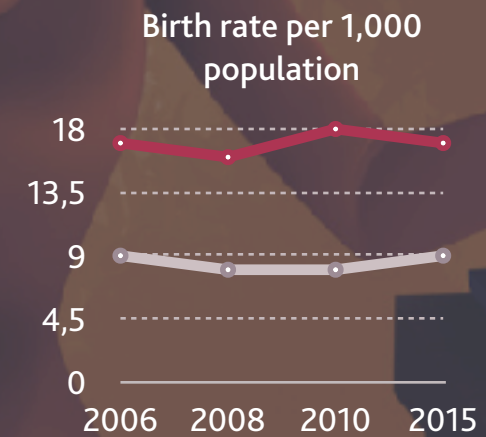
## ONLINE BEHAVIOUR

53% COMPARE PRICES / FEATURES

34% GET IDEAS / INSPIRATION

33% LOOK FOR REVIEWS / ADVICE

26% DISCOVER NEW BRANDS



● Turkey

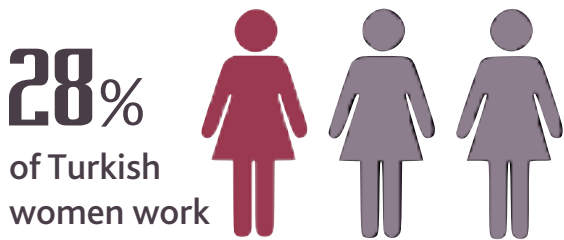
● Italy



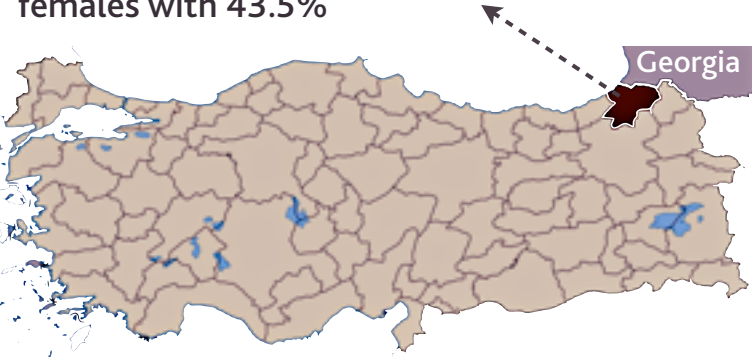


"They ask why daughters are given lower shares from a will while sons receive more. But [...] men are assigned the responsibility for bringing the bread home, while women are not. So naturally giving higher inheritance shares to men is normal, fair and righteous. [...] The only social role clearly defined by religion is men's responsibility to bring the bread home and provide for his wife and children. **There is no rule in Islamic law about working women. Women are free and have the right to choose. They don't need permission from their fathers or husbands**"

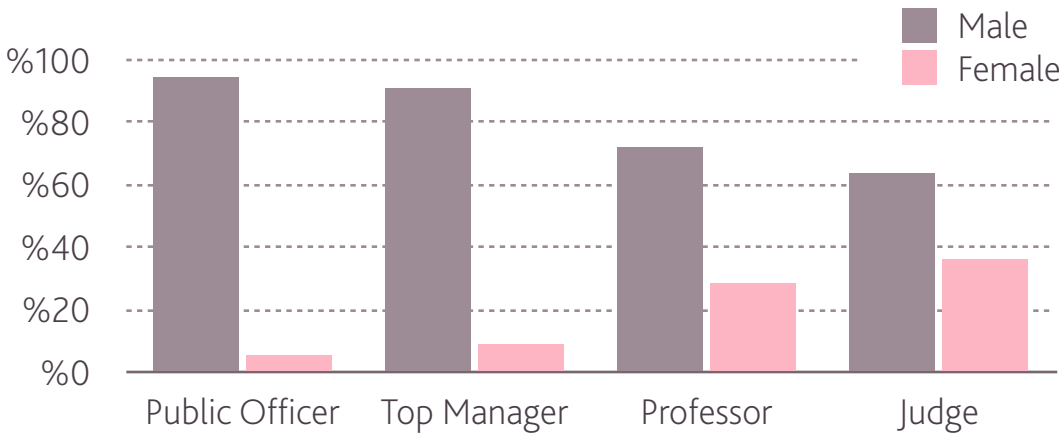
**Sümeyye Erdoğan**  
Deputy head of the Women and Democracy Association (KADEM)



ARTVIN is the province with the highest labour force participation rate for females with 43.5%

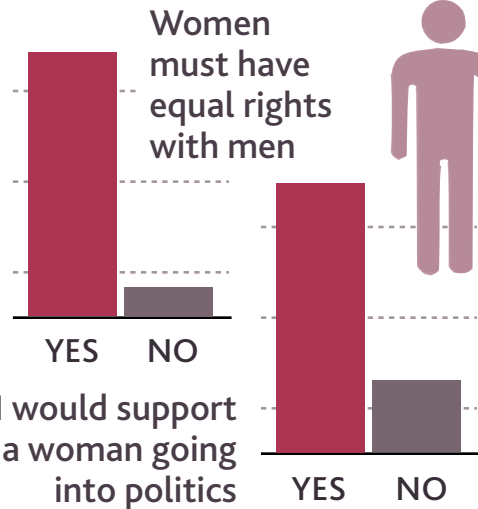
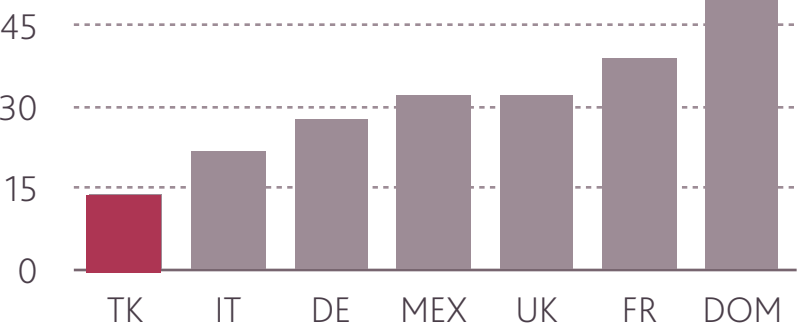


**GENDER GAP** Ranked **125<sup>TH</sup>** out of 142 countries



## WORKING WOMEN

### % OF SENIOR AND MID-LEVEL MANAGERS WHO ARE WOMEN

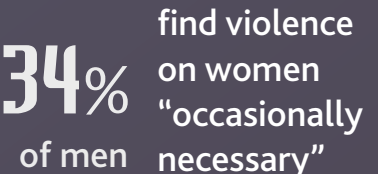


# WOMEN AND VIOLENCE

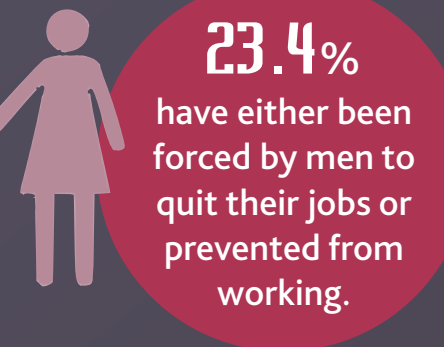
2012 IPSOS KMG study on Turkey reveals that



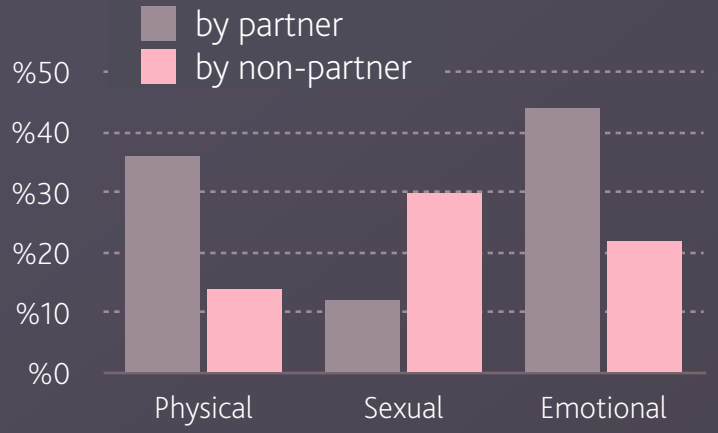
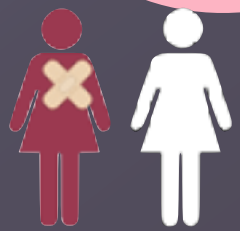
Meanwhile, a Nationwide Survey on Violence against Women reveals that as much as



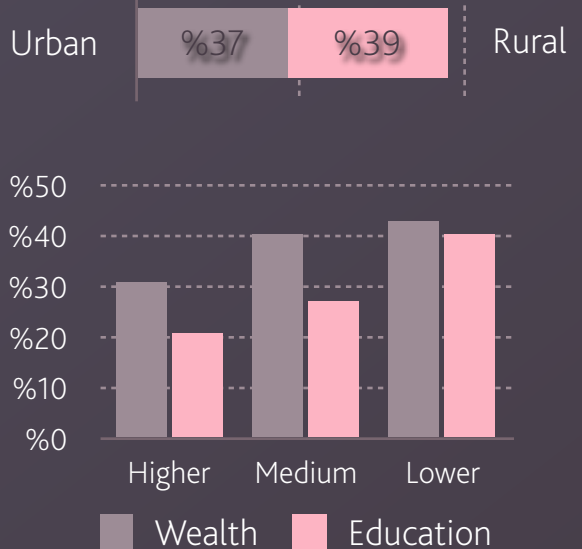
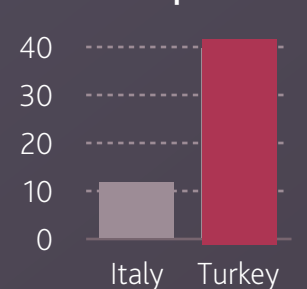
## HAVE BEEN PREVENTED FROM...



According to Turkey's National Women Institute,  
**1 IN 2**  
women suffered from physical violence



### % that denounced being physically assaulted by an intimate partner



SOURCES:  
· Organization for Economic Cooperation and Development  
· Türkiye'de Kadına Yönelik Aile İçi Şiddet Araştırması 2014  
· ILO Statistical Database, June 2014  
· UN stats Report, Violence Against Women, 2006

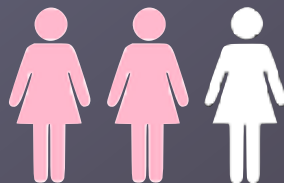
· PEW Research Center, 2014  
· Global Gender Gap Report 2014  
· TurkStat - <http://www.turkstat.gov.tr/PreHaberBultenleri.do?id=16056>  
· <http://factsonturkey.org/15420/turkey-women-boards-means-little/>



In 1925, the Law of the Hat banned the Fez and discouraged women from wearing the headscarf. After the 1980 military coup, further restrictions were imposed, banning the headscarf in all public institutions. The AKP moved in early 2008 to lift the ban on headscarves specifically at public universities.

# WOMEN AND HEADSCARVES

Over **60%** of Turkish women wear the headscarf



**37%** wear it even when at home

**3%**  
"because I'm forced to"

**46%** of men expect their wife to wear a headscarf

**70%**

agrees that students can wear headscarves in universities

but only **51%** agrees to the use of headscarves by public servants

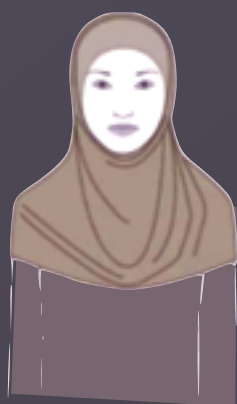
## WHAT STYLE IS APPROPRIATE FOR WOMEN IN PUBLIC?



Niqab  
**2%**



Chador  
**2%**



al-Amira

**46%**



Hijab



Shayla  
**17%**

**32%**  
say it's ok to wear none





# HIJABISTAS HIJABSTERS MIPSTERZ GLAMJABIS

} GLOBAL ISLAMIC  
FASHION TRENDS ARE  
TAKING OVER TURKEY

Anthropologist Jenny White argues that the Shayla style suggests being **culturally**, but not politically Muslim.”

**Emerging market:**  
conservative  
fashionistas with  
deep pockets

“ A new breed of fashion innovators is blazing a trail for modesty, creative flair and business sense. Dubbed ‘hijabistas’, these women are homing in on a barely tapped market for fashionable coverings, estimated at \$96 billion by fashion institute Esmod Dubai. ”  
*LSNGlobal, “Hijabistas”, 2015*

## ISLAMIC BOURGEOISIE

The new, wealthy and religiously conservative middle class demands branded goods, but also a different kind of design.

“ MY WAY, MY CHOICE, MY  
LIFE, MY TRUTH, MY RIGHT. ”  
*Âlâ’s slogan*



Âlâ is Turkey’s 1st fashion magazine for conservative Islamic women who want to follow fashion trends and be glamorous. Its young female editor, Hulya Aslan had to give up university for insisting on wearing a hijab, before the law was changed in 2008.



<http://tribune.com.pk/story/374475/turkish-beauty-mag-ties-muslim-veil-to-glamour/>  
Al Monitor, Turkey Pulse, “Turkey’s rising middle class ups demand for Islamic fashion” by Riada Asimovic Akyol, 2013



# FASHION INDUSTRY

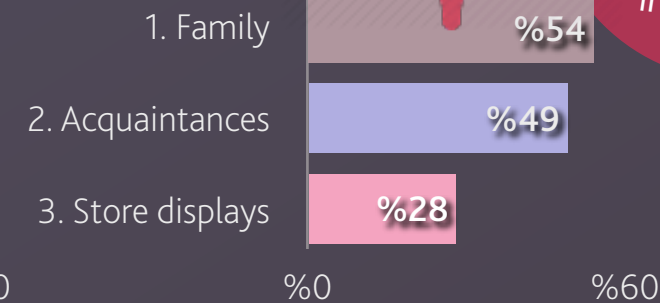
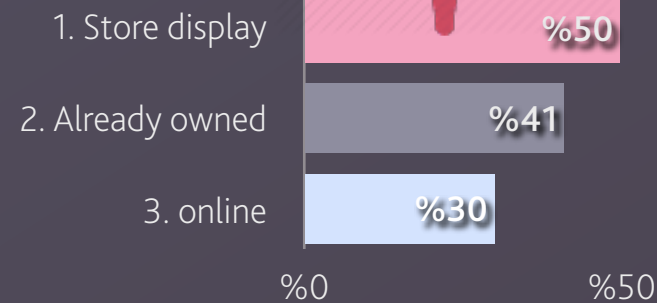
## FACTORS THAT INFLUENCE THE BUYING DECISION

66% DETAILED SIZE INFO  
64% FIBER CONTENT INFO  
62% CUSTOMER REVIEWS  
60% DETAILED FIT INFO  
60% LAUNDERING INFO

## APPAREL SHOPPING HABITS

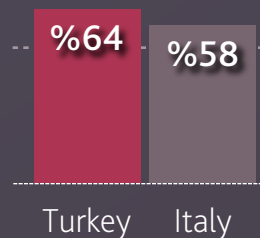
	TURKEY	ITALY	USA
I pay more for better quality	%72	%66	%48
I shop for clothing at least once per month	%70	%49	%88
I love shopping for clothes	%68	%76	%52
I often buy clothes on impulse	%38	%28	%34

## TOP 3 SOURCES OF CLOTHING IDEAS

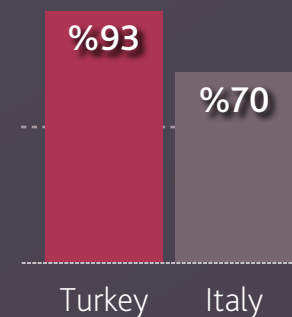


**7 IN 10**  
say blogs are their top online source of clothing inspiration

## I LOOK FOR SUSTAINABLE CLOTHING



## I PREFER COTTON-RICH FABRICS



Cotton Council International, Global Lifestyle Monitor Survey: Turkey



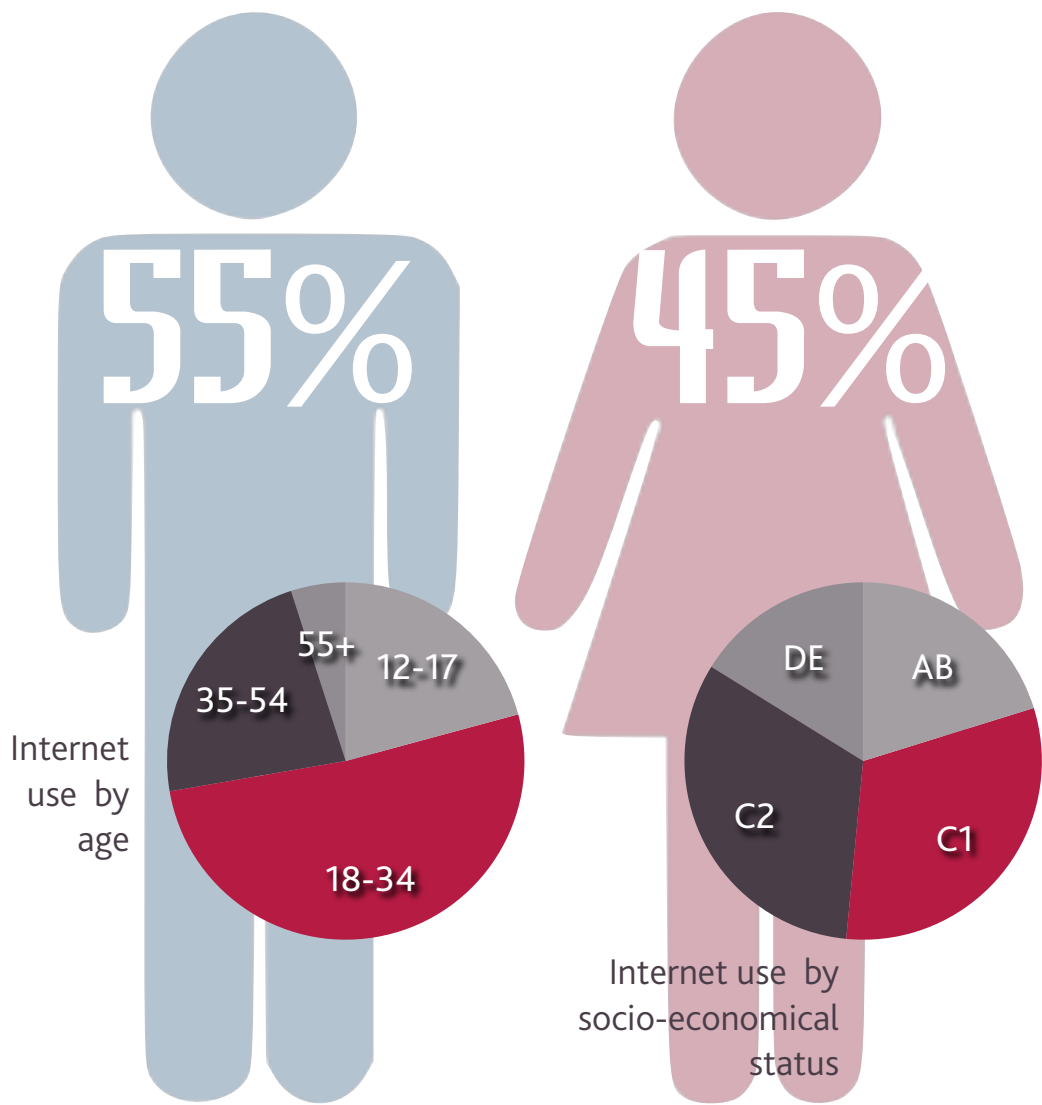




**DIGITAL**

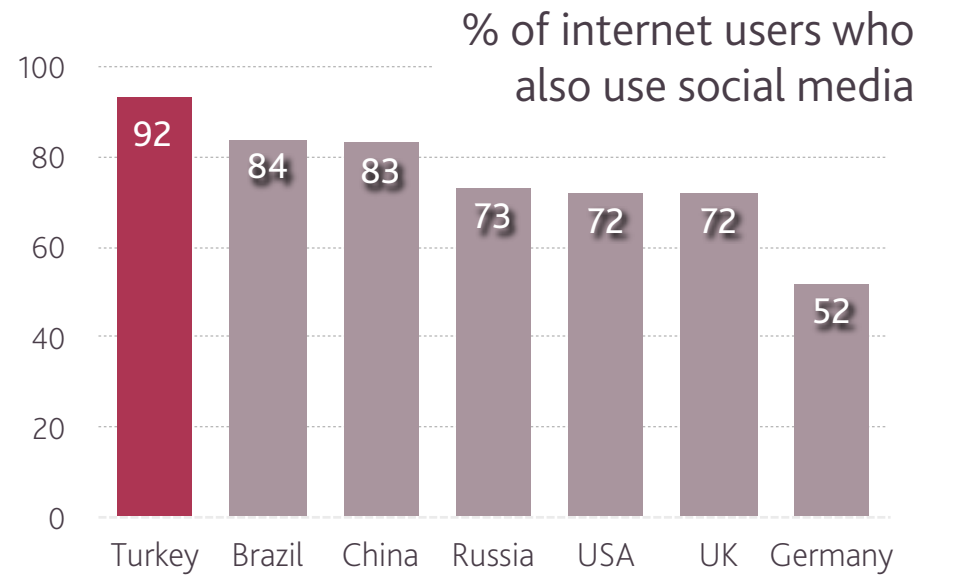
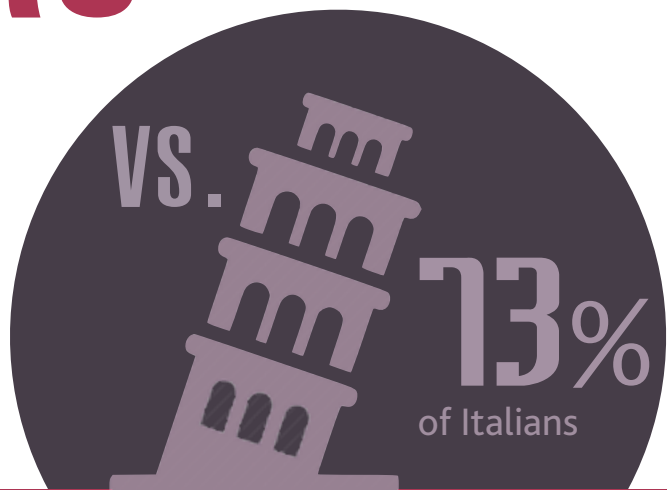
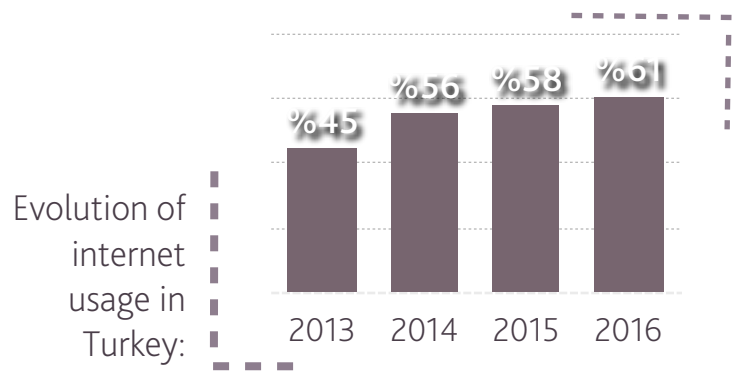
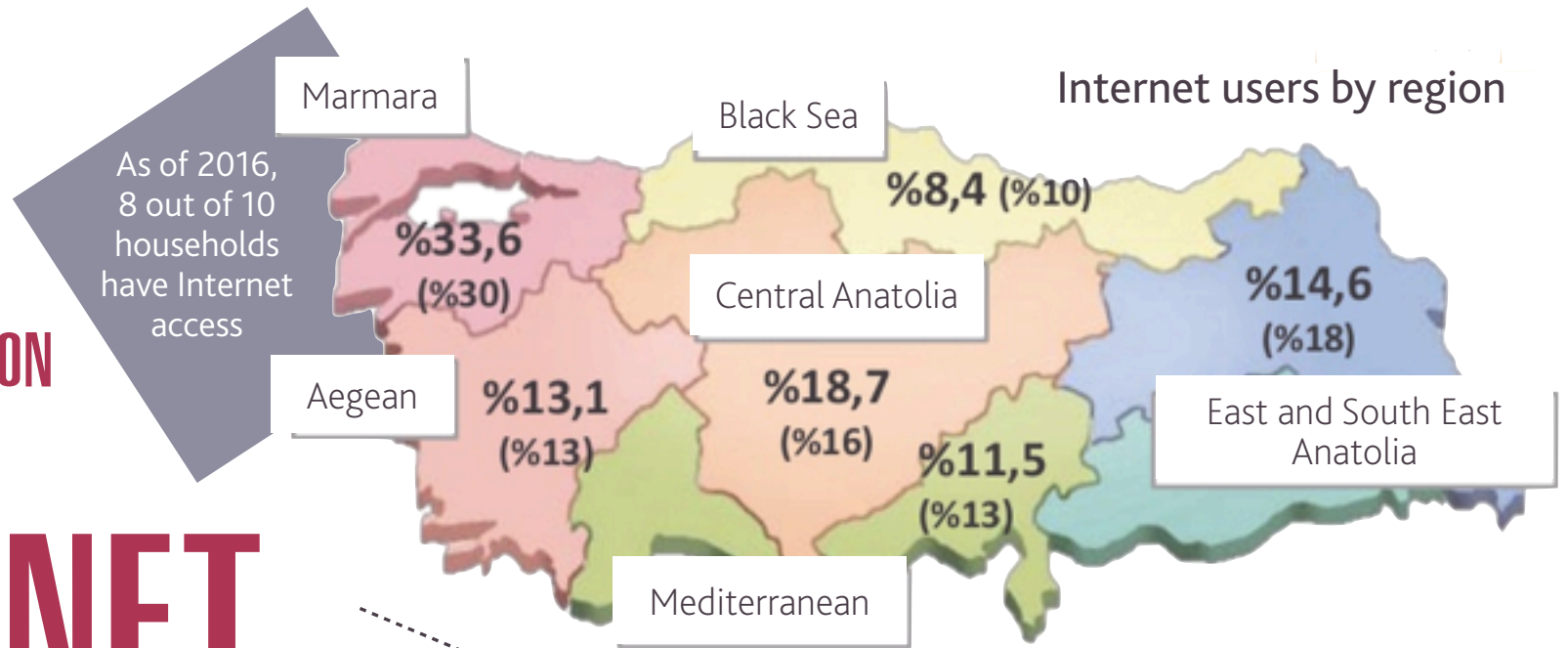
**DIJITAL**





**61% OF THE POPULATION ARE INTERNET USERS**

**1 IN 2 IS AN ACTIVE USER**



**MOST VISITED SITES:**

**#1 Google.com.tr**

11 million active users | 7 million active users

**#2 Facebook.com**

10 million active users | 7 million active users

**#3 Youtube.com**

8 million active users | 5 million active users

**#4 & 5**

Yandex Sahibinden | Twitter Wikipedia



# SOCIAL MEDIA

On February 10th of 2015 President Erdogan sent his first tweet. He now has over 7 million followers. This example clearly embodies the continued tensions in Turkey between efforts to control social media and a need to embrace – and recognize – their popularity.

During the Gezi Park protest,

**70%** of young people (18 to 29 yo) say to have kept informed through social networks.

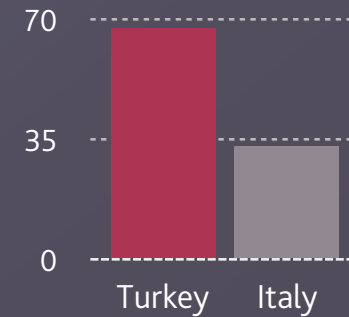
When looking at the 50+ population, this number goes down to

**29%**

Nevertheless, TV and Newspapers remain by far the most common source of news across all age groups

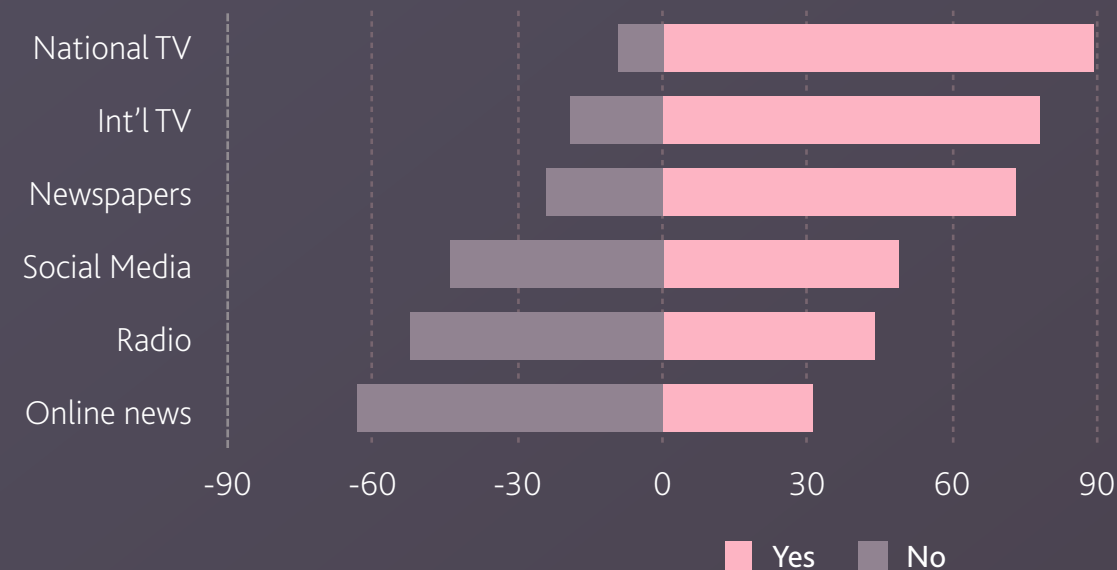


Percentage of social media users that use social media as a source of news



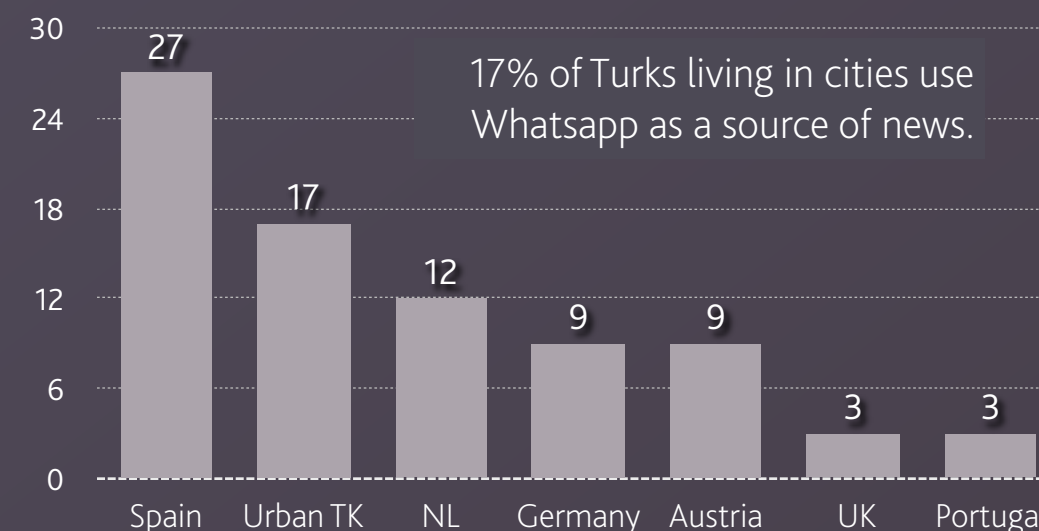
Facebook, Twitter and Google have all faced repeated calls to remove online content in Turkey. In the second half of 2014, Twitter received more requests from Turkey – through Government channels of by court order – to remove content, than from any other country; and complied with nearly half of those requests.

## WHERE DO TURKS GET THEIR INFORMATION FROM?



Users fight back, deploying other means such as SMS or changing the setting of domain names to conceal their geographic location

50% of internet users in Turkey share social media contents.



17% of Turks living in cities use Whatsapp as a source of news.

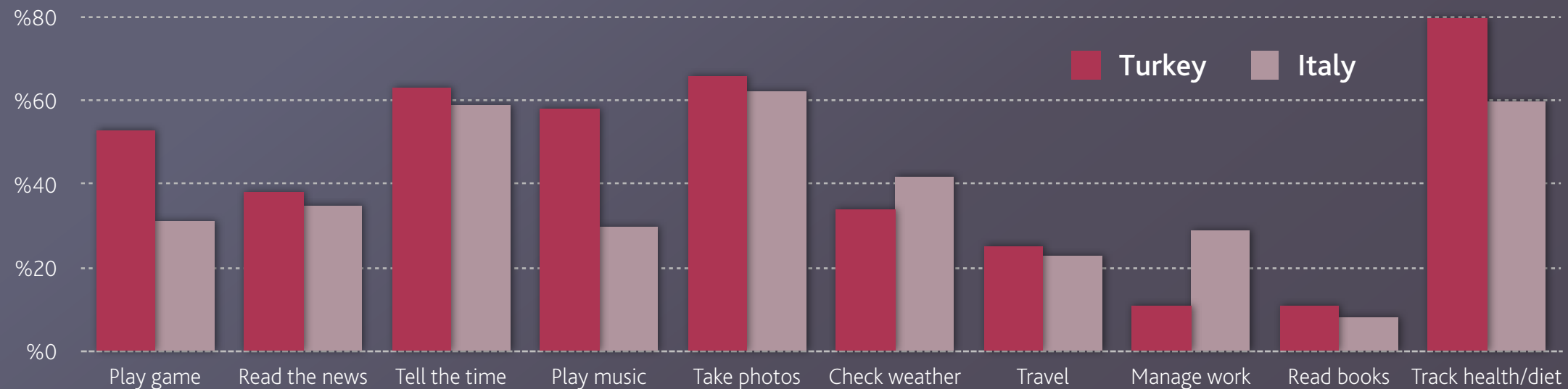
# NEWS

Sources:  
· Consumer Barometer with Google  
· Spring 2014 Global Attitudes Survey, Pew Research Center  
· OECD Digital Economy Outlook 2013  
· Reuters Digital News Report 2015

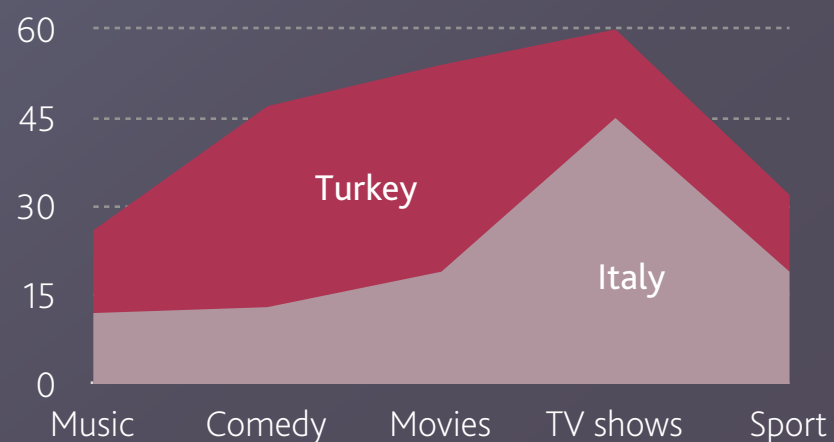


# MOBILE USAGE

## HOW PEOPLE USE THEIR SMARTPHONE DAILY

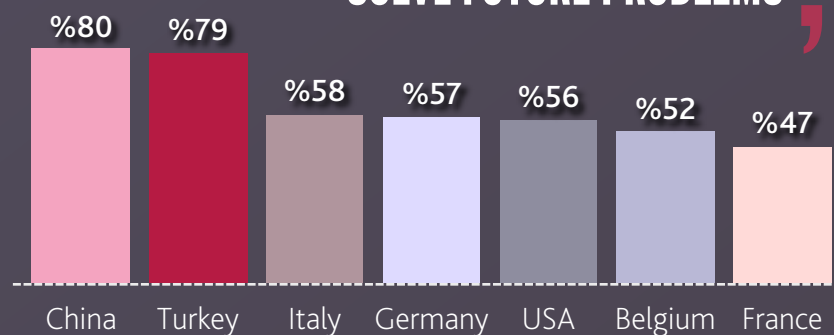


## VIDEO CONTENT WATCHED VIA SMARTPHONE



Turkish users are much more avid of video contents and more willing to watch on their smartphone.

“ONLY TECHNOLOGY CAN HELP SOLVE FUTURE PROBLEMS”

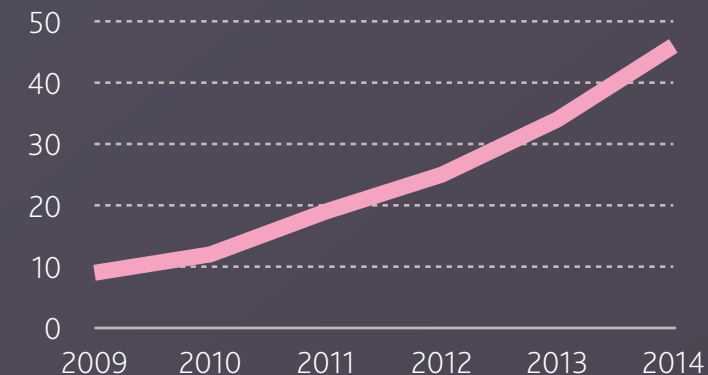


## E-COMMERCE

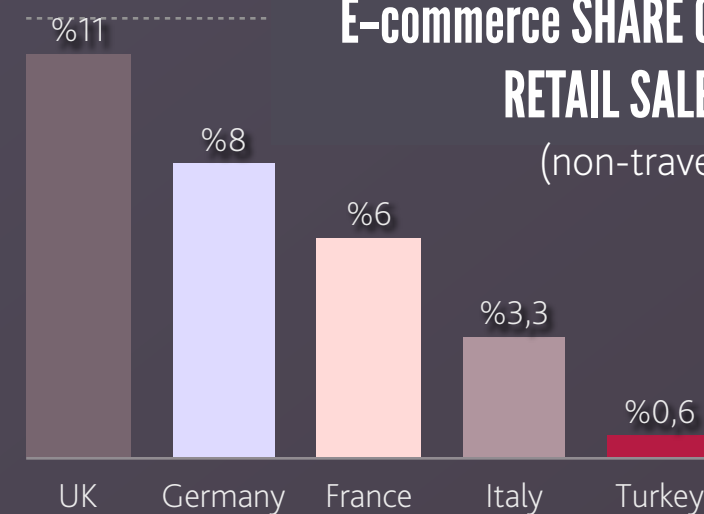
E-commerce market is expected to grow by **15.8%** at the end of 2017

E-commerce is less widely spread than in other European countries, partly due to brands' slow adaptation

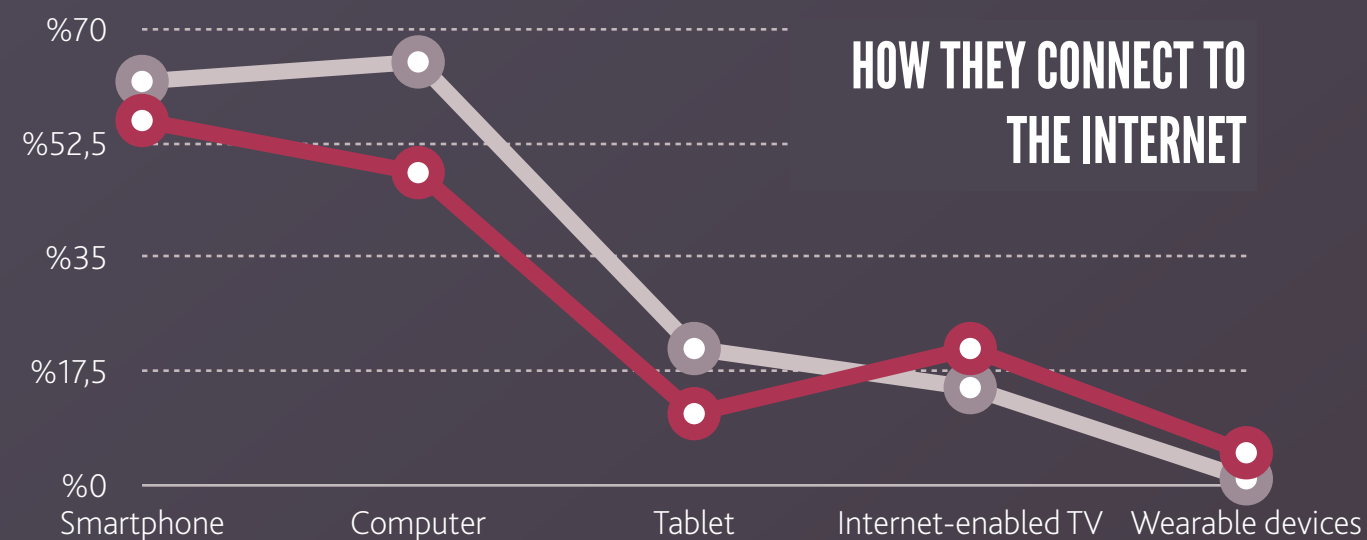
## EVOLUTION IN TRY BILLIONS



## E-commerce SHARE OF RETAIL SALES (non-travel)



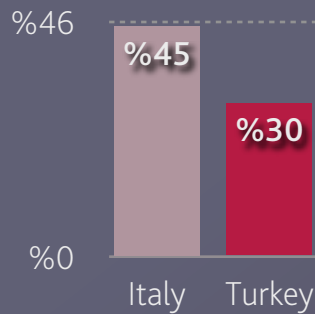
## HOW THEY CONNECT TO THE INTERNET



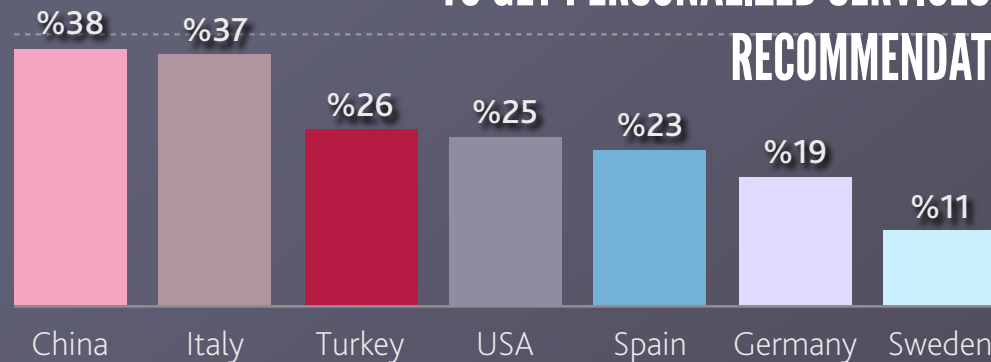
Sources:  
 · Consumer Barometer with Google  
 · Spring 2014 Global Attitudes Survey, Pew Research Center  
 · Dijital Pazarın Odak Noktası: E-Ticaret, published by TÜSİAD  
 Deloitte, "E-commerce in Turkey, market definition and-sizing", 2013



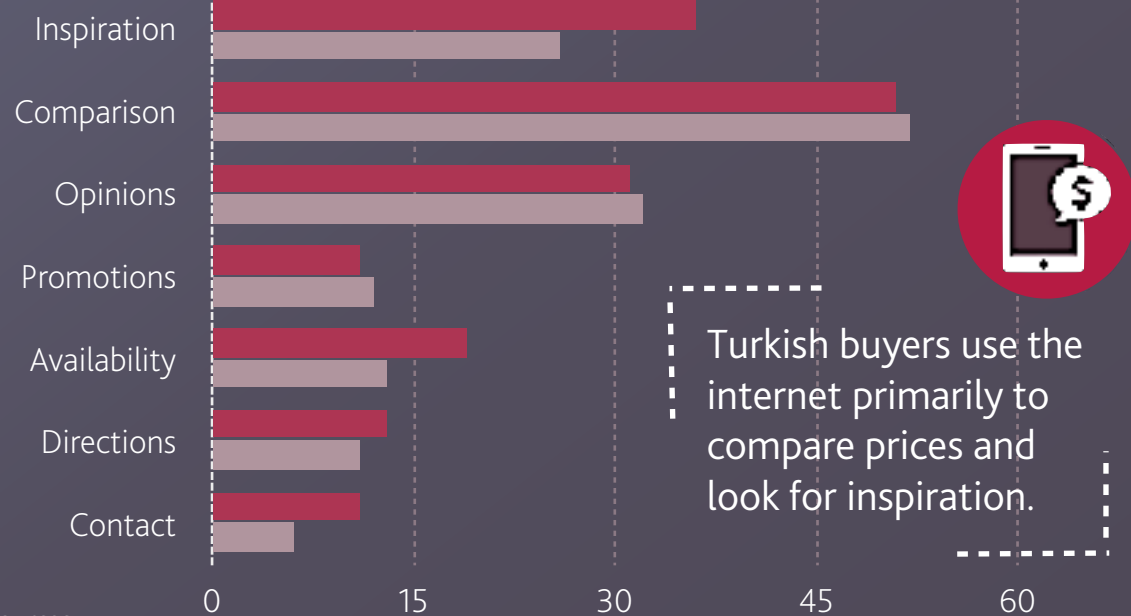
## % OF CONSUMERS COMPLETING AT LEAST 1 ONLINE INTERNATIONAL PURCHASE PER YEAR



## I'LL HAPPILY SHARE INFO ABOUT ME ONLINE TO GET PERSONALIZED SERVICES AND RECOMMENDATIONS



## TYPE OF LOCAL BUSINESS INFO NEEDED



Turkish buyers use the internet primarily to compare prices and look for inspiration.

Sources:

· Consumer Barometer with Google

· IAB Türkiye 2013

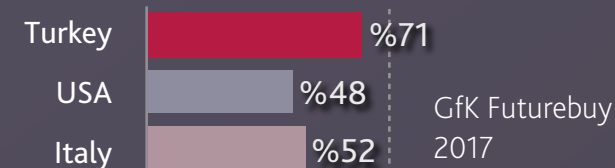
· GfK Futurebuy 2017 Report

· Global Media Journal Turkey, Edition 5, 2014 - ONLINE BUYING BEHAVIOUR OF TURKISH

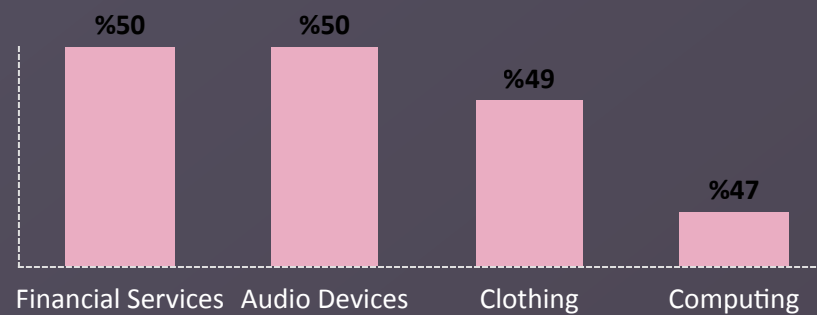
CONSUMER: AN EXPLORATORY STUDY ON Hepsiburada.com

# PURCHASE BEHAVIOR

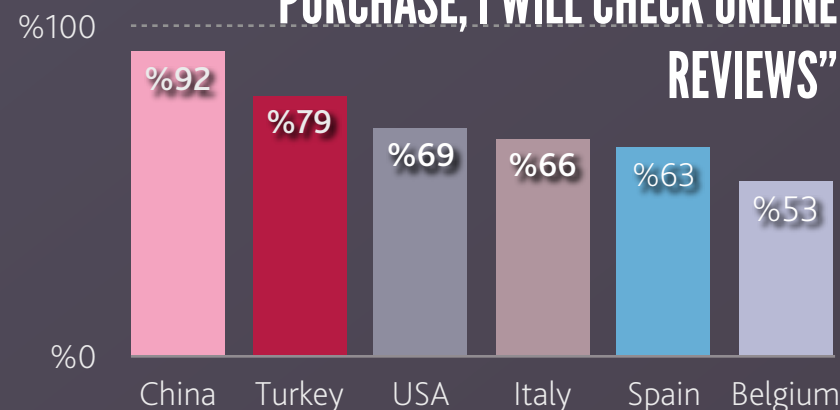
"I can shop for nearly 100% of the products / services I need online."



## ONLINE BUYERS FAVORITE TYPE OF PURCHASES



## "IF I DON'T FEEL CONFIDENT MAKING A PURCHASE, I WILL CHECK ONLINE REVIEWS"



## REASONS FOR NOT BUYING ONLINE

### #1

SECURITY ISSUES AND CREDIT CARD FRAUDS



### #2

NEED TO TOUCH AND TRY ON

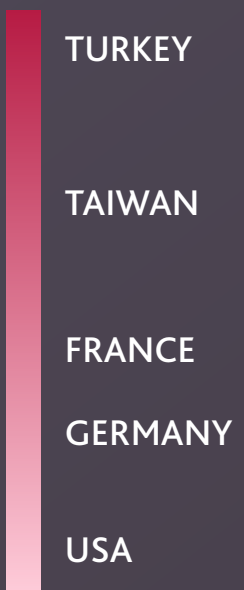
### #3

HASSLE OF RETURNING THE PRODUCT

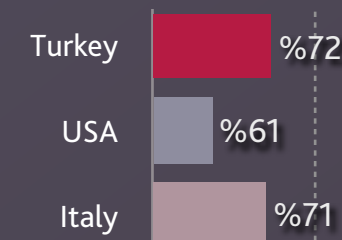
SEARCH  
ONLINE  
BUY  
OFFLINE

68%

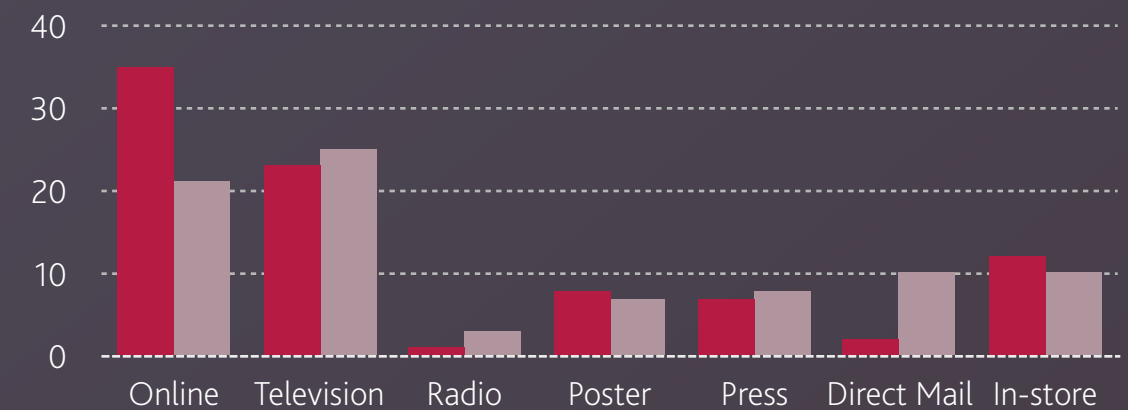
research a product or service before purchasing - more than any other country!



## "SHOPPING ONLINE SAVES MONEY"



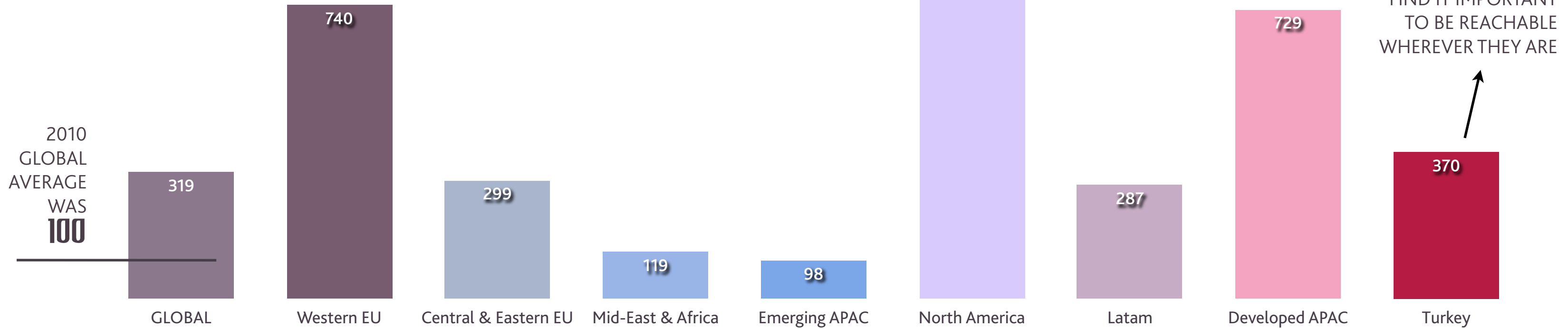
## PRIMARY SOURCES OF ADVERTISING THAT LED TO A PURCHASE





# 2016 GFK CONNECTED CONSUMER INDEX

The index measure the level to which consumers are connected to each other and with digital content - through any of these devices: smartphone, tablet, mobile PC, desktop PC, wearables, smart TV, TV set-top box, video games console, e-reader, connected cars, smart home





## A DICHOTOMIC POPULATION

**50%**  
FEEL HAPPY AND  
PEACEFUL



**50%**  
FEEL ANXIOUS,  
ANGRY OR EVEN  
DEPRESSED

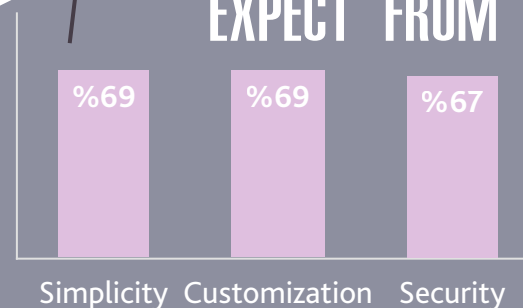


2016 - 2017  
average based  
on GfK  
Economic  
Situation,  
Expectations &  
Saving Behavior  
Report June  
2017

**51%**  
"IF A TECHNOLOGY  
PRODUCT IS NOT  
SIMPLE I LOSE  
INTEREST"

**39%**  
CONSIDER  
THEMSELVES EARLY-  
ADOPTERS

### WHAT TURKS EXPECT FROM BRANDS



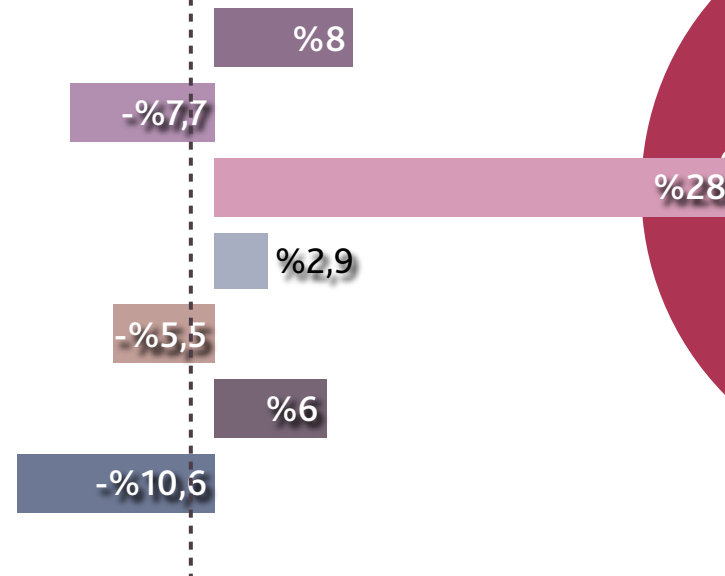
Being a foreign  
brand is the least  
important buying  
factors (32%)

**69%** SAY THEY PREFER  
ECO-FRIENDLY  
BRANDS YET  
ONLY **51%**

ACTUALLY READ THE  
INFO ON THE  
PACKAGING

**75%**  
SEE FAMILIARITY  
AND ACCESSIBILITY  
AS THE MAIN BUYING  
DRIVERS

Consumer Electronics  
Photography  
Major Domestic Appliances  
Small Domestic appliances  
IT  
Telecommunication  
Office Equipment



**9,3%**  
OVERALL GROWTH OF  
TECHNICAL  
CONSUMER GOODS  
SECTOR COMPARED  
TO LAST YEAR

source:  
GfK TEMAX TURKEY 2017

# CONSUMERS

## ECONOMIC RESTRICTIONS

When considering where to save  
money or reduce consumption,  
Turks will most easily give up  
cultural activities

For the following 12 months,  
I'm planning to decrease my  
consumption of...



**40%**

CULTURE, ART,  
CINEMA



**34%**

RESTAURANTS,  
BARS



**33%**

CLOTHES,  
SHOES

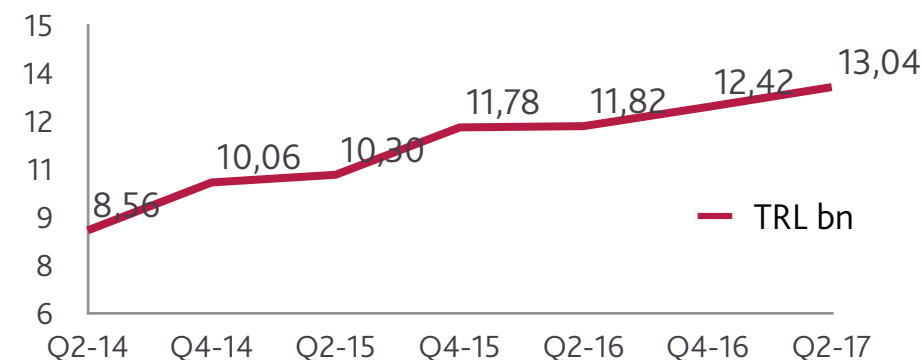


**24%**

SNACKS,  
SWEETS

**74%**  
ARE LESS LOYAL TO  
BRANDS AND PREFER  
TO SHOP AROUND  
FOR BEST VALUES

## TURNOVER EVOLUTION FOR TECHNICAL CONSUMER GOODS

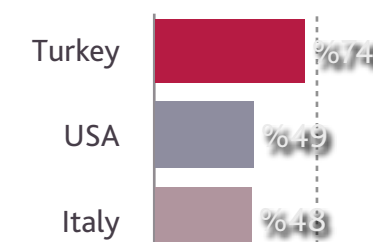


## FASHION FIRST

Most shopped categories  
(online & offline)



"I WOULD BE MORE LOYAL  
TO A BRAND THAT LETS ME  
GIVE INPUT OR SHAPE  
PRODUCTS"



source:  
GfK FUTUREBUY TURKEY REPORT 2017





**ECONOMY**

**EKONOMI**



# REACHING FOR THE DEVELOPING WORLD

**6<sup>TH</sup>**

LARGEST AND  
#1 FASTEST  
GROWING  
ECONOMY IN  
EUROPE

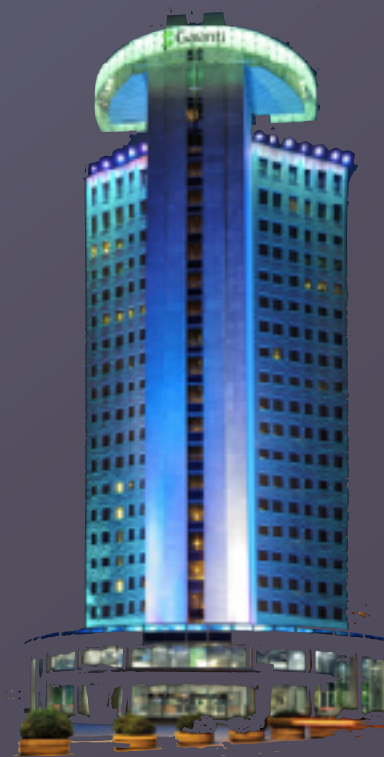
**2<sup>ND</sup>**

BIGGEST  
ECONOMY  
AMONG ISLAMIC  
COUNTRIES  
- after Indonesia

MEMBER  
OF THE  
**OECD**  
AND  
**G-20**

**12**

COMPANIES  
LISTED IN THE  
2015 FORBES  
GLOBAL 2000



starting with  
**GARANTI BANK** ranking  
**#449**

## EMERGING ECONOMY

Turkey is sometimes described as an “EMERGING MARKET” (World Bank, Merrill Lynch, The Economist) sometimes as a “NEWLY INDUSTRIALIZED” country (by economists).

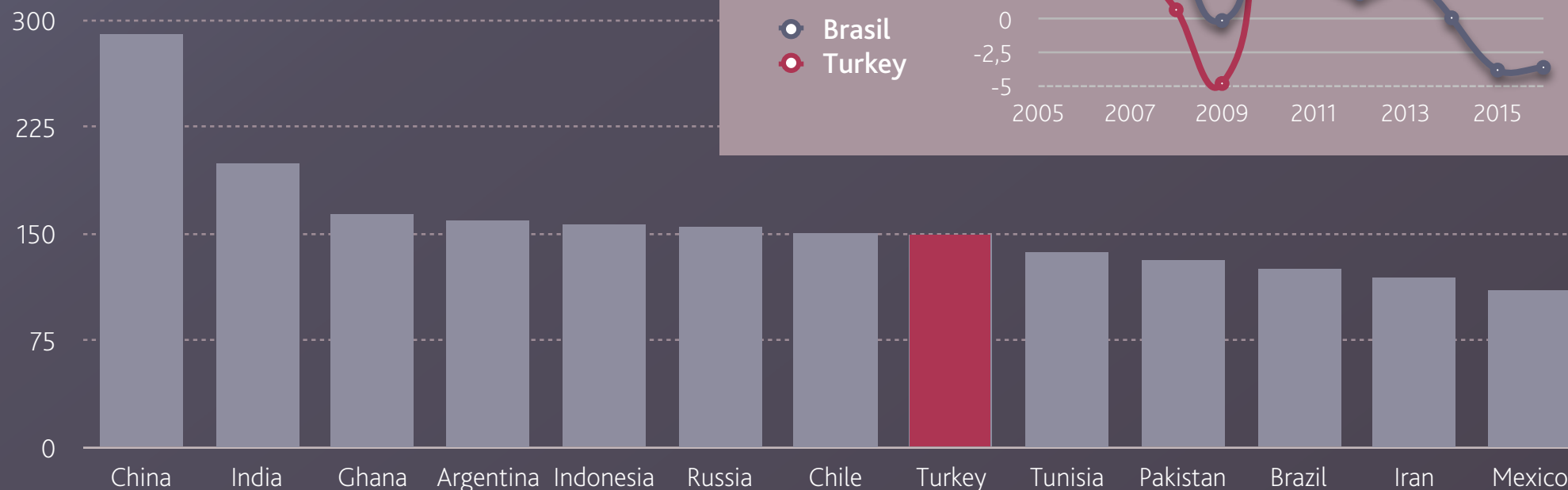
Economist Jim O’neill created the acronym **MINT** – Mexico, Indonesia, Nigeria, Turkey - anticipating that the favorable demographics and the economic prospects of these countries shall put them in the top 10 within 20 years.

2016  
INTERNATIONAL  
RESERVE:  
USD 92,6 billion

Also voted in the  
TOP 10 of Emerging  
markets by the  
Global Intelligence  
Alliance

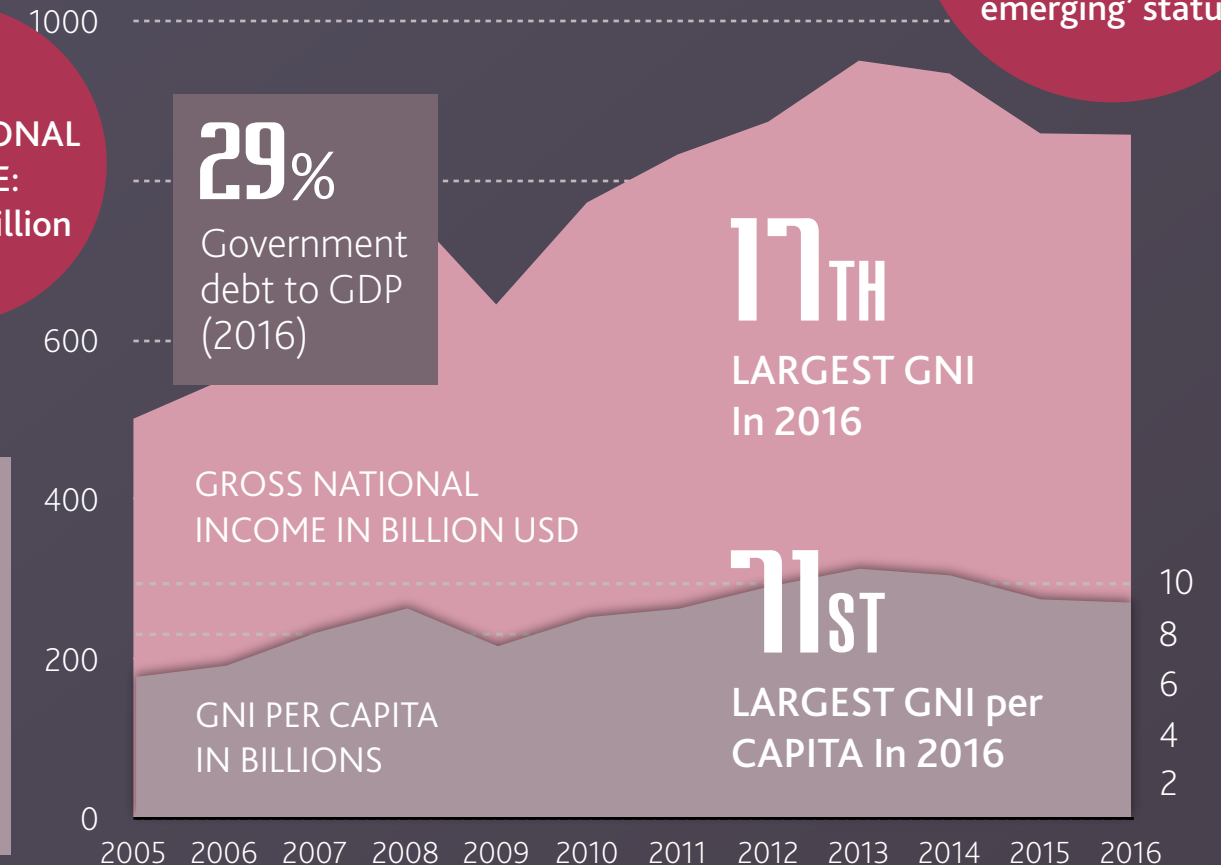
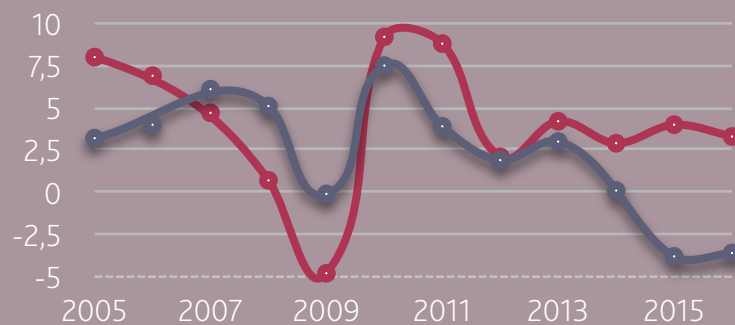
In 2010, the FTSE  
Group promoted  
Turkey from  
'secondary emerging'  
to 'advanced  
emerging' status

## EMERGING ECONOMIES BY GROWTH IN GDP PER CAPITA 2002–2014



## GDP ANNUAL % GROWTH

● Brasil  
● Turkey



Against all  
expectations,  
Turkey boasted a

**5%**

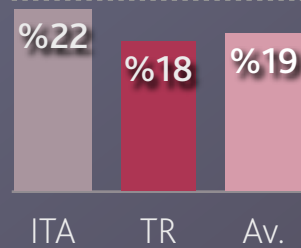
GDP  
GROWTH  
in 2016

Sources:  
IMF  
World Bank  
· Turkish Statistical Institute (TÜİK)  
· Hurriyet Daily News, Sept. 2015  
· Forbes Magazine, 2015 Forbes Global 2000  
· Global Intelligence Alliance, Business Perspectives on Emerging Markets 2012 - 2017 Survey  
· Hurriyet Daily News, 'Differences and similarities between the economies of Brazil and Turkey', May 2016



# BUSINESS ENVIRONMENT

## FAVORABLE VAT RATES



## NEW TAX LAWS

Since August 2016 a new law provides additional incentives through tax exemption options and energy saving rewards

Sources:  
UK Foreign & Commonwealth Office, "Turkey: latest killer facts about the economy", Sept. 2014  
[http://www.turkiyeyianlamakilavuzu.com/Turkiyeyi\\_Anlama\\_Kilavuzu\\_EKitap.pdf](http://www.turkiyeyianlamakilavuzu.com/Turkiyeyi_Anlama_Kilavuzu_EKitap.pdf)

## REGIONAL HUB

33% of big multinational companies use their offices in Turkey as their regional headquarters.

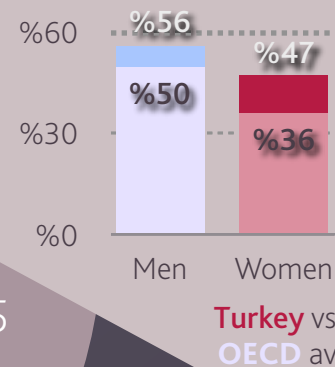
## EASE OF BUSINESS

AVERAGE TIME TO START A BUSINESS:  
**6 DAYS**

World av. = 30.6 days  
OECD av. = 12 days

## RISK PERCEPTION

"I would rather take a risk and build my own business than work for someone else"



## FOREIGN DIRECT INVESTMENTS

**16.5 BILLION**

FDI influx in 2015  
32% growth from 2014

**78%**

of all FDI come from the EU

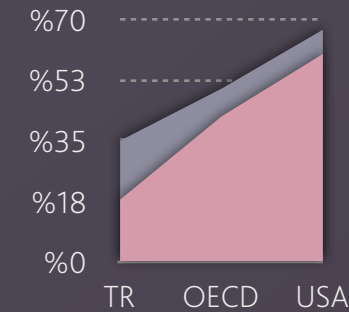
## MANUFACTURING

#1 recipient sector  
32% growth from 2014

## SPAIN

#1 investor in 2015  
followed by USA and Luxembourg

## "I HAVE ACCESS TO BUSINESS TRAINING OR EDUCATION"



**7.9%** AVERAGE INFLATION RATE  
April 2015 to December 2016

## DEVELOPMENT PRIORITIES

According to Ministry employees

education

energy

job creation / justice

1

2

3

According to the private sector

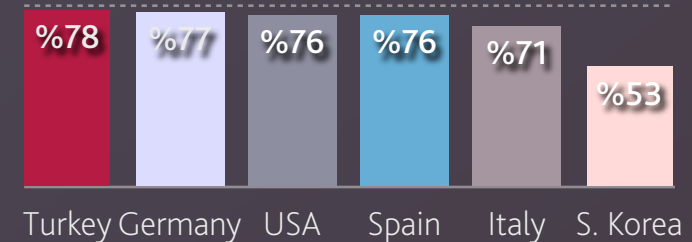
corruption

education

regulatory framework

## DIY MENTALITY

TURKEY AMONG THE LEAST LIKELY TO RESORT TO EXPERTS' OPINION



# EMPLOYMENT

**51.6%**

LABOR FORCE PARTICIPATION RATE

**11%** UNEMPLOYMENT  
as of January 2016

PER CAPITA INCOME:  
**\$18,800**  
(2023 goal: \$25,000)

## EMPLOYER'S RESPONSIBILITIES

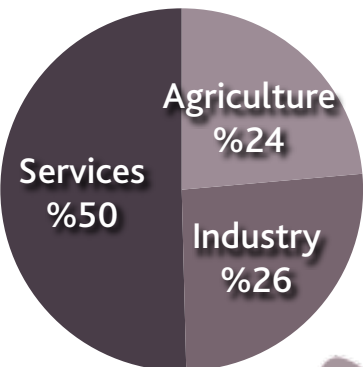
**13%** SHORT & LONG TERM RISK PREMIUMS

**7.5%** GENERAL HEALTH INSURANCE

**2%** UNEMPLOYMENT INSURANCE FUND

**1647 TL / MONTH**  
NET MINIMUM WAGE

**1965 TL / MONTH**  
EST. AVERAGE WAGE



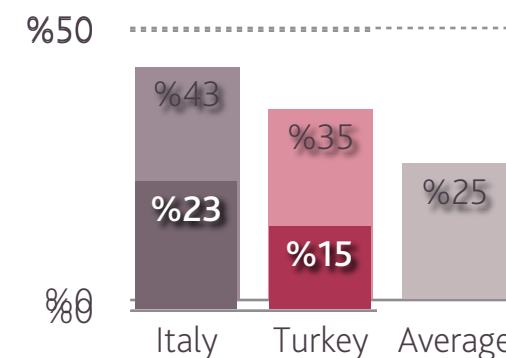
**9%** of employees work in construction

**45** MAX. WORKING HOURS/WEEK

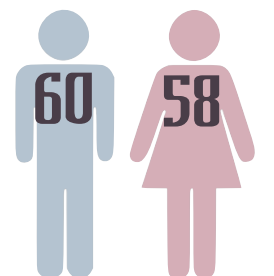
**35%** AVERAGE SOCIAL SECURITY RATE

## PERSONAL INCOME TAX

(lowest & highest rates)



## RETIREMENT AGE



Sources:  
<http://www.intes.org.tr/content/nisan2015.pdf>  
2014 World Bank Group Survey for Turkey  
Invest In Turkey, Investment Guide  
IPSOS Global Trends Survey 2014



**10%**  
AVERAGE  
GROWTH

## CONSTRUCTION

**2<sup>ND</sup>** best country for contracting companies after China

**118,784**  
foreign-owned  
properties in Turkey

**#1**  
buyers =  
Britons

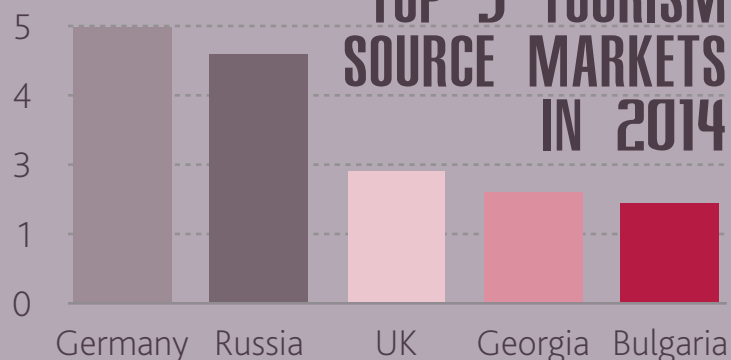
Larger construction companies seek to attract foreign buyers to luxury residential projects, known as *BRAND* projects.

## TOURISM

Turkey is the 6th more popular destination



### TOP 5 TOURISM SOURCE MARKETS IN 2014



**36 MILLION**  
visitors in 2015

If pulled together, **ARABS** actually form the **3<sup>rd</sup>** group. in 2016, they will likely take the **nº1** spot.

### A YACHTING PARADISE

**40+** marinas

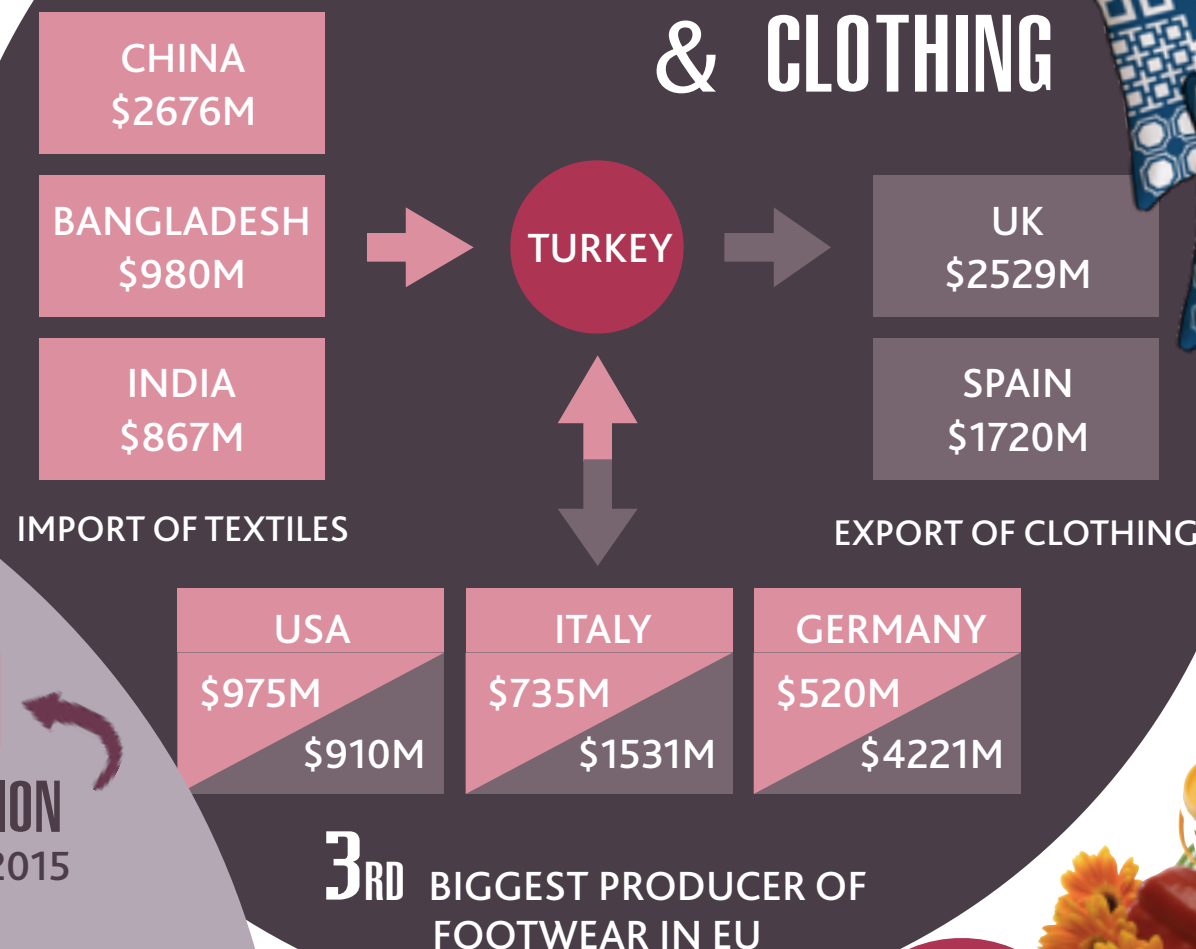
### MEDICAL TOURISM

Each year on average **150.000** come for medical reasons, including hair transplant.



**REVENUES FROM TOURISM DOUBLED IN 10 YEARS**

## 6<sup>TH</sup> largest trader in TEXTILE & CLOTHING

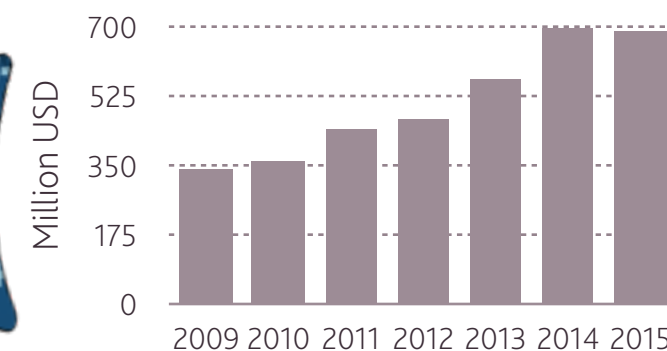


## 10<sup>TH</sup> PRODUCER OF MINERALS IN TERMS OF DIVERSITY

**12%** of the world's **BORON SALT RESERVES** are in turkey

World largest exporter of refined sunflower oil

## SEAFOOD EXPORTS



# RESOURCES

## AGRICULTURE

Agricultural exports more than tripled in the past decade.



## LARGEST PRODUCER OF HOUSE & KITCHENWARE IN EUROPE

Sources:  
 · Tursab, Turkish Tourism Industry today  
 · Turkey Ministry of Agriculture  
 · Turkish Exporters Assembly TIM  
 · [http://www.turkishseafood.org.tr/?page\\_id=31](http://www.turkishseafood.org.tr/?page_id=31)  
 · Ministry of Culture and Tourism  
 · ENR Engineering News Record Mag  
 · Al Monitor, "Sales of Turkish property to foreign buyers reaches \$4.3B in 2014", May 2015



## TOP EXPORT INDUSTRIES

2. CLOTHING

1. AUTOMOTIVE

\$21,3 billion in value  
(-4,8% from 2014)  
due to parity

\$17 billion in value  
(-9,3% from 2014)  
due to parity

#1 EUROPEAN UNION

(-8,3% from 2014 due to parity) \$62MM in value

#2 MIDDLE EAST

\$26MM in value (-10,4% due to parity)

The Russian Federation used to be Turkey's 4th export partner but in 2014 it cancelled all buying deals.

## TOP EXPORT PARTNERS

9,6%



6,9%



6,3%



4,5%



4,1%



4%



## TOP IMPORT PARTNERS



11%



10%



9,2%



5,3%



5%



4,1%

in 2014, Russia imports from Turkey were worth 25,3B but relations were broken at the end of 2015

## TOP IMPORT INDUSTRIES:

1. OIL

2. MACHINERY

3. ELECTRONICS

## FASTEST-GROWING IMPORTS:

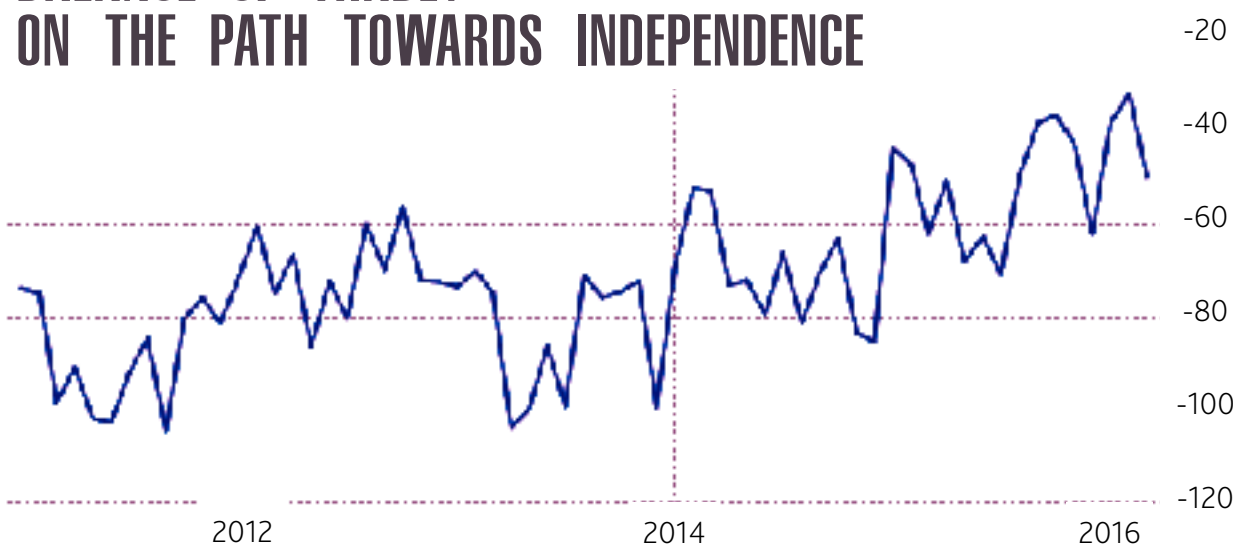
1. MEAT
2. SUGAR
3. COFFEE, TEA & SPICES
4. MILLING PRODUCTS
5. VEGETABLES
6. WEAPONRY

# IMPORTS EXPORTS

“There have been significant changes in the commodity composition and structure of Turkish companies' exports. The share of traditional exports, such as textiles and garments, has declined, while the share of motor vehicles, machinery and equipment has increased.”

Rifat Hisarciklioğlu  
President of the TOBB and the DEIK

## BALANCE OF TRADE: ON THE PATH TOWARDS INDEPENDENCE

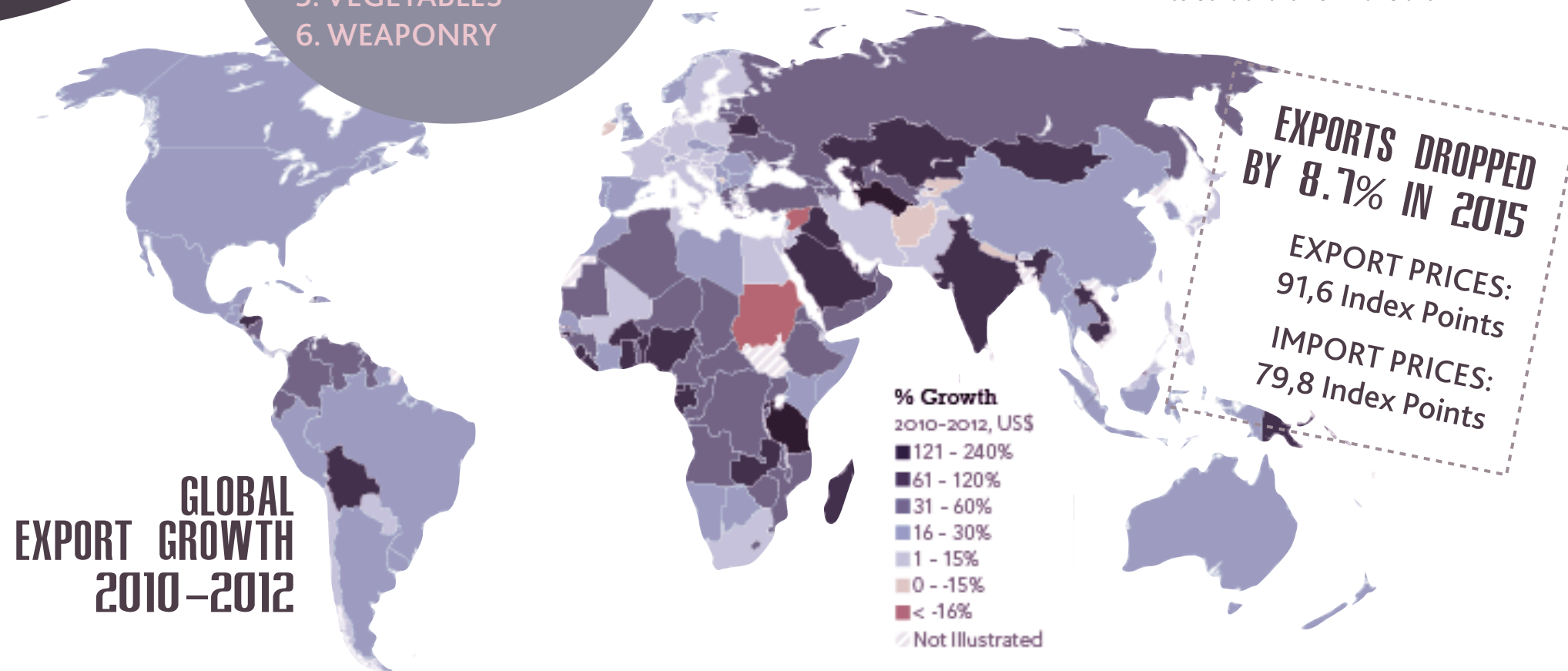


Sources:

· Euromonitor International 2015  
· Turkish Exporters Assembly TIM

· CIA World Factbook, Country export partners.  
· Hurriyet Daily News 'Turkey's exports drop 8.7 percent in 2015', Jan. 2016

## GLOBAL EXPORT GROWTH 2010-2012



EXPORTS DROPPED  
BY 8.7% IN 2015

EXPORT PRICES:  
91,6 Index Points

IMPORT PRICES:  
79,8 Index Points

% Growth  
2010-2012, US\$  
■ 121 - 240%  
■ 61 - 120%  
■ 31 - 60%  
■ 16 - 30%  
■ 1 - 15%  
■ 0 - 15%  
■ < -16%  
○ Not Illustrated



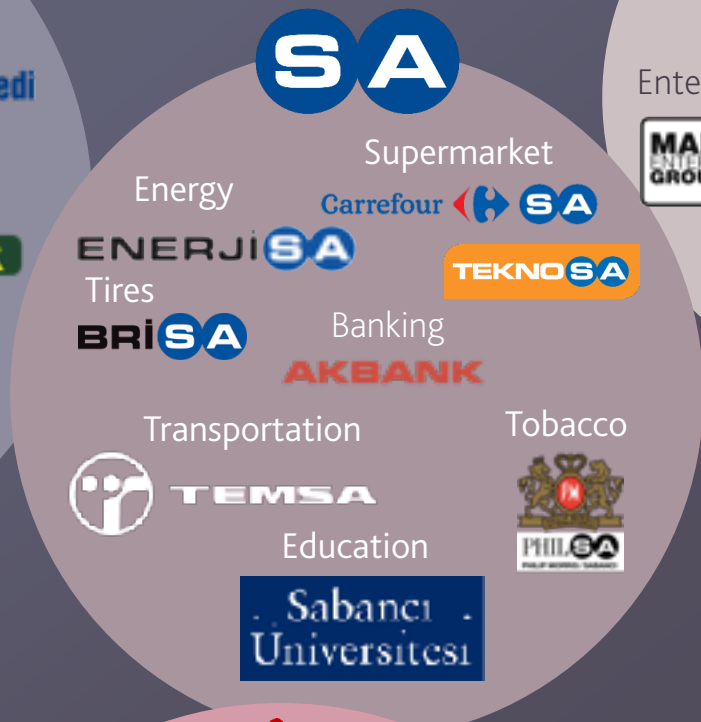


Established in 1926 by Vehbi Koç, Koç Holding's combined revenue amounts to 7.4% of Turkey's GDP and the market share of its companies on Borsa Istanbul was 18% in 2015.



Yildiz Holding acquired Şok, a discount supermarket chain boasting over 1,200 branches, from Migros for 600m TL in 2011.

Sabancı Group was established by Hacı Ömer Sabancı after he saved enough money to open a store focusing on cotton trade.



Ülker is one of the largest food manufacturer in Europe, Middle East, and Africa, generating revenues of 15.7 billion TL in 2013.

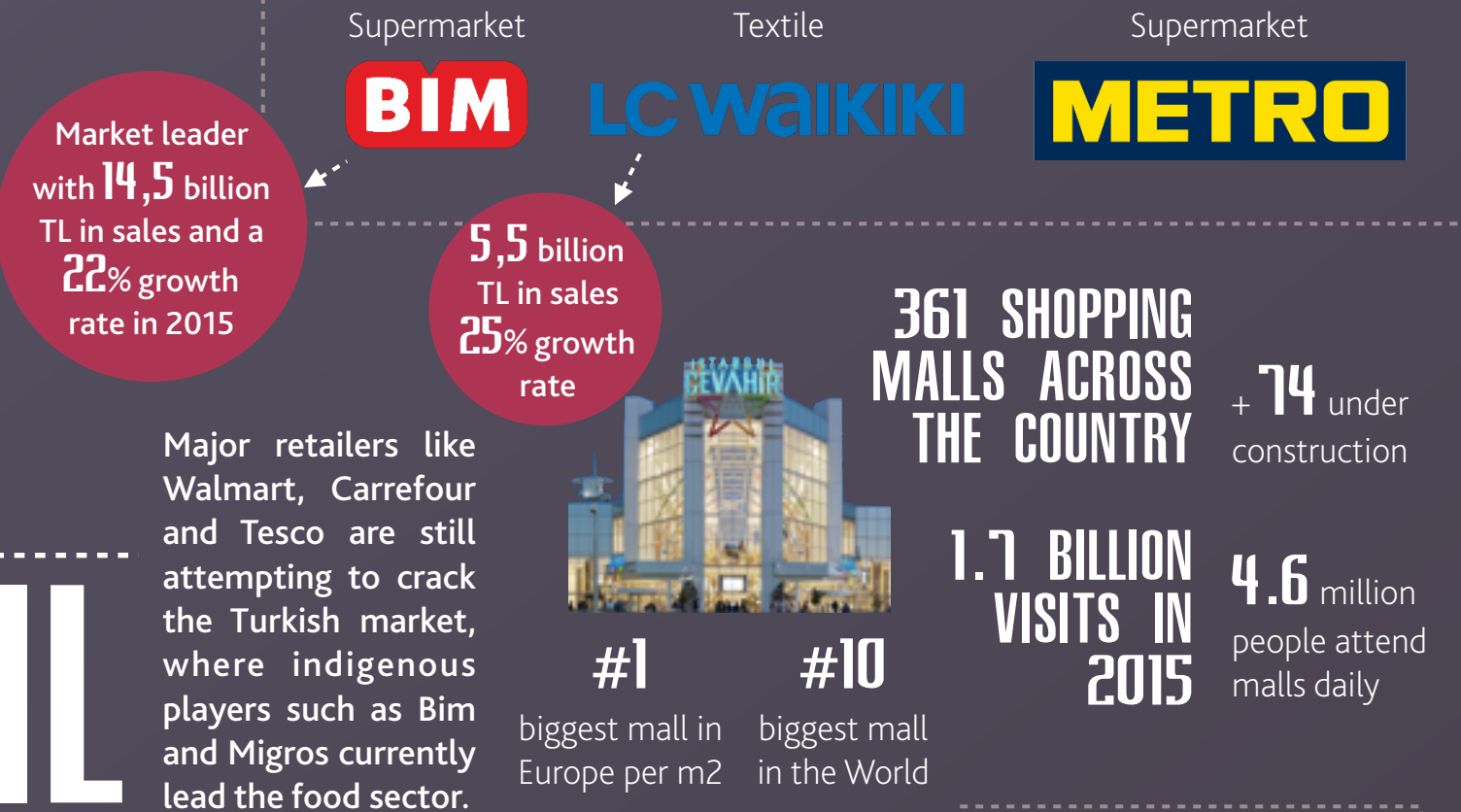


# RETAIL

“Retail business is like bamboo. For the first 5 years you work for it the hardest, without seeing any result. Once it germinates, though, it grows 26m in 40 days. [...] Business is exactly like that. You have to combine required education with patience, ambition and determination to be successful.”

- Vahap Küçük -  
Chairman of the Board, LC Waikiki

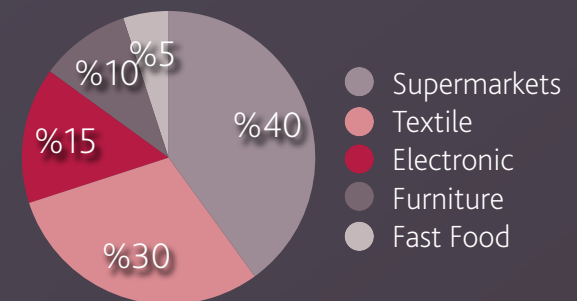
## INDEPENDENT PLAYERS



## BIGGEST PLAYERS by net sales

- BIM**
- MIGROS**
- LC Waikiki**
- ŞOK**
- METRO**
- Carrefour** **SA**
- TEKNO SA**
- BİZİM**

SECTORS OF TOP 20 BEST SELLING RETAILERS as of 2015

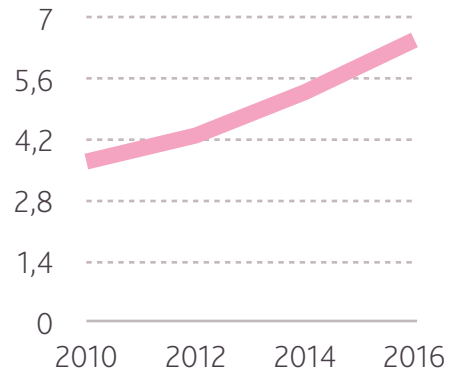


RETAIL SECTOR GREW BY 9% in terms of revenues in 2015 for a value of 663 billion TL.

Sources:  
· file:///C:/Users/Bilgi/Downloads/gx-cb-global-powers-of-retailing-2016.pdf  
· Capital Mag, "Perakendede En Büyük 100 şirket", Jan. 2016  
· Cumhuriyet, "İşte Türkiye'nin en zengin listesi", Oct. 2014  
· FinancialTimes/CNBC, "Turkey poses retail challenge", Jan. 2013  
· Hurriyet Daily News, 'Magazine names Turkey's 'most popular' companies', April 2016

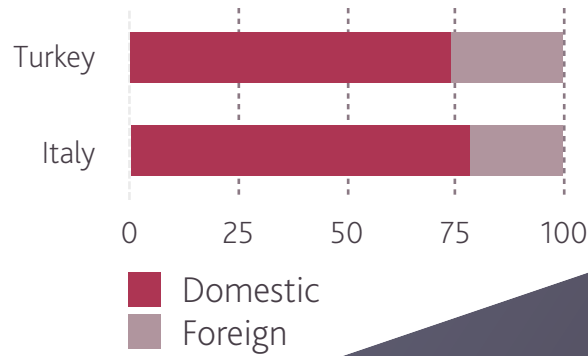


In 2015, Turkey was among the top 10 growth markets



Spending on luxury good in Billion TL

=1% of global annual luxury spending



Prices are on average 20% higher than those in Milan or Paris

Tabloid print media and tabloid style TV shows are very popular in Turkey, and are the main source of inspiration and influence for luxury product trends.



FROM RUSSIAN BOURGEOISIE IN COASTAL RESORTS TO MIDDLE EASTERN TOURISTS IN ISTANBUL

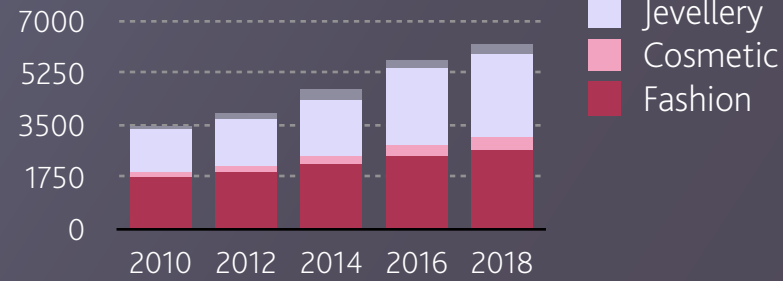
Turkish soap operas largely contribute to attracting luxury consumers from the Gulf

20% of luxury retail spending by visitors from Central Asia and Persian Gulf

ENTREPRENEURS & TOP MANAGERS OF BIG CORPORATIONS

With the exception of cars, Turkey's super rich prefer to shop for luxury goods abroad.

CATEGORY-BASED ANNUAL LUXURY CONSUMPTION



# LUXURY

## TRENDS

### AFFORDABLE LUXURY

Marc Jacobs, Chanel and Gucci have all started producing affordable lines, which supported their growth in Turkey.

### UP & COMING

Whilst there is strong demand for established brands, Turkish consumers are also very close followers of up-and-coming designers and styles.

Melis Kaptanoğlu  
Turkey's luxury brand for girls



### CASUAL CHIC & BUSINESS CASUAL

Turkish men are more frequently wearing non-classical items such as red trousers and orange ties in addition to more classic items. Women are purchasing more mechanical and kinetic watches and preferring handbags that can be used as business bags, or female-oriented briefcases.

### LUXURY GOES ONLINE

Beymen started its e-commerce operation in November 2010 and since then the business is growing exponentially. Today, close to 3% of total sales come from internet and the objective is to reach 5% in the near future.

Luxury players increasingly use social media to develop brand recognition, but also to support new launches.

### STATUS SEEKERS

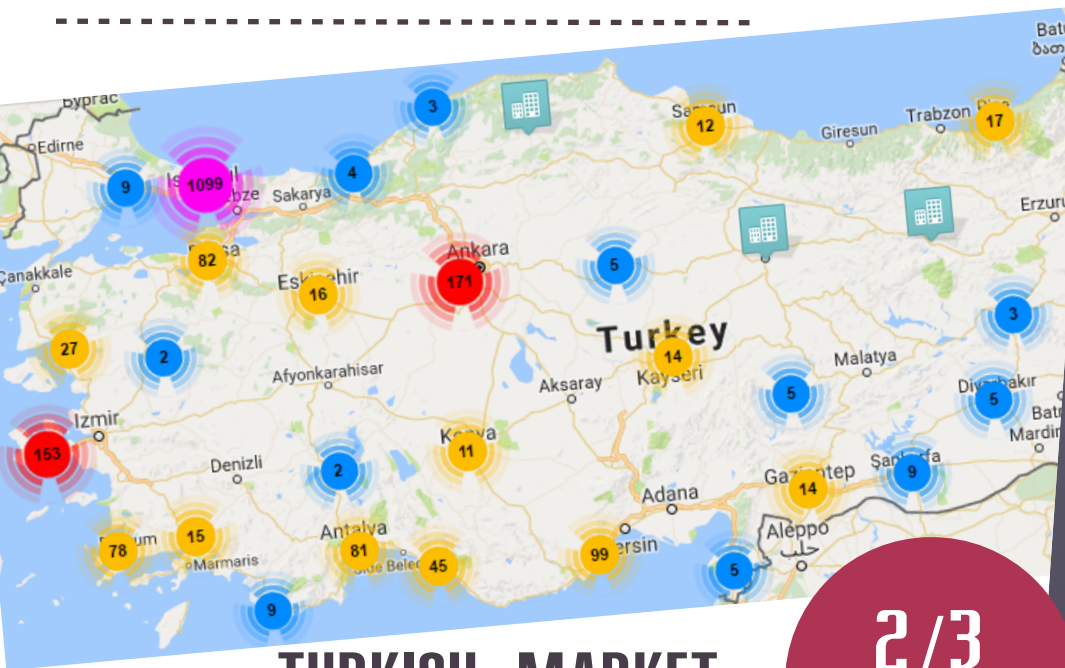
The Turkish upper middle class is the real growth generator for Turkey's luxury market. They are the "new rich", many often enjoying the fruits of their parents working hard and saving every penny.

50% of all luxury sales

Sources:  
Euromonitor International, Luxury Goods Industry Overview 2016  
[https://www.nytimes.com/2015/12/02/fashion/has-turkey-lost-its-luster-for-luxury-brands.html?\\_r=0](https://www.nytimes.com/2015/12/02/fashion/has-turkey-lost-its-luster-for-luxury-brands.html?_r=0)  
<http://luxurysociety.com/en/articles/2014/07/turkey-economy-ripe-for-luxury-growth/>  
CPP-luxury.com



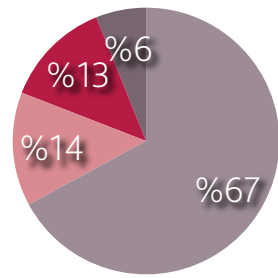
# CONSTRUCTION



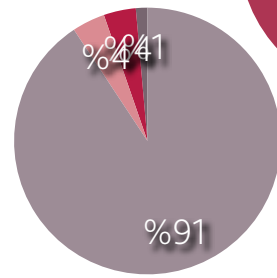
## TURKISH MARKET

### SEARCHES BY UNIT TYPE

- Flat
- Villa
- Residence
- Others



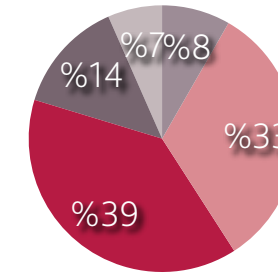
1st quarter of 2016



1st quarter of 2017

### SEARCHES BY # OF ROOMS

- 1
- 2
- 3
- 4
- 5+



87% of all searches focus on ISTANBUL vs 74% last year



The RINGS OFFICES in Sancaktepe is 1 of 5 LEEDS GOLD certified project in 2017.

In total 392 projects are LEEDS certified in Turkey

## GREEN DESIGN

### LEED

The "Leadership in Energy and Environmental Design" is the world's most widely used green building rating system

2016 TOP 10 COUNTRIES BY LEED-CERTIFIED GSM

1. USA (336 MILLION GSM)
2. CHINA (34 MM GSM)
3. CANADA
4. INDIA
5. BRAZIL
6. SOUTH KOREA
7. TAIWAN
8. GERMANY
9. TURKEY (5 MM GSM)
10. SWEDEN

### INTERNATIONAL PROJECT OF THE YEAR 2014

Turkish Contractors Association in Ankara

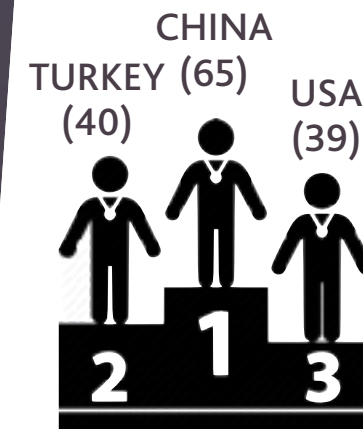


## FOREIGN BUYERS



## TURKISH COMPANIES WORKING ABROAD

Turkish contractors rank 2nd in the world by number of companies for the 9th straight year

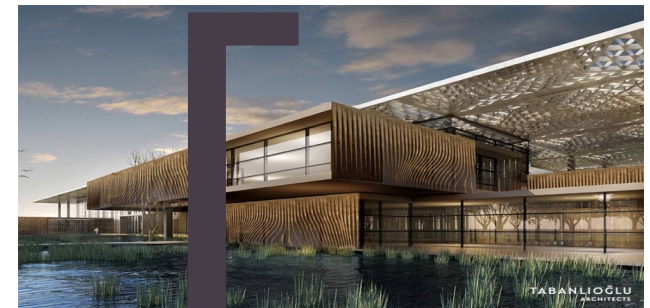


Eurasia Tunnel, located in Istanbul, Turkey. Submitted by Avrasya Tuneli Isletme Insaat ve Yatirim A.Ş.



completed almost a year ahead of the original schedule

Dakar International Congress Center, located in Dakar, Senegal. Submitted by SUMMA Turizm Yatirimcılığı A.Ş.



Prince Mohammed Bin Abdulaziz Airport, located in Madinah, Saudi Arabia. Submitted by TAV Construction



<https://www.projepedia.com/emlakanalizi>

<http://www.enr.com/toplists/2016-Top-250-International-Contractors1>

<http://www.milliyet.com.tr/-dunya-kucuk-turkler-buyuk/ekonomi/detay/2120117/default.htm>

ENR  
(Engineering News Record)  
2016 & 2015 AWARD WINNERS  
GLOBAL BEST PROJECTS



## EXPORTS OF WEAPONS

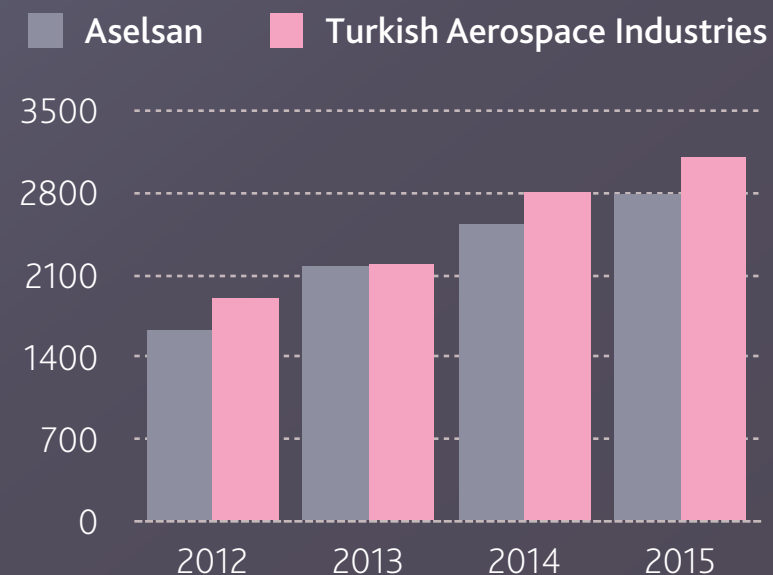
**+18%**  
IN DEFENSE  
EXPORTS IN 2014  
FOR A TOTAL OF  
**\$1.65** BILLION.

AFRICA IS THE  
FASTEST  
GROWING  
IMPORTER OF  
TURKISH  
WEAPONS

According to Defense News, TAI and Aselsan continue climbing up the ranks for top defense industries. In 2015, TAI went up from 85th place to No. 72, while Aselsan went from the 93rd to 58th place in just 10 years.

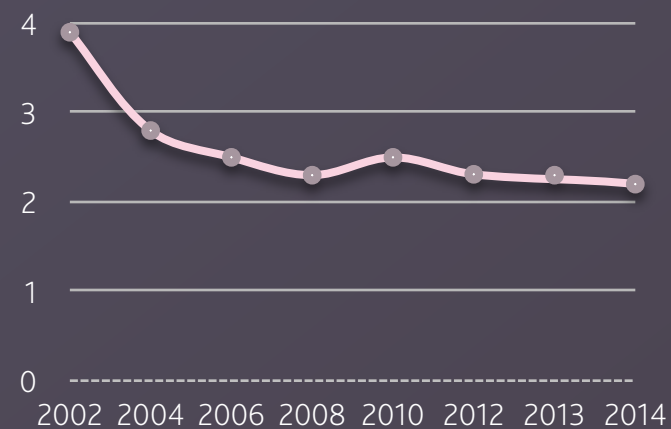
## MAIN DEFENSE FIRMS' REVENUE

(in million TRY)



## MILITARY EXPENDITURE

as % of GDP



Recep Tayip Erdogan at defense industry conference, May 2015:

“**OUR GOAL IS TO COMPLETELY  
RID OUR DEFENSE INDUSTRY OF  
FOREIGN DEPENDENCY BY 2023**”

# DEFENSE INDUSTRY

## CORNERSHOT

Turkey's new cutting-edge weapon was unveiled at Ankara's Ivedik Industrial Zone in April 2016

## JOINT STRIKE FIGHTER

Turkey remains committed to the multinational Joint Strike Fighter program, the most expensive ever weapons program with a lifetime price tag of \$1.5 trillion.



**52%**  
of Turkey's  
military equipment  
is domestically  
manufactured

In March 2016, the defense industry executive committee approved \$5.9 billion in new defense projects, \$4.5 billion (75%) of which will be domestically produced.

“We are talking about a country that will have its own national tank, national ship, national helicopter, satellite and war plane. We are aiming to have everything the five permanent members of the U.N. Security Council have.”

Muharrem Dortkasli  
CEO of TUSAS

## MAJOR MANUFACTURERS

**TAI**  
**aselsan**



 **roketsan**

**FNSS**  
Savunma Sistemleri A.Ş.

 **nurol** LLC

**Otokar**

 **HAVELSAN**

Sources:

- IBTimes, “Turkey is boosting weapons exports with a focus on Africa”, May 2014
- Reuters, “Erdogan aims to turn Turkey into a major defense industry power”, May 2015
- Hürriyet Daily News, “Turkey’s fighter aircraft choices from hard to hardest”, March 2016
- Defense News





**PUBLIC  
INSTITUTIONS**

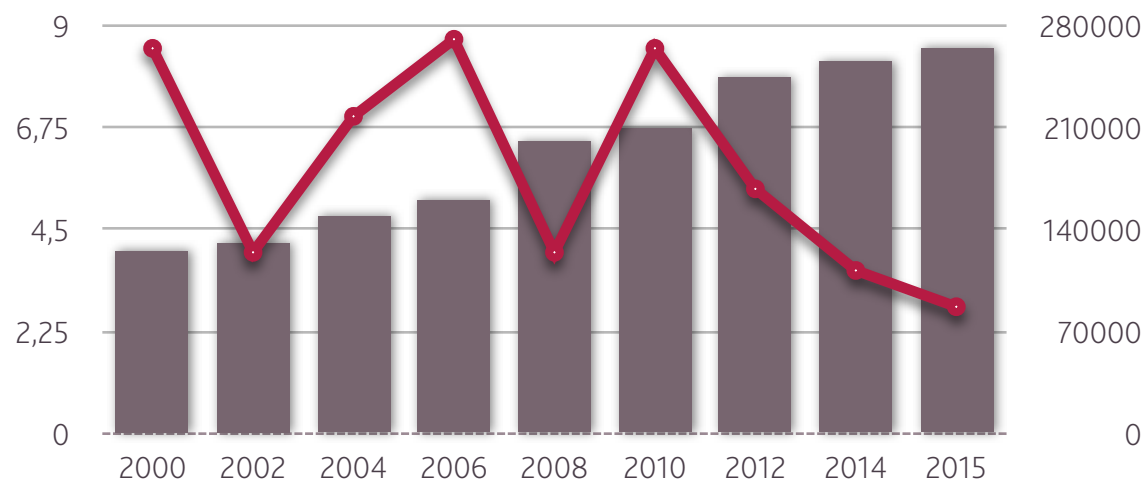
**KAMU  
KURULUŞLARI**



# ENERGY

Energy Exchange Istanbul (EXIST) was established on March 2015 to administrate the electricity exchange market. Its operations are expected to expand beyond electricity and include natural gas, oil and derivatives in the forthcoming period.

## EVOLUTION OF ELECTRICITY DEMAND AND GROWTH



## COAL CONTROVERSY

The boring activities in the exploration for coal have risen five fold in the last five years, and, in addition to the 8,3 billion tonnes of existing reserves, 4,1 billion tonnes of new lignite reserves were determined as of May 2008, as a result of these explorations.

RISING DEMAND

FOCUS ON DOMESTIC RESOURCES

DECREASE DEPENDENCE ON IMPORTS

The Government's overemphasis on coal resources has triggered controversy and heavy opposition from local communities and organizations.

LEAST SUSTAINABLE RESOURCE

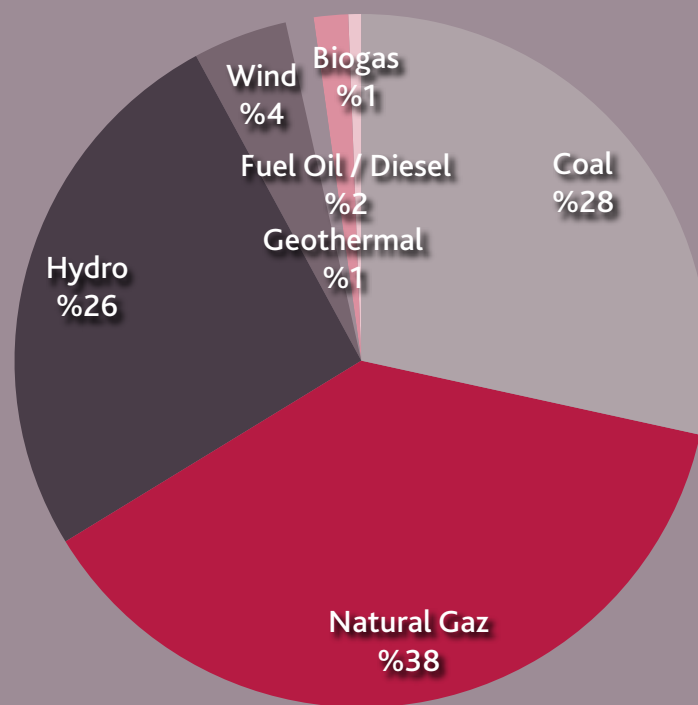
HEALTH ISSUES

MINING INCIDENTS

SOURCES:  
 · Turkey Ministry of Foreign Affairs - Energy profile and strategy  
 · Mondaq, Turkish Energy Market 2015 by A.J. Santos  
 · Hurriyet Daily News, "Questions rising over Turkey's overemphasis on coal resources", March 2016  
 · The Guardian, "Is it too late to stop Turkey's coal rush?", 2015

· BP Statistical Review, 2015  
 · Turkish Exporters Assembly TIM  
 · Daily Sabah, "Wider use of Turkish coal to decrease gas imports by \$7.2 billion", Feb. 2016

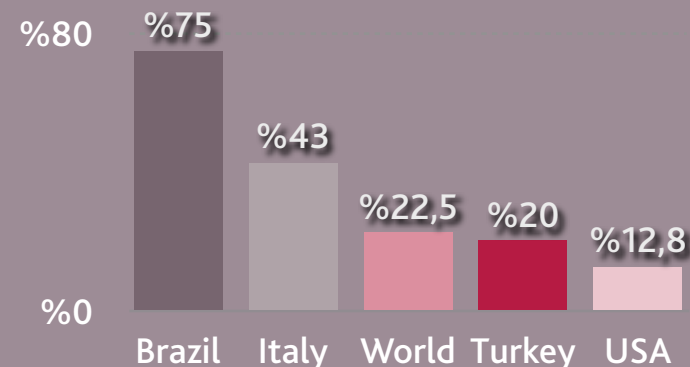
## ELECTRICITY GENERATION BY TYPE – 2015



## GOING AGAINST THE TREND

While Europe is renouncing nuclear, Turkey plans to generate 10% of its electricity from 2 nuclear plants which are to be built in Mersin/Akkuyu and Sinop.

## % OF ELECTRICITY GENERATED BY RENEWABLES – 2014



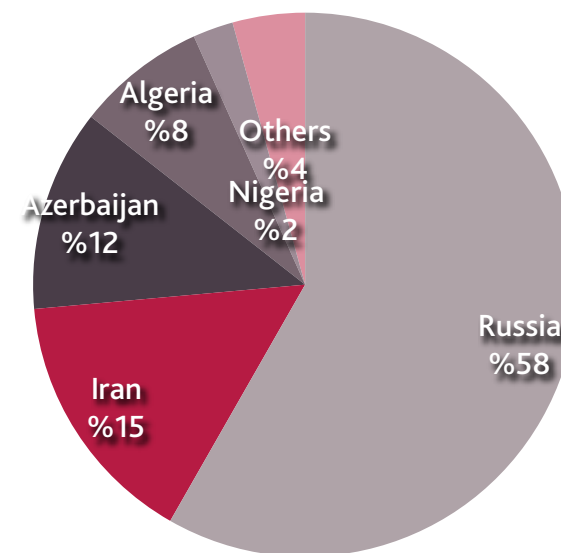
## PRIVATIZATION

In 2014, 6 thermoelectric plants and 10 hydroelectric plants were privatized mainly attracting local investors. At the end of 2014, the share of energy produced by the private sector reached 72%, up from 57% in 2003.

Since 2013, the government is selling off operating rights for **SMART GRIDS**, to boost investment and reduce debt.

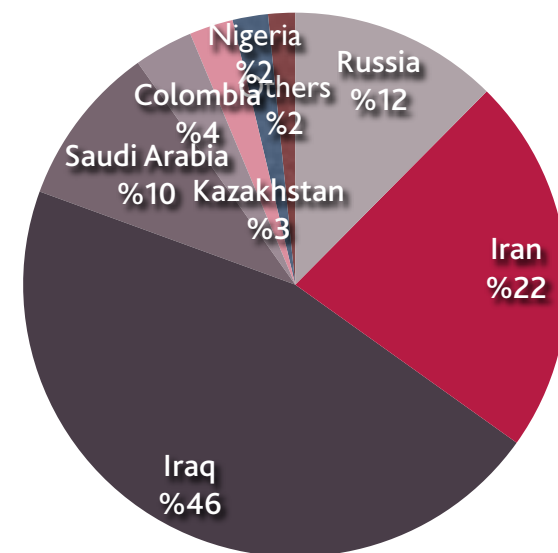
## NATURAL GAS IMPORTS BY SOURCE – 2015

Turkey imports nearly 99% of the natural gas it consumes.



## CRUDE OIL IMPORTS BY SOURCE – 2015

Turkey imports around 89% of its oil supplies.



## TRANSIT COUNTRY FOR GAS AND OIL TRANSPORTATION

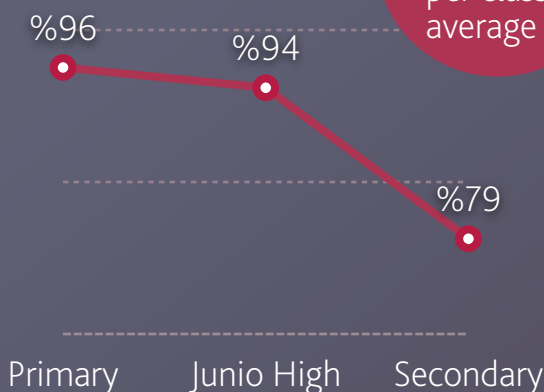
Even though Turkey is limited in primary energy resources and is dependent on imported energy, it acts as a bridge between the world's crucial supply and demand regions.





# EDUCATION

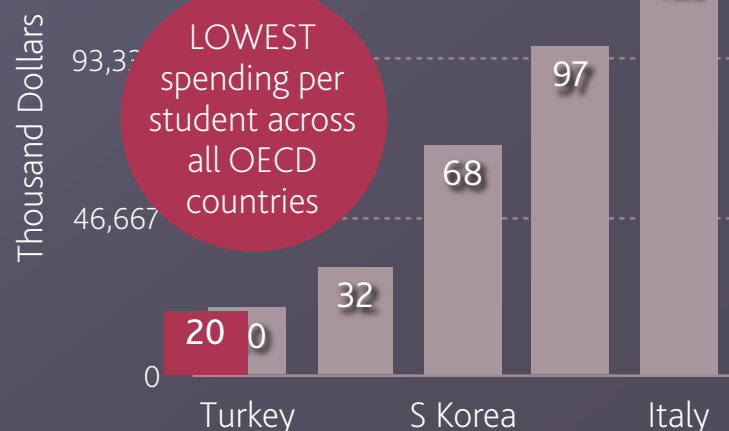
## NET SCHOOLING RATE



26

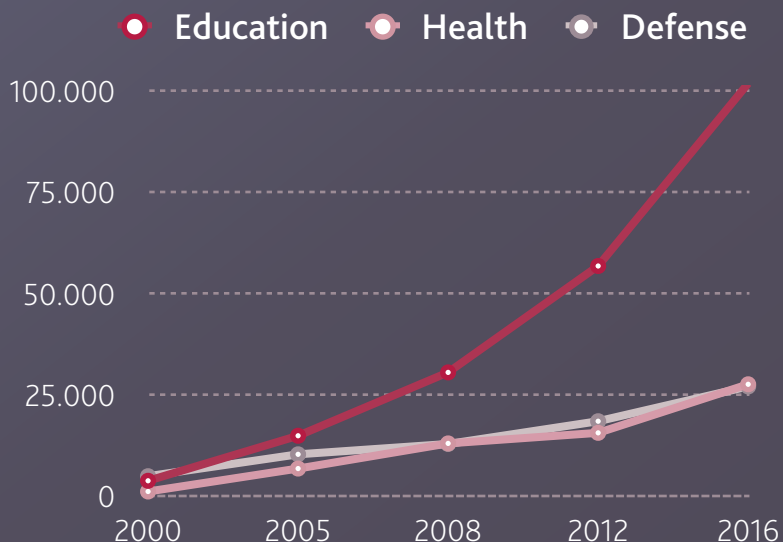
students per class on average

## NATIONAL SPENDING PER STUDENT IN 2012



LOWEST spending per student across all OECD countries

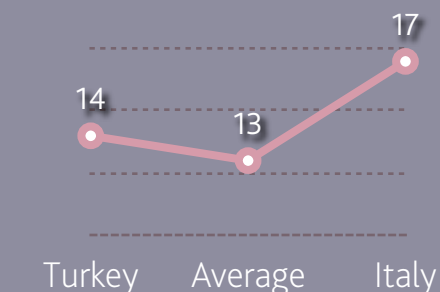
## CHANGE IN BUDGET ALLOCATION



14%

## REPETITION RATE

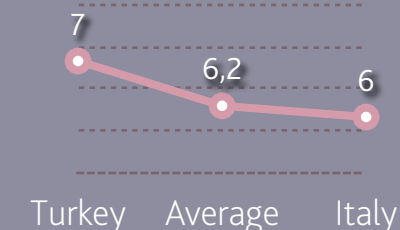
= students repeating at least 1 year (down 19% in 2003)



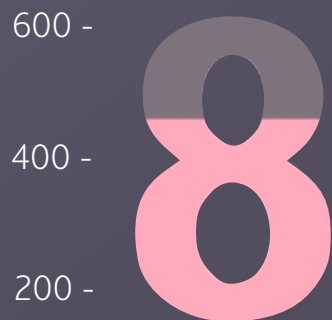
1%

## RESILIENCY

= students from the 25% lower SES groups who perform in the highest 25%

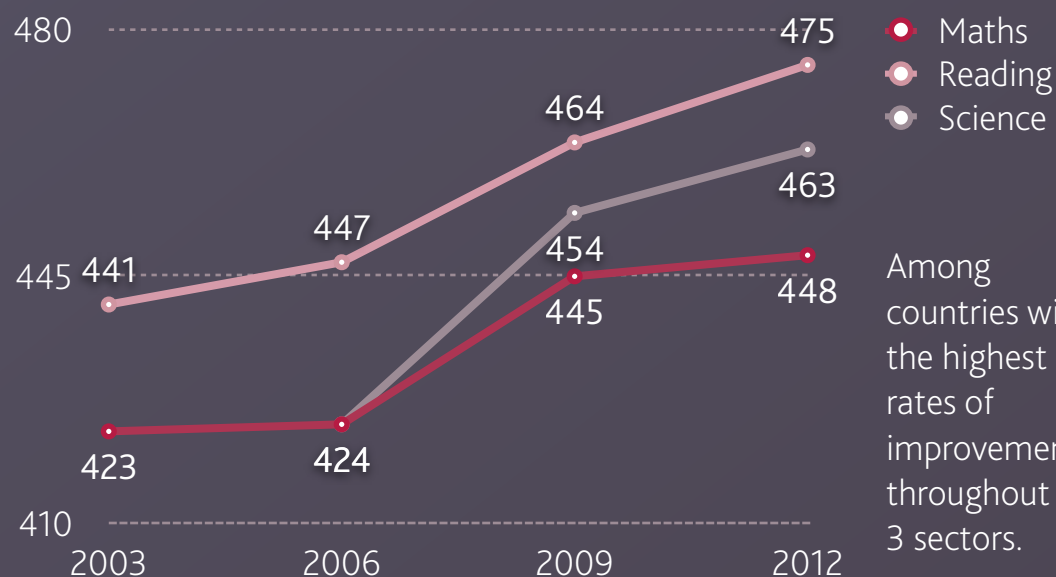


## PISA INDICATOR



462.3 Grade 8 PISA 2012

## TURKEY PISA SCORE EVOLUTION



Among countries with the highest rates of improvement throughout all 3 sectors.

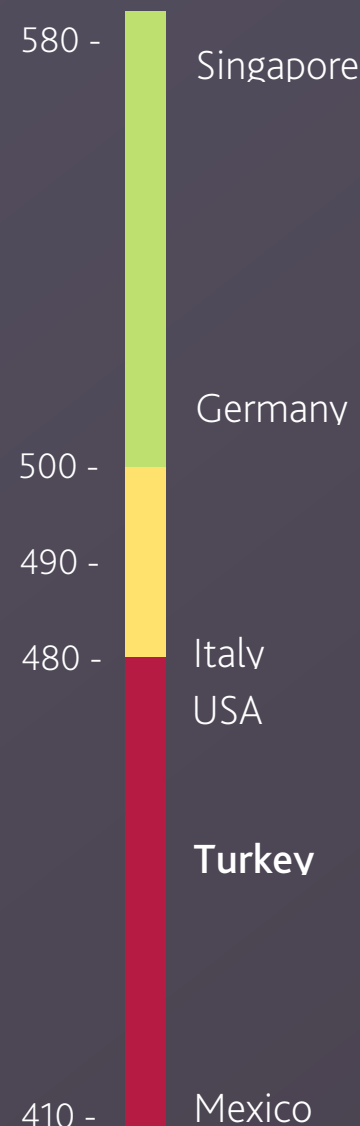
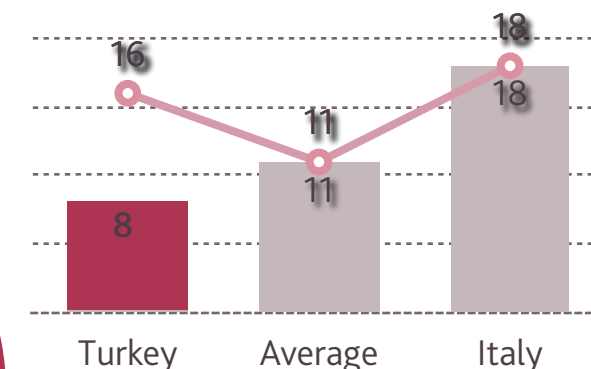
In 2012, the education bill was revised to adopt the 4+4+4 system, increasing compulsory schooling from 8 to 12 years.

Low results are registered across all regions and socio-economic levels

Turkey is the 2nd most successful country in reducing the effect of family background in education success.

## GENDER GAP IN MATHS

Turkey records an impressive success in reducing the gender gap, now quite below the OECD average. Meanwhile in Italy, boys continue to score much higher than girls in Maths.

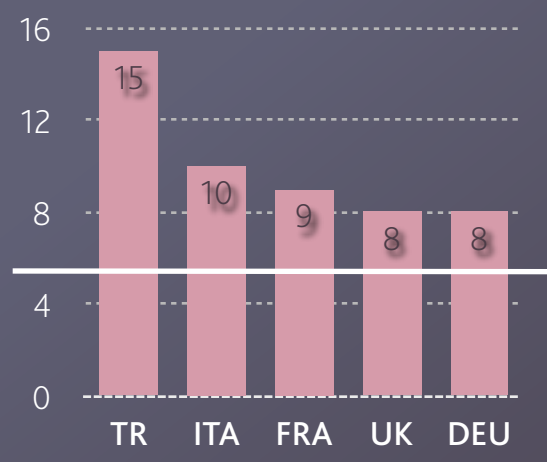




# HEALTH CARE

## SALT INTAKE

WHO/ FAO recommendation <5 grams



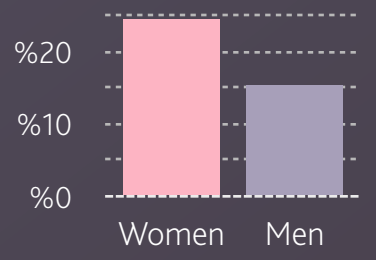
*Tombiş / Tombul*  
Cute affectionate names given to plump kids

16% of 15+ suffer from HYPERTENSION

“A MAN WITHOUT A BELLY IS LIKE A HOUSE WITHOUT BALCONY”

12.8% suffer from DIABETES

Women are up to 50% more at risk of obesity than men



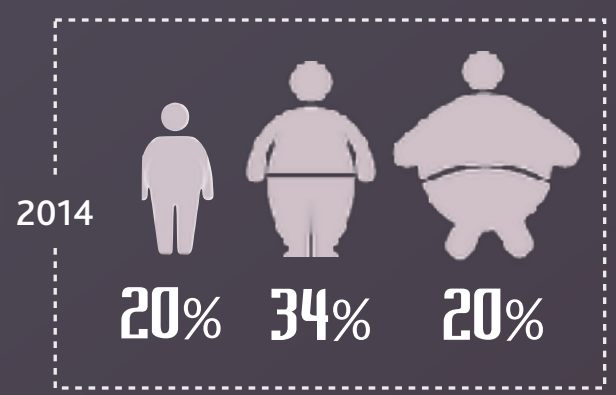
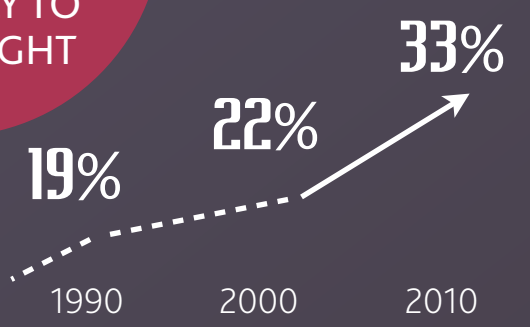
## LOW BACK DISORDERS

= MOST COMMON DISEASE

In 2014 33% of 15+ suffered from back musculoskeletal system disorders

VS. 16,4% in 2010

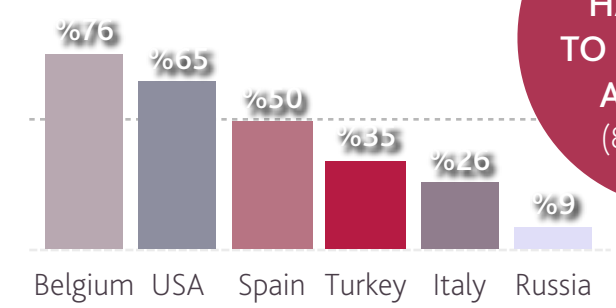
TURKS ARE NOW SPENDING \$5 BILLION ANNUALLY TO LOSE WEIGHT



Sources: Eurostat (hlth\_cd\_asdr2)  
Turkey Statistics Agency - TÜİK

WHO, Turkey Profile, Nutrition, Physical Activity and Obesity, 2013  
Al-monitor, Turkey Pulse, "Turkey goes after obesity" by Pinar Tremblay, 2014

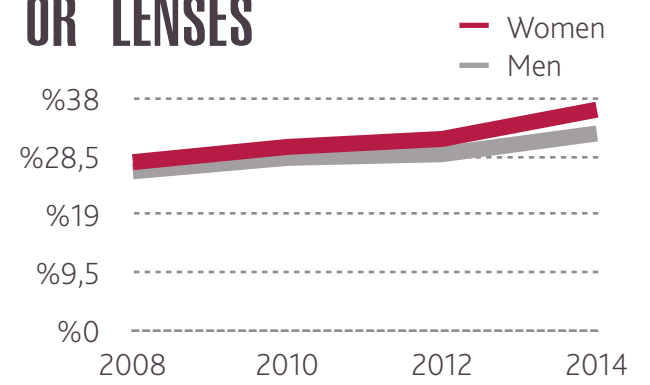
“WE RECEIVE GOOD QUALITY HEALTHCARE”



## MAIN CAUSES OF DEATH

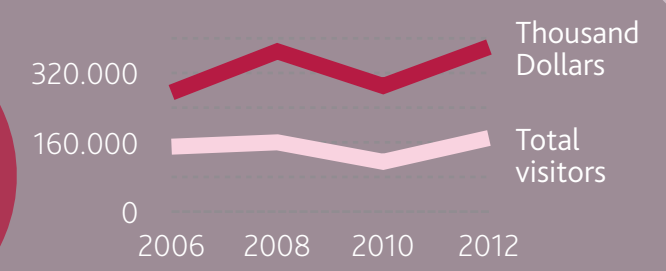
- #1 CIRCULATORY DISEASE
- #2 CANCER
- #3 HEART DISEASE

## USAGE OF GLASSES OR LENSES



EYE SURGERY is one of the main attractives for medical tourism

## MEDICAL TOURISM



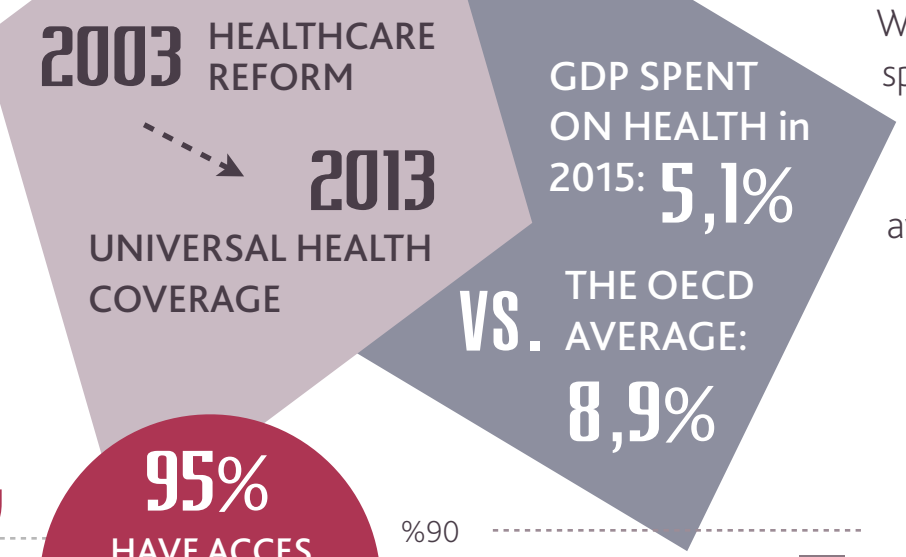
### TOP 3 ORIGINS

- #1 LIBYA
- #2 GERMANY
- #3 IRAQ

### TOP 3 DESTINATIONS

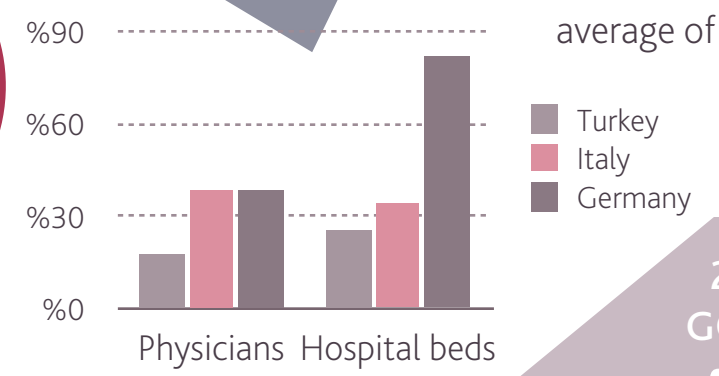
- #1 ANTALYA
- #2 ISTANBUL
- #3 ANKARA

Sources: International Diabetes Federation, Diabetes Atlas.:  
Turkey Ministry of health, Evaluation report on medical tourism, 2013



While Government spending as a % of GDP remains below the OECD average, insurance coverage has increased from 62% in 2000 to 78% in 2013 - above the OECD average of 73%

95% HAVE ACCES TO SANITATION AS OF 2015 (88% in 2000)



2023 GOAL: 210 PHYSICIANS per 100K people



A large crowd of people is gathered at night, holding up flags. The most prominent flag is the Turkish national flag, featuring a red field with a white crescent and star. To its left, a yellow flag with the AK Party logo and the text 'AK PARTİ' is visible. In the foreground, a woman wearing a black hijab is looking towards the camera. The scene is illuminated by artificial lights, creating a vibrant atmosphere.

**POLITICS**

**POLITIKALAR**



# MIGRATIONS IN THE EU

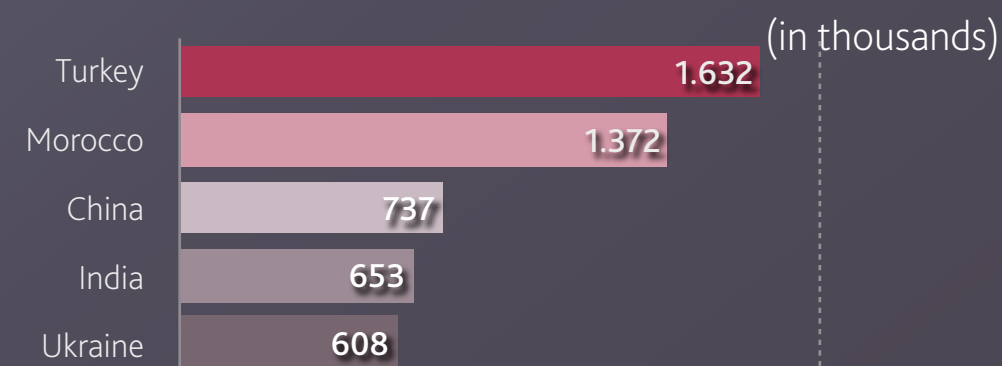
## TURKS VS. ITALIANS

An estimated **5 MILLION** Turkish citizens live in the European Union, constituting the majority of its Muslim population

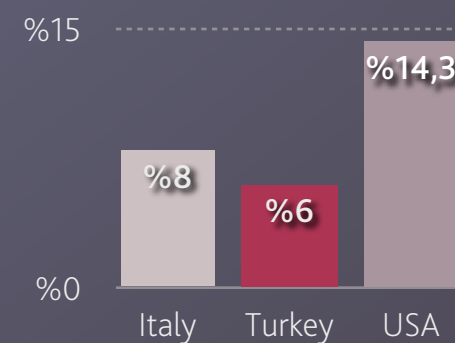
Total population of the European Union **509 MILLION**

Contribution of Turkish people: **1%**

### TOP 10 COUNTRIES OF ORIGIN OF NON-EU NATIONALS RESIDING IN EU



### % OF MIGRANTS TO NATIONALS



● Turks  
● Italians

**145.000**

Turkish entrepreneurs  
operating in Europe  
= €63 billion worth  
of business

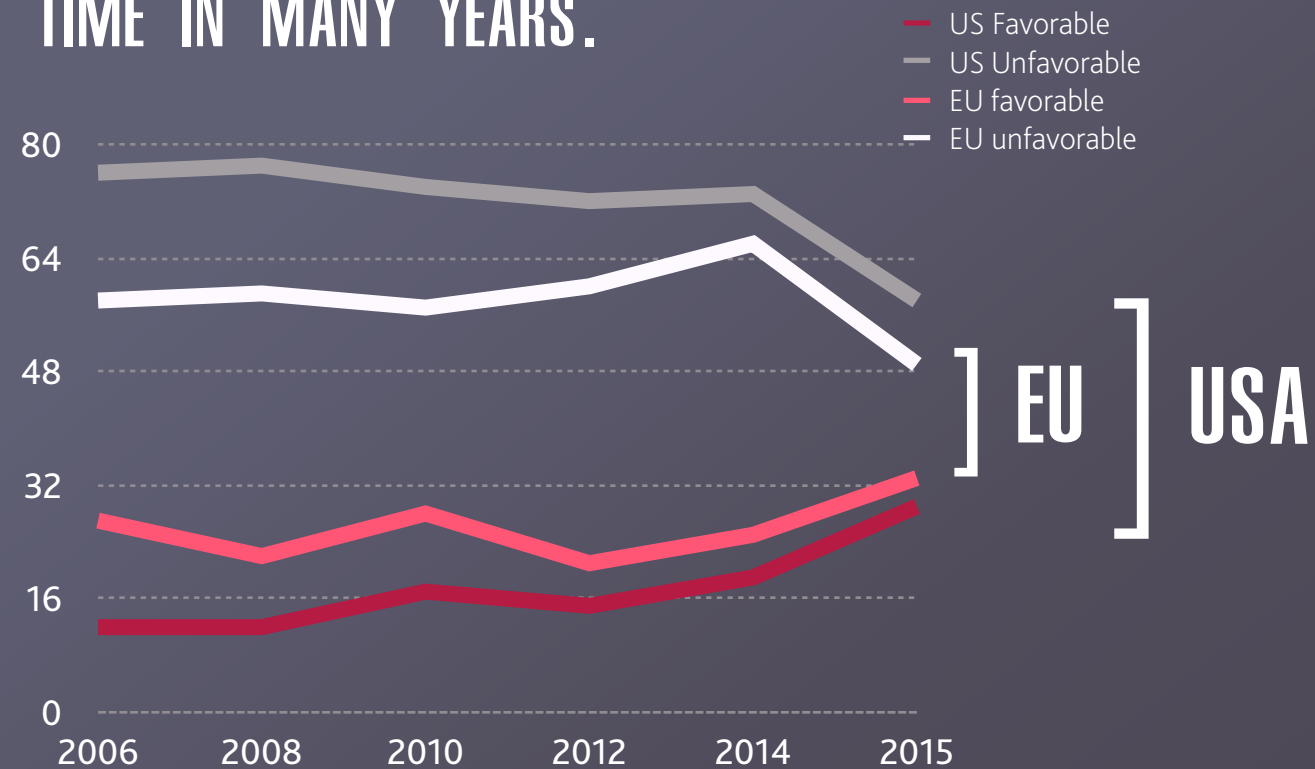
**#1**  
immigration  
from  
Romania

**5.8MM**  
immigrants in  
Italy

**4.6MM**  
immigrants in  
Turkey

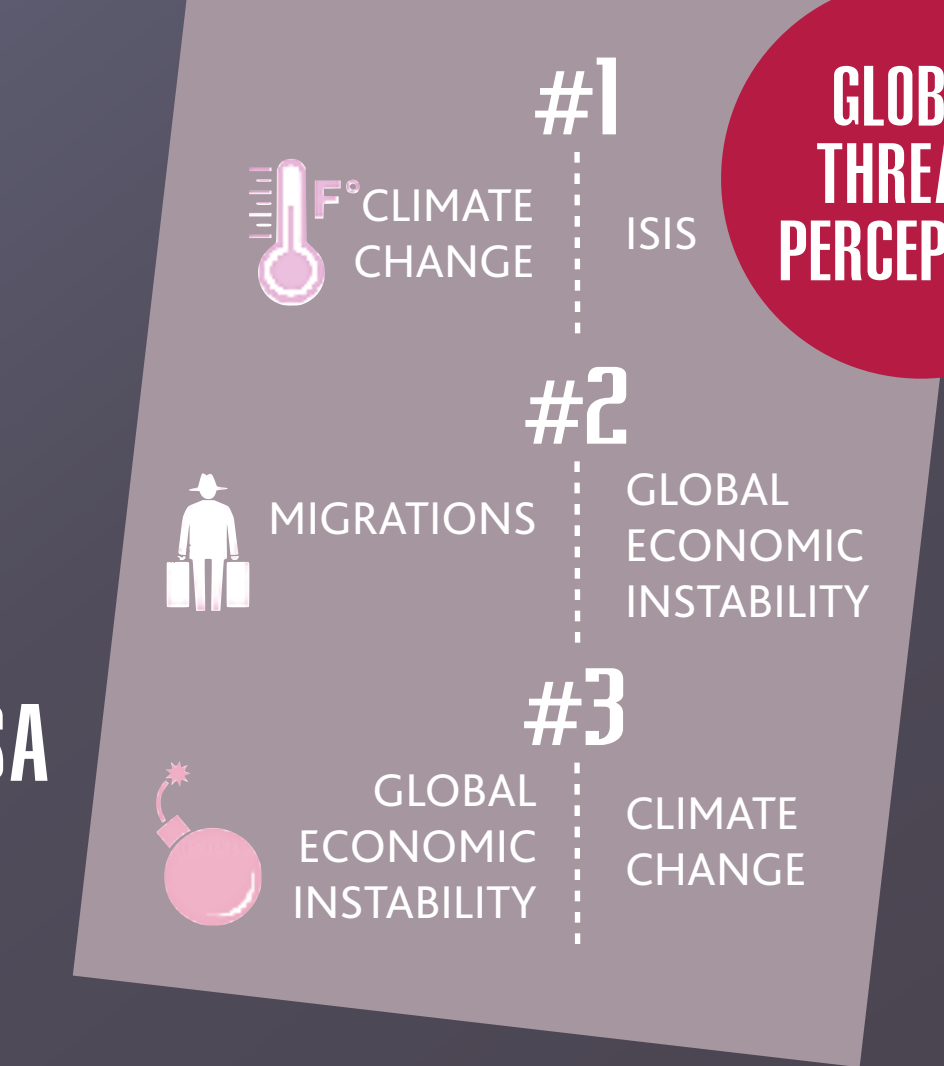


## EU AND USA ARE RISING IN POPULARITY FOR THE FIRST TIME IN MANY YEARS.

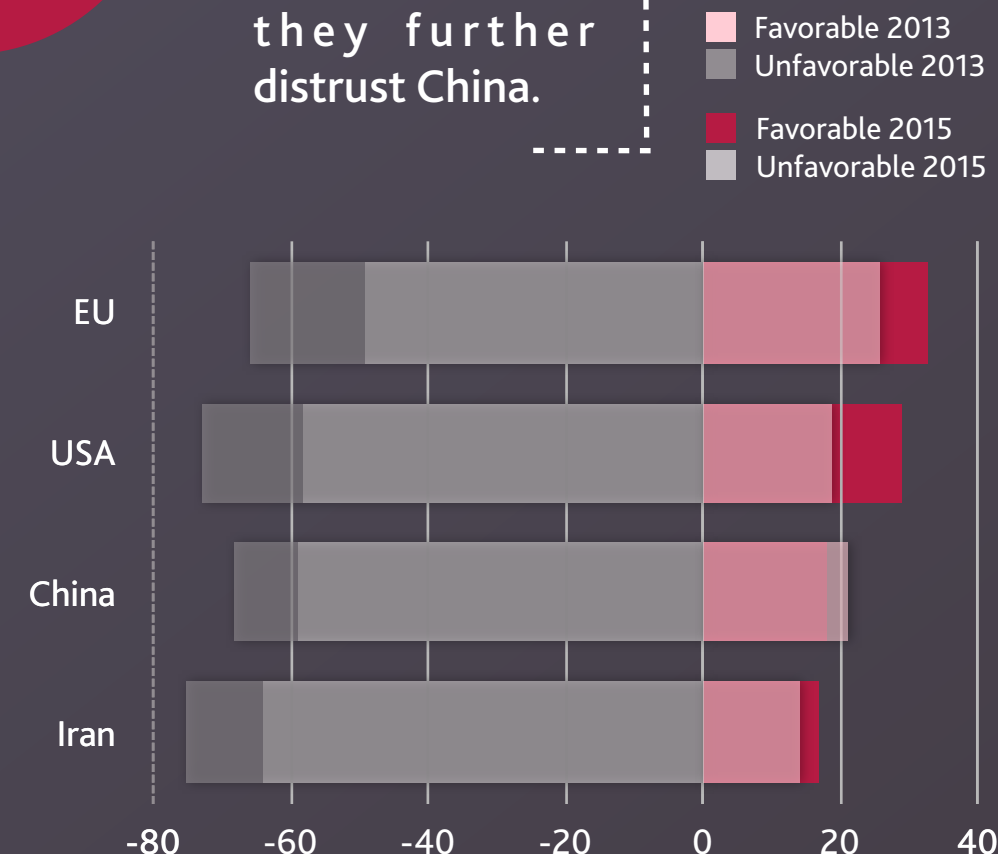


Source: PEW Research Center's Spring 2015 Global Attitudes survey.

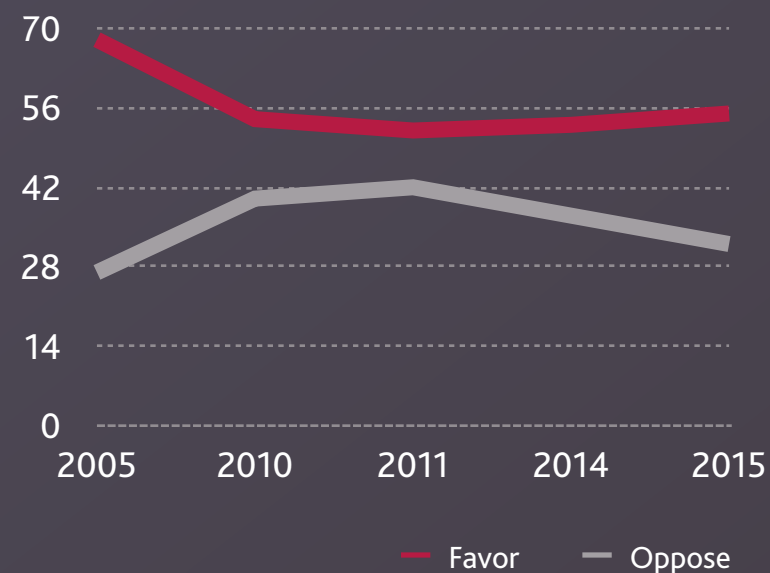
## FOREIGN POLITICS HANGING OUT IN THE MIDDLE



While Turks are warming up to Western nations, they further distrust China.



## ABOUT JOINING THE EUROPEAN UNION



Public opinion is still very much divided, with only 56% in favor

31% of Turks said that EU leadership in world affairs was desirable (up 5% since 2013). 33% of Turkish respondents said that Turkey should act alone on international matters (down 5% since 2013) while 28% said that Turkey should work with the European Union at all (up 7% since 2013).

Sources:  
Transatlantic Trends 2014 by GMF  
Global Attitudes Survey, Spring 2014 & Spring 2015 - PEW RESEARCH CENTER



## GEZI PARK PROTESTS



Between May and August 2013 an estimated

**3.5 MILLION**

participated in the almost 5000 protests across the country

## SUPPORT FOR PROTESTS

PRO **49%** ↔ AGAINST **40%**

The level of support is lesser among the less educated and more religious

## THE COUNTRY IS...

Worsening **51%** Improving **44%**

Media remain the least trusted institution, while the Military is seen as having the most positive influence on Turkey's internal politics.

“All of Turkey was represented: the young and the old, the secular and the religious, the soccer hooligans and the blind, anarchists, communists, nationalists, Kurds, gays, feminists, and students.”

The Atlantic

“Families with children, women in headscarves, men in suits, hipsters in sneakers, pharmacists, tea-house proprietors – all are taking to the streets to register their displeasure.”

Der Spiegel

# LOCAL POLITICS

## LAND OF EXTREMES SOCIETY OF OPPOSITES

Turkey ranks among the worst performers in dealing with rising CO2 emissions, according to a 2014 study by GermanWatch and the Climate Action Network.

### What Turks see as most pressing issues:

1. UNEMPLOYMENT

2. CORRUPTION

3. POLLUTION

Military

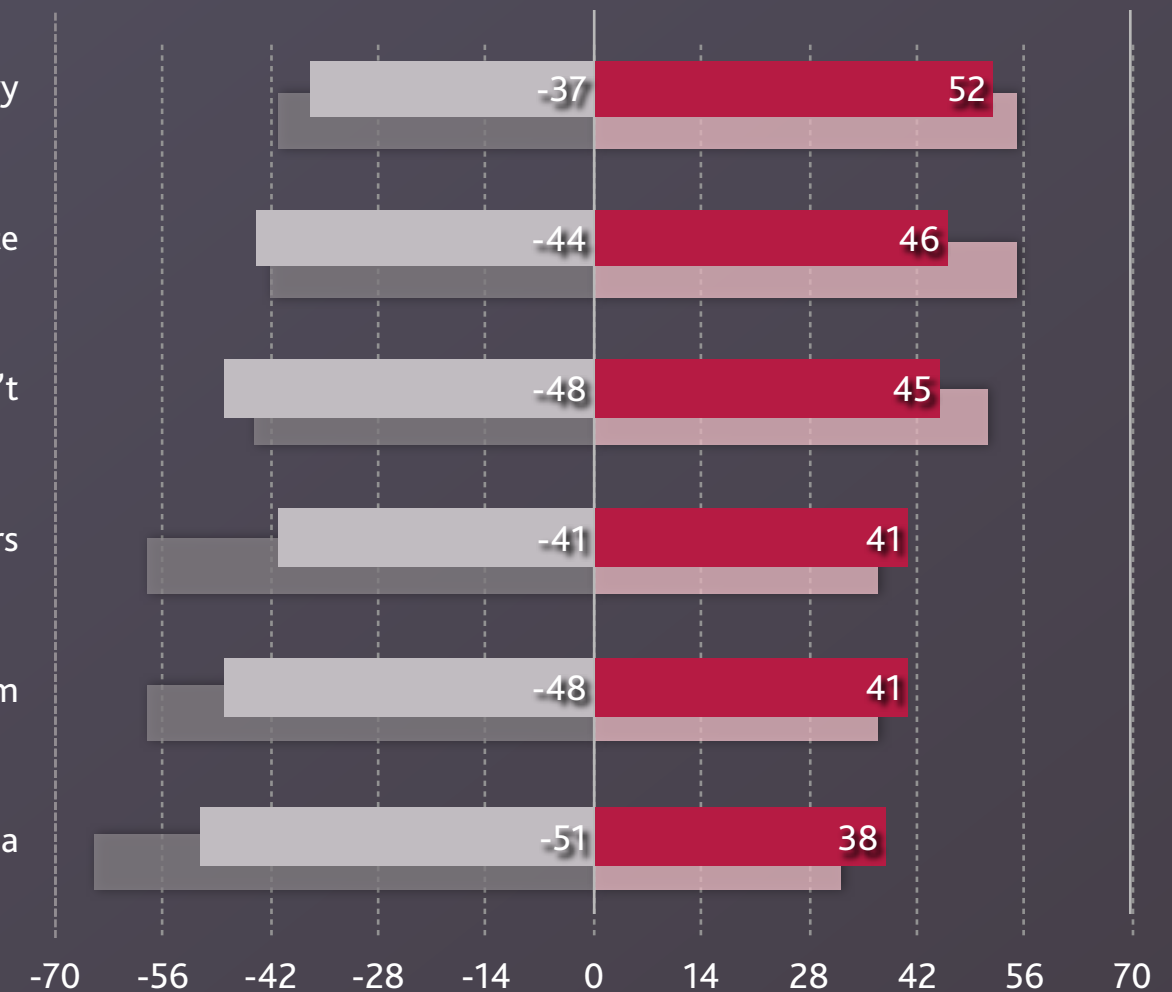
Police

Gov't

Religious Leaders

Court System

Media



1. Inflation



2. Crime

WHAT TURKS ARE WORRIED ABOUT:

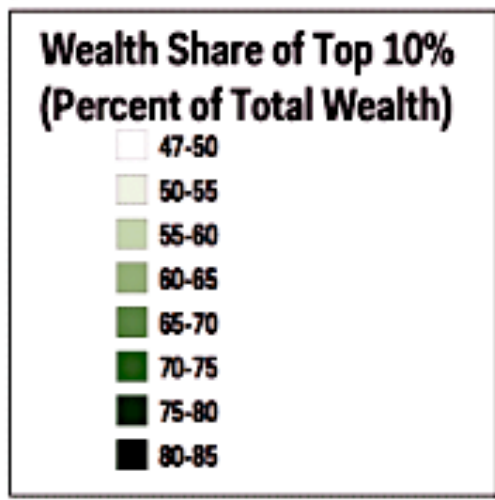
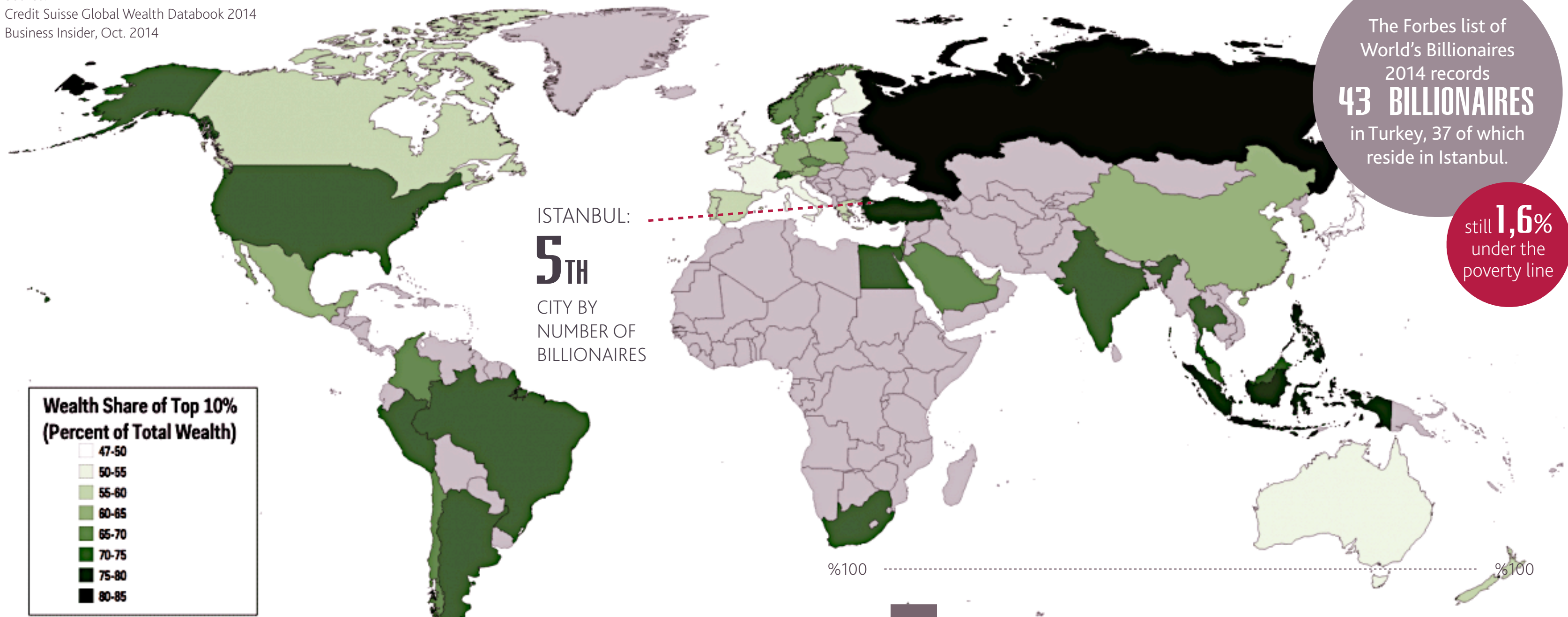
3. Rich vs. poor divide



SOURCES:  
 · Global Attitudes Survey, Spring 2014 & Spring 2015 - PEW RESEARCH CENTER  
 · The Atlantic, 'How the protest will impact Turkey at home and abroad' June 2013.  
 · TESEV, Corruption Assessment Report for Turkey, 2014  
 · Hürriyet Daily News, "Turkey among the worst performers in dealing with greenhouse gas emissions, Dec. 2014"

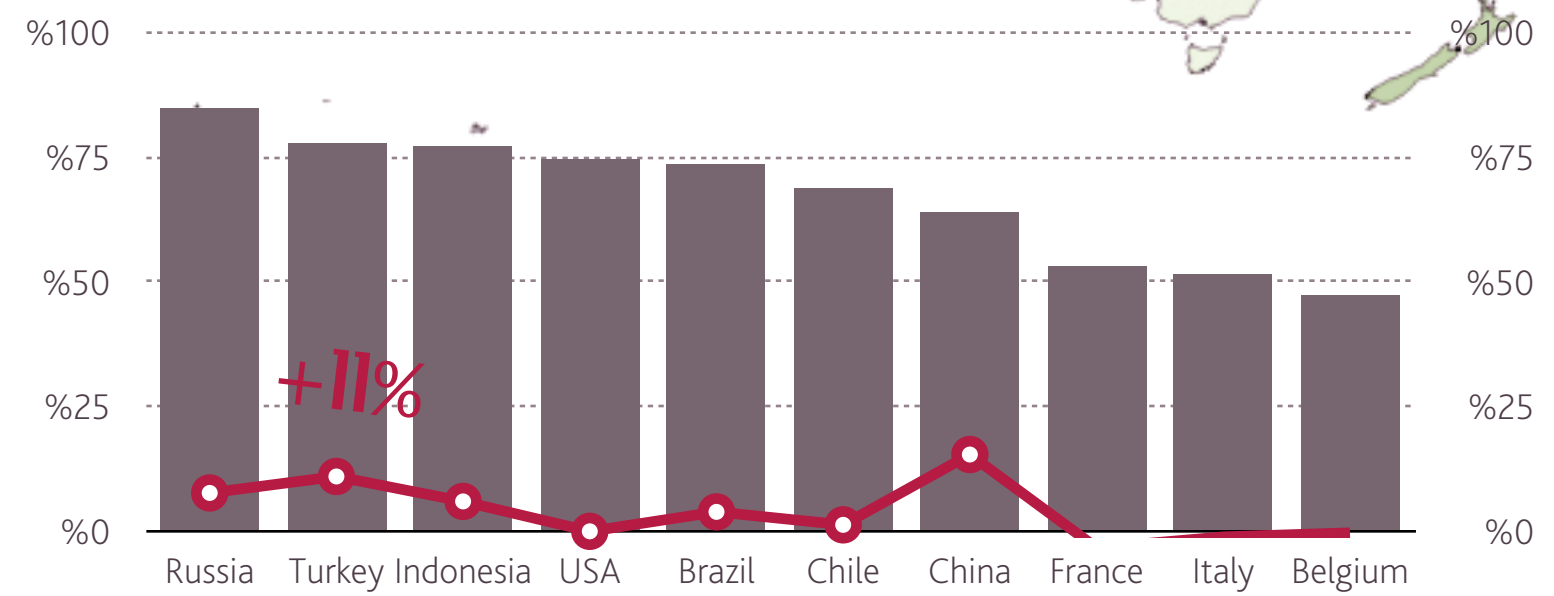


Source:  
Credit Suisse Global Wealth Databook 2014  
Business Insider, Oct. 2014



# WEALTH DISTRIBUTION

○ Change 2000-2014  
■ Wealth Share





“

Our goal is [...] to have a more efficient and overall stronger Turkey in 2023. [...] Some invisible hands are trying to hinder our development. Let us be aware of these games, let us stop these hands. Turkey can stop this game.

”

Recep T. Erdogan



FROM 20TH IN 2002 TO 16TH IN 2014, TURKEY IS NOW AIMING TO BECOME

ONE OF THE TOP 10 WORLD ECONOMIES

This includes reaching 2B GDP, 500B in exports, and reaching a per capita income of \$20K.

TO BE THE GATE BETWEEN WEST AND EAST

FULL EU MEMBERSHIP

MIDDLE EAST LEADERSHIP

LESS IMPORTATION, MORE LOCAL PRODUCTION



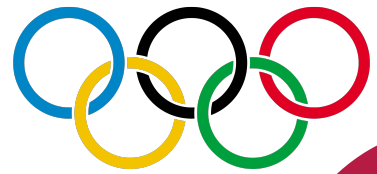
To reach a GDP of \$2 TRILLION from 718.2 BILLION in 2015

While Turkey already produces cars for many global brands, it wishes to move further by starting the production of an independent local brand.

Turkey has repeatedly applied

TO HOST BIG INTERNATIONAL EVENTS

such as the Olympics, the FIFA World Cup or the EURO Cup - without success till now.



TO ACHIEVE 100% SCHOOLING RATE

for primary and secondary level, %50 for university degree



TO REACH 50B USD IN REVENUES FROM TOURISM

PER CAPITA INCOME of \$25,000 (from \$18,800 as of 2013)

# 2023 100 GOALS FOR THE 100TH ANNIVERSARY OF THE TURKISH REPUBLIC MACRO GOALS

TO ACHIEVE ENERGY INDEPENDENCE

through

- construction of 2 NUCLEAR POWER PLANTS
- additional WIND POWER stations
- construction of new HYDROELECTRICITY DAMS



RENEWABLE ENERGIES TO BECOME #1 SUPPLY SOURCE

TO CONVERT 30% OF THE LAND IN FORESTS



LAND OF TRANSIT

TO BUILD ONE OF THE WOLRD 10 BIGGEST HARBORS

TO BECOME AN AIRWAY HUB, WELCOMING 350M PASSENGERS YEARLY



Sources:  
- KPMG TURKEY, 2015 Construction Managers Survey  
- globalpse.org/turkiye-ekonomisinin-2023-hedefi/  
- tim.org.tr/



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[www.milabranders.com](http://www.milabranders.com)