

**AN EXPORT MARKETING
ANALYSIS OF
TURKISH WOMEN'S
READY TO WEAR PRODUCTS IN
FEDERAL REPUBLIC OF GERMANY**

by

F.Zeynep Bilgin

B.A. in Business Administration, Boğaziçi University, 1983

M.A. in Business Administration, Boğaziçi University, 1985

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to my parents for their patience and love

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ABSTRACT

The objectives of this research were to investigate the strengths and weaknesses of Turkish WRW (women's ready to wear) products in the export market of FRG (Federal Republic of Germany), and to outline the structure of the distribution channel network.

In order to specify the export market expectations and evaluations, the WRW products were analysed based on their physical-functional, aesthetic and social characteristics as well as their identification factors.

The study includes the review of literature and a field survey. For the field survey, a questionnaire was given to distribution channel members in FRG textile-apparel market.

The findings of the research show that firms contacted mainly buy cotton and mixed fibre products through direct contact to producers in Turkey. For the different channel members at producer, wholesaler and retailer stages in the distribution channel network, material quality is more important than processing and durability quality among the physical-functional product attributes. In Turkish WRW products, the most frequently occurring quality problems are related to the solidity of colors and input products in material used, to the labor force in processing, and to sewing in manufacturing technique chosen.

Related to the aesthetic characteristics, optic and haptic attributes of Turkish WRW products were rated to be at middle level. In case of social characteristics, product image of Turkish WRW products is not satisfactory, and fashion creativity attempts were rated to be still insufficient. The evaluations for the identification factors show that Turkish brands are not known in the FRG export market and label and package are evaluated positively.

ÖZET

Tezin amaçları, Türk kadın hazır giyim ürünlerinin Federal Almanya dışsatım pazarındaki kuvvetli ve zayıf yönlerini saptamak ve dağıtım kanalları ağı yapısını oluşturmak olarak belirlenmiştir.

Dışsatım pazarındaki beklentileri ve değerlendirmeleri saptamak amacıyla kadın hazır giyim ürünleri fiziksel-fonksiyonel, estetik ve sosyal özelliklerine ve tanımlayıcı faktörlerine göre incelenmiştir. Çalışma yazın taraması ile bir saha çalışmasını içermektedir. Saha çalışması için Federal Almanya tekstil-hazır giyim pazarındaki dağıtım ağı elemanlarına anket uygulaması yapılmıştır.

Araştırmanın bulgularına göre, bağlantı kurulan firmalar esas olarak, pamuklu ve karışık iplikten mamulleri doğrudan Türkiye'deki üretici ile bağlantı kurarak satın almaktadırlar. Dağıtım kanalları ağının üretici, toptancı ve perakendeci basamaklarındaki değişik kanal üyeleri için, kullanılan malzemenin kalitesi, mamulün üretim ve dayanıklılık kalitesinden daha fazla önem taşımaktadır. Fiziksel-fonksiyonel özellikler açısından Türk kadın hazır giyim ürünlerinde en çok rastlanan kalite problemleri, kullanılan malzemede renklerin dayanıklılığı ve girdi mamullerinde, üretim sürecinde işçi kalitesinde ve seçilen üretim tekniğinde dikişte ortaya çıkmaktadır.

Estetik özelliklere bağlı olarak Türk kadın hazır giyim ürünleri görsel ve dokunsal özellikler açısından orta düzeyde değerlendirilmiştir. Sosyal özelliklerde Türk kadın hazır giyim ürünlerinin imajı fazla üstün olmayıp moda yaratıcılığı atılımları ise halen yetersiz olarak değerlendirilmiştir. Tanımlayıcı faktörler yönünde yapılan incelemelerde, Türk markalarının Federal Almanya dışsatım pazarında tanınmadığı ve etiket ile pakette değerlendirmenin olumlu olduğu görülmektedir.

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I. INTRODUCTION AND BACKGROUND FOR THE STUDY

In order to achieve higher returns or a better market share in an export market, careful analyses of the products based on the comparative advantages in their production; and of the expectations and preferences of the consumer in the export market should be done.

As a cotton plantation country, Turkey has comparative advantages in the production of cotton based industry goods. The factor abundance of cotton makes exports of the textiles and apparel products attractive. Combined with market analysis based on production and marketing efforts, the exports help to achieve higher returns or to assure a better market share.

In this study the Turkish WRW (Women's Ready to Wear) products in the FRG (Federal Republic of Germany) market are analysed.

1.1. Objectives of the Study

The study aims to obtain information about the following questions:

1. What is the nature and scope of the "product" element among the marketing mix variables for WRW products?
 - a) What are the requirements of the FRG market; i.e. what are the important product attributes for WRW products?
 - b) What are the strengths and weaknesses of Turkish WRW products, based on the product attributes?
 - c) Where are the Turkish WRW products positioned in the FRG market, based on the product attributes?
 - d) Where are the WRW products of competitor countries positioned in the FRG market?
2. What is to be changed and to what extent in order to be effective in export marketing of WRW products? Which product attributes should be revised, changed, emphasized?

3. What is the structure of the distribution channel network for WRW products in the FRG market?

The study starts with the review of the literature, with the objective of:

1. Presenting background information about the developments in textile and apparel industries in the world in general, in FRG and in Turkey;
2. Presenting evaluative information about export marketing strategies and about the factors of physical-functional, aesthetic and social product characteristics as well as the identification factors such as, brand name, label and package for WRW products.

A cross section of exploratory and descriptive research constitutes the field survey. The objectives of the survey are:

1. to identify the attributes of WRW products that are important for the distribution channel members in the textile-apparel sector in FRG;
2. to find out the evaluations of the distribution channel members about the Turkish WRW products in the FRG market;
3. to describe the positioning of Turkish WRW products versus competitors' in the FRG market;
4. to outline the structure of the distribution channel network;
5. to investigate the possible differences in replies from different channel members.

The results will help Turkish exporters for ready to wear products to recognize their strengths and weaknesses, as well as the expectations of the export market in FRG. It will also help German importers to see the general positioning of Turkish WRW products and that of competitors' products.

These highlights will contribute to a better understanding of the expectations of both parties, i.e. the exporters to and importers from FRG. The results will also have implications for government agencies involved in export promotion programs for textiles and apparel products.

1.2. Scope and Significance of the Study

The choice of the WRW products as the product line, FRG as the export market, and the distribution channel members in FRG as the primary unit of analysis is verified in the following paragraphs.

1.2.1. Reasons for Choosing the WRW (Women's Ready to Wear) Products as the Product Line

Based on the foreign trade figures of textiles and apparel products in FRG for the years 1985 and 1986, an analysis has been conducted in order to determine the product class and the product line to be concentrated for the empirical part of the study.

Table 1.1 shows the foreign trade figures for 1985 and 1986 in FRG: The percentage shares calculated reveal the fact that FRG is not only an importer but also exporter of textiles and apparel products. The higher monetary returns compared to other product classes in the textile and apparel product family make ready to wear products more attractive for the study.

Table 1.2 shows the exports of MRW (Men's Ready to Wear) products and WRW products in value terms. Figure 1.1 shows the actual and projected consumption amounts for different product types of MRW and WRW products: The consumption levels for WRW products are higher than the consumption levels for MRW products in the FRG market (Figure 1.1). The ready to wear exports of Turkey are higher for WRW products compared to the exports of MRW products, in monetary terms. The Turkish ready to wear export figures show that the shares of EC countries (European Community Countries) and specifically of FRG are higher for WRW products compared to the Turkish exports of MRW products (Table 1.2).

The analysis of the figures in Table 1.2 and Figure 1.1 show that within the ready to wear product class, the product line women's ready to wear reveals higher consumption level and monetary returns compared to the product line for men's ready to wear.

Hence, choosing the Turkish WRW products as the products line to concentrate for the study is highly significant.

1.2.2. Reasons for Choosing the FRG as the Export Market

FRG is chosen as the export market for Turkish WRW products after studying the developments in the textile and apparel industries and trade patterns in the world, in FRG and in Turkey.

Table 1.1
Foreign Trade in Textile-Apparel in FRG for the Years 1985 and 1986

	FRG Import (in 000)								FRG Export (in 000)							
	1985				1986				1985				1986			
	Unit	%	DM	%	Unit	%	DM	%	Unit	%	DM	%	Unit	%	DM	%
<u>Textiles and Apparel Products:</u>	2.094	100.0	36.720	100.0	2.192	100.0	37.196	100.0	1.824	100.0	27.629	100.0	1.813	100.0	27.835	100.0
. Raw Material	733	35.0	3.556	9.7	730	33.3	2.588	6.9	593	32.5	2.236	8.1	550	30.3	1.806	6.5
. Thread	369	17.6	4.242	11.6	366	16.7	3.784	10.2	563	30.9	5.625	20.4	569	31.4	5.340	19.2
. Textile Fabrics	451	21.5	8.182	22.3	478	21.8	8.470	22.8	432	23.7	9.872	35.7	439	24.2	10.044	36.1
. Ready to Wear	541	25.8	20.740	56.5	618	28.2	22.354	60.1	236	12.9	9.896	35.8	255	14.1	10.645	38.2
. Apparel without Knit and Woven Goods	236		11.397		275		12.236		70		5.716		76		6.189	
. Knitwear and Woven Goods	166		7.795		202		8.605		35		2.390		39		2.587	
. Other spinning fibre products	139		1.547		141		1.513		131		1.791		140		1.869	

Source: "Die Bekleidungsindustrie in der Bundesrepublik Deutschland im Jahre 1986"; 36. Jahrgang, 1986.

Figure 1.1

Consumption of Ready to Wear Products in FRG in Actual and Projected Amounts for 1966 to 1990

a) Consumption of Coats and Jackets for Men and Women (in 000 000 units)

b) Consumption of Suits for Men and Cloths, Costumes for Women (in 000 000 units)

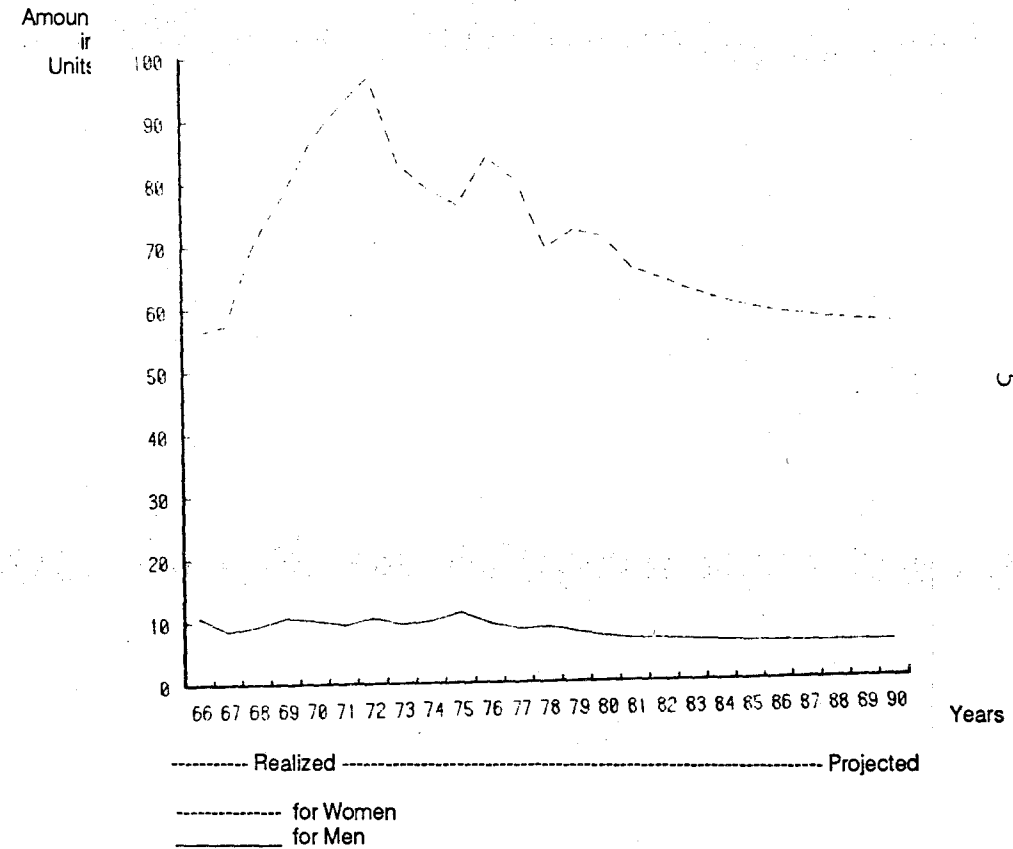
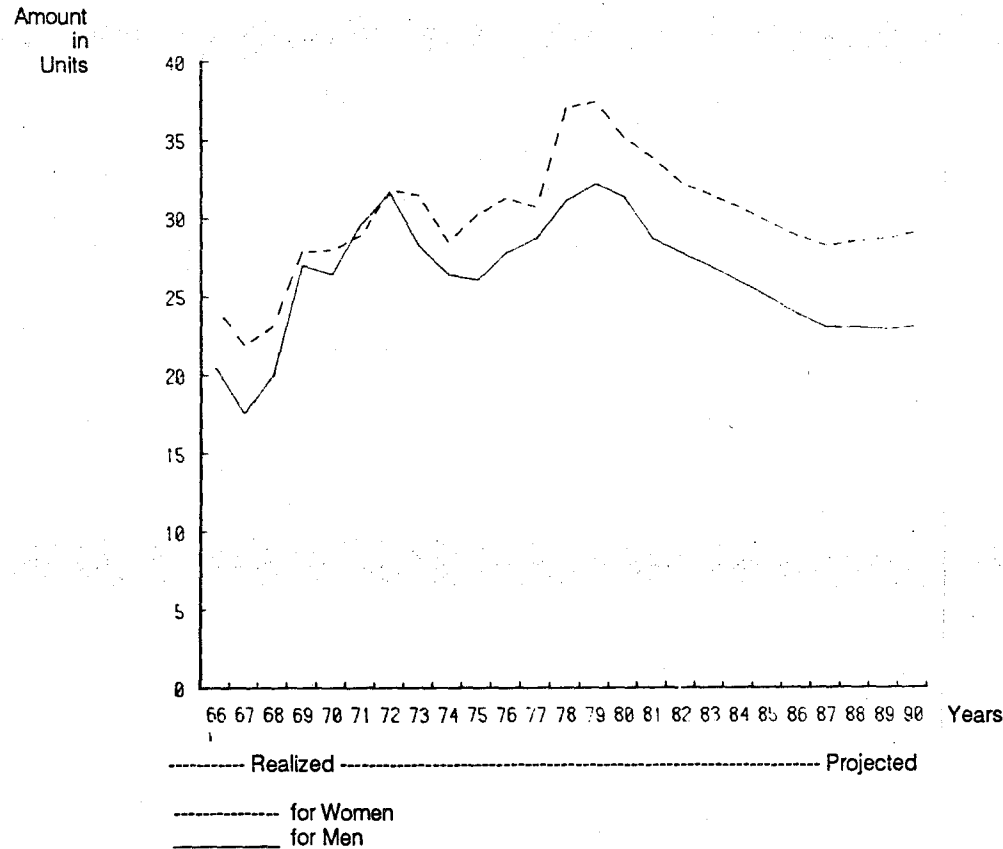
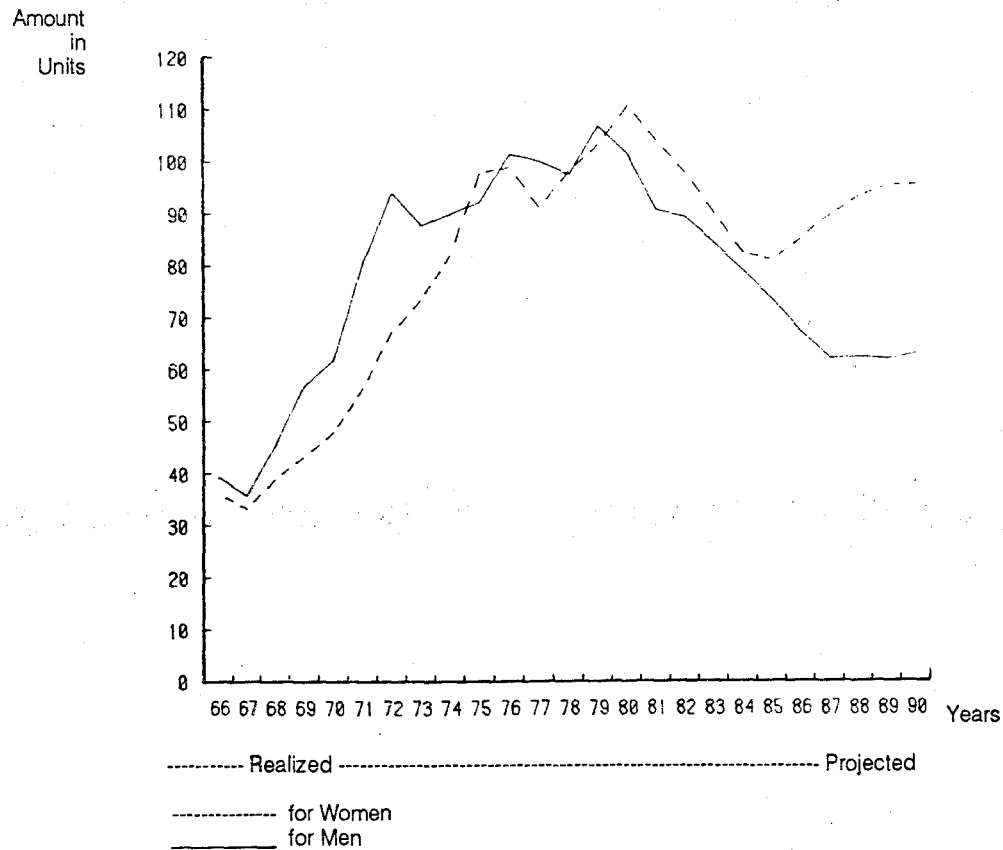


Figure 1.1
(continued)

c) Consumption of Trousers for Men and Trousers, Shorts, Skirts for Women
(in 000 000 units)



d) Consumption of Pullover for Men and Women (in 000 000 units)

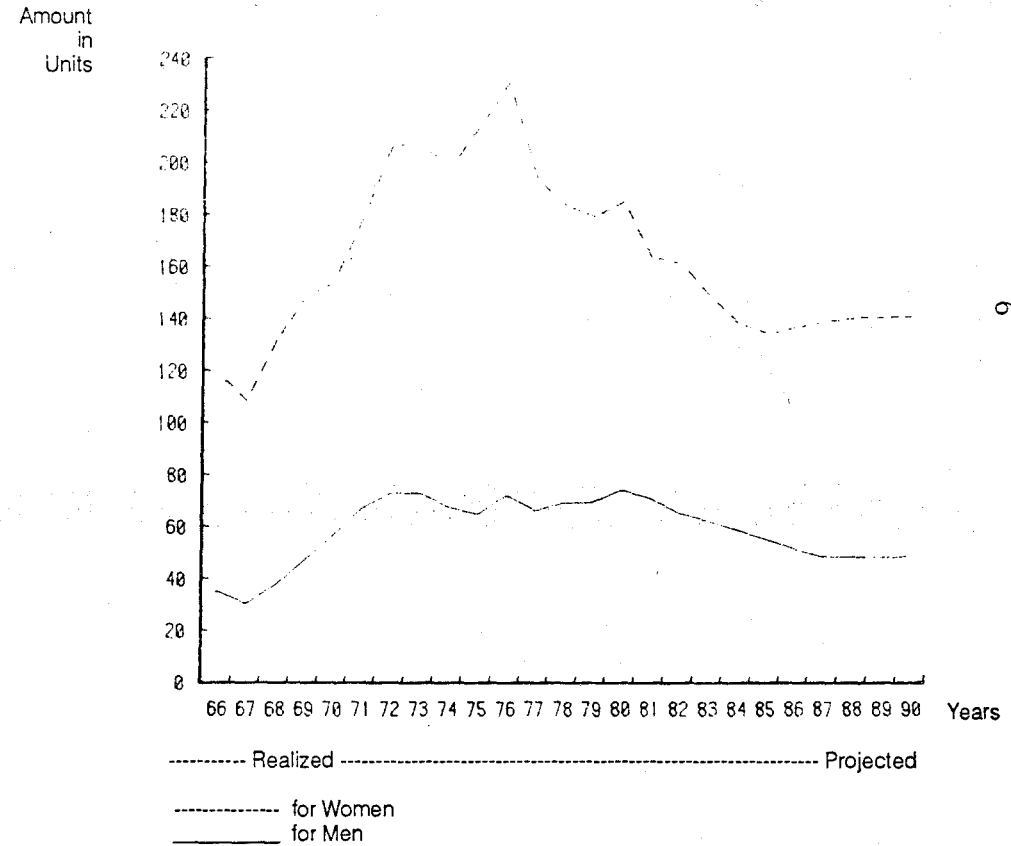


Figure 1.1
(continued)

e) Consumption of Shirts for Men and Blouses for Women (in 000 000)

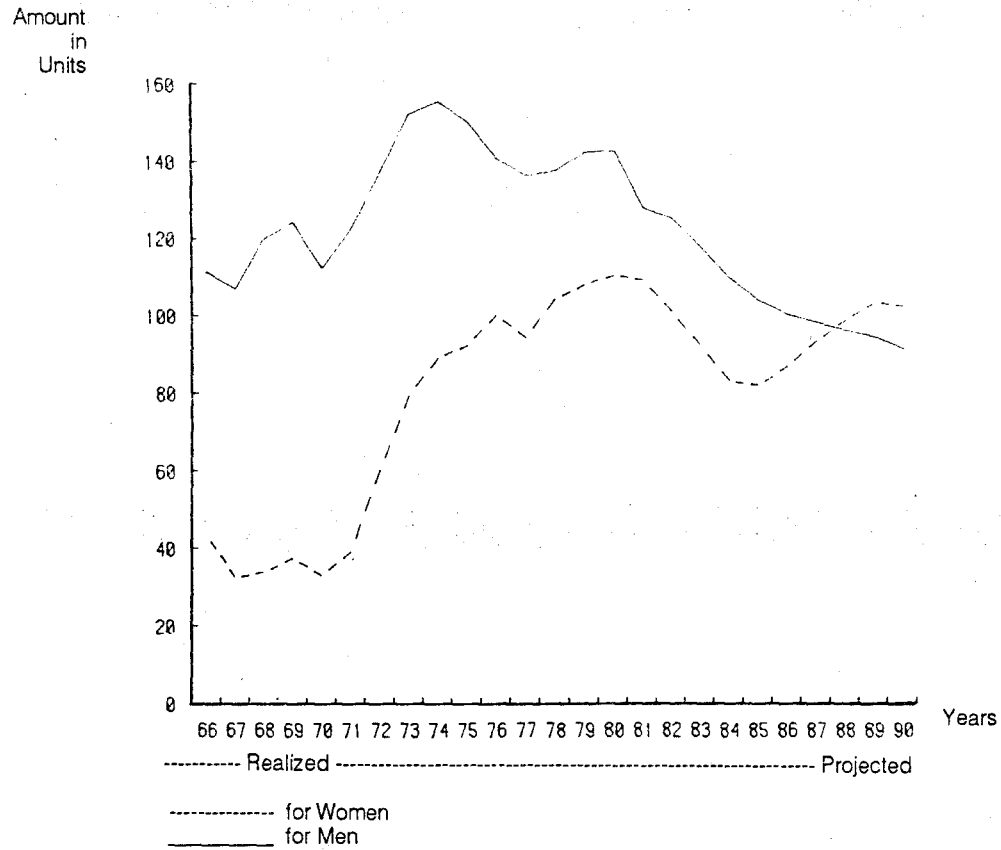


Table 1.2.
Export Shares of EC and FRG (in 000 \$)

Exports of Turkish	Years					
	1982	%	1983	%	1984	%
MRW Products						
Total:	45.017	100.0	48.141	100.0	141.641	100.0
EC Countries	30.612	68.0	33.217	69.0	94.483	66.0
FRG	16.206	36.0	20.701	43.0	70.254	49.6
WRW Products						
Total:	196.859	100.0	314.841	100.0	497.880	100.0
EC Countries	159.456	81.0	273.912	87.0	383.367	77.0
FRG	102.367	52.0	206.851	65.7	322.626	64.8

Source: "Hazır Giyim Eşyası Dış Piyasa Araştırması" by Erol Özenç. T.C. Başbakanlık Hazine ve Dış Ticaret Müsteşarlığı, İhracatı Geliştirme Etüd Merkezi, No.100, İGEME Yayını; Şubat 1986.

a) Structural Changes in International Trade Relations for Textiles and Apparel Products Considering FRG

Since 1973 there is an expansion in the textile-apparel production of developing countries, and a contraction can be observed for developed ones.

In most developed countries the income elasticity of demand became less than one for clothing. Through the rise in disposable income, the share of necessities in total demand declined (Breitenacher, 1975; Lanner, 1981). High labor costs resulted in high prices and lowered the demand level. Lanner (1981) states that mechanization of work in developed countries caused unemployment in textile-apparel industry. Hence, production levels decreased.

Prices became the forcing factor in competition (Adler and Breitenacher, 1984). To increase demand through attractive prices, imports from developing countries started (Keesing and Wolf, 1980; Lanner, 1981). These countries could offer attractive prices due to their low wage structure, low expenditures on safety, on social benefits and on environmental protection compared to the developed countries (Lanner, 1981). Cost advantages, longer working hours and machine operation times in developing countries led to their penetration in the world ready to

wear market (Adler and Breitenacher, 1984). The production level decreased in developed countries because of high import penetration, changes in living standards and in patterns of expenditure. This caused a loss in the world output share of developed countries (Lanner, 1981; Schulz, 1983). The trade balance for textiles and apparel products became negative in industrialized countries (Keesing and Wolf, 1980).

In order to protect the textile and apparel industries of the developed countries, import restrictions in the form of quotas have been introduced in 1970's through MFA (Multi Fibre Agreement), LTA (Long Term Agreement for International Trade in Cotton Textiles), and in 1980's through the WTA (World Textile Agreement). These attempts decreased the growth rate of apparel imports from the developing countries (Keesing and Wolf, 1980; Schulz, 1983).

The future trends in the textile and apparel sectors can be evaluated as follows:

1. Developed countries will still continue to export textiles and even apparel products. They have a trade surplus in textiles and a trade deficit in apparel products. Developing countries cannot outstrip the textile and apparel industries of the developed countries (Keesing and Wolf, 1980).
2. South Europe and South East Asia enjoy trade surplusses especially in apparel products (Keesing and Wolf, 1980). The low wage countries will capture higher market shares in the future, since they adapt their supply more and more to the preferences of the consumers in the export market. The restrictions of EC (European Community) will increase, as more and more firms will prefer ordering abroad (Adler and Breitenacher, 1984).

Observations on the developments in German textile and apparel industries show that there is a strong decrease in employment and in the number of firms in these sectors (Engel, 1985; Schulz, 1983). In 1983 only three per cent of all people employed in the entire industry worked in the apparel sector. Although the level of employment decreased about 1/3 in the WRW sector, the sales expanded by 40 per cent (Schulz, 1983).

In FRG, domestic manufacturers try to compete through product innovation in higher quality, through product differentiation, advanced fashion, better delivery conditions and permanent quality controls. However, cost related disadvantage increased (Adler and Breitenacher, 1984). The apparel industry in FRG specializes more and more in manufacturing of high quality products; and imports in lower quality products could expand their market share and meet in an increasing manner the mass demand (Breitenacher, 1975). Besides this, technological developments in

production steps like sewing or cutting cannot outstrip the human factor, compared to the more capital intensive industries. Especially ready to wear products constitute almost the most labor intensive product line in the sector (Schulz, 1983).

In order to decrease costs of production in FRG, many German manufacturers started to shift their production to low wage countries where raw materials and labor are cheaper and product quality is advanced (Adler and Breitenacher, 1984; Breitenacher, 1975; Engel, 1985; Schulz, 1983). As a result, imports were composed of three different groups: Purchase of collections abroad, ordering abroad and CMT (Cutting-Making-Trimming) abroad (Adler and Breitenacher, 1984; Breitenacher, 1975). For CMT, a low wage structure and an innovative potential of the foreign markets are preferred (Adler and Breitenacher, 1984).

Besides big giants like Kaufhaus Konzerne, big chain stores like C & A, Peak & Cloppenburg, cooperative buying offices were engaged in ordering and CMT abroad, sourcing firms emerged and expanded through ordering and CMT (Engel, 1985). In 1984, sales of a German producer were composed of their own production (62.8 per cent), domestic CMT (14.1 per cent), CMT abroad (9.5 per cent), purchase of collections abroad (7.6 per cent), ordering abroad (3.1 per cent) and purchase of domestic collections (2.9 per cent) (Adler and Breitenacher, 1984). According to 1985 foreign trade figures, there was a great import surplus of WRW products in FRG. In 1985, the major suppliers of WRW products were: 1. Italy, 2. Hong Kong, 3. Yugoslavia, 4. South Korea, 5. Turkey. In the period 1981 to 1985 the major WRW products sold were pullovers and blouses (Marketing in Europe, No.294,1987). From 1983 to 1984, Turkey's share in apparel imports of FRG increased by 64.0 per cent and in textile imports of FRG by 43.0 per cent. In both product classes this increase is highest compared to the export developments of competitor countries (Textil Wirtschaft, 1985).

In general, it can be concluded that employment and production levels in textile-apparel industries in the developed countries decreases and their imports from low wage countries increases. This structural change is also true for FRG. Since 1984 Turkey became one of the main suppliers of FRG for ready to wear products.

b) Developments in Textile and Apparel Industries in Turkey

In Turkey there are a variety of firms with different ways of operations in textile and apparel sectors:

1. Large sized firms - they have full integrated plants; are also involved in export production.
2. Medium sized firms - they work in connection with different external units to the firm, ordering for production steps like coloring; they fulfill ordering activities.
3. Small sized firms - they operate with a limited number of machines, fulfilling ordering activities.
4. Small operating units - their activities are restricted to CMT.

This difference in ways of manufacturing causes differences in product quality, prices and delivery times (Özdeş, 1986; Özenç, 1986a; Şeker and Baykal, 1974).

The production processes differ for knitwear and woven products. Ready to wear products of woven texture require input products such as zips and buttons from the supplier industries more than those of the knitwear. In case of knitwear, a particular production technique can be applied to various product types (Özenç, 1986b).

Turkey mainly produces cotton made ready to wear products where she has comparative advantages. About one half of this production is exported, the rest meets the domestic demand. The capacity utilization of firms manufacturing cotton made products and of firms operating based on ordering to export is higher than the average which is about 50-55 per cent in the apparel industry (Özenç, 1986b).

The analysis of Turkey's foreign trade figures for the period 1980-1986 shows the following: The share of textiles and apparel products in total exports have increased from 26.72 per cent in 1980 to 28.32 per cent in 1986. Exports to EC countries increased from 14.44 per cent in 1980 to 18.0 per cent in 1986. The share of textile-apparel exports in total exports to EC was 33.83 per cent in 1980 and increased to 43.9 per cent in 1986 (Şahinalp and Güzelhan, 1987). Turkey's export figures for two product lines, WRW and MRW reveal that ready to wear products are mainly exported to EC countries. Among the EC countries FRG has the highest export share of Turkey and exports for WRW products are higher in value and market share compared to MRW products (concluded from Özenç, 1986a).

Table 1.3
Export Shares of Turkey and Import Shares of FRG based on Turkish Apparel Products in 1985
(in 000 Units)

Product Categories	Exports of Turkey to		Export share of FRG	Imports of FRG from		Import share of Turkey
	FRG	EC	%	Turkey	Countries except EC	%
T-shirts/sweatshirts	13.906	21.317	65.2	13.906	43.155	32.2
Pullover	13.921	15.846	87.9	13.921	61.503	22.6
Trousers/shorts	6.994	8.540	81.9	6.994	69.695	10.0
Blouses (for women)	5.472	7.492	73.0	5.472	48.794	11.2
Shirts (for men)	7.310	13.260	55.0	7.310	81.986	9.0

Source: "1980-1987 Döneminde Avrupa Ekonomik Topluluğu Ülkelerine Yönelik Tekstil İhracatımız"; Bülent Şahinalp and Coşkun Güzelhan; HDTM İhracat Genel Müdürlüğü (Tekstil Şubesi); 1987.

In 1985 figures, FRG is the largest buyer for T-shirts and sweatshirts, pullovers, trousers and shorts, blouses as well as shirts; and Turkey is the largest supplier of FRG for blouses and shirts. The share of FRG in Turkey's exports to EC countries and the share of Turkey in imports of FRG in these product categories are given for 1985 in Table 1.3.

The import restrictions of the developed countries appear as quota restrictions of WTA. This could be overcome through using quotas for products of high value added and through shifting the exports to product lines without quotas. The quota regulations bring also some flexibilities. Such practices as described by Şahinalp and Güzelhan (1987) provide the following opportunities for exporters:

1. Carry over - shift in quantity from one year to the next
2. Advance utilization - shift in quantity from next year to this year
3. Swing - carry over among product categories
4. Regional transfer - carry over among countries within the same product categories.

Besides these flexibilities, there are also some gaps in the regulations which help to overcome the quota such as combining different product categories (Özenç, 1987).

These opportunities can help to overcome the quota restrictions to a certain extent; however, quota limitations will not be analysed in this study.

Turkey faces also some threats in the textile and apparel sectors. The identification of major threats helped in defining the points the researcher had to deal with in the studied export market.

The problems or threats can be summed up as follows:

1. The supplier industries are technologically not well advanced so that their products are not of a standard quality (Çetin, 1988; Özenç, 1986b).
2. The only price advantage is in labor wages. In all other cost items, especially in texture the input prices are not under the world average (Çetin, 1988).
3. There are problems in processing activities like coloring, prints (Çetin, 1988; Özenç, 1986b); and in material where standardization is lacking for texture, and quality control problems occur. These, in turn, cause gaps in production and results in delays of the delivery (Çetin, 1988; Özdeş, 1986; Özipek, 1986).
4. Inefficiencies due to lack of qualified people, quality control gaps, lack of standardization and the idle capacities cause problems (Şeker and Baykal, 1974).

The increasing import and sourcing activities in FRG, the high market share of Turkey in WRW imports of FRG, the increasing WRW exports from Turkey to EC countries, especially to FRG justify the choice of FRG as the export market to be analysed in this study.

1.2.3. Reasons for Choosing Distribution Channel Members in FRG as the Primary Unit of Analysis

In order to determine the positioning of Turkish WRW products in the FRG market, expectations as well as evaluations of the export market for WRW products are necessarily to be defined.

A study with German consumers as the chosen sample elements would not provide the necessary information because as stated by the observations done in Hamburg in the period October 1987 - July 1988 and June 1989 - November 1989, most of the Turkish WRW products are not sold under Turkish brand names in the retail shops in FRG, and in most cases the labels of WRW products do not inform about the country of origin.

In international marketing the most important stage between the producer and the consumer is the distributors' stage. Well informed about the expectations, preferences and complaints of the consumers, the distributors know also the capacities, capabilities and requirements of different producers from various countries so that they can easily match the expectations of both parties. Hence, it was thought that it would be significant to gather information and to collect the primary data for the study from distribution channel members located in FRG market.

1.3. Design of the Study

This chapter covered the scope and significance of the study, following the objectives of the dissertation. Here, the reasons behind the choice of the product line (WRW products), of the export market (FRG) and of the sample elements (distribution channel members) are verified.

In chapter two export marketing strategies and the literature about product attributes and distribution channel network of WRW products are evaluated.

In chapter three research design and methodology forming the basis for the survey conducted among firms in textile-apparel sectors in FRG which also import

WRW products in their product line is presented.

In chapter four, findings based on the data collected through the survey are discussed.

Chapter five covers the conclusion reached evaluating the findings and results of the study, and also reflects the implications for various parties of interest as well as for further research.

In the appendix part of the study, the questionnaire used as the data collection instrument is presented.

II. A REVIEW OF GLOBALIZATION ATTEMPTS, PRODUCT ATTRIBUTES, AND DISTRIBUTION CHANNEL STRUCTURE AS RELATED TO TEXTILE AND APPAREL GOODS

This part of the study is based on the secondary data reviewed in order to give insights about export marketing strategies to be developed for the FRG market and presents the important factors related to a ready to wear product in the export market. A distribution channel network chart for textiles and apparel products in FRG market is drawn and information about channel members is given.

2.1. Export Marketing and the Attempts for Globalization

A global market philosophy searches for market opportunities to synergistically achieve corporate objectives and goals. For a company with global market orientation there is no distinction made between domestic and foreign market opportunities. They have to be consistent with strategic objectives of the company. Companies in global market orientation have either global market segmentation and use same marketing strategies for all export markets, or they have national market segmentation and use different marketing strategies for each export market chosen according to the specifications of the market (Toyne and Walters, 1989).

2.1.1. Textile and Apparel Sectors and Globalization

Toyne and Walters (1989) state that clothing is an industry essentially national in nature and hence requires national marketing strategies. In today's

internationalization of fashion styles, companies from different countries are in production efforts to satisfy the needs for new trends in the world. Hence, these companies are more and more forced to compete in a sector characterized slowly by universal needs. Here the market segments tend to become global. For products like those in the ready-to-wear sector, this is especially true for their fashion related aspects.

For the development of globalization strategies, the consumer typologies have to present similarities. Although the functional and aesthetic characteristics are also influenced by the seasonal and fashion based trends, a globally oriented ready-to-wear company has to make use of national market segmentation strategies in order to fit the products to the individual preferences of the foreign markets.

Tietz (1990) stated that in the fashion-market there is a tendency towards internationalization and globalization in sales and consumption although the local, regional or national features prevail. Accordingly, four major marketing zones tend to develop in Europe: 1. Great Britain / Scandinavia; 2. France / Italy / Spain / Portugal and some parts of Belgium; 3. Germany / Austria / Switzerland / Benelux Countries; and 4. Greece and Turkey. These zones will require differentiation among each other and standardization within the group. The tendency for internationalization in the textile-apparel sector was mainly influenced by the developments in communication, transportation and also by the globalization of production techniques and consumption habits.

In cooperation with American and also Japanese companies, the German firms started a worldwide globalization in the textile and apparel industry. The export-market strategies of the producers are determined by "Euro" or international marketing. Here the major considerations are market size, the competitive positioning in the chosen market, and the production and trade-structure in these countries. The strategy zones and target markets can be differentiated as: 1. markets where manufacturing takes place and there are branches for intensive customer communication through selective distribution; 2. markets where direct or indirect exports are made. The producer and the distributors work to develop a mutual customer relation at international level through a variety of communication media such as, catalogues and journals. Internationalization in retail business is observed through fashion trends. For the retail business internationalization means know-how transfer and a new distribution and customer structure in the internationalized shops.

2.1.2. Cultural Aspects of Globalized Marketing

Besides the globalization tendencies in the textile-apparel sector due to the international aspects of widespread fashion ideas, there can still be country specific differences in the way to dress and appear. The taste of colors or the style and cut of a ready to wear product can differ from one country to the other.

Toyne and Walters (1989) stated that these differences in the way to dress and appear are a result of cultural differences. Customs and tradition still determine the modes of dressing. "Even colors and color combinations are culturally determined" (p.175). These differences have to be taken into consideration when developing promotional materials and selecting the colors for the package or the product itself.

As stated by Cateora and Hess (1975), the firms involved in international marketing have only limited control over the cultural environment in the export market. Besides the different meanings of colors, different tastes forming the cultural knowledge, the elements of culture such as, the belief systems and the expectations can also show differences from country to country. Firms and people involved in international marketing activities should try to deal with the possible effects of these uncontrollable variables and develop product and marketing strategies accordingly. Otherwise the achievement of marketing objectives can be precluded by the uncontrollable elements.

2.1.3. Diversification versus Standardization for WRW Products

Since the cultural differences influence the product development, it is difficult to decide for standardized products in textile and apparel sectors although fashion trends tend to help for the globalization of the markets. Standardization can only be useful in countries with very similar cultural background such as those defined by Tietz (1990) under four major marketing zones in the world. Differentiation should be preferred for different marketing zones and even based on slight country specific differences also within the chosen marketing zones.

According to Cateora & Hess (1988), differentiated products are adapted and even redesigned for each culturally unique market. The product strategies to be developed are as follows: 1. Selling the same product using the same promotional tools; 2. Selling the same product with promotions oriented towards a different use of the product; 3. Individualizing the existing product to the tastes and specific needs in the export market and using the same promotional methods for the same use as in the domestic market or other countries; 4. Changing the product to meet different needs and use patterns in the export market and changing also the promotional message accordingly; 5. Investing or developing a completely new product rather than adapting the existing one.

In case of WRW products, the third alternative is the most appropriate product strategy. The differences in customer expectations in the export markets require an adaptation of the WRW product to the tastes and specific needs according to the importance attached to the quality specifications or aesthetic characteristics of the WRW product. The major need satisfied by the WRW products is the same in all export markets: Protecting the body and ensuring a good outlook. Hence, the promotional messages used in the domestic market can also be used in the export market.

This study tries to reflect the opinions of the distribution channel members for WRW products from Turkey in FRG. In order to make any statements about whether the Turkish WRW producers have to concentrate on national market segmentation strategies also for different markets or whether complete globalization efforts have to take place in this sector, similar field surveys in different countries are to be carried out so that similarities or differences can be detected.

2.2. An Analysis of Product Attributes as Related to Ready to Wear Goods

A product has to offer first of all functional usefulness. In the broad sense the physical-functional characteristics show the extent a product is useful (Berekoven, 1978). The level of functionality of a product depends on the treatment process of the materials used (Bänsch, 1982). This shows the quality level of the product which is the crucial dimension of the physical-functional characteristics. Secondly, a product should meet the expectations of customers related to the appeal. The importance of aesthetic attributes of a product are higher for those purchased 'by the eyes'

(Berekoven, 1978). This statement is especially true for clothing articles. Here, besides optic attributes, also haptic attributes shape the aesthetic product characteristics. A drastic aesthetic change is observable in fashion and in direction of style. In this case products become obsolete although they still have a strong physical-functional value. This can be described as style-, fashion-, or psychisch-obsolescence (Bänsch, 1982).

Through the syntheses of physical-functional and aesthetic characteristics, a certain opinion is attributed to the product by the consumers. This constitutes the third dimension of product attributes, which is the social characteristics. The social attributes of the product guarantee social acceptance and social status (Bänsch, 1982). Social characteristics of a textile or apparel product are related to fashion and image.

Through the use of the identification factors, individuality and distinction is ensured for the product. These factors are brand name, label and package. If a product does not have a brand name, it is called a generic product. In this case, the physical-functional, aesthetic and social characteristics as well as the label and package gain on importance. When identification factors are not well developed, product characteristics and their evaluation take a more critical focus of attention.

The conceptual analysis of the product in this section covers the attributes lending significance to the existence of a product; i.e. the product characteristics, and the factors which help to differentiate the product at first glance from the others.

2.2.1. Attributes Lending Significance to the Existence of a Product

A product can satisfy the needs of customers through three main groups of attributes which can be defined as product characteristics:

1. Physical-functional characteristics which are related to the usefulness of a product;
2. Aesthetic characteristics which are related to the appeal of a product;

3. Social characteristics which are related to the psychological role and social acceptance of a product.

2.2.1.1. Physical-Functional Characteristics

The functional aspects of a product constitute the main reason for its existence. This can be different for each product. In case of outwear products it is the protection factor: To protect against cold or heat, to cover or hide the body.

The crucial dimensions of physical-functional characteristics are: Functional capacity and quality of a product (Berekoven, 1978). The long term existence of physical-functional characteristics depends on the sturdiness of the product. This again can only be ensured through quality.

a) Functionality

Functionality covers size adjustment as well as the climatic adjustment of the product to export market conditions.

1. Size Adjustment

The size of the products to be manufactured should meet the expectations of the market.

In case of ready to wear products, the articles should be designed, cut such that a fit in size to the body of the people in the chosen market is possible (Bänsch, 1982). The fit and suitability of a ready to wear product is a quality criteria itself (Reiche, 1976).

2. Climatic Adjustment

An important aspect for the material to be chosen is the degree of fit to the climatic conditions in foreign markets. This is especially true for products sensitive to temperature or for products whose functionality is highly dependent on the fit to

climate (Bänsch, 1982; Berekoven, 1978; Cateora & Hess, 1988; Majaro, 1978; Terpstra, 1983). The response to climatic conditions is highly important for ready to wear products.

The material of ready to wear products have to fit to various climatic conditions in different countries (Bänsch, 1982). This can ensure the functionality of a ready to wear product in terms of protection against cold or heat.

b) Quality

The quality of a product starts with the material used, is reinforced through the art of processing and ensured through the finish processing and quality control.

According to Gütermann (1987), the quality of a product is the outcome of the necessary measures taken for its production such as quality planning, quality control and quality evaluation, as well as of the technical and human resources such as raw materials, investments, funds, operations, know how, and the necessary efforts and capabilities. Each market has different requirements or expectations related to the quality and durability of the products offered. In case of ready to wear products in fashion, consumers in the USA are satisfied even if the product can be worn only throughout one season. For the consumers in the FRG, the qualitative distinction of a product plays an important role besides the fashion based taste (Durniok, 1970).

1. Material Quality

The quality level of every material used in the manufacturing process determines the quality level of the end-product.

In the ready to wear sector, following items shape the material quality frame for a product:

1. Purity of the fibre used, e.g. cotton or wool percentage (Gütermann, 1987; Reiche, 1976).
2. Quality of products from supplier industries e.g. threads, buttons, zips, lining and other complementary material used (Reiche, 1976), such as press buttons (Kruse, 1985).

3. Standardization of texture in textile fabrics for knitwear or woven products (Şeker and Baykal, 1974).
4. Solidity of the colors of the material used (Gütermann, 1987; Şeker and Baykal, 1974).

2. Processing Quality

The processing quality depends on the equipment used, the manufacturing technique chosen and the quality of labor force. The cutting technique, sewing, coloring and finish processing constitute the manufacturing technique in the ready to wear industry.

For ready to wear products, the following factors determine the processing quality:

1. Factors in cutting process:
 - . Ensurance of perfect fit through correct cut (Gütermann, 1987)
 - . Accuracy in the cut and style (Gütermann, 1987)
2. Factors in sewing process:
 - . Cleanliness of seams and borders (Gütermann, 1987, Reiche, 1976)
3. Factors in coloring:
 - . Solidity of colors (Gütermann, 1987)
4. Factors in finish processing:
 - . Elasticity and/or stretch degree (Gütermann, 1987; Mittmann, 1987)
 - . Crease resistance (Gütermann, 1987; Mittmann, 1987).
 - . Resistance to wear out, ensurance of easy care (Adler, 1987; Gütermann, 1987; Reiche, 1976), that is solidity for wash and dry clean, resistance to shrink and color run.
5. Factors for the quality of labor force:
 - . Training of the labor force (Gütermann, 1987)

The main problems faced with processing in the Turkish ready to wear industry are:

1. High replacement costs for machinery and equipment, difficulties in obtaining spare parts. This results in slacks and idle time in production (Şeker and Baykal, 1974);
2. Difficulties in hiring qualified labor force and problems occurring during on the job training (Barchard, 1987; Şeker and Baykal, 1974). If a standard quality of material and processing can be ensured, durability and solidity of a product are easy to guarantee (Gütermann, 1987).

3. Durability Quality

Durability of a ready to wear product depends on its finish processing, on the quality control measurements and their execution, and is ensured finally through the easy care such as solidity for wash and dry clean without shrinking and color run. As stated by Reiche (1976), a quality criteria for a product is the level of simplicity in its care.

The instructions related to maintenance and care help the consumers to extend the useful life and functionality period of a ready to wear product. According to Rossow (1984), the instructions should be easy to understand and cover the essential information necessary for the consumer.

Labels on ready to wear products inform consumers about the instructions for care of the product.

4. Quality Control

Quality control covers the inspection of quality criterion for material used and for manufacturing process. Problems in quality control can arise from the material used, the equipment operated, and the labor force in the ready to wear sector. Defects can occur at certain times like at the start of the season or by a shift from one product to the other, or at certain points in production like in cutting due to defective machines, dirty machines or unqualified labor force hired. Most of the quality defects are found in the materials used, in cutting and styling, in sewing (Adler, 1987).

When quality defects in textile fabrics arise, the reactions of ready to wear manufacturers may be: 1. sending the complete delivery back and requiring the

reproduction of the textile fabrics; 2. obtaining a price out considering the defective deliveries; 3. obtaining new textile fabrics without defects in the amount of defective ones (Gütermann, 1987).

Quality control measures to be taken are: Random sampling controls, controls to see if quality criterion are met or if there are defects, marking of defects, elimination of defects during the manufacturing process and control to ensure quality standards within the tolerance limits (Adler, 1987).

The methods of quality control are described by Sandhom (1987) as follows:

- a. Vendor survey is opinion development
- b. Vendor rating is studying the results of previous deliveries
- c. Initial sample control is sending an initial sample to give the customer an idea about the quality of the vendor's supplies. Defects are then corrected based on customer evaluations.
- d. Incoming inspection is controlling at places of raw material goods received before production, such as at unloading, unpacking, checking, and transport to storage areas.

Quality control can be done for materials to be used in production of ready to wear products, during the manufacturing process, at the end of the manufacturing process on finished ready to wear products before or after delivery.

Basic defects observed on ready to wear products are defined by Gütermann (1987) as follows: Diagonal stretching of the textile fabrics, folds and knots on the material, unpleasant smell on the textile fabrics, unclean appearance due to strange fibres or failing fibres in the texture, scratches, holes and stains in the texture, color stains and deviations in colors as well as deviations of designs from the order requirements.

Types of defects observed during the quality control of ready to wear products are classified by Gütermann (1987) under three major groups:

A- type defects fall in the tolerance limits

B- type defects fall outside the tolerance limits but can still be eliminated at

some costs. These are the second choice products in the market.

C- type defects fall outside the tolerance limits and cannot be eliminated. These products are waste products and cannot be sold in the market at all.

The quality control should not only help to point out the defects but also help to eliminate, correct and avoid the defects in the production of ready to wear products.

In summary, the physical functional characteristics of a product reflect the essential reason for its existence. Although each product line appeals to a different need, the way to ensure the physical functional dimension depends on the same factors such as:

1. Functionality ensured through the adjustment to climatic conditions and sizes in the market;
2. Quality enabled through the material quality, quality of manufacturing process and quality control measures and their execution for ensuring sturdiness of the product. The individual items significant for the determination of these two main dimensions differ in their composition for each product line. In this part of the study, only those relevant for ready to wear products from the textile and apparel sectors are discussed, taking the export marketing requirements into consideration.

Table 2.1. gives a precise picture of the components and individual factors of physical-functional characteristics of ready to wear products explained in this subsection.

2.2.1.2. Aesthetic Characteristics

Aesthetic attributes influence the "beauty perception" for a product. Here product style, form, design, proportions and colors play a significant role (Bänsch, 1982). The spatial dimensions like volume, size, form and style determine the shape of a product, through the material used; design, and colors chosen (Berekoven, 1978).

In the textile and apparel industry, decisions for product development are highly influenced by emotions and creativity. The product does not only have a functional value, hence marketing efforts have to concentrate on the aesthetic

Table 2.1
Physical-Functional Characteristics of
Ready to Wear Products

Physical-Functional Characteristics	
Functionality	Quality
<u>Size Adjustment</u> - Body Fit	<u>Material Quality</u> - Standardization of Texture in Textile Fabrics - Purity of the Fibre Used - Solidity of Colors - Quality of Input Products
<u>Climatic Adjustment</u> - Protection Against Cold or Heat	
	<u>Processing Quality</u> - Equipment Used - Manufacturing Technique Chosen - Cutting Technique - Sewing - Coloring - Finish Processing - Quality of Labor Force
	<u>Durability Quality</u> - Finish Processing - Quality Control - Maintenance and Care

attributes as well (Fuchslocher, 1981).

Attitudes of consumers towards colors, shapes and general appearance of a product differ in international markets. Needs related to aesthetic characteristics should be defined properly for each market and their consistency with domestic tastes and traditions should be measured (Majaro, 1978).

The creative and emotional influences for products in textile and apparel industries mainly affect the "appeal" of the product and are often determined by the fashion cycles. It is important to find out the colors, models, styles which are significant for the purchasing decision of a German consumer besides the influence of fashion. Mittmann (1987) stated that the "perception" related specifications on the texture of a ready to wear product are optic and haptic attributes. Optic attributes are related to the visual perception and haptic attributes are related to the sense of touching. According to Mittmann's (1987) definition, optic attributes are style, surface shape of texture, colors and color compositions, their brightness and the designs of a product. Haptic attributes on the other hand are softness or hardness, elasticity, surface smoothness or stiffness of a product. Mittmann (1987) defines these attributes as quality specifications or quality characteristics of a textile or apparel product.

Related to perceptions about the appeal of a ready to wear product, optic and haptic attributes shape the aesthetic characteristics. They can individually be defined as follows:

a) Optic Attributes

Optic attributes for ready to wear products appeal to the visual perception of the consumers. They are shaped during the manufacturing process and can be grouped as:

1. Product style and surface shape of texture, which is highly influenced by fashion trends;
2. Product cut as a factor of manufacturing technique used;
3. Colors, color compositions and their brightness;
4. Development of designs: Keegan (1989) stated that there four groups of factors important for the design of a product which have an impact upon the international sales:

- a) Preferences. They mainly vary in color taste in different countries.
- b) Costs. They are determinant in pricing alternatives.
- c) Prescriptions: They are laws and regulations related to product design in international marketing.
- d) Compatibility:.. It is the fit to the market environment.

For ready to wear products the preferences in tastes are highly significant. During the design creativity process, also the costs of styling and costs of models developed by the fashion creative team, the stylists are to be considered.

b) Haptic Attributes

Haptic attributes for ready to wear products appeal to the sense of touching. They are moulded during the finish refinement process and can be defined as related to the 'treatment' of the product and grouped as:

1. Softness or hardness of the texture
2. Smoothness or stiffness of the texture
3. Elasticity of the texture.

Brilliance or paleness of a ready to wear product is also ensured through finish processing. Haptic attributes for ready to wear products are highly influenced by and determined through fashion trends, similar to optic attributes. The haptic attributes are shaped throughout the steps in manufacturing technique.

In summary, aesthetic characteristics of a ready to wear product should help to meet the expectations of customers related to the appeal of the product. This appeal is created by the visual and touch perceptions. The aesthetic expectations are highly influenced by fashion, act upon form, refinement and treatment of the product. These in turn shape the optic and haptic attributes, the factors constituting the aesthetic characteristics. In the broad sense, aesthetic characteristics can be grouped under optic and haptic attributes for all product lines. The composition of these attributes however differs for each product line, according to the trends in the chosen export market. In this part of the study, only those relevant for ready to wear products from textile and apparel sectors are discussed, taking the export marketing requirements into consideration.

Table 2.2 gives a precise picture of the components and individual factors of aesthetic characteristics of ready to wear products explained in this subsection.

Table 2.2
Aesthetic Characteristics of
Ready to Wear Products

Aesthetic Characteristics	
Optic Attributes	Haptic Attributes
Product Style Surface Shape Product Cut Colors Color Compositions Color Brightness Designs Designing	Softness or Hardness Smoothness or Stiffness Elasticity Brilliance or Paleness

2.2.1.3. Social Characteristics

Some products have also the function to satisfy esteem needs of consumers. This is the psychological role of the product and can be reinforced through the Veblen or so called snob effect. Mason (1981) stated that in the Veblen effect, there is a conspicuous consumption effort to buy social status. The necessity of wealth display in seeking social status has emerged due to social and economic improvements in the society. In conspicuous consumption efforts, high price of a good can also make the product attractive. Besides material and social wealth expression, personal status and prestige will be rather the motivating forces for consumer behavior (Mason, 1981). Esteem needs shape the societal expectations for a product. The societal expectations differ for each product, according to the social importance of a product, the societal expectations and the image of that product in the market have an impact on the social characteristics of the product.

The product image is shaped through the influence of aesthetic and physical functional product characteristics as well as the influence of product identification factors.

Through the social characteristics of a product the consumers are given a social status and social acceptance and they have the opportunity to express

themselves (Bänsh, 1982).

In this respect, ready to wear products have a very significant role in developing and expressing the identity and individuality. Worn directly on the body, they are the most direct display items for life style expression. Social acceptance or belongingness-and self esteem needs can be satisfied through ready to wear products. In this sense, product image, country of origin of the product and especially fashion are determinant factors of the social characteristics of ready to wear products.

a) Fashion and Life Style Expression

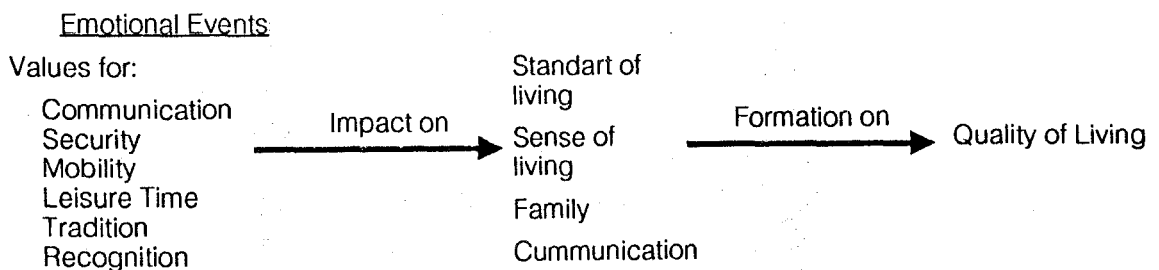
According to Verret (1980), it would be misleading to state that fashion creates demand. Demand is created through the level of wealth per capita or purchasing power per capita (Verret, 1980).

Hence, for the export and sales of fashion ready to wear products it is important to concentrate on a country or market where disposable income of people is high and the consumers are fashion oriented.

By meeting the expectations of the consumers, a product has to contribute also to the quality of living of the consumers. Quality of living proves to be a factor of the standard of living, sense of living, family and communication. These again are shaped by the emotional events such as values of the consumers for communication, security, mobility, leisure time, tradition and recognition (Weinberg and Konert; 1985).

Table 2.3

Formation of Quality of Living



The perception of quality of living differs for each person according to the personality and life style. For some people, an easy way to point out individuality is having a good outlook through appropriate dressing.

Fashion presents itself as a chance to create and emphasize the personal, individual style despite the desire for collectivism.

As a result, not only the need for belongingness is satisfied but also the Veblen effect comes into action. Through fashion outlook there is the freedom to differentiate oneself from others and to develop the own style. Especially in the ready to wear sector it is possible for the consumer to express the individuality and own style by varying and combining different quality products, different designs and colors (Gutenberg, 1962).

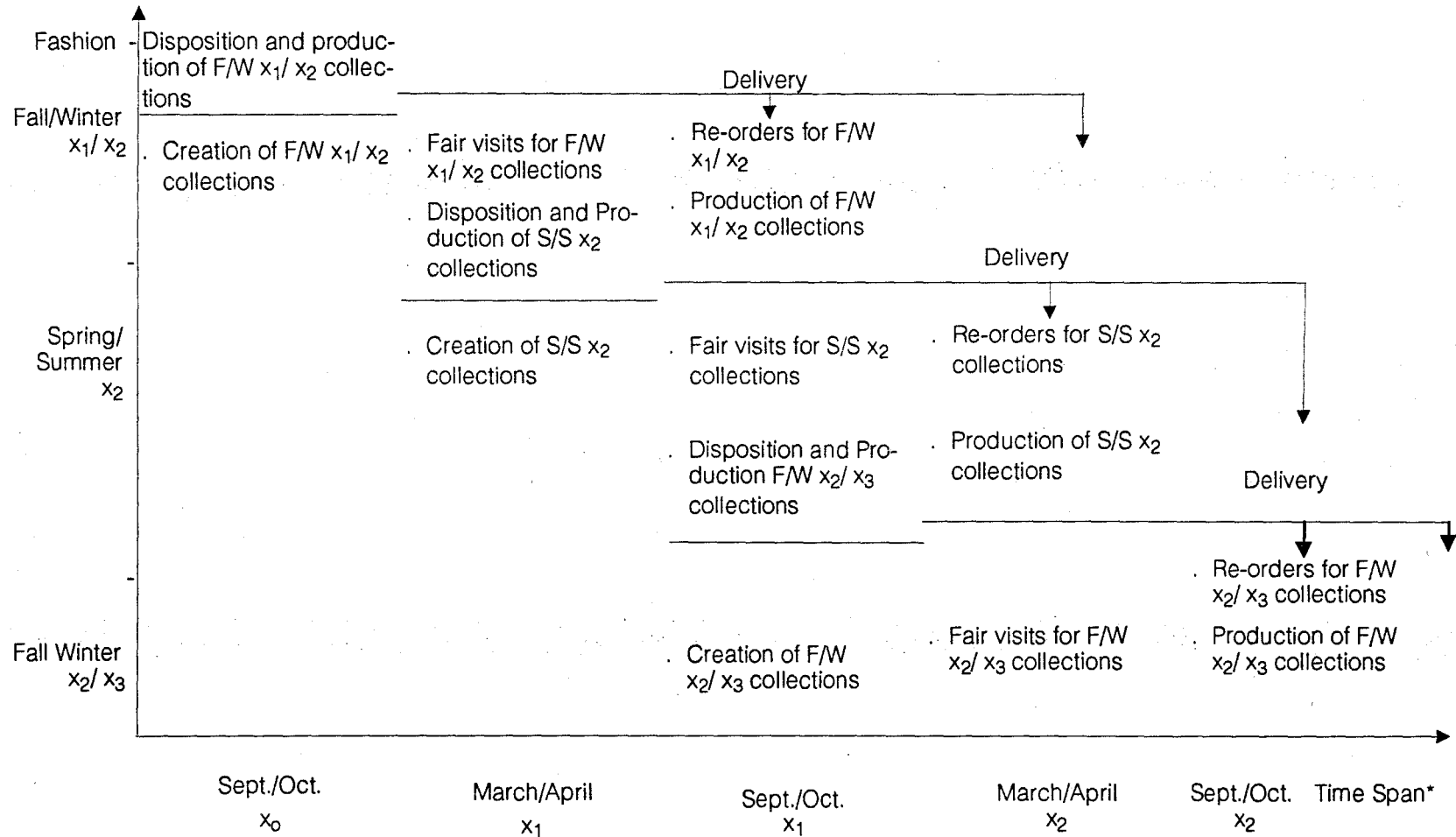
Fashion is hence a medium to develop and express one's own life style. The stylists and manufacturers work on models and designs to meet a variety of expectations related to different life styles. In this process of action the life style creates the fashion and fashion again shapes the life style expression. The extremely high velocity of changes in fashion due to changes in seasons shortens the product life cycle for ready-to-wear industry products. The planned obsolescence takes place.

The consumer starts to put on a new model, a new outwear product in a time determined by the producer and distributor. The need created by fashion is actually a postponable need (Ferrari; 1977). It occurs based on the timing and creativity of stylists in fashion.

As stated by Fuchslocher (1981), the fashion action is influenced by a seasonal half year rhythm i.e. spring/summer and autumn/winter. A successful marketing planning is based on information and ideas from the trend makers. The information gathering and idea generation starts in the first textile fabrics fairs in famous fashion centers like Paris, Rome, Milan, New York and continues with the first informal meetings of the industry and market. The creative teams develop fashion ideas by evaluating the past seasons' experience and by evaluating the information collected through international trade, trade representatives of distributor firms and consumers. The test-market phase covers the presentation of the collection to various dealers by the distributors and other trade representatives. The determinant time for test market is the spring or autumn fair where pre-orders for the next season are given.

The seasonal change twice a year enforces innovativeness in fashion. As a

Figure 2.1
The Fashion Process



* x_0 to x_3 = Year 1 to Year 3

Source: Modified and extended based on a model of H.Fuchslocher, 1981, p.62.

result, when in September creative people work on the models for the fall winter fashion of the next year, fair visits for the coming spring/summer collections start, and re-orders for this year's fall/winter collections are made, so that production for fall/winter collections of this year continues (Figure 2.1).

The tendency to shift to re-orders increases and more and more re-orders replace first or so called pre-orders in the order policy of the distributors (Moritz, 1987; Fuchslocher, 1981). About 25.0 per cent of the orders can be made to later dates than September for spring/summer of the following year; to later dates than March for fall/winter Collections (Moritz, 1987).

The reason for shifting the order dates as close as possible to the start of the season is the desire to minimize the risk of carrying stocks and to order based on the market demand for "fast seller" products.

Through a good information network between the manufacturer and distributors, the fast seller products in high fashion periods can be announced to the producer very quickly so that the production for re-orders can be accomplished on time (Moritz, 1987).

A product's becoming a fast seller indicates that it is highly in fashion, highly demanded. Especially fast seller products have a very short product life cycle. High fashion products loose on value during the season so that price cuts are inevitable. A too early order can miss the fashion trend and taste of the consumer. If a fast seller product is discovered too late, post delivery is hardly possible (Moritz, 1987). The study conducted by Moritz (1987) reveals that about 48.0 per cent of "fast sellers" are women's blouses and women's T-shirts.

The opinion leaders in fashion in Europe are mainly the people involved in distribution. The communication policy-based efforts should hence be directed towards distributors. The decision to accept or reject a ready to wear product is done by the consumer. The consumer is influenced in the decision making by the following factors: Distributors as opinion leaders; fashion magazines; societal environment like friends; opinion leaders in films; TV and radio (Fuchslocher, 1981).

In summary, fashion helps to meet belongingness needs and also to express the individuality and ones own life style. The short term nature of the seasons forces stylists to create new models. In order to avoid stocks at the end of a season, distributors tend to make only a minimum amount of their orders in advance to the season, and try to make re-orders as close as possible to the start of the season and

when they discover fast seller products.

Fashion sets Veblen and snob effects in motion for those who want to differentiate themselves through their outlook.

b) Image

The psychological role of the product is shaped also by the image associated with the country of origin. The value attached to the country of origin or the influence of origin factor is highly dependent on the image of that product.

The image can have two different kinds of effects: stimulating or slowing down the sales. The positive attitude towards the product specifications has a positive impact on stimulating the sales. If the needs and expectations of the customers cannot be met, a negative image for the product occurs. A better image of competitors also has a negative impact on sales, slowing them down (Weinhold-Stünzi, 1970). A positive image will make the origin of that product highly interesting whereas a negative image of a product will destroy the demand for it and its origin.

The image itself is developed through various factors. Britt (1970, p.3) sums up basic elements of imagery as:

1. National origin of the company and its products;
2. Discernible differences in the products;
3. Differences in packaging;
4. Company names and brand names;
5. Graphics of design; and
6. Where the products are sold.

Hence, it is rather the impact of various factors on the development of an image for a product which at the end effect creates a positive or negative attitude towards the country of origin of that product.

Two field surveys conducted by Schwenzner and Andersen (1983) and Schwenzner and Schwenzner (1984) about population-image of Germans based on the evaluation of various industrial and consumption goods as well as living habits show that people in FRG have a tendency to evaluate them selves as being better in

many fields compared to other nations. They evaluate products of other countries much critically and their standards for quality, thoroughness in production and delivery are high.

This reveals the fact that a positive image of an import-product is not easily developed in FRG, and to ensure a positive image for its country of origin, the product has to meet the various standards related to production and delivery.

In summary, social characteristics of a product help to satisfy the esteem needs of a person. The psychological role of the product shape the attributes of social acceptance. These attributes are product image, country of origin of the product and fashion. Fashion helps the consumers to express their personality and individual life styles; satisfying the need for belongingness and for differentiation. Due to rapid seasonal changes, fashion collections of ready to wear products also change. Distributors mainly prefer re-ordering after the detection of fast seller products. The development of the product image is based on the value attached to the country of origin vice versa. The image is developed through the importance attached to various factors and can stimulate or slow down the sales of a product.

Table 2.4. gives a precise picture of the factors of social characteristics of ready to wear products covered in this subsection.

Table 2.4
Social Characteristics of Ready to Wear Products

Social Characteristics	
Fashion	Image
Life Style Expression	Country of Origin

2.2.2. Identification Factors for a Product

The perception of a product by the consumer is easily ensured through three major identification factors:

1. Brand Name;
2. Label;
3. Package.

Through these factors, a product ensures its individuality and distinction.

2.2.2.1. Brand Name

The selection of a brand is highly influenced by consumer needs, such as, functional-, symbolic-, and experiential needs. Functional needs motivate the search for a product to solve consumption related problems. Symbolic needs are desires for products that fulfill internally generated needs for self-enhancement, role position, group membership or ego-identification. Experiential needs are desires for products that provide sensory pleasure, variety, and/or cognitive stimulation. Any product theoretically can be ranked with a functional, symbolic, or experiential image. But a brand with all three concepts may be less effective in establishing an image because tied with all three needs, it can be difficult for the consumers to identify the brand's basic meaning (Park, Jaworski and MacInnis, 1986).

For developing a brand for a ready to wear product it is important to investigate which consumer needs are mainly desired to be met through the chosen product. Among the physical-functional characteristics, the quality factor meets the functional needs. Among the social characteristics of a ready to wear product, fashion factor meets the symbolic needs since it helps to ensure both belongingness and own life style expression through popularity and exclusivity.

Hence, the ready to wear products not only function to protect the body against cold, but they are also a symbol for self expression and belongingness to a social group (Heiner, 1986).

After establishing an image and a position for the brand at the introduction stage, it is important to enhance the value of this image and its position. This stage is defined as the "elaboration" stage and is followed by the fortification of the brand

through the efforts to maintain and control the image and position developed by extending it to new, complementary products. Throughout these three stages of the brand concept management, the needs for the product should be defined and the brand concept developed to create a functional, symbolic or experiential image for the product. Planning for elaboration and fortification stages before the period of market entry based on a strategic perspective helps to develop an introduction stage prior to elaboration and fortification efforts. As a result, marketers can build on an image consistent with the knowledge of the consumers about the brand, create efficiencies in maintaining and controlling the image, and enhance the duration of the brand's life cycle. The development of an initial brand image can also have a lasting effect on other products produced by the firm. The images of these other products reinforce the image of the elaborated brand and also contribute to the formation and reinforcement of the image of the firm as well as the image of the entire product line. When value of the brand concept changes through a change in customer preferences, e.g. from functional to symbolic needs, either the brand concept has to be changed, or the brand has to be removed from the market and a new brand concept consistent with market trends have to be introduced (Park, Jaworski and MacInnis, 1986).

As stated by Swartz (1983), through the increase of signature goods and other externally branded items, through the increased emphasis on symbolic consumption, the message sent by the product has to be differentiated. Especially ready to wear products have more than just a functional use, so that these products have also a communicative function, and image is perceived as highly relevant in the consumer's brand selection decision for ready to wear products.

According to the results of Swartz's (1983) study about perceptual differences for nearly identical brands tested on shirts, based on the message attributed to different brands, different interpretations were attached by individuals to very similar brands worn by the same person. Hence, the brand message helps to distinguish the product from others.

Message differentiation can be used as a product differentiation strategy when functional differences between brands of the same product are minimal.

As a factor of distinguishing a product from others, brand name has also an advertising effect. When there is no other advertising possibility brand names can be used as an effective message in advertisements. A brand can be a quality indicator as long as standardization in the quality level of production and quality controls can be ensured for a long period of time. But the quality image for a brand can also be lost

if competitors improve the quality level of their products (Gutenberg, 1962).

The results of a study conducted by Batzer, Greipl and Täger (1982) show that for retail firms from textile-apparel and other sectors, the brand name set by the cooperative buying offices where they purchase their products, is an important advertising instrument for their retail shop as an identification factor and image sign of the product.

The perceived qualities of brands as summed up by Castling (1985) are as follows:

1. Performance is the degree the product can satisfy the sense of taste, appearance. The maintenance of quality depends on continuous tests and research on the product.
2. Credibility is ensured through identifying and meeting the expectations of consumers about the product. The consumer requires consistency in quality, style of advertising and promotional efforts.
3. Awareness is keeping a brand in front of the consumer's minds and depends on creative expression and on customers which have to be reminded always.
4. Impetus depends on the consistency of quality, availability and awareness, and shows the level when a product starts to benefit from economies of scale.
5. Price-value relationship forces the brand setter to reevaluate customer needs at each price increase in order to preserve the customer loyalty.
6. Availability depends on outside influence and is on hands of the retailers.

According to Fiedler (1987), a brand is associated with certain criterion of a product such as continuity in quality, style and price-level, fame among the consumers, availability of a product quality sign, and availability in the market everywhere.

In case of ready to wear products with a short product life cycle and seasonal fashion changes, the styles, designs and colors change; thus the appearance of the product changes as well. Many retailers try to ensure a brand image by removing all information about the country of origin on the ready to wear product and attaching their own brand names on it. But this in turn endangeres the continuity in quality, since

the product under the brand name of the retailer is produced in various countries. The ready to wear products are sold under a large variety of brand names. As there is a selective distribution observed for ready to wear products according to their various specifications, the availability is restricted mainly to small retail shops, chain stores, department stores. Hence, being available everywhere in the market cannot be ensured. These facts reveal that it is difficult to associate a ready to wear brand with the classical brand name expectations related to different product criterion as suggested by Fiedler (1987).

Besides the importance attached to brand name by retailers and other distributors in the market, a part of the Outfit-study conducted among female consumers in age bracket 14 to 64 shows that for the consumers brand name is completely unimportant; and only an outlook fitting to the life-style of the consumer is important. However subjects also stated that a well-known brand name is a guarantee a good quality. The consumers neglect to go around for advertisement for a product they wear and in case of exclusive brands many of the consumers think that they mainly pay for the name but not for a better quality (Outfit, 1986).

In summary, the selection of a brand depends on which consumer needs are intended to be satisfied. In case of ready to wear products the brand chosen not only has to pinpoint the functionality but also the possibility to express individuality and to satisfy the belongingness needs. A brand is developed through establishing an image and a position, enhancing the value of this image and trying to maintain and control the image and position by extending the image to new, complementary products. The message differentiation based on the consumer needs help to create differentiation in the image for the product. The brand has also an advertising effect in this respect. In most cases it is difficult to meet the expected product criterion through a ready to wear brand since there are various limitations. Although the brand name is a highly important factor for distributors of ready to wear products, for the consumers it is completely unimportant.

2.2.2.2. Label

"The primary role of labeling is to provide information" (Toyne and Walters, 1989, p.445). Government requirements and regulations about the information content of the label differ among countries (Toyne and Walters, 1989; Terpstra, 1983). The major information presented by a label cover use instructions, contents,

ingredients, warnings for use and care of the product (Peter and Olson, 1987) as well as the name of the manufacturer, brand name, country of origin, unit price when necessary according to the legal requirements in the market (Toyne and Walters, 1989; Terpstra, 1983).

In informing the consumers about the product specifications the language is an important factor, varying in each market. Firms deal with this problem by using a single multilingual label, by using the same acceptable language everywhere or by adding internationally recognized symbols to deliver a universal message (Toyne and Walters, 1989; Terpstra, 1983).

As stated by Rossow (1984), the instructions for use and care of a high quality brand have to be complete and understandable, i.e. comprehensible, interesting to read, easy to understand and clearly expressed. It has to cover the major information which is necessary for the consumer.

In case of ready to wear products the most important message on the label are the instructions about wash or dry clean, i.e. care of the product. The internationally accepted signs related to wash, iron or dry clean as well as fibre purity help to solve the language problem. However, the label should be correctly attached and still readable after washing or drycleaning of the ready to wear product in order to present the necessary information for a long period of time.

2.2.2.3. Package

The major concerns in packaging are product protection and promotion. The protection related specifications are highly influenced by the climate, kind of transportation and handling in export distribution, and show differences among countries. The promotion related specifications also differ among countries and depend on local cultural factors such as colors, shapes, styles, materials and appearance preferred by the consumers (Toyne and Walters, 1989; Terpstra, 1983). The label information about the use and care of the product and about the content and ingredients presented on the package have also a promotional effect (Peter and Olson, 1987).

Besides the protective and promotional functions the package should be economical and have a proper size to allow convenient storage and use of the

product by the channel members and consumers (Toyne and Walters, 1989; Peter and Olson, 1987; Terpstra, 1983).

National preferences and requirements should be determined in selecting a package for a market. For the producers, standardization of shapes, sizes and packaging materials is desirable, but differences in aesthetic appeal factors such as colors can be maintained since they do not increase the costs drastically. Possibilities of innovation in the export packaging should also be considered, based on changes in consumer habits, income levels and channel structure related developments in the export market. In the European market the increasing consciousness in the issue of pollution caused by throwaway packages results in measures to be taken by the governments and consumers so that the firms should also concentrate on the pollution problems caused by packages in exporting to the European markets (Terpstra, 1983).

Gutenberg (1962) lists the package related attributes as follows:

1. Size and shape;
2. Functionality to ensure practical usage and protection;
3. Shape, color, design and brand name.

The ready to wear products are either transported individually packaged or hanging. The package is rather important for the distributors because in the shops consumers can choose the products which are unpacked.

The material used and the size of the package for ready to wear products have to be chosen based on the requirements of transportation facilities used and on the storage capacities of channel members. The functionality of the package is related to both the protection and providing the necessary information about the care of the product. The package of the ready to wear product can fulfill promotional expectations through an attractive outlook such as colors chosen and through an advertising message for the distributors. The durability and reuse of the package material facilitates the transport among channel members.

In summary, identification factors of a product help to distinguish the product from similar ones at first glance, and attach individuality to the product. The brand name chosen can pinpoint the functionality of the product or meet the symbolic or experiential needs of the consumers. The message differentiation based on consumer needs in the export market help to create differentiation in the image for the product. The brand has also advertising effect. The primary role of labeling is to provide information about the use and care of the product as well as the brand name

and country of origin when required. The language chosen has to appeal to the consumers in the export market. A multilingual label or internationally recognized symbols can be used to deliver a universal message. The package developed should be protective, functional, economical and should allow convenient storage of the product. The package fulfills also a promotional role through carrying an advertising message about the product.

2.3. An Analysis of Distribution Channel Structure for Textiles and Apparel Products

Competition in the market forces firms to shift from product orientation to market orientation. Production becomes consumer oriented, according to the needs and wants of the customers instead of being sales oriented. The level of competition with other companies and the desire to reach various market segments in a variety of markets makes it more and more difficult for firms to reach the consumers directly. Consumers lose their position of being direct customers and become indirect customers. Distributors become direct customers of a firm and their influences on marketing practices as a result of their positioning increases.

Differences in customer and consumer expectations in various export markets lead to differences in the values attached to the product specifications. As a bridge between the manufacturers and the consumers, the distribution channel members are indispensable for the success of a firm in foreign markets. They undertake the role to mediate the needs and desires of consumers to the manufacturers'. Through the contact with distribution channel members, the manufacturers become aware of the expectations of consumers. As a result, distributors gain more power in determining the individual specifications related to the attributes and identification factors of a product.

This part of the study tries to give information about the roles and functions of various distribution channel members operating in the textile-apparel sectors, considering the FRG export market. The study also helps to develop a chart of the distribution channel network for textiles and apparel products in FRG.

The distribution structure for textiles and apparel products is very complex in FRG. At the production level, the supplies from various countries enter FRG market

through domestic producers' import departments buying from independent producers, through their own foreign subsidiaries where their sales representatives are located, or through independent import agents, brokers, merchants, before being distributed directly to retailers or via wholesalers. The domestic manufacturers in FRG account for 15 per cent of direct imports (Marketing in Europe, No.303, 1988).

The chart for the distribution channel network of textiles and apparel products in FRG market has been drawn based on studies of Aschenbach (1986), Mannhardt (1984) and Tüfekçi (1980) about the distribution of textiles and apparel products as well as on a similar chart developed by the publication company Verlagsgruppe Deutscher Fachverlag in 1989.

The roles and functions of different channel members are summarized in Figure 2.2.

2.3.1. Roles and Functions of Distribution Channel Members at Producer Stage

Besides the textile-apparel manufacturers with an established plant in FRG, there are two other types of producers in the FRG market: Sourcing firms and Franchisors.

Sourcing firms do not have production facilities like plants in the FRG. They develop their collections and make orders for production in FRG or in various foreign countries where costs of production and labor are low. They develop their own brands or sell generic products. Their importance rises in the FRG market since they order according to the expectations of German consumers and are in direct contract with supplier firms and retailers¹.

Franchisors are in a long term contract with the independent operating franchisees, who obtain the right to use the name, the trademark, outfit and all guarantees of the franchisor in marketing the products. In textile -apparel sectors the manufacturers have direct influence on the retailing and hence on the end-user through this system. About 2 per cent of textiles and apparel products' sales are done

¹ Based on the discussions with Mr. Wolfgang Schmitt, on Sept. 11th, 1989 in Düsseldorf and on October 25th, 1989 in Frankfurt a.M.

through franchisees. The major franchise firms for textiles and apparel products in FRG are Benetton, Stefanel, Rodier, Falke, Aigner, Daniel Hechter and Bleyle (Mannhardt, 1984).

2.3.2. Roles and Functions of Channel Members at Wholesaler Stage

There are three types of import wholesalers, namely; merchants, agents and sales representatives besides the cooperative groups which are the major channel groups for textiles and apparel products.

The merchant buys and sells the product under his own title so that the manufacturer has no control over the customers, sales level, selection of channel members and selling prices (Ward, 1984). Merchant middlemen in export markets are distributors, dealers, import jobbers, and wholesalers and retailers (Cateora and Hess, 1988).

The agent buys and sells the product under a special agreement and gets commission for the job. Ownership of the product passes directly from supplier to the buyer (Ward, 1984).

A variety of different types of middlemen performing low-cost agent services are called broker. They bring buyers and sellers together, and do not have a continuing relationship with their clients (Cateora and Hess, 1988).

Sales representatives take orders directly from the buyer firms and have direct contact with the supplier market. They function well if supported by an export department in the supplier market which processes orders, handles shipment, invoicing, credit and collections (Ward, 1984). They are paid a commission when they arrange a sale between the manufacturer and the actual buyer. Their function is similar to that of brokers (Keegan, 1989).

The cooperative groups are either established as wholesaler cooperatives, or retailer cooperatives or they are loosely organized buying associations.

Besides wholesalers operating in cooperative forms, many retailers have joined specialist textile-apparel buying groups or full line buying offices i.e. central purchasing organizations to achieve better terms from producers and import agents. Very often they also import directly either independently or through these associations. These buying groups have achieved a very strong position in the last

years (Marketing in Europe, No 303, 1988). There are 31 retailer-cooperatives with 8500 member firms and some 20 loosely organized buying associations in FRG market (TW-Poster, 1989; Marketing in Europe, No.303, 1988).

Among the wholesaler cooperatives for textiles and apparel products, the full line cooperative wholesalers carry a universal textiles and apparel assortment without main emphasis. There are 5 full line cooperative wholesalers in FRG, the major ones are Sütegro and Grozentra. The specialist line wholesaler cooperatives carry home-textiles, and ready to wear fashion products. For home-textiles there are 9 cooperatives with 206 members. The tendency is in direction of cooperation of big enterprises with high sales volume. For home textiles and ready to wear fashion products there is one cooperative: Domiset Group, where 3 South-German textile wholesalers cooperate on contractual basis. The joint work lies in purchasing, product selection and experience exchange (Mannhardt, 1984).

The retailer cooperatives for textiles and apparel products are established by retailers and aim to strengthen the small and mid-sized textile shops against the competition of larger sized retailers. Their functions concentrate mainly on purchase. Many of them operate also jointly in market research, promotion and consultancy activities. As in case of wholesaler cooperatives they are diversified according to the product lines they carry. There are specialist textiles and apparel products buying groups and full line buying offices. There are nine main groups of full line buying offices in FRG market. Some of the associations have also contractual relations abroad (Mannhardt, 1984). The major full line buying offices are Kaufring, Katag, hpv (former Hadeka), Sütex, WHG, Unitex, Frankentex, KMT Rheintextil and Nordwest eG (TW-Poster, 1989).

The specialist textiles-apparel buying groups operate in ready to wear, home-textiles and other product classes. For ready to wear products, abz is the most important association. The members of abz are firms with yearly sales volume above 5 million DM (Mannhardt, 1984). The buying offices emerged from the Erfa-Gruppen, where small retailer firms came together to exchange their experience, to obtain better prices ordering together in larger amounts, and to acquire a high reputation through their joint efforts².

2.3.3. Roles and Functions of Channel Members at Retailer Stage

According to Mannhardt's study (1984), the distribution of textiles and apparel products to the consumers can follow through two major types of retailers: 1. Retailers exclusively selling textiles and apparel products, and 2. Retailers selling general merchandise, and textiles and apparel products.

Retailers selling exclusively textiles and apparel products are:

1. Independent Retailers which are either members of buying offices or are non-affiliated. Here a distinction can be made according to the depth and width of their assortments in their product line sold.

a) Textile specialty stores Textilspezialgeschäfte have a narrow assortment but the assortment is deep. These stores such as boutiques are fashion oriented and mostly they sell one main product.

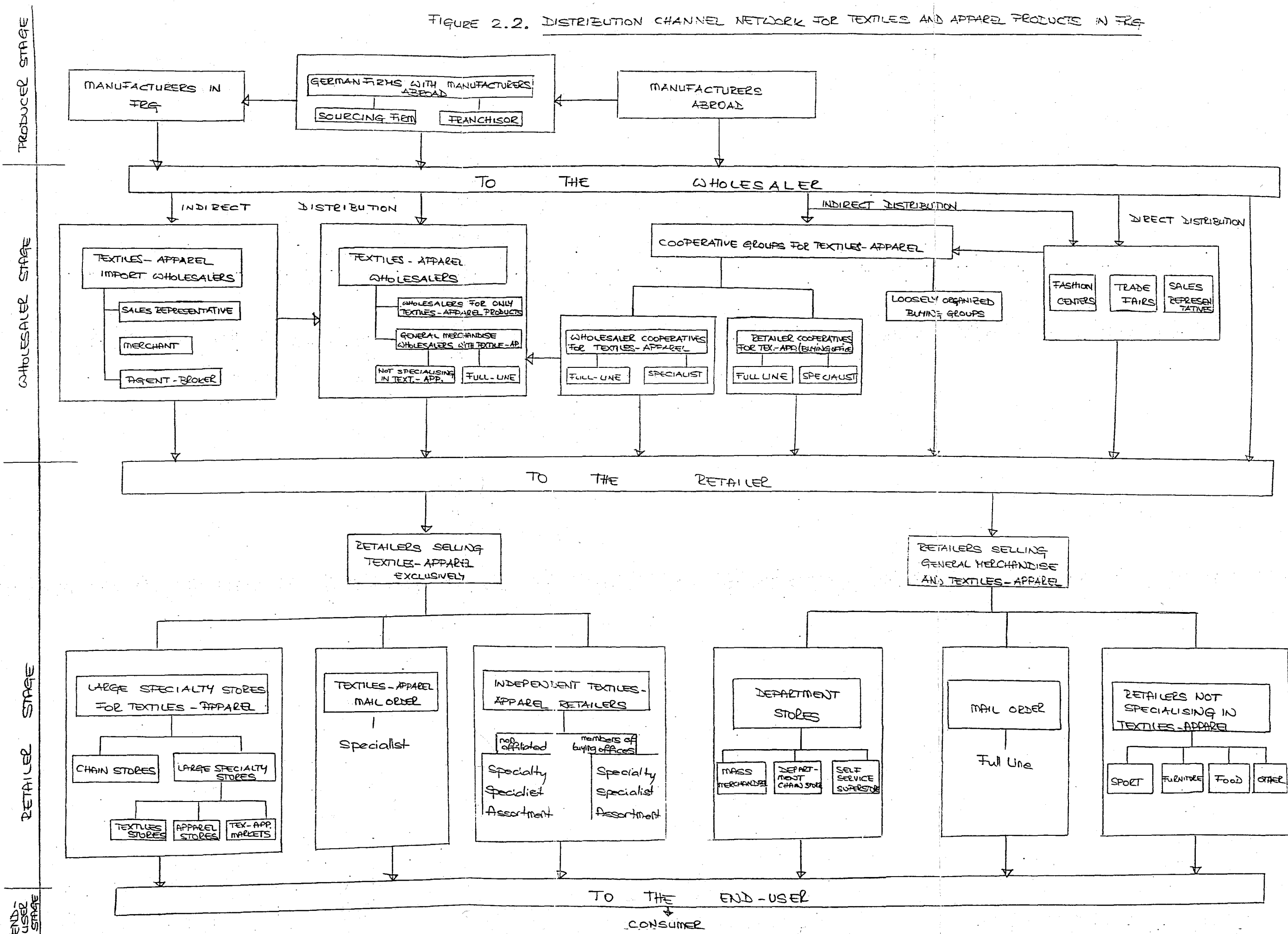
b) Textile specialist stores Textilfachgeschäfte have a wide and deep assortment, for high quality fashion products.

c) Textile assortment stores Textilsortimentsgeschäfte have a wide but flat assortment. Because of the width of the assortment the products are not of very high quality and advanced fashion. Assortment stores are typical distributors of buying offices (Mannhardt, 1984).

2. Textile-apparel mail order stores, most of which have diversified their product line. The most important ones are Josef with KG, Peter Hahn, Karl Lorenz KG for ready to wear products (Mannhardt, 1984)

3. Large specialty stores for textiles and apparel products are mainly chain stores, textile specialist markets, textile and apparel stores. Stores having more than eight outlets are chain stores. The textile specialist markets are self service stores and offer a great variety of products at low prices. The leading firm is Adler. The four most important chain stores are C & A Brenninkmeyer, Peak & Cloppenburg, Boecker and Hettlage (TW-Poster, 1989; Mannhardt, 1984). The sales volume of chain stores and large specialty stores increases compared to the sales volume of independent textile and apparel retailers as well as department stores (Rehmann and Gierl, 1985).

FIGURE 2.2. DISTRIBUTION CHANNEL NETWORK FOR TEXTILES AND APPAREL PRODUCTS IN FRG



Retailers selling general merchandise and textiles-apparel products are grouped by Mannhardt (1984) as follows:

1. Department stores have the highest sales volume. They offer a great variety of products to meet consumer needs in one shop. The share of textiles and apparel products to meet consumer needs in one shop. The share of textiles and apparel products in total sales showed a decrease so that new marketing strategies such as shop in the shop systems are developed to increase the market share of textiles and apparel products in shop in the shop systems, within the department for a product line, certain brands are presented in a separate part of the department furnished like a separate shop. The five major department-chain stores are Karstadt, Kaufhof, Hertie, Herten and Woolworth.

2. Mail Order retailers offer the products through catalogues, prospects and advertisement announcements to customers. The most important mail order firms are Quelle, Otto Versand and Neckermann.

3. Retailers not specializing in textiles and apparel products but also selling these product lines are a. Retailers for sport products; b. Retailers for furniture; c. Retailers for food, and d. other stores with textil-apparel products (Mannhardt, 1984); Ikea in furniture retail, Aldi in food retail, Tchibo and Eduscho in coffee retail are the most important firms in the FRG market (TW-Poster, 1989).

In summary, globalization attempts in marketing textiles and apparel products require national market segmentation strategies in order to fit the products to different needs in export markets with different consumer typologies, which are shaped through cultural differences. The textiles and apparel products should be individualized to the tastes and specific needs in the export market; using the same promotional methods for the same use of the product as in all countries, that is, protecting the body and ensuring a good outlook.

Textiles and apparel products have three main characteristics: Physical-functional, aesthetic, and social. Physical-functional characteristics are related to the usefulness of the product, and are determined through size adjustment, climatic adjustment ensuring the functionality and through the three quality factors material, processing and durability quality of the product. Related to perceptions about and

appeal of an apparel product, optic and haptic attributes shape the aesthetic characteristics. Optic attributes appeal to the visual perception of the consumers and haptic attributes appeal to the sense of touching. In developing and expressing the identity and individuality, and in satisfying the esteem needs, the textiles and apparel products have a very significant social role. Fashion helps to meet belongingness needs and also to express one's own life style. The social role of the product is also shaped by the image associated with the country of origin.

Besides the product characteristics, the identification factors are important attributes for textiles and apparel goods. The three identification factors brand name, label and package ensure an easy perception of the product by the consumer. For developing a brand for apparel products, it is important to investigate which consumer needs are mainly desired to be met through the chosen product. Consumers want to satisfy their functional and/or symbolic needs through the purchase of apparel products. The label attached to a textile or apparel product should provide the necessary information about the use and care of the product. The language problem can be solved through the use of a multilingual label or through the use of the same acceptable language everywhere or by adding internationally recognized symbols related to wash, iron or dry clean. The package of a textile or apparel product should have a proper size to allow convenient storage and use of the product by the distributors and consumers. The package can also fulfill promotional expectations through an attractive outlook.

The distribution channel members are indispensable for the success of a textile-apparel firm in export markets, as they undertake the role to mediate the needs and desires of consumers to the manufacturers. As a result, they gain more power in determining the individual specifications related to the attributes and identification factors of a product.

In the distribution channel network for textiles and apparel products in FRG, the major channel members carrying Turkish ready to wear products are manufacturers with own plant and sourcing firms at producer stage; import wholesalers and cooperative groups at wholesaler stage; and independent retailers, mail order stores, chain stores and department stores at retailer stage.

III. RESEARCH DESIGN AND METHODOLOGY

This chapter will introduce the field study conducted with 45 import institutions in FRG.

3.1. Research Purpose

The purpose of this study was:

1. to identify the attributes of WRW products that are important for the channel members in the textile-apparel sector in FRG;
2. to find out the evaluations of channel members about WRW products from Turkey in the FRG market;
3. to describe Turkish WRW products versus competitors' positioning in FRG market;
4. to outline the structure of the distribution channel network;
5. to investigate the possible differences in replies from different channel members.

The identification of important product attributes covers the individual ratings on the physical-functional, aesthetic and social characteristics as well as the product identification factors such as brand name, label and the package. The evaluation of Turkish WRW products and the determination of competitor countries' positioning compared to that of Turkey are based on the same product characteristics and the identification factors. The evaluations have several implications about the strengths and weaknesses of Turkish WRW products in FRG market.

The distribution channel network for textile-apparel sector in FRG is developed through the review of different secondary sources. The channel member characteristics identified in the primary data collected were further helpful in outlining the channels used for the distribution of WRW products from

The study also covers the detection of possible differences in perceptions, attitudes and opinions, intentions, and behavior of the channel members in four different groups: Producers with their own plant, sourcing firms, wholesalers and retailers.

3.2. Research Design

The first part of the study concentrated on developing the channel network used for the distribution of Turkish WRW products in the FRG market. To outline this structure, an exploratory study was conducted. Literature about the distribution channel network of textile-apparel sector in FRG was reviewed and a chart was developed. Based on the literature reviewed, a questionnaire was constructed for the primary data phase of the study (see Appendix). In the first part of the data collection instrument, firm characteristics as related to the distribution structure was probed. The second part of the questionnaire concentrated on product related factors. Initially a literature survey was conducted to gather information about: 1. The characteristics of WRW products and the identification factors of WRW products; and 2. The importance attached to the different attributes of WRW product-characteristics and the related identification factors.

Later, evaluations of channel members on WRW products were obtained. In this part of the research the study had a descriptive nature. Product evaluations of different channel members and the possible differences in their opinions, beliefs were hypothesized.

3.3. Hypotheses Developed

Among the objectives of the research was the detection of characteristics of four channel types: Producers, Sourcing firms, Wholesalers and Retailers in the distribution channel network. Based on this descriptive nature of the research, the following hypotheses were developed:

H₁: The yearly gross sales of the four channel types are different from each other.

(Question I.9/b)

- H₂: The involvement in investment and other contact activities in WRW sector differs among the four channel types.
(Question I.10)
- H₃: The customers of the four channel types for WRW products are different from each other.
(Question I.7)
- H₄: The suppliers for WRW products differ among the four channel types.
(Question I.8)
- H₅: The types of production chosen for WRW products differ among the four channel types.
(Question I.4).
- H₆: The evaluations for Turkish WRW products based on factors of physical-functional characteristics (quality) differ among the four channel types.
(Question II.1/b)
- H_{6a}: The evaluations for Turkish WRW products based on factors of material quality differ among the four channel types.
(Question II.2/b)
- H_{6b}: The evaluations for Turkish WRW products based on factors of processing quality differ among the four channel types.
(Question II.3/b)
- H_{6c}: The evaluations for Turkish WRW products based on factors of manufacturing technique quality differ among the four channel types.
(Question II.4/b)
- H₇: The methods of quality control executed differ among the four channel types.
(Question II.6)

H₈: The evaluations for Turkish WRW products based on attributes of aesthetic characteristics differ among the four channel types.
(Question II.10)

H_{8a}: The evaluations for Turkish WRW products based on optic attributes differ among the four channel types.
(Question II.10)

H_{8b}: The evaluations for Turkish WRW products based on haptic attributes differ among the four channel types.
(Question II.10)

The importance attached to factors of social characteristics of WRW products and the evaluations for Turkish WRW products based on these factors (fashion and origin/image) were grouped as follows:

H_{9a}: The evaluations for Turkish WRW products based on fashion differ among the four channel types.
(Question II.12/a)

H_{9b}: The importance attached to the country of origin of WRW products differ among the four channel types.
(Question II.13/a)

H_{9c}: The evaluations for Turkish WRW products based on image differ among the four channel types.
(Question II.13/b)

The importance attached to identification factors of WRW products and the evaluations for Turkish WRW products based on these factors (brand name, label, package) were grouped as follows:

H_{10a}: The importance attached to brand name of WRW products differs among the four channel types.
(Question II.15/a)

H_{10b}: The evaluations for the label of Turkish WRW products differ among the four channel types.
(Question II.18/b)

H_{10c}: The evaluations for the package of Turkish WRW products differ among the four channel types.
(Question II.17/c)

The hypotheses were developed based on various statements about characteristics of distribution channels. According to Stern and El-Ansary (1988), in any channel there are collective goals, a cooperative relationship and also interdependency among channel members based on the task performance. The goals of different channel types show also differences. They also stated that, in case of retail activities the buying motive is satisfaction of the individual or of families through the final consumption, because the customers are end-users of the products or services offered and do not purchase for resale or for business, industrial or institutional use. In case of wholesale activities on the other hand, the customers buy, based on profit or business motives and not on satisfaction of their own needs. The similarity in retailer and wholesaler activities is that both groups aim to offer appropriate assortments for their customers and both groups work in a competitive environment.

Producers on the other hand either work like wholesalers in direct contact with retailers, or have also their own retail outlets or they use wholesalers to reach their customers. This specification shows that producers try to satisfy different groups of customers: the end users or the retailers and wholesalers which buy for resale to make profits and business.

A study about purchasing decisions of textile-retailers conducted by the German Specialist Publications Inc. (TW-Marktforschung - Verlagsgruppe Deutscher Fachverlag) also reveals differences in opinions even among retailer groups in the German Market (TW-Marktforschung, 1987).

It can be concluded that because of differences in customer groups' expectations, different attributes of the same kind of WRW products sold gain on importance for different channel types. Hence, in vertical business relations with customers, the expectations and evaluations of the channel members are assumed to be different for the WRW products.

The competitive structure in the WRW sector plays a role in horizontal business relations. The competitive structure is much broader at producer stage than at wholesaler and retailer stage because the German Market is open to WRW suppliers from the whole world, operating in this sector. Hence, the product expectations and evaluations of producers are hypothesized to be quite different from product expectations of wholesalers and retailers.

3.4. Data Collection Procedure and Instrument

3.4.1. The Method of Data Collection

For this study the primary data were obtained through questionnaires administered to managers or employees of firms in FRG importing WRW products from Turkey. Both face to face and mail communication were utilized in contacting the responding firms in Hamburg, Frankfurt, Düsseldorf and Munich.

Prior to the main study, a pilot study was conducted in FRG. Telephone interviews helped to specify the firms to be contacted and to make appointments for face to face interviews. The questionnaire was self administered in the presence of the researcher. The aim of the pilot study was to test the content of the questions and the clarity of their wording as well as obtaining new insights from the responding firms to formulate the final questionnaire for the main study.

The final questionnaire was self administered in the presence of the researcher through face to face contact. In some cases when the contacted firm was located out of researchers' area of residence (Hamburg), the questionnaire was mailed to the firm. Throughout the main study telephone interviews helped to specify the firms to be contacted, to make appointments for face to face communication, and to awake the interest of the firm for filling out a mail questionnaire.

During the primary data collection, the researcher was the person who carried out the whole study. The following reasons can be stated for not using an interviewer team for the field study: 1. People contacted through telephone interviews were managers, owners of the firms or employees. The contacts were built through personal relations developed in trade fairs, through the help of people met in trade fairs and the help of responding firms. A communication ensured this way required that the researcher herself administer the questionnaire; and 2. The open ended

questions required a careful detection of the information as of qualitative nature. Comparative evaluations during the communications were possible by one interviewer and the loss of information was minimized.

3.4.2. Data Collection Instrument

The data collection instrument was a self-administered questionnaire. Both in the pilot study and in the final study it consisted of two parts: The first part covered firm specific questions, the second part concentrated on WRW products.

The questionnaire was composed of structured-undisguised questions. The undisguised nature of the questions helped to obtain the expert opinion on the specific subjects of the research much easier; that is, knowing the aim of the study and the purpose of the questions, the respondents showed a great interest to reply. Through the structured nature of the questionnaires, the standardization ensured that all respondents replied to the same questions with the same wording and the same order.

Based on the form of response required for the study, the structured questions were open ended or covered fixed alternatives such as dichotomy, multichotomy or a scale, or they were composed of fixed alternatives with open ended parts.

During the face to face contacts, the results of Hornik's (1981) study about time cue and time perception effects were used. The respondents were told that the questionnaire would take 1 - 1 1/4 hours time. The effect was that they worked faster and completed the questionnaire with the time limits. The remaining time was then used to discuss the open ended questions in detail and to talk about possibilities for further contacts with firms in the sector.

In the first part of the questionnaire, the questions related to firm characteristics were asked. They included:

1. Size of the firm;
2. Duration of business relations with Turkey;
3. Types of suppliers and customers;
4. The position in the distribution network;
5. Production type for imported WRW products;
6. The depth and width of the assortment and the product line;
7. The nature of market and marketing research done;
8. Target consumers;

9. Types of business connections and level of investments in apparel sector in Turkey and other countries.

In the second part of the questionnaire, the questions relating to WRW products were probed. They included:

1. Physical-functional characteristics such as, quality and quality control;
2. Aesthetic characteristics such as, optic and haptic attributes;
3. Social characteristics such as, fashion, country of origin, and image;
4. Identification factors such as, brand name, label, and the package;
5. Importance attached to product characteristics and to the identification factors of WRW products;
6. Evaluations of the Turkish WRW products according to the attributes in product characteristics and identification factors.
7. Comparisons of Turkish WRW products with other countries' products.

Throughout the second part of the questionnaire the laddering technique was used. This part started with broad questions about factors of product characteristics and concentrated in its sequence on user evaluations about individual product identification factors, narrowing down the scope (Durgee, 1986; Churchill, 1983).

3.4.3. Variables Used in the Research

The variables used in the questionnaire for the study were derived from the literature reviewed, or developed by the researcher based on the research objectives.

Table 3.1. shows the variables used for the study and literary source of each variable.

Table 3.1
Variables Measured by the Questionnaire

Question Numbers	Statements	Variables	Sources
I. 1	For how long are you in business relations with Turkey?	Firm characteristic	Developed by the researcher
	What is your position in the firm?	Demographics about the contacted person	Developed by the researcher
I. 2	What kind of WRW products do you purchase from Turkey? - Knitwear - Woven products - Other kind of fabrics - Type of fibre - Group of customer	Assortment related firm characteristics: product type and product line	Developed by the researcher
I. 3	How many colors, sizes, models do you present with each product type in the assortment?	Depth and width of the product line	Adopted from Mannhardt (1981)
I. 4	The WRW production is done in Turkey, in FRG and/or in another country by: - Own production - Order - Purchase of collections - CMT (Cutting Making Trimming)	Production type for WRW preferred by channel members	Özdeş (1986), Engel (1985), Adler & Breitenacher (1984), Schulz (1983) Breitenacher (1975)
I. 5	What kind of market and marketing research do you conduct?	Behavior related to research activities	Developed by the researcher

Table 3.1
(continued)

Question Numbers	Statements	Variables	Sources
I. 6	To which of the following groups do your activities fit? - Producer - Merchant - Wholesaler - Retailer	Definition of the firms' position in the distribution channel network	TW-Poster (1989), Stern & El Ensary (1988), Ward (1984), Mannhardt (1981) Tüfekçi (1980)
I. 7	What percentage of your total sales are partitioned among the following channel members? - Wholesaler - Retailer - Producer in FRG - Consumer	Definition of the customer groups in the channel network	Developed by the researcher
I.8	Who is the direct source for Turkish WRW products? - in Turkey - in FRG	Definition of the supplier groups from the channel network	Developed by the researcher
I.9	What is the - Number of outlets - Gross Sales of the firm	Firm characteristics	Developed by the researcher
I.10	- Do you have investments in WRW sector, - Do you plan any investments in Turkey, - Do you have contact offices in Turkey and in other countries?	Firm characteristics relating to investment involvement	Developed by the researcher

Table 3.1
(continued)

Question Numbers	Statements	Variables	Sources
II. 1	The quality of a WRW product is determined by the following factors: - Material - Processing - Durability	Definition of quality factors	Adopted from Gütermann (1987), Mittmann (1987)
1/a	State their level of importance for WRW products.	Perceived importance level of quality factors	Developed by the researcher
1/b	Evaluate Turkish WRW products according to these quality factors.	Opinions about quality factors	Developed by the researcher
II. 2	The material quality is determined by the following factors: - Standardization level in textile fabrics - Solidity of colors - Quality of input-products	Definition of material quality factors	Adopted from Gütermann (1987), Reiche (1976), Şeker & Baykal (1974)
2/a	State their level of importance for WRW products.	Perceived importance level of material quality factors	Developed by the researcher
2/b	Evaluate Turkish WRW products according to these material quality factors.	Opinions about material quality factors	Adopted from Gütermann (1987), Reiche (1976), Şeker & Baykal (1974)

Table 3.1
(continued)

Question Numbers	Statements	Variables	Sources
II. 3	The processing quality is determined by the following factors: - Equipment used - Manufacturing technique chosen - Quality of labor force	Definition of factors of workmanship/processing quality	Adopted from Gütermann (1987)
3/a	State their level of importance for WRW products.	Perceived importance level of workmanship/processing quality factors	Developed by the researcher
3/b	Evaluate Turkish WRW products according to the quality factors of manufacturing process.	Opinions about the quality of workmanship	Developed by the researcher
II. 4	The quality of the manufacturing technique is determined by the following factors - Cutting technique - Sewing - Coloring - Finish processing/refinement	Definition of factors of manufacturing/production technique quality	Adopted from Adler (1987), Gütermann (1987)
4/a	State their level of importance for WRW products.	Perceived importance level of manufacturing/production technique quality factors	Developed by the researcher
4/b	Evaluate Turkish WRW products according to the quality factors of processing technique.	Opinions about the quality of manufacturing/production technique	Adopted from Adler (1987), Gütermann (1987), Mittmann (1987), Reiche (1976)

Table 3.1
(continued)

Question Numbers	Statements	Variables	Sources
II. 5	Who does the quality control work? - the producer in Turkey - the distributor from FRG - the quality control firm	Extent of participation in quality control	Developed by the researcher
II. 6	What kind of quality control is executed?	Definition of quality control methods chosen	Sandholm (1987)
II. 7	How do you react in case of observed quality defects? - go to court - cut all relations - require a price cut - send the delivery back - prevent the delivery - try to eliminate quality defects - order in another country - order somewhere else and require the cost difference from the problem country	Attitudes and behavior in case of quality defects	Adopted from Adler (1987) and partly developed by the researcher
II. 8/a	What is the level of your complaints? - on Turkish WRW products - on WRW products from other countries	Identification of the level of complaints	Developed by the researcher
II. 8/b	What is the level of your customers' complaints? - in general - due to Turkish WRW products	Sensitivity to customer complaints	Developed by the researcher

Table 3.1
(continued)

Question Numbers	Statements	Variables	Sources
II. 8/c	What are the reasons behind the quality defects?	Opinions about the occurrence of quality defects	Developed by the researcher
II. 9	Make a country based comparative evaluation for WRW products considering quality criteria!	Quality comparisons by countries	Developed by the researcher
II. 10	How well can Turkish producers design the aesthetic characteristics that fits the expectations of the consumers?	Opinions about the level of creativity of Turkish producers	Adopted from Mittmann (1987), Bansch (1982), Fuchslocher (1981), Majaro (1978)
II. 11	Make a country based comparative evaluation for WRW products considering design of aesthetic characteristics!	Aesthetic attributes comparisons by countries	Developed by the researcher
II. 12/a	Who determines the models in the collection? - Producer in Turkey - Wholesaler in FRG - Retailer in FRG	Creativity in fashion	Developed by the researcher
II.12/c	How do the Turkish creative teams work? Compare their efforts with those from other countries!	Fashion ideas of Turkish designers versus other country designers	Adopted from Moritz (1987), Fuchslocher (1981)

Table 3.1
(continued)

Question Numbers	Statements	Variables	Sources
II. 13/a	How important is the country of origin for WRW products for the German consumer? Why?	Importance attached to country of origin	Adopted from Gütermann (1987), Britt (1970)
II. 13/b	How is the country image for Turkish WRW products? Why?	Opinion about the Turkish product image	Adopted from Britt (1970)
II. 14	Make a country based comparative evaluation for WRW products considering social characteristics.	Opinion about different countries based on the social characteristics of WRW products	Developed by the researcher
II. 15/a	How important is the brand name for WRW products?	Importance attached to brand name	Outfit (1986), Batzer, Greipl and Täger (1982)
II. 15/b	How are the brand names used by Turkish producers evaluated?	Opinions about the Turkish brand names	Developed by the researcher
II. 15/c	Who determines the brand name for Turkish WRW products? Why? - Merchant - Wholesaler - Retailer - Producer	Brand name specification	Adopted from Fiedler (1987)

Table 3.1
(continued)

Question Numbers	Statements	Variables	Sources
II. 16/a	What does the consumer associate with a brand name? - High quality - Popularity - Exclusivity - Image - High price	Consumer perceptions about a brand name	Adopted from Heiner (1986), Castling (1985), Gutenberg (1962)
II. 16/b	What does the distributor associate with a brand name? - Firm image - Quality Standardization - Sales Ensurance	Distributor perceptions about a brand name	Adopted from Heiner (1986), Batzer, Greipl & Täger (1982)
II. 17/a	Who determines the specifications for the package? Why?	Participants in packaging decisions	Developed by the researcher
II. 17/b	For which countries are package specifications determined?	Determining package specifications	Developed by the researcher
II. 17/c	How do you evaluate the package for WRW products from Turkey ? - Form - Material - Functionality - Social Role - Reuse	Opinions about the package evaluations	Gutenberg (1962)

Table 3.1
(continued)

Question Numbers	Statements	Variables	Sources
II. 18	The following factors are important for labeling: - covering necessary information - readability after washing - being correctly attached - use as quality factor	specification of label factors	Adopted from Rossow (1984)
18/a	State their level of importance for WRW products!	Perceived importance level of label factors	Developed by the researcher
18/b	Evaluate Turkish WRW products according to these label factors!	Opinions about label factors	Developed by the researcher
II. 19	Make a country based comparative evaluation for WRW products considering identification factors (brand name, label and the package)!	Identification factor comparisons by countries	Developed by the researcher
II. 20/a	Who are your target consumers?	Consumer groups of channel members	Outfit (1986)
II. 20/b	What criteria are important in choosing WRW products for: - Retailer - Consumer	Choice criteria for WRW products	Developed by the researcher
II. 21	Which countries would you prefer for each criteria?	Country preferences for WRWs and possible collaborations	Developed by the researcher

3.5. The Sampling Process

The sampling process is composed of seven steps (Tull and Hawkins, 1987):

1. Definition of the population
2. Specification of the sampling frame
3. Specification of the sampling unit
4. Selection of the sampling method
5. Determination of the sample size
6. Specification of the sampling plan
7. Selection of the sample

3.5.1. Population of Interest and Sampling Unit

Tull and Hawkins (1987) state that a population must be defined in terms of elements, sampling units, extent, and time.

The population is defined as the firms selling ready to wear products in FRG market having also Turkish WRW products in their product line since at least one year. The unit of interest were firms located at the four stages of the distribution channel network (producers, sourcing firms, wholesalers and retailers).

3.5.2. Sampling Frame

The sampling frame was developed by interviews held with prominent managers in leading importing companies in Hamburg; with the commercial attachés in the Turkish Consulate in Hamburg and in the Turkish Embassy in Bonn, with the people contacted from Hermann Fuchslocher Consultancy Firm in Düsseldorf and Deutscher Fachverlag in Frankfurt a.Main as well as representatives of various associations of the sector such as BTE - Federal Association for German Textile Retail and DOB Verband - Association for WRW Industry, and Chamber of Commerce in Hamburg.

Referrals from initial contacts made were obtained and included in the sampling frame.

3.5.3. Sampling Method

A judgmental sampling method was utilized by which importing firms that were judged to be eligible to answer the questionnaire were identified.

As a method of non-probability sampling, in the judgement sample the population elements are purposively selected. This selection is made on the basis that they can offer contributions sought for the research and are representative of the population of interest (Churchill, 1983).

For the expansion of the sample, snowball effect was made use of. The information was collected through face to face interviews, and in regions outside the location of the researcher mail questionnaires were utilized. Contacts were ensured in fashion centers in Hamburg, Munich, and in trade fairs IGEDO - Düsseldorf and Mode Woche München (Fashion Week Munich) in Munich, as well as through the firms contacted for interviews.

3.5.4. Sample Size

Since the method of sample selection was not of probabilistic nature, the sample size determination did not follow the statistical principles.

Following constraints precluded the researcher to take a census, i.e. to measure each element in the population of interest: 1. the lack of accuracy in obtaining clear, informative and full lists of ready to wear importing firms; 2. time to be spent on collecting the primary data was limited to four months without any possibility to extend; 3. taking a census would result in inaccuracy for the fact that also small size firms without a significant import volume for Turkish WRW products would be taken into the sample.

For the pilot study nine firms operating as producer, wholesaler and retailer in the distribution channel network were contacted in Hamburg. In the final study the sample size was 60. However, due to non-response to mail questionnaires, the number of usable questionnaires dropped to 45 at the end of the time spent (August - November 1989) for the final study, with a response rate of 75.0 per cent.

In the final sample there are ten producer firms with their own plant, 13 sourcing firms, ten wholesalers and 12 retailers among the 45 responding firms.

3.5.5. Sampling Procedure, Plan and Selection of the Final Sample

For the pilot study, firms in business relations with Turkey located in the Fashion Center Hamburg (Mode Centrum Hamburg) were contacted through word of mouth communication. Snowball effect helped to expand the sample size to retailer and wholesaler firms located in various parts of the city. The pilot study was conducted in August 1989.

The final study started in September 1989 in Fashion Center Hamburg. For further contacts the fashion trade fair IGEDO (International Fashion Fair) in Düsseldorf was visited during September 10th to 13th 1989 period. Besides building contacts, the fashion fair IGEDO was visited to see whether WRW products presented showed any differences according to the regions to be sold. It was observed that contracts were made nationwide. This observation showed that the sample should not be limited to Hamburg region only.

Through the contacts built during IGEDO fashion fair, questionnaires were conducted face to face or were mailed to the responding firms: head offices in various cities in FRG.

Through the face to face communication, the respondents helped in building the snowball sample for further contacts in FRG.

The fashion fair Mode Woche München (Fashion Week Munich) was visited during October 1st to 4th, 1989 to build further contacts for conducting the questionnaires.

In November 1989 data collection proceeded and a follow up of the previously mailed questionnaires was done.

3.6. Analysis of Data

The computer program SPSS-X was used for the derivation of frequency distributions, chi-square statistics and cross-tabulations of the responses.

IV. FINDINGS OF THE STUDY

The primary data collected covers information about the following areas of interest for the study:

1. Firm Characteristics
2. Distribution Channels
3. Product Line of the Firms
4. Consumers as Target Group
5. Physical Functional Characteristics of WRW Products
6. Aesthetic Characteristics of WRW Products
7. Social Characteristics of WRW Products
8. Identification Factors of WRW Products
9. Customer Expectations in General
10. Country Preferences of the Firms in General.

To collect the necessary information, various people have been contacted in the responding firms. Their status in the firm is given in Table 4.1. The largest group of people contacted is "owners of the firm", followed by "employees in purchasing department" and "purchasing managers".

Calculations show that 39.0 per cent of the respondents are involved in purchasing activities, 37.0 per cent are either owners of the firms or general managers, 13.1 per cent are involved in selling activities and 6.5 per cent are engaged in both selling and purchasing activities.

4.1. Firm Characteristics

Firm characteristics cover the size of the responding firms and their business relations with Turkey and with other countries.

Table 4.1
Position of the Contacted People in the Firm
(Responses to Question I.1/b)

Status	n	%
Owner of the Firm	12	26.1
Employee (Purchasing Department)	8	17.4
Purchasing Manager	6	13.0
General Manager	5	10.9
Sales Manager	5	10.9
Purchasing and Sales Manager	3	6.5
Central Purchasing and Sales Manager	2	4.3
Employee (Central Purchasing Department)	2	4.3
Employee (Design and Development)	1	2.2
Quality Control Manager	1	2.2
Shop Manager	1	2.2
No answer	4	-
Total	50*	100.0
<u>Allocation of Operative Positions</u>		
Purchasing	18	39.0
Company owner/General Manager	17	37.0
Selling	6	13.1
Purchasing and Selling	3	6.5
Other	2	4.4
No answer	4	-
Total	50*	100.0

* In 40 firms one person and in five firms two people were contacted for the questionnaire. Total number of people exceeds total number of firms by five.

4.1.1. Size of the Firms

a) Number of Outlets and Gross Sales

Size of the firms were analysed according to the number of outlets in FRG and to the yearly gross sales.

Among the firms contacted 21/45 didn't mention any of the choice alternatives and these non-responding firms operate as producer or sourcing firm at producer stage in the channel network. The major reason for the low response rate is that the question did not cover the category "no outlet". Hence, the "no answer" category can be evaluated as having "no outlet". Out of the firms which have outlets nearly 60.0 per cent stated to have "more than 50" (Table 4.2).

Table 4.2
Number of Outlets of Firms Contacted
(Responses to Question 1.9/a)

Categories	n	%
1	3	12.5
2 - 10	3	12.5
11 - 20	1	4.2
21 - 50	2	8.3
51 - 100	7	29.2
More than 100	7	29.2
No outlets	1	4.2
No answer	21	-
Total	45	100.0

Table 4.3 shows that most of the respondent firms have yearly gross sales higher than 1 billion DM.

Table 4.3
Yearly Gross Sales of Firms Contacted (in DM)
(Responses to Question I.9/b)

Categories	n	%
1.1 - 2 Million DM	1	3.5
2.1 - 5 Million DM	2	6.9
5.1 - 10 Million DM	4	13.8
11 - 100 Million DM	5	17.2
101 - 250 Million DM	5	17.2
251 - 500 Million DM	2	6.9
501 Million - 1 Billion DM	-	-
Higher than 1 Billion DM	10	34.5
No answer	16	-
Total	45	100.0

b) Gross Sales by Channel Types

The yearly gross sales of the firms contacted were cross-tabulated with different levels of the distribution channel network, namely: Producers, Sourcing firms, Wholesalers and Retailers.

This analysis was conducted to test hypothesis H_1 , which is stated as:

H_1 : The yearly gross sales of the four channel types are different from each other.
 (Question I.9/b).

The findings are presented in Table 4.4.

Table 4.4
Yearly Gross Sales Distribution by Channel Types
 (Responses to Question I.9/b)

Yearly Gross Sales	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
1-100 Million DM	2 16.7 100.0 6.9	8 66.7 80.0 27.6	1 8.3 20.0 3.4	1 8.3 8.3 3.4	12 41.4
101-500 Million DM		2 28.6 20.0 6.9	1 14.3 20.0 3.4	4 57.1 33.3 13.8	7 24.1
higher than 1 Billion DM			3 30.0 60.0 10.3	7 70.0 58.3 24.1	10 34.5
Column Total	2 6.9	10 34.5	5 17.2	12 41.4	29 100.0
Number of Firms Contacted	10	13	10	12	

$$\chi^2 = 17.056$$

$$d.f. = 6$$

$$p = 0.009$$

Cells with Expected Frequency (EF) < 5 : 100%.

Significance should be interpreted with care since EF > 5 criteria is not met.

There is a relation between the gross sales volume and type of channel. Therefore, H_1 is accepted.

Based on the distribution of responses it can be observed that:

- Among producers the response rate is very low. The responding firms show a yearly gross sales volume lower than "101 Million DM".
- Among the sourcing firms 10 out of 13 reported their yearly gross sales. Also in this channel type the sales volume is low.
- Among wholesalers 1/2 reported their yearly gross sales. The concentration is rather at a high sales volume such as over "1 Billion DM".

d) Among retailers all reported their yearly gross sales. In this group the sales volume is concentrated in "higher than 1 Billion DM" category.

Among the responding firms it is observed that producers have the lowest yearly gross sales volume; wholesalers and retailers have higher gross sales than producers and sourcing firms (Table 4.4).

4.1.2. Business Relations with Turkey and Other Countries

Business relations were analysed according to the number of years in contact with Turkey and according to the contact offices held, and actual or planned investments in Turkey and in other countries.

a) Number of Years Spent in Business Relations with Turkey

Most of the firms contacted for the study are in business relations with Turkey for 2-5 years, followed by firms in business with Turkish firms for more than 10 years (Table 4.5).

Table 4.5
Number of Years Spent in Business Relation with Turkey
(Responses to Question I.1/a)

C a t e g o r i e s	n	%
For 1 year	1	2.3
For 2-5 years	17	39.5
For 6-10 years	12	27.9
For more than 10 years	13	30.2
No answer	2	-
Total	45	100.0

b) Type of Contact Built in Relations with Turkey and Other Countries

The type of contact built in relation with Turkey is rather based on having an office in Turkey to build the contacts with various Turkish supplier firms and producers. Nearly 70.0 per cent of the respondent firms do not have any investments or investment shares in the WRW sector in Turkey and nearly 58.0 per cent do not plan to have any commitments of this kind (Table 4.6).

Table 4.6
Types of Contact Built in Relation with Turkey
(Responses to Question I.10)

Relations in WRW Sector	n	%
. Having Investments/Shares in Turkey:		
- Yes	9	20.0
- No	31	68.9
- No answer	5	11.1
Total	45	100.0
. Planning to have Investments/Shares in Turkey:		
- Yes	6	13.3
- No	26	57.8
- No answer	13	28.9
Total	45	100.0
. Having Contact Offices in Turkey:		
- Yes	32	71.1
- No	6	13.3
- No answer	7	15.6
Total	45	100.0

The replies given for reasons behind their investment plans in Turkey fell short of sample size. Among firms who stated some intentions to invest, only two have mentioned a reason: For one of the firms the low wage structure was attractive. For the other firm the good improvisation capability and adaptability, reliability of Turks as well as "the better feeling for form" was the reason given.

Among firms which stated "no plans to invest in Turkey", ten have indicated a reason. Three of them are mainly trade oriented with trade experience only. For two it is a risky environment due to rapid changes in the market, the political situation and inflation. For the other two, having investments is too restrictive and complicated, allowing no flexibility. Other reasons stated are: No need and bad previous experience of the colleagues.

The firms contacted have investments in:

1. Europe mainly in: FRG, Netherlands, Austria, Hungary, Switzerland, Italy, Denmark and Sweden.
2. America: USA and Canada.
3. Asia: Hong Kong, other Far East countries, India.

They have also contact offices in various countries. For establishing contact offices the most preferred countries other than Turkey are as follows: Hong Kong, Greece, Far East countries, Italy and Portugal (Table 4.7).

Table 4.7
Contact Offices of Firms
(Responses to Question I.10)

Countries	n*	%
Hong Kong	13	43.3
Greece	13	43.3
Far East Countries	12	40.0
Italy	12	40.0
Portugal	10	33.3
Korea	6	20.0
India	4	13.3
Brazil	2	6.7
Pakistan	2	6.7
Israel	2	6.7
Yugoslavia	2	6.7
Other: Asia, Japan, U.S.A., Holland, France	5	16.7
No answer	15	-

* The totals are not written below since more than one country was mentioned by the respondents.

c) Investments and Other Contact Patterns by Channel Types

The replies for investments and other contact patterns of the firms were cross tabulated with different levels of the distribution channel network in order to test hypothesis H₂, which is stated as:

H₂: The involvement in investment and other contact activities in WRW sector differs among the four channel types.
(Question 1.10).

The findings are presented in Table 4.8 and Table 4.8.1.

The response rate among producers varies between 2/10 and 9/10. For sourcing firms it is between 10/13 and 13/13. In all four categories of contact activities wholesalers show a 7/10 response rate. For retailers the replies are between 9/12 and 11/12 (Table 4.8).

Table 4.8
Response Rate for Investments and Other Contact Patterns by
Channel Types

Investments and Other Contact Patterns:	Channel Types			
	Producer	Sourcing Firm	Wholesaler	Retailer
Have Investments in Ready to Wear Sector in Turkey: Yes	7	2	-	-
No	2	11	7	11
Plan Investments in Ready to Wear Sector in Turkey: Yes	4	1	-	1
No	2	9	7	8
Have Contact Offices in Turkey: Yes	5	10	7	10
No	3	3	-	-
Have Contact Offices in Other Countries	2	10	7	11
Number of Firms Contacted	10	13	10	12

There is a relation between the type of contacts built and the type of channel. Therefore H₂ is accepted (Table 4.8.1.).

Table 4.8.1
Investments and Other Contact Patterns by Channel Types
(Responses to Question I.10)

Count Row Percent Column Percent Total Percent	Channel Types				Row Total
Investments and Other Contact Patterns	Producer	Sourcing Firm	Wholesaler	Retailer	
Have Investments in	7	2			9
Ready to Wear Sector in Turkey	77.8	22.2			11.7
	38.9	8.7			
	9.1	2.6			
Plan Investments in Ready Wear Sector in Turkey	4	1		1	6
	66.7	16.7		16.7	7.8
	22.2	4.3		4.5	
	5.2	1.3		1.3	
Have Contact Office in Turkey	5	10	7	10	32
	15.6	31.3	21.9	31.3	41.6
	27.8	43.5	50.0	45.5	
	6.5	13.0	9.1	13.0	
Have Contact Office in Other Countries	2	10	7	11	30
	6.7	33.3	23.3	36.7	38.9
	11.1	43.5	50.0	50.0	
	2.6	13.0	9.1	14.2	
Column Total	18	23	14	22	77
	23.4	29.9	18.2	28.5	100.0

 $\chi^2 = 28.34$

d.f. = 9

p = 0.005

Cells with Expected Frequency (EF) < 5 : 50%.

Significance should be interpreted with care since EF > 5 criteria is not met.

Based on the distribution of responses it can be observed that (Table 4.8):

- a) Seven out of 9 producers responding to the question have already engaged in investments in Turkey and 5/8 of the responding firms have contact offices in Turkey. The response rate to "planning investments in Turkey" and "having contact offices in other countries" were low, 6/10 and

2/10 respectively; and 4/6 of the responding firms plan investments in Turkey.

- b) The sourcing firms mainly have contact offices in Turkey and in other countries. Among the responding sourcing firms only 2 have investments in Turkey and only one plans investments in Turkey.
- c) The responding wholesalers neither have investments in Turkey nor they plan to have any. They have contact offices in Turkey and in other countries.
- d) The responding retailers also do not have any investments in Turkey. Only one retailer firm stated to plan investments in Turkey. They have contact offices in Turkey and in other countries.

Among the responding firms it is observed that mainly producers have or plan to have investments in Turkey. Sourcing firms, wholesalers and retailers mainly have contact offices in Turkey and in other countries and are less interested in investment activities.

The other countries where the sourcing firms, wholesalers and retailers have their contact offices are mainly Far East countries. The next preferred region is Mediterranean.

4.2. Distribution Channels

The distribution channel structure covers the position of the contacted firms in the channel network, their customers and suppliers as well as the types of WRW production chosen.

4.2.1. Channel Position

The position of the firms contacted in the channel network was analysed according to their main areas of activities.

Among the 45 firms contacted 51.1 per cent operate at the producer-stage. Here the "sourcing firms" constitute the largest group of producers with 56.5 per cent, followed by "firms with their own plant in Turkey". About 27.0 per cent of the firms contacted operate at retailer-stage. Here the "chain stores" constitute the largest group of retailers with 41.7 per cent. Among the firms contacted 22.2 per cent

operate at wholesaler-stage. Here, "Cooperative Groups" or the so called "Buying Offices" which are central purchasing organizations, constitute the largest group of wholesalers with 60.0 per cent (Table 4.9).

Table 4.9
Position of the Firms Contacted in the Distribution Channel Network
According to the Main Activity Areas
(Responses to Question I.6)

Categories	n	%	Total %
TOTAL	45		100.0
Producer:	23	<u>100.0</u>	
with own plant in Turkey	8	34.8	
with own plant in FRG	2	8.7	
as Sourcing Company	13	56.5	
Wholesaler:	10	100.0	22.2
Central Purchasing Organizations (Cooperative Buying Groups)	6	60.0	
Full Line	5	50.0	
Specialist	1	10.0	
Wholesalers for Textile & Apparel	4	40.0	
Retailer:	12	100.0	26.7
Independent Textile & Apparel Retailers	1	8.3	
Chain Stores	5	41.7	
Department Stores	3	25.0	
Mail Order - Full Line Retail	2	16.7	
Retailers not specializing in Textile & Apparel	1	8.3	

Some of these firms are involved in more than one channel activity and operate at the same time in various channel stages.

From the producer stage 11 firms operate also as merchant, 12 undertake wholesale activities and two undertake retail activities.

From the wholesaler stage four operate also as merchants and three of them undertake also agent activities.

From the retailer stage one firm operates also as merchant.

4.2.2. Customers

a) Customers for WRW Products

The firms contacted sell their product line to various customers in the distribution channel network. The respondents also stated the percentage distribution of their WRW products sold to different customer groups.

The major customer group is retailers. About 73.0 per cent of the firms sell to retailers and 37.8 per cent sell to wholesalers. Among the respondents 31.1 per cent stated to be in direct contact with end-users. Distribution to producers is 6.7 per cent (Table 4.10).

Table 4.10
Customers of the Firms Contacted
(Responses to Question I.7)

Categories	n*	%
Producer in FRG:	3	6.7
up to 20%	3	
Wholesaler:	17	37.8
up to 20%	11	
30-50%	3	
60-70%	3	
Retailer:	33	73.3
up to 20%	1	
30-50%	4	
60-80%	6	
85-95%	5	
99%	17	
Consumer:	14	31.1
up to 10%	2	
50%	1	
99%	11	

* Number of responses exceeds to sample size 45 since multiple responses are observed.

b) Customers by Channel Types

The replies for customers of the firms contacted were cross tabulated with different levels of the distribution channel network in order to test hypothesis H₃, which is stated as:

H₃: The customers of the four channel types for WRW products are different from each other.
(Question I.7).

The findings are presented in Table 4.11. Statistically there is a relation between customers and the type of channel; therefore, H₃ is accepted.

Based on the distribution of responses it can be observed that (Table 4.11):

- a) Producers sell to all types of customers, especially to retailers. All producers sell directly to retailers and 8/10 of them sell also to wholesalers.
- b) All responding sourcing firms sell their product line to retailers, 1/2 also sells to wholesalers. Only 1/6 sells to producers in FRG; and one sourcing firm sells directly to the consumer as well.
- c) Wholesalers do not sell at all to producers in FRG and directly to the consumers. They all sell to retailers and also to other wholesalers (3/10 of the firms contacted).
- d) Retailers do not sell to producers in FRG and to wholesalers. They all sell mainly directly to the consumers. Only one retailer stated to sell also to other retailers.

It can be concluded that among the responding firms producers, sourcing firms and wholesalers mainly sell their WRW products to retailers. The second customer group for these channel types are wholesalers. Retailers mainly sell their products directly to consumers. Wholesalers do not have direct contact with consumers. Neither retailers nor wholesalers sell to producers in FRG.

From the customers' perspective, major supplier sources of the customers of the firms contacted are as follows (Table 4.11, row percentages):

Producers in FRG usually buy ready to wear products from sourcing firms. Among the wholesalers 47.1 per cent buy their product lines from producers in Turkey and in FRG. Retailers buy from all sources of supply, including mainly producers in Turkey and FRG, sourcing firms and wholesalers. For the consumers

the major suppliers are retailers with 85.7 per cent.

Table 4.11
Buyer Channel Members by Channel Types
 (Responses to Question I.7)

Customers:	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
Producer in FRG	1 33.3 5.0 1.5	2 66.7 9.5 3.0			3 4.5
Wholesaler	8 47.1 40.0 11.9	6 35.3 28.6 9.0	3 17.6 23.1 4.5		17 25.4
Retailer	10 3.3 50.0 14.9	12 36.4 57.1 17.9	10 30.3 76.9 14.9	1 3.0 7.7 1.5	33 49.2
Consumers/End-Users	1 7.1 5.0 1.5	1 7.1 4.8 1.5		12 85.7 92.3 17.9	14 20.9
Column Total	20 29.9	21 31.3	13 19.4	13 19.4	67 100.0
Number of Responding Firms	10	12	10	12	
Number of Firms Contacted	10	13	10	12	

$$\chi^2 = 53.73$$

$$d.f. = 9$$

$$p = 0.005$$

Cells with Expected Frequency (EF) < 5 : 62.5%.

Significance should be interpreted with care, since EF > 5 criteria is not met.

4.2.3. Suppliers

a) Suppliers for Turkish WRW Products

The firms contacted have different suppliers in Turkey and in FRG. In Turkey, "Producers" are the major group exporting WRW products to firms in FRG. Nearly 98.0 per cent of the firms in the sample have direct contact with Turkey for WRW products, either through their own plant or other producers. Only 46.7 per cent of the firms stated to buy Turkish WRW products from suppliers in FRG. In this group import merchants of FRG are the major suppliers followed by export merchants from Turkey (Table 4.12).

Table 4.12
Suppliers of the Firms Contacted
(Responses to Question I.8)

C a t e g o r i e s	n	Adjusted %	Unadjusted %
Suppliers located in Turkey:			
Producer	36	81.8	80.0
Own Plant	8	18.2	17.8
No answer	1	-	2.2
Total	45	100.0	100.0
Suppliers located in FRG:			
Export Merchant from Turkey	10*	47.6	22.2
Import Merchant of FRG	15*	71.4	33.3
Central Purchasing Organizations (Cooperative Buying Groups)	3*	14.3	6.7
Wholesalers	1*	4.8	2.2
No answer	24*	-	53.3

* In the second part of the table, number of responses exceeds the sample size together with no answer cases since multiple responses are observed.

The response rate given to the reasons for the choice of the suppliers was very low. For choosing suppliers from Turkey, the respondents mainly mentioned a good

price-performance relationship and high cooperation in work with Turkish producers. Six respondents reported having their own plant in Turkey as the only supply alternative chosen (Table 4.13).

Table 4.13 shows also the reasons given for choosing suppliers in FRG. These justifications concentrate on export merchants and import merchants chosen. The main reasons stated by the responding firms are suppliers' creativity, fashion orientation, offering collections that coordinate well. A good price-performance relation is also a factor for choosing a supplier in FRG for Turkish WRW products.

Table 4.13
Reasons for Choosing Certain Suppliers
(Responses to Question I.8)

Reasons Cited	Supplier	
	in Turkey	in FRG
	n*	n
There is a good price-performance relation; They have appropriate prices	7	3
A good and direct coordination of work is possible, based on good personal relations and cooperation	7	2
Only the own plant in Turkey supplies the Turkish WRW products. No contact to other suppliers	6	-
The producers work only for the responding firm	3	-
Correctness in the job done, punctuality and quick delivery	3	1
The supplier is creative, has fashion sense, offers collections easy to coordinate	2	4
The supplier has long term market knowledge and market experience	2	2
It is possible to take over the quality control	1	-
Processing quality is clear and advanced	1	-
It is riskless for the responding firm	-	1
No answer	25	34

* The sum of replies and no answers exceeds the sample size 45, because in the open ended part of Question I.8 more than one reason was stated.

b) Suppliers from Turkey by Channel Types

The types of suppliers of Turkish WRW products were cross-tabulated with different levels of the distribution channel network in order to test hypothesis H₄, which is stated as:

H₄: The suppliers for WRW products differ among the four channel types.
(Question I.8).

The findings are presented in Table 4.14. Statistical analysis shows that there is a relation between the type of supplier and type of channel. Therefore, H₄ is accepted.

Based on the distribution of responses it can be observed that for all four channel types the major supplier is the "producer in Turkey" directly. Eight out of 10 producers have their own plant in Turkey and directly import their products from this plant. For the other producers (2/10) the supplier of Turkish WRW products are merchants in FRG and different producers in Turkey.

For sourcing firms, wholesalers and retailers the second major group of suppliers for Turkish WRW products are merchants in FRG. In this group the import merchants are more effective compared to export merchants from Turkey operating in FRG (Table 4.14).

From the suppliers' perspective, "Producers in Turkey" sell mainly to sourcing firms and wholesalers. The plants in Turkey supply the products to producers who own them. In FRG, export merchants from Turkey mainly sell WRW products to the retailers. Producers and wholesalers are the second major buyer group. Import merchants also sell mainly to retailers. Their second buyer group are wholesalers. Wholesalers sell to retailers. Only for one wholesaler are sourcing firms the buyer (Table 4.14, row percentages).

Table 4.14
Suppliers by Channel Types
 (Responses to Question I.8)

Count Row Percent Column Percent Total Percent	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
Suppliers in Turkey:					
Producers in Turkey	2	12	10	12	36
	5.6	33.3	27.8	33.3	49.2
	14.3	75.0	62.5	44.4	
	2.7	16.4	13.7	16.4	
Own Plant in Turkey	8				8
	100.0				11.0
	57.1				
	11.0				
Suppliers in FRG:	2	1	2	5	10
Export Merchant from Turkey	20.0	10.0	20.0	50.0	13.7
located in FRG	14.3	6.25	12.5	18.5	
	2.7	1.4	2.7	6.9	
Import Merchant in FRG	2	2	4	7	15
	13.3	13.3	26.6	46.7	20.5
	14.3	12.5	25.0	25.9	
	2.7	2.7	5.5	9.6	
Wholesaler in FRG		1		3	4
		25.0		75.0	5.5
		6.25		11.1	
		1.4		4.1	
Column Total	14	16	16	27	73
	19.1	21.9	21.9	37.0	100.0
Number of Responding Firms	10	12	10	12	
Number of Firms Contacted	10	13	10	12	

$$\chi^2 = 45.81$$

$$d.f. = 12$$

$$p = 0.005$$

Cells with Expected Frequency (EF) < 5 : 70%

Significance should be interpreted with care, since EF > 5 criteria is not met.

4.2.4. WRW Production Types

The production processes for WRW goods showed varieties. Among the firms contacted 29 stated to decide for more than one type of production. The alternatives were: own production, ordering, purchase of collections and CMT (cutting, making, trimming).

a) Production Activities Chosen

Table 4.15
Allocation of the Different Types of WRW Production
(Responses to Question I.4)

Categories	in Turkey		in FRG		in other countries		Non-Response Rate		Response Rate	
	n	%	n	%	n	%	n	%	n	%
Ordering	39	100.0	15	38.5	34	87.2	6	13.3	39	86.7
Purchase of Collections	15	68.2	12	54.5	12	54.5	22	48.9	23	51.1
Cutting-Making-Trimming (CMT)	9	75.0	2	16.7	8	66.7	33	73.3	12	26.7
Own Production	8	72.7	3	27.3	-	-	34	75.6	11	24.4

(The allocation of responses according to countries and according to the type of production exceeds the sample size 45 since multiple responses are observed).

Nearly 87.0 per cent of the firms contacted stated to choose "ordering" as the type of production. Ordering in Turkey is done by all these firms and ordering in other countries by 87.2 per cent of this group. About 51.0 per cent of the firms contacted stated to "purchase collections". Among these 68.2 per cent purchase collections in Turkey. Nearly 27.0 per cent of the firms contacted stated to choose "CMT" as the type of production. Within this group 75.0 per cent work in connection with Turkey and 66.7 per cent have connections with other countries. "Own Production" has been mentioned by 24.4 per cent of the firms contacted. Nearly 73.0 per cent of these firms have plants in Turkey (Table 4.15).

The respondents also mentioned names of other countries chosen for the four types of production. Countries contacted for "ordering" are: Far East Region,

Mediterranean Region, Asia, Eastern Europe and other European countries. Countries contacted for the "purchase of collections" are: Far East Region, England, Italy and other members of European Community. A remark was made by contacted people who had mentioned "purchase of collections in FRG": In that case the buyer firm does not know whether the WRW products have been manufactured in FRG or were imported. It would be highly possible that these WRW products were manufactured in other countries through "ordering" or "CMT" and sold as own collections of the firm in FRG. For "CMT" contacts are built with South East Asia or with Thailand mainly.

b) Production Activities by Channel Types

The replies for production types were cross-tabulated with different levels of the distribution channel network in order to test hypothesis H₅, which is stated as:

H₅: The types of production chosen for WRW products differ among the four channel types.
(Question I.4).

The findings are presented in Table 4.16 and Table 4.16.1.

There is a relation between the type of production activity chosen and the type of channel. Therefore, H₅ is accepted (Table 4.16.1).

Table 4.16
Response Rate for Production Activities by
Channel Types

	Channel Types			
	Producer	Sourcing Firm	Wholesaler	Retailer
Own Production:				
in Turkey	8	-	-	-
in FRG	2	-	-	1
Number of Responding Firms	10			1
Ordering Activity:				
in Turkey	6	13	8	12
in FRG	2	4	4	5
in Other Countries	2	13	8	11
Number of Responding Firms	6	13	8	12
Purchase of Collections:				
in Turkey	3	1	8	3
in FRG	1	-	4	7
in Other Countries	2	1	5	4
Number of Responding Firms	4	2	9	8
Cutting Making Trimming - CMT				
in Turkey	3	5	-	1
in FRG		2	-	-
in Other Countries	2	4	1	1
Number of Responding Firms	4	6	1	1
Number of Responding Firms in all Production Activities	10	13	10	12
Number of Firms Contacted	10	13	10	12

(The totals for number of mentions in individual cells exceeds the number of responding firms since multiple responses are observed.)

Table 4.16.1
Production Activities by Channel Types
(Responses to Question I.4)

Production Activities	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
Own Production	10			1	11
	90.9			9.1	7.0
	32.3			2.2	
	6.4			0.6	
Ordering Activity	10	30	20	28	88
	11.4	34.1	22.7	31.8	56.0
	32.3	69.8	52.6	62.2	
	6.4	19.1	12.7	17.8	
Purchase of Collections	6	2	17	14	39
	15.4	5.1	43.6	35.9	24.8
	19.4	4.6	44.7	31.1	
	3.8	1.3	10.8	8.9	
Cutting Making Trimming - CMT	5	11	1	2	19
	26.3	57.9	5.3	10.5	12.1
	16.1	25.6	2.6	4.4	
	3.2	7.0	0.6	1.3	
Column Total	31	43	38	45	157
	19.8	27.4	24.1	28.6	100.0

 $\chi^2 = 66.43$

d.f. = 9

 $p = 0.005$

Cells with Expected Frequency (EF) < 5 : 37.5%

Significance should be interpreted with care, since EF > 5 criteria is not met.

Based on the distribution of responses it can be observed that (Table 4.16):

- Among the producers, eight out of 10 do their "own production in Turkey" and the remaining two have a plant in FRG. Besides having their own production plants, six out of 10 producers are involved in "ordering activity". For this production type all work in connection with Turkey, 1/3

order also in FRG and 1/3 order also in other countries. "Purchase of collections" is preferred by four out of 10 producers. Here 3/4 buy the collections in Turkey. Again four out of 10 producers are involved in Cutting-Making-Trimming - CMT activities.

- b) Sourcing firms don't have their "own production" facilities. They all "order" their product line in Turkey and in other countries. Only 4/13 order in FRG. The second most frequently chosen type of production activity is CMT, preferred by nearly 1/2 of the sourcing firms. Only two firms stated to purchase collections.
- c) Wholesalers don't have their "own production" facilities. Although the "purchase of collections" is chosen by nine out of 10 and "ordering activity" is chosen by eight out of 10 wholesalers, the responding firms are more actively involved in ordering: All order in Turkey and in other countries and 1/2 order also in FRG. Only one firm stated to make CMT.
- d) Among the retailers one firm has its "own production" facility in FRG. All retailers are mainly involved in "ordering activities" in Turkey, 11/12 order also in other countries". Besides ordering, "purchase of collections" is the second most frequently chosen type of production activity. In this group 7/8 of the retailers purchase the collections in FRG. CMT is done by only one retailer firm, in Turkey and in other countries.

In short, for producers "ordering activity" is the second frequently chosen type of production besides having their own production activity. For sourcing firms, retailers and wholesalers in descending order, the ordering activity is the most preferred production type. Purchase of collections is mainly done by wholesalers and also by retailers, less actively by producers. CMT is the second frequently chosen production type by sourcing firms. CMT is mainly preferred by sourcing firms and by producers as a way of production.

Related to the distribution channels analysed in this part of the study, following results can be summarized:

The majority of the firms contacted for the study operate at producer stage in the distribution channel network. There are sourcing firms and producers with own plant in Turkey or in FRG. Retailers constitute the second large group of firms contacted, followed by wholesalers.

The major customer group of the firms contacted is retailers, followed by wholesalers and consumers i.e. endusers.

Suppliers of WRW products from Turkey are located in Turkey or in FRG. Besides the producers in Turkey as the main supplier of WRW products, import merchants in FRG are the second large source for WRW products from Turkey, followed by the export merchants and own plants of the firms contacted.

Among the four production types, the firms contacted mainly choose ordering. The responding firms are involved in ordering activities mainly in Far East and Mediterranean countries. Besides ordering, purchase of collections is chosen, followed by Cutting-Making-Trimming and own production.

4.2.5. A Flow Chart of Distribution Channel Network

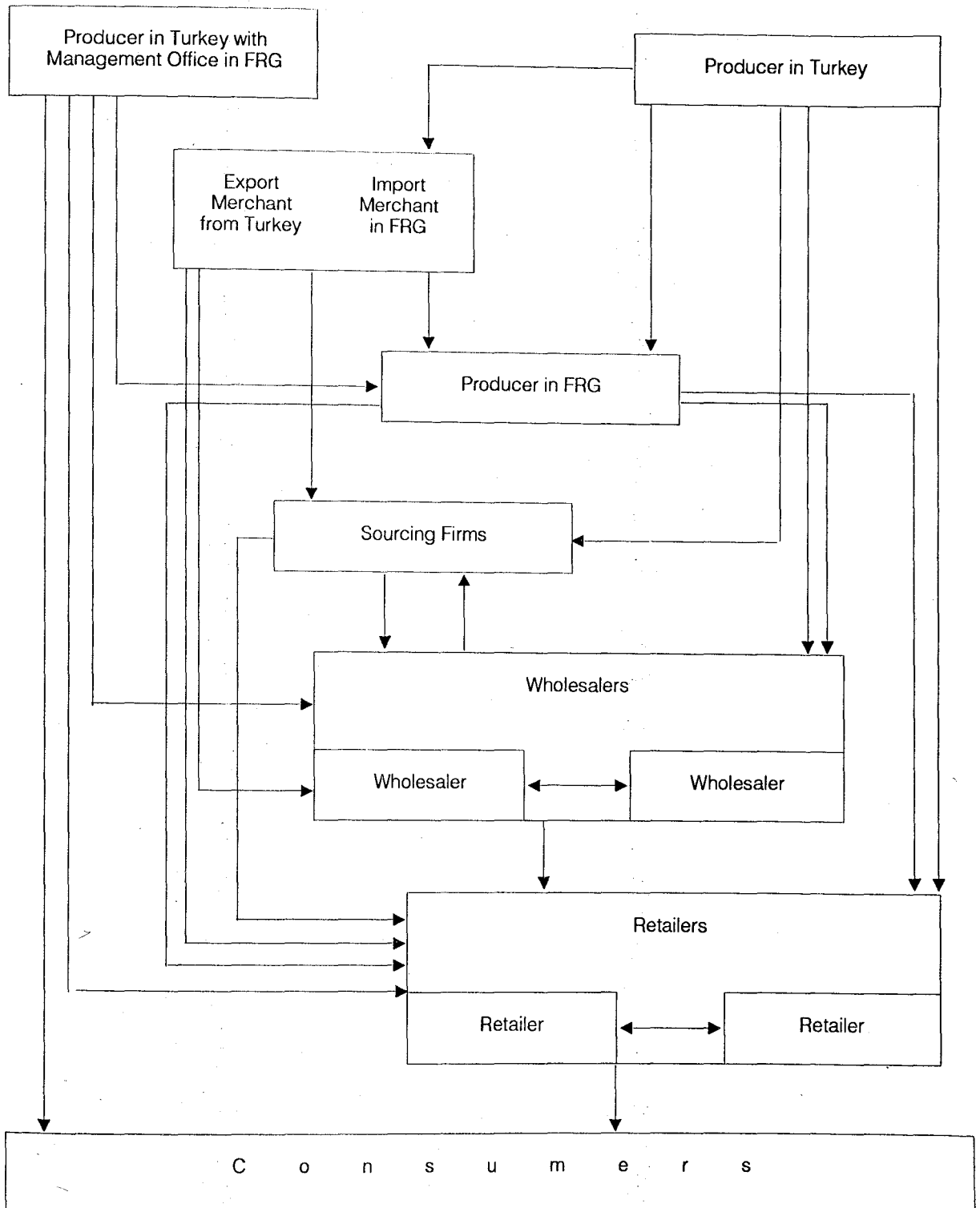
The distribution channel network for Textile and Apparel products presented in the literature review part (Chapter II) of the study does not show specifically the flow of Turkish WRW products. Figure 4.1 is developed based on the replies of the responding firms, and presents the flow of Turkish WRW products within the distribution channel network for the Textile and Apparel sectors in FRG.

Figure 4.1 shows that for the producer firms contacted the suppliers of Turkish WRW products are different producers in Turkey and also the Turkish export merchants and German import merchants operating in FRG. A distinction should be made that among the responding producers those from Turkey with a location in FRG import their product line from the own plant and additionally buy Turkish WRW products from the two types of merchants mentioned before. The German producers contacted purchase Turkish WRW products also from the Turkish producers located in FRG. Turkish and German producers contacted sell their product line mainly to wholesalers and retailers. Besides this product flow there is also a direct contact observed from the Turkish producer located in FRG to the German consumer.

Sourcing firms contacted purchase the Turkish WRW products mainly from producers in Turkey and merchants in FRG. There is also a product flow observed from wholesalers to the sourcing firm. Sourcing firms then sell their product line to wholesalers and retailers but not directly to consumers.

For the wholesalers contacted, the suppliers of Turkish WRW products are producers from Turkey located in FRG, German producers, export and import merchants located in Turkey and the Turkish producers in Turkey. Wholesalers sell their product line mainly to retailers but there is also a product flow observed among wholesalers themselves and to the sourcing firms.

Figure 4.1.
WRW Products' Flow from Turkey and their Distribution
in the Channel Network of FRG
 (Responses to Questions I.7 and I.8)



For the retailers contacted, the suppliers of Turkish WRW products are Turkish and German producers, export and import merchants operating in FRG, Turkish producers directly from Turkey and the wholesalers in FRG. Retailers mainly sell their product line directly to the consumers but there is also a product flow observed among the retailers themselves.

German consumers buy the WRW products from retailers or retail outlets of Turkish producers located in FRG with a plant in Turkey.

4.3. Product Line of the Firms

This part of the study covers product types in the product line of the contacted firms, the depth or width of the assortment, as well as the market and marketing research activities performed to sell these products.

4.3.1. Products in the Product Line

The product types, their fibre, and the product lines purchased from Turkey within the product class "Ready to Wear" have been questioned in this section of the study. Responses are presented in Table 4.17 and in Table 4.18.

All responding firms purchase WRW products from Turkey. Those concentrating only on this product line make up 38.6 per cent. About 34.0 per cent of the respondents purchase a combination of Women's Ready to Wear (WRW), Men's Ready to Wear (MRW) and Children's Ready to Wear (CRW) products from Turkey.

Cotton and mixed fibre are the most purchased types of fibre. Only cotton goods are purchased by 18.6 per cent of the respondents.

The product types were grouped under three categories: Knitwear, Woven goods and other. In the knitwear group 25.0 of the respondent firms purchase all five types of products from Turkey. Pullover, T-shirts and sweatshirts are purchased by 18.2 per cent. In the Woven goods group all four types are purchased by 32.4 of the respondent firms. In the third group the response rate was very low (Table 4.17).

Table 4.17
Product Lines, Types of Fibres and Product Items Purchased from Turkey
(Responses to Question 1.2)

Choice Categories	Chosen Categories	n	%
<u>Product Line</u>	1	17	38.6
1 = WRW	1 + 2 + 3	15	34.1
2 = MRW (men's ready to wear)	1 + 2	12	27.3
3 = CRW (children's ready to wear)	No answer	<u>1</u>	<u>-</u>
		45	100.0
<u>Type of Fibre</u>	2 + 5	12	27.9
1 = Wool	2	8	18.6
2 = Cotton	2 + 4 + 5	7	16.3
3 = Silk	1 + 2 + 4 + 5	5	11.6
4 = Synthetics	1 + 2 + 5	4	9.3
5 = Mixed Fibre	Other Combinations	7	16.3
	No answer	<u>2</u>	<u>-</u>
		45	100.0
<u>Knitwear</u>	1 + 2 + 3 + 4 + 5	11	25.0
1 = Pullover	1 + 2 + 3	8	18.2
2 = T-shirts	2 + 3 + 4	6	13.6
3 = Sweatshirts	1 + 2 + 3 + 4	5	11.4
4 = Shorts/Trousers/Skirts	2 + 3	4	9.1
5 = Suits	Other Combinations	10	22.7
	No answer	<u>1</u>	<u>-</u>
		45	100.0
<u>Woven Goods</u>	1 + 2 + 3 + 4	12	32.4
1 = Blouses/Shirts	1 + 2	6	16.2
2 = Shorts/Trousers/Skirts	1 + 2 + 3	5	13.5
3 = Suits	1	4	10.8
4 = Dresses	1 + 2 + 4	4	10.8
	Other Combinations	6	16.2
	No answer	<u>8</u>	<u>-</u>
		45	100.0
<u>Other</u>	1	7	70.0
1 = Wind jackets	1 + 2	3	30.0
2 = Ski-/sport trousers	No answer	<u>35</u>	<u>-</u>
		45	100.0

Among the responding firms all purchase WRW products from Turkey for their product class, 61.4 per cent purchase MRW products and 34.0 per cent purchase CRW products from Turkey. The type of fibre chosen is cotton for 93.0 per cent and mixed fibre for 74.4 per cent of the responding firms. Among knitwear products sweatshirts from Turkey are purchased by 93.2 per cent and T-shirts by 90.9 per cent of the firms. From the woven goods blouses/shirts and shorts/trousers/skirts are purchased by 86.5 per cent of the responding firms. Among the other product types mentioned wind-jackets are the mainly chosen products (Table 4.18).

4.3.2. Depth and Width of the Assortment

Depth and width of the assortment was measured by a question which asked colors, sizes and models mostly purchased. It is found that color variety is preferred for T-shirts, sweatshirts and pullovers whereas color preferences are restricted for blouses, shorts, trousers and skirts. Sizes ranging from 36 to 48 are preferred for shorts, trousers, skirts whereas the sizes ranging from S to XL are used for T-shirts, sweatshirts and pullovers. Standard size is not preferred at all. Model variety is preferred for T-shirts, sweatshirts whereas model preferences are restricted for shorts, trousers and skirts.

The results show that the contacted firms order T-shirts and sweatshirts rich in variety of colors and models, in sizes S to XL. They order shorts, trousers, skirts with little variety of colors and models and mostly in sizes ranging from 36 to 48.

4.3.3. Market and Marketing Research Activities

Activities of the firms as related to market and marketing research are outlined in Table 4.19. Information collection through visits to supplier markets, to trade fairs and fashion centers was utilized by 51.5 per cent of the responding firms. Besides this, observation based methods make up 48.5 per cent of the replies. Close contacts with competitors, customers, consultants and import agents provide information exchange and market knowledge. Information collection through literature survey is done by 27.3 per cent of the responding firms. The literature survey covers specialist-journals such as TW-Textilwirtschaft and various subject specific literature sources from trade centers, chambers of commerce and different unions in the sector.

Table 4.18
Purchase Level for Product Lines, Types of Fibre and Product Types
(Responses to Question I.2)

Categories	n	%
Product Line:		
WRW	44	100.0
MRW	27	61.4
CRW	15	34.0
No answer	1	-
Type of Fibre:		
Cotton	40	93.0
Mixed Fibre	32	74.4
Synthetics	14	32.6
Wool	13	30.2
Silk	2	4.7
No answer	2	-
Knitwear		
Sweatshirts	41	93.2
T-shirts	40	90.9
Pullover	30	68.2
Shorts/Trousers/Skirts	26	59.1
Suits	16	36.4
No answer	1	-
Woven Goods:		
Blouses/Shirts	32	86.5
Shorts/Trousers/Skirts	32	86.5
Suits	20	54.1
Dresses	17	45.9
No answer	8	-
Other:		
Windjackets	10	100.0
Ski-/Sport trousers	3	30.0
No answer	35	-

(The totals are not written below since more than one category was mentioned by the firms).

Table 4.19
Market Research Activities of Firms Contacted
(Responses to Question I.5)

Descriptions	n	%
Information collection through visits to supplier markets, trade fairs, fashion centers	17	51.5
Close contact with competitors, customers, agents	16	48.5
Information collection through literature survey	9	27.3
Research about economic and political environment of countries	6	18.2
Analysis of future trends, market and customer profile, target market and test marketing of the product	3	9.1
No Research done	3	9.1
Presenting information about the activities to the customers	2	6.1
No answer	12	-

(The totals are not written below since multiple responses were observed).

The most frequently used method, information collection through visits, helps to identify the supplier markets and suppliers at trade fairs, fashion centers by observing what they offer and how they work. Analysis of fashion markets like Italy and France helps to get insights about the coming trends in fashion and fabric. Combining information about supplier market conditions and fashion trends helps in determining where and what to buy.

The trade fairs mostly visited are fibre, fabrics, fashion fairs such as IGEDO/Düsseldorf, Interstoff/Frankfurt a.M., Pitti Immagine Filati/Florence-Italy, Premiere Vision/Paris-France, Esma/Milan-Italy.

The close contact with competitors, customers and import agents helps to obtain information about the positioning of other firms in the sector, about the expectations of customers and the purchase or production opportunities. The contact with import agents helps especially in developing international collections. The wholesalers have close contact with retailers in order to get information about the consumer expectations and preferences.

Research about economic and political developments in various countries is either done through the market research department of the firm or through "Gesellschaft für Konsumforschung-GFK" (Society for Consumption Research). Analysis of future trends in the market requires analysis of customer profile and test marketing the product in the defined target markets. Accordingly customer oriented production and sales can be ensured.

4.4. Target Consumers

The WRW products sold by different channel members appeal to various consumer types according to age, income and outfit style.

The major consumer type in the target market of the responding firms shows the following characteristics: Nearly 24.0 per cent of the respondents didn't specify any particular age group. For 28.1 per cent, the income level of the consumer ranges from low to middle. She is young and sporty for 42.4 per cent of the respondents (Table 4.20).

The analysis of age, income and outfit style of consumers aims to give only a broad idea of consumer types. It is not the objective of this study to identify the consumer profile, since this was not deemed necessary for the purposes of this study. The consumer profile could be identified through another study.

4.5. Evaluations and Opinions about Physical-Functional Characteristics of WRW Products

The quality aspect is the main component of the physical-functional characteristics of a WRW product. This part of the study concentrates on the quality, on the major quality factors such as material, processing and durability of WRW products, as well as quality control issues for WRW products.

Table 4.20
The Target Group of the Firms Contacted
(Responses to Question II.20/a)

Categories	n	%
Age:		
12-25	4	11.8
15-35	6	17.6
18-45	7	20.6
25-50	7	20.6
35-60	2	5.9
All Groups	8	23.5
No answer	<u>11</u>	<u>-</u>
	45	100.0
Income:		
low-middle	9	28.1
middle	8	25.0
low-high	4	12.5
middle-high	7	21.9
high	4	12.5
No answer	<u>13</u>	<u>-</u>
	45	100.0
Outfit-Style:		
Young, sporty, student outlook	14	42.4
Price conscious, fashion oriented	8	24.2
Exclusive, elegant	7	21.2
All types: fashion girl-lady	6	18.2
Leisure time outlook	4	12.1
Own life style people	4	12.1
Emancipated business women	3	9.1
Conservative, classic	2	6.1
No answer	12	<u>-</u>

(The totals for outfit-style are not written below since more than one style was mentioned by the respondents).

4.5.1. Evaluations about Quality in General

a) Importance Attached to Quality Factors for WRW Products

Quality evaluations were further investigated by asking about the level of importance attached to the three quality factors; namely, material, processing and durability; for both knitwear and woven WRW products. Knitwear products were grouped as I: T-shirt and sweatshirt knit, and II: Pullover knit.

The ordinal nature of the scale used about quality factors allowed for calculations of the weighted mean ranks in order to reveal the slight differences in ranking of these factors according to their level of importance.

For knitwear products, "material" is the most important factor followed by "processing" to ensure quality. "Durability" is at third place. For woven goods, "processing" is the most important factor with a mean rank of 1.5, followed by material with a mean rank of 1.71. "Durability" still remains in the third place (Table 4.21). "Material quality" for woven goods was ranked behind the "processing quality" of the same product item, with a mean rank of 1.71 a higher level of importance was attached to it compared to the "processing quality" of knitwear II with a mean rank of 1.76 (Table 4.21).

b) Quality Evaluations for Turkish WRW Products

The scale used in measuring the evaluations has five points, ranging from very good to very poor.

Evaluations for Turkish WRW products in Table 4.22 show that all three quality factors were rated at middle level.

Material quality received the highest ratings in the scale of values ranging from very good to neutral, followed by the processing quality with very few poor evaluations. Durability was evaluated mainly neutral.

There was also a large consensus among the respondents as indicated by the small standard deviations.

In general it can be concluded that the quality of the Turkish WRW products has been evaluated to be at middle level; that is, neither too good nor too poor. In fact, evaluation is slightly in the positive direction for material- and processing quality.

Table 4.21
Importance Level of Quality Factors
(Responses to Question II.1/a)

Quality Factors			Product Items		
			Knitwear I	Knitwear II	Woven Garments
Material:	ranked as*	1	17	15	10
		2	8	8	11
		3	1	1	3
	missing		<u>19</u>	<u>21</u>	<u>21</u>
			45	45	45
	Mean Rank:		1.38	1.42	1.71
Processing:	ranked as*	1	8	8	12
		2	17	15	12
		3	-	2	-
	missing		<u>20</u>	<u>20</u>	<u>21</u>
			45	45	45
	Mean Rank:		1.68	1.76	1.50
Durability:	ranked as*	1	1	1	2
		2	-	2	1
		3	23	20	22
	missing		<u>21</u>	<u>22</u>	<u>20</u>
			45	45	45
	Mean Rank:		2.92	2.83	2.80

* Where 1 = most important.

Table 4.22

Evaluations for Turkish WRW Products with Respect to the Quality Factors
(Responses to Question II.1/b)

Evaluations	Material Quality		Processing Quality		Durability Quality	
	n	%	n	%	n	%
very good	3	7.0	2	4.5	2	4.9
good	14	32.6	12	27.3	5	12.2
neither good/nor poor	21	48.8	24	54.5	25	61.0
poor	5	11.6	5	11.4	8	19.5
very poor	-	-	1	2.3	1	2.4
No answer	<u>2</u>	<u>-</u>	<u>1</u>	<u>-</u>	<u>4</u>	<u>-</u>
	45	100.0	45	100.0	45	100.0
Mean*:	2.65		2.80		3.02	
Standard Deviation:	0.783		0.795		0.790	

* For calculating the mean, the rating scale has been coded as
1 = very good, 2 = good, 3 = neither good/nor poor, 4 = poor, 5 = very poor.

c) Quality Evaluations for Turkish WRW Products by Channel Types

The ratings for quality factors of Turkish WRW products were cross-tabulated with different levels of the distribution channel network in order to test hypothesis H_6 , which is stated as:

H_6 : The evaluations for Turkish WRW products based on factors of physical-functional characteristics (quality) differ among the four channel types.
(Question II.1/b)

The findings are presented separately Tables 4.23 to 4.25 for the three quality factors: material, processing and durability.

The rating scale was condensed from six points ranging from very good to very poor to three points as very good/good, neither good nor poor and poor/very poor.

Table 4.23
Material Quality Evaluations by Channel Types
 (Responses to Question II.1/b)

Count Row Percent Column Percent Total Percent	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
<u>Material Quality Evaluations</u>	5	7	1	4	17
very good/good	29.4	41.2	5.9	23.5	39.5
	55.6	53.8	11.1	33.3	
	11.6	16.3	2.3	9.3	
neither good/nor poor	3	5	7	6	21
	14.3	23.8	33.3	28.6	48.8
	33.3	38.5	77.8	50.0	
	7.0	11.6	16.3	14.0	
poor/very poor	1	1	1	2	5
	20.0	20.0	20.0	40.0	11.6
	11.1	7.7	11.1	16.7	
	2.3	2.3	2.3	4.7	
Column Total	9	13	9	12	43
	20.9	30.2	20.9	27.9	100.0
Mean*:	1.56	1.54	2.00	1.83	
Number of Firms Contacted	10	13	10	12	45

* Where 1 = very good/good

$\chi^2 = 5.91$

d.f. = 6

$p > 0.10$

Cells with Expected Frequency (EF) < 5 : 75.0%

Significance should be interpreted with care, since EF > 5 criteria is not met.

Calculations in Table 4.23 show that even at $p = 0.10$ level there is no relation between the material quality evaluations and the type of channel. Hence, H_6 is rejected for the material quality factor.

Although statistically not significant, based on the distribution of responses in Table 4.23 it can be observed that the producers and sourcing firms rated material quality of Turkish WRW products somewhat better than the wholesalers and retailers with mean values 1.56 and 1.54 respectively. Frequency distributions show that more than 1/2 of the responding producers and sourcing firms evaluated the material

quality as "very good" or "good"; the majority of wholesalers (77.8 per cent) rated the material quality as "neither good nor poor" and 1/2 of the retailers' evaluation was also as "neither good nor poor".

Statistical calculations in Table 4.24 show that even at $p = 0.10$ level there is no relation between the processing quality evaluations and the type of channel. Hence, H_6 is rejected for the processing quality factor.

Although statistically not significant, based on the distribution of responses presented in Table 4.24 it can be observed that the best rating for processing quality of Turkish WRW products was done by sourcing firms and the worst rating was done by retailers, with mean values 1.54 and 2.17 respectively.

Frequency distributions show that four out of 10 producers evaluated the processing quality as very good or good, and another 4/10 rated as neither good nor poor. For more than 1/2 of the sourcing firms, 77.8 per cent of the responding wholesalers and 1/2 of the retailers the processing quality of Turkish WRW products is neither good nor poor.

Statistical calculations in Table 4.25 show that even at $p = 0.10$ level there is no relation between the durability quality evaluations and the type of channel. Hence, H_6 is rejected for the durability factor of quality.

Although statistically not significant, based on the distribution of responses it can be observed that producers, sourcing firms and wholesalers rated the durability factor rather at middle level (mean values 2.00, 2.00 and 1.78 respectively). The lowest rating was given by retailers with a mean value of 2.36.

Frequency distributions show that for 55.6 per cent of producers, 66.6 per cent of sourcing firms and 77.8 per cent of wholesalers the durability quality of Turkish WRW products is neither good nor poor. Among the responding retailers 45.5 per cent rated durability quality at middle level and again 45.5 per cent evaluated as poor or very poor.

In short, there is no significant difference among the ratings of producers, sourcing firms and wholesalers.

It can be concluded that for the evaluation of the Turkish WRW products based on the quality factors, for material and processing the best ratings were given by sourcing firms and the worst ratings were given by wholesalers for material quality; by retailers for processing quality. For durability the best rating was given by wholesalers and the worst rating was again given by retailers. This shows that related to the major quality factors of WRW products from Turkey, retailers are the least satisfied channel group.

Table 4.24
Processing Quality Evaluation by Channel Types
 (Responses to Question II.1/b)

Count
 Row Percent
 Column Percent
 Total Percent

Processing Quality Evaluation	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very good/good	4	6	2	2	14
	28.6	42.9	14.3	14.3	31.8
	40.0	46.2	22.2	16.7	
	9.1	13.6	4.5	4.5	
neither good/nor poor	4	7	7	6	24
	16.7	29.2	29.2	25.0	54.5
	40.0	53.8	77.8	50.0	
	9.1	15.9	15.9	13.6	
poor/very poor	2	-	-	4	6
	33.3			66.7	13.6
	20.0			33.3	
	4.5			9.1	
Column Total	10	13	9	12	44
	22.7	29.5	20.5	27.3	100.0
Mean*:	1.80	1.54	1.78	2.17	
Number of Firms Contacted	10	13	10	12	45

* Where 1 = very good/good

$\chi^2 = 10.209$

d.f. = 6

$p > 0.10$

Cells with Expected Frequency (EF) < 5 : 75%

Significance should be interpreted with care, since EF > 5 criteria is not met.

Table 4.25
Durability Quality Evaluation by Channel Types
 (Responses to Question II.1/b)

Durability Quality Evaluation	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very good/good	2	2	2	1	7
	28.6	28.6	28.6	14.3	17.0
	22.2	16.7	22.2	9.1	
	4.9	4.9	4.9	2.4	
neither good/nor poor	5	8	7	5	25
	20.0	32.0	28.0	20.0	61.0
	55.6	66.6	77.8	45.5	
	12.2	19.5	17.0	12.2	
poor/very poor	2	2	-	5	9
	22.2	22.2		55.6	22.0
	22.2	16.7		45.5	
	4.9	4.9		12.2	
Column Total	9	12	9	11	41
	22.0	29.3	22.0	26.8	100.0
Mean*:	2.00	2.00	1.78	2.36	
Number of Firms Contacted	10	13	10	12	45

* Where 1 = very good/good

$\chi^2 = 6.54$

d.f. = 6

$p > 0.10$

Cells with Expected Frequency (EF) < 5 : 67%

Significance should be interpreted with care, since EF > 5 criteria is not met.

The calculations throughout the Tables 4.23 to 4.25 show that statistical significance cannot be ensured for H_6 ; that is the evaluations based on the Turkish WRW quality factors differ among the four channel types, hence H_6 is rejected.

4.5.2. Evaluations about the Material Quality

a) Importance Attached to Material Quality Factors for WRW Products

Material quality evaluations were further investigated by asking the level of importance attached to the three determinant factors; namely, the standardization level of texture in textile fabrics, the solidity of colors, the quality of input products. Material quality was measured for both knitwear and woven WRW products. Knitwear products were grouped as I: T-shirt and sweatshirt knit, and II: Pullover knit.

The ordinal nature of the scale used about material quality factors allowed for calculations of the weighted mean ranks in order to reveal the slight differences in ranking of these factors according to their level of importance.

For knitwear and woven WRW products, "standardization level of texture in textile fabrics" is the most important material factor, followed by "solidity of colors" and "quality of input products". However, "Texture standardization in textile fabrics" seems to be the most important factor in the case of woven garments (mean rank = 1.35), followed by knitwear I (mean rank = 1.45), and knitwear II (mean rank = 1.55). "Solidity of colors" seems to be more important in case of knitwear group I than either of woven garments or knitwear group II. "Quality of input products" is the least important evaluated quality factor for all three types of products, especially for knitwear group II (Table 4.26).

Although there were three factors of material quality mentioned in Question II.2/a, the ranking was done up to the fourth level of importance because the question covered also the "other" choice criteria. The fourth level of importance was attached to the "other" factor of material quality which was mentioned mostly as labor quality. But this criteria will later be taken into consideration as a factor of processing quality.

Table 4.26
Importance Level of Material Quality Factors
(Responses to Question II.2/a)

Material Quality Factors			Product Items		
			Knitwear I	Knitwear II	Woven Garments
Standardization Level in Textile Fabrics:	ranked as*	1	13	16	15
		2	5	2	3
		3	2	2	2
		4	-	2	-
	missing		<u>25</u>	<u>23</u>	<u>25</u>
			45	45	45
	Mean Rank:		1.45	1.55	1.35
Solidity of Colors:	ranked as	1	7	4	4
		2	13	13	14
		3	1	3	2
		4	1	-	-
	missing		<u>23</u>	<u>25</u>	<u>25</u>
			45	45	45
	Mean Rank:		1.82	1.95	1.90
Quality of Input Products: (i.e. zips, buttons)	ranked as	1	1	1	1
		2	2	4	3
		3	17	15	15
		4	-	2	1
	missing		<u>25</u>	<u>23</u>	<u>25</u>
			45	45	45
	Mean Rank:		2.80	2.82	2.80

* Where 1 = most important

b) Material Quality Evaluations for Turkish WRW Products

The scale used in measuring the evaluations has six points, ranging from very often to never for the occurrence of defects in the textile fabrics and in colors of the material used; it has five points, ranging from very good to very poor for the quality level of input products such as zips and buttons used as material for the production of Turkish WRW's.

Table 4.27 shows the evaluations for Turkish WRW products with respect to the material quality factors, together with the respective means and standard deviations.

The most frequently occurring faults are "warp and weft faults" and "slack, failing fibres, holes, stretches" in the textile fabrics. In colors, there are "deviations" and "color stains".

The "quality of input products" were evaluated to be better than the "standardization of texture in textile fabrics" and the "solidity of colors" based on a five point rating scale ranging from very good to very poor. Among the input products the worst evaluations were given for "zips" and "press-buttons". The best evaluation were given for label and for "thread" used. There was also a large consensus among respondents on the rating of thread used, as indicated by the small standard deviation of 0.88 (Table 4.27).

In general it can be concluded that the occurrence of quality defects in textile fabrics and colors are at middle level. The quality of input products were rated to be between good and middle level.

c) Material Quality Evaluations for Turkish WRW Products by Channel Types

The ratings for material quality factors of Turkish WRW products were cross-tabulated with different levels of the distribution channel network in order to test hypothesis H_{6a} , which is stated as:

H_{6a} : The evaluations for Turkish WRW products based on factors of material quality differ among the four channel types.
(Question II.2/b)

The findings are presented separately in Tables 4.28 to 4.30, for the material quality factors textile fabrics, colors and input products.

Table 4.27
Evaluations for Turkish WRW Products with Respect to the Material Quality Factors
(Responses to Question II.2/b)

Evaluations	very often		often		sometimes		rarely		very rarely		never		No answer		Mean*	Standard Deviation
	n	%	n	%	n	%	n	%	n	%	n	%	N	AF		
<u>In fabrics there occurs:</u>																
. Warp and weft faults	1	2.4	<u>16</u>	39.0	16	39.0	2	4.9	5	12.2	1	2.4	4	-	2.93	1.127
. Slack, failing fibres - in the fabric, holes and scratches	2	4.7	<u>16</u>	37.2	12	27.9	7	16.3	5	11.6	1	2.3	2	-	3.00	1.195
. Dirtiness as well as strange fibres	4	9.5	7	16.7	11	26.2	<u>15</u>	35.7	3	7.1	2	4.8	3	-	3.29	1.255
. Unpleasant smell	5	11.6	7	16.3	10	23.3	6	14.0	<u>11</u>	25.6	4	9.3	2	-	3.54	1.548
. Darnings, nots	-	-	6	14.6	11	26.8	10	24.4	<u>12</u>	29.3	2	4.9	4	-	3.83	1.160
<u>In Colors there are:</u>																
. Deviations in Colors	3	7.0	10	23.3	18	41.9	7	16.3	4	9.3	1	2.3	2	-	3.05	1.133
. Color Stains	5	11.9	9	21.4	13	31.0	8	19.0	6	14.3	1	2.4	3	-	3.10	1.303
. Running of Colors	3	7.0	5	11.6	<u>18</u>	41.9	8	18.6	8	18.6	1	2.3	2	-	3.37	1.196
	very good		good		neither good/ nor poor		poor		very poor				No answer		Mean*	Standard Deviation
. Standardization level in textile fabrics	-	-	15	40.5	<u>18</u>	48.6	3	8.1	1	2.7	-	-	8	-	2.73	0.732
. Solidity of Colors	3	7.1	11	26.2	<u>21</u>	50.0	5	11.9	2	4.8	-	-	3	-	2.81	0.917
. Quality of Input Products are (in general)	-	-	3	42.9	4	57.1	-	-	-	-	-	-	38	-	2.57	0.535
. Zips	1	2.4	7	17.1	12	29.3	7	17.1	<u>14</u>	34.1	-	-	4	-	3.63	1.199
. Press-buttons	1	2.4	8	19.5	<u>13</u>	31.7	12	29.3	7	17.1	-	-	4	-	3.39	1.070
. Buttons	1	2.4	<u>15</u>	36.6	14	34.1	6	14.6	5	12.2	-	-	4	-	2.98	1.060
. Thread	-	-	<u>18</u>	46.2	14	35.9	6	15.4	1	2.6	-	-	6	-	2.74	0.818
. Label	4	12.1	<u>15</u>	45.5	5	15.2	7	21.2	2	6.1	-	-	12	-	2.64	1.141

* For calculating the mean, the rating scale has been coded as 1 = very often; 6 = never and 1 = very good; 5 = very poor

For the evaluation of Turkish WRW products based on the textile fabrics' quality defects observed by each channel type; the evaluations for five different attributes of textile fabrics' defects (presented in Table 4.27) were summed up. The rating scale was also condensed from six points to three points (Table 4.28).

Table 4.28
Textile Fabrics' Quality Defects by Channel Types
(Responses to Question II.2/b)

Occurrence of Quality Defects	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very often/often	16	25	11	12	64
	25.0	39.1	17.2	18.8	30.5
	35.6	40.3	22.4	22.2	
	7.6	11.9	5.2	5.7	
sometimes/rarely	18	24	29	29	100
	18.0	24.0	29.0	29.0	47.6
	40.0	38.7	59.2	53.7	
	8.6	11.4	13.8	13.8	
very rarely/never	11	13	9	13	46
	23.9	28.3	19.6	28.3	21.9
	24.4	20.9	18.4	24.1	
	5.2	6.2	4.3	6.2	
Column Total	45	62	49	54	210
	21.4	29.5	23.3	25.7	100.0
Mean*:	1.89	1.81	1.96	2.02	
Number of possible mentions for 5 attributes	50	65	50	60	225

* Where 1 = very often/often

$\chi^2 = 8.51$

d.f. = 6

$p > 0.10$

Cells with Expected Frequency (EF) < 5 : None

Hence, EF > 5 criteria is met.

Calculations show that even at $p = 0.10$ level there is no relation between the ratings for textile fabrics' quality defects and the type of channel. Therefore, H_{6a} is rejected for the "textile fabrics" factor of material quality. Although statistically not significant, based on the distribution of responses presented in Table 4.28 it can be observed that those most satisfied with textile fabrics quality are retailers and the least satisfied group are the sourcing firms.

The frequency distributions of producers and sourcing firms' ratings concentrate at "very often" to "rarely" intervals for the occurrence of textile fabrics' quality defects. Among the wholesalers 59.2 per cent and among the retailers 53.7 per cent evaluated the occurrence of textile fabrics' quality defects as "sometimes" or "rarely".

For the evaluation of Turkish WRW products based on the "color quality defects" observed by each channel member, the evaluations for three different attributes of color defects (presented in Table 4.27) were summed up. The rating scale was also condensed from six points to three points (Table 4.29).

Statistical calculations show that there is a relation between the ratings for color quality defects and the type of channel. Therefore, H_{6a} is accepted for the "color factor" of material quality.

Based on the distribution of responses presented in Table 4.29 it can be observed that the least satisfied channel members contacted are sourcing firms and the most satisfied ones are retailers. Among the retailers 75.0 per cent stated that defects in colors occur sometimes or rarely; for 13.9 per cent of retailers defects in colors occur often or very often. Hence, even the most satisfied channel members are actually dissatisfied with the quality of colors in the material. In general, the mean values show that the occurrence of color defects ranges from very often to rarely, stating that there is a color defect problem.

For the evaluation of Turkish WRW products based on the "quality of input products" by each channel member, the evaluations for five different input items (presented in Table 4.27) were summed up. The rating scale was also condensed from five points to three points (Table 4.30).

Statistical calculations show that there is a relation between the ratings for the quality of input products and the type of channel. Therefore, H_{6a} is accepted for the "input products factor" of material quality.

Based on the distribution of responses presented in Table 4.30 it can be observed that the best ratings were given by sourcing firms and the worst ratings came from wholesalers.

Table 4.29
Color Quality Defects by Channel Types
(Responses to Question II.2/b)

Occurance of Quality Defects	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very often/often	8	14	8	5	35
	22.9	40.0	22.9	14.3	27.3
	29.6	40.0	26.7	13.9	
	6.3	10.9	6.2	3.9	
sometimes/rarely	12	17	16	27	72
	16.7	23.6	22.2	37.5	56.3
	44.4	48.6	53.3	75.0	
	9.4	13.3	12.5	21.1	
very rarely/seldom	7	4	6	4	21
	33.3	19.0	28.6	19.0	16.4
	25.9	11.4	20.0	11.1	
	5.5	3.1	4.7	3.1	
Column Total	27	35	30	36	128
	21.1	27.3	23.4	28.1	100.0
Mean*:	1.96	1.71	1.93	1.97	
Number of possible mentions for 3 attributes	30	39	30	36	135

* Where 1 = very often/often

$\chi^2 = 10.68$

d.f. = 6

$p < 0.10$

Cells with Expected Frequency (EF) < 5 : 16.7%

Hence, EF > 5 criteria is met.

Table 4.30
Quality of Input Products Evaluations by Channel Types
(Responses to Question II.2/b)

Quality Level:	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very good/good	16	26	9	19	70
	22.9	37.1	12.9	27.1	35.9
	37.2	48.1	20.0	35.8	
	8.2	13.3	4.6	9.7	
neither good/nor poor	14	17	15	12	58
	24.1	29.3	25.9	20.7	29.7
	32.6	31.5	33.3	22.6	
	7.2	8.7	7.7	6.2	
poor/very poor	13	11	21	22	67
	19.4	16.4	31.3	32.8	34.4
	36.2	20.4	46.7	41.5	
	6.7	5.6	10.8	11.3	
Column Total	43	54	45	53	195
	22.1	27.7	23.1	27.2	100.0
Mean*:	1.93	1.72	2.27	2.06	
Number of possible mentions for 5 items	50	65	50	60	225

* Where 1 = very good/good

$\chi^2 = 12.76$

d.f. = 6

p = 0.05

Cells with Expected Frequency (EF) < 5 : None

Hence, EF > 5 criteria is met.

Frequency distributions show the following: Based on the five different input product items, the quality was rated mainly as "very good" or "good" by 37.2 per cent of producers and by 48.1 per cent of sourcing firms. On the other hand, 46.7 per cent of wholesalers and 41.5 per cent of retailers gave the rating "poor" or "very poor".

In general, it can be concluded that according to the evaluation of Turkish WRW products based on material quality factors, the least satisfied channel members with textile fabrics and colors are the sourcing firms and the most satisfied ones with these two factors are the retailers. Wholesalers are the least satisfied channel members with input products and sourcing firms are the most satisfied channel members in case of input products.

The replies show that there are quality problems based on the defects occurring in colors and textile fabrics, and the quality of input products are at middle level.

4.5.3. Evaluations about the Processing Quality

a) Importance Attached to Processing Quality Factors for WRW Products

The level of importance attached to the three processing quality factors; namely, the equipment used, the manufacturing technique chosen, and the quality of labor force is investigated in this section of the study. Processing quality was measured for knitwear and woven WRW products. Knitwear products were grouped as I: T-shirt and sweatshirt knit, and II: Pullover knit.

The ordinal nature of the scale used about processing quality factors allowed for calculations of the weighted mean ranks in order to reveal the slight differences in ranking these factors according to their level of importance.

As seen in Table 4.31, for knitwear products the "equipment used" is the most important processing quality factor. For knitwear I, the "quality of labor force" is the second important processing quality factor, followed by the "manufacturing technique chosen". For knitwear II, the second important processing quality factor is the "manufacturing technique chosen", and the third is the "quality of labor force". For woven garments the "quality of the labor force" is the most important processing factor, followed by the "equipment used", and by the "manufacturing technique chosen". Among the processing quality factors, the most important ones are the "equipment used" for both knitwear types, and the "quality of labor force" for woven garments. The least importance was attached to the "quality of labor force" in case of knitwear II and to the "manufacturing technique chosen" in case of woven garments (Table 4.31).

Table 4.31
Importance Level of Processing Quality Factors
(Responses to Question II.3/a)

Quality Factors			Product Items		
			Knitwear I	Knitwear II	Woven Garments
<u>Equipment used:</u>	ranked as*	1	8	7	5
		2	8	7	8
		3	3	3	5
		4	-	-	-
	missing		<u>26</u>	<u>28</u>	<u>27</u>
			45	45	45
	Mean Rank:		1.74	1.76	2.00
<u>Manufacturing Technique</u> <u>Chosen</u>	ranked as	1	5	5	5
		2	5	6	4
		3	8	6	9
		4	-	-	-
	missing		<u>27</u>	<u>28</u>	<u>27</u>
			45	45	45
	Mean Rank:		2.17	2.06	2.22
<u>Quality of Labor Force</u>	ranked as	1	6	5	8
		2	5	4	6
		3	7	8	4
		4	-	-	-
	missing		<u>27</u>	<u>28</u>	<u>27</u>
			45	45	45
	Mean Rank:		2.05	2.18	1.78

* Where 1 = most important

Although there were three factors of processing quality in the question asked, the ranking was done up to the fourth level of importance because the question covered also the "other" criteria. The fourth level of importance was attached to the "other" factor which was mostly stated as "flexibility in and adaptability to new model ideas" and the "cleanliness of the plant".

b) Processing Quality Evaluations for Turkish WRW Products

Table 4.32 shows the evaluations for Turkish WRW products with respect to the processing quality factors, together with the respective means and standard deviations.

Table 4.32
Evaluations for Turkish WRW Products with Respect to the
Processing Quality Factors
(Responses to Question II.3/b)

Evaluations	Equipment Quality		Quality of the Manufacturing Technique		Quality of the Labor Force	
	n	%	n	%	n	%
very good	5	13.2	3	7.9	1	2.6
good	18	47.4	12	31.6	8	20.5
neither good nor poor	10	26.3	19	50.0	19	48.7
poor	4	10.5	4	10.5	10	25.6
very poor	1	2.6	-	-	1	2.6
No answer	<u>7</u>	<u>-</u>	<u>7</u>	<u>-</u>	<u>6</u>	<u>-</u>
	45	100.0	45	100.0	45	100.0
Mean*:	2.42		2.63		3.05	
Standard Deviation:	0.948		0.786		0.826	

* For calculating the mean, the rating scale has been coded as
1 = very good, 2 = good, 3 = neither good nor poor, 4 = poor, 5 = very poor.

The equipment quality was rated mainly as being good or nearly good. The quality of the manufacturing technique and the quality of the labor force were evaluated mainly neutrally. There was also a large consensus among the respondents as indicated by the small standard deviations (Table 4.32).

In general, it can be concluded that processing quality of the Turkish WRW products has been evaluated to be at middle level; that is, neither too advanced nor too backward. In fact, the evaluation is slightly in the positive direction for equipment and manufacturing technique quality.

c) Processing Quality Evaluations for Turkish WRW Products by Channel Types

The ratings for processing quality factors of Turkish WRW products were cross tabulated with different levels of the distribution channel network in order to test hypothesis H_{6b} , which is stated as:

H_{6b} : The evaluations for Turkish WRW products based on factors of processing quality differ among the four channel types.
(Question 11.3/b).

The findings are presented in Tables 4.33 to 4.35 for processing quality factors; namely, equipment used, manufacturing technique and labor force quality separately. The rating scale was also condensed from five points to three.

Calculations in Table 4.33 show that even at $p = 0.10$ level there is no relation between the quality evaluations of the equipment used and the type of channel. Hence, the H_{6b} is rejected for the equipment factor in processing quality factors of Turkish WRW products.

Although statistically not significant, based on the distribution of responses in Table 4.33, it can be observed that the best rating for the quality of equipment used in manufacturing the Turkish WRW products was done by sourcing firms. The responding producers, wholesalers and retailers rated the quality of equipment used at the same level, as shown by the means 1.63, 1.63 and 1.64 respectively.

Frequency distributions show that 62.5 per cent of producers, 72.7 per cent of sourcing firms, 50.0 per cent of wholesalers and 54.5 per cent of retailers evaluated the quality of the equipment used for the production of Turkish WRW products as very good or good.

Table 4.33

Evaluations for the Quality of the Equipment Used by Channel Types
(Responses to Question II.3/b)

Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very good/good	5 21.7 62.5 13.2	8 34.8 72.7 21.1	4 17.4 50.0 10.5	6 26.1 54.5 15.8	23 60.6
neither good/nor poor	1 10.0 12.5 2.6	3 30.0 27.3 7.9	3 30.0 37.5 7.9	3 30.0 27.3 7.9	10 26.3
poor/very poor	2 40.0 25.0 5.3	-	1 20.0 12.5 2.6	2 40.0 18.2 5.3	5 13.2
Column Total	8 21.1	11 28.9	8 21.1	11 28.9	38 100.0
Mean*:	1.63	1.27	1.63	1.64	
Number of Firms Contacted	10	13	10	12	45

* Where 1 = very good/good

 $\chi^2 = 3.97$

d.f. = 6

 $p > 0.10$

Cells with Expected Frequency (EF) < 5 : 83%

Significance should be interpreted with care, since EF > 5 criteria is not met.

Calculations in Table 4.34 show that even at $p = 0.10$ level there is no relation between the quality evaluations of the manufacturing technique used and the type of channel. Hence, the H_{6b} is rejected for the manufacturing technique factor in processing quality of Turkish WRW products.

Although statistically not significant, based on the distribution of responses in Table 4.34 it can be observed that the best rating was given by sourcing firms and the worst rating was given by retailers. The producers and wholesales rated the

manufacturing technique quality of Turkish WRW products at the same level, as shown by the same means.

Frequency distributions show that 75.0 per cent of wholesalers, 50.0 per cent of producers and 45.5 per cent of retailers evaluated the manufacturing technique quality as "neither good nor poor". Among the sourcing firms, for 54.5 per cent the manufacturing technique quality is "very good" or "good".

Table 4.34
Manufacturing Technique Quality Evaluations by Channel Types
(Responses to Question II.3/b)

Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very good/good	3	6	2	4	15
	20.0	40.0	13.3	26.7	39.5
	37.5	54.5	25.0	36.4	
	7.9	15.8	5.3	10.5	
neither good/nor poor	4	4	6	5	19
	21.1	21.1	31.6	26.3	50.0
	50.0	36.4	75.0	45.5	
	10.5	10.5	15.8	13.2	
poor/very poor	1	1	-	2	4
	25.0	25.0		50.0	10.5
	12.5	9.1		18.2	
	2.6	2.6		5.3	
Column Total	8	11	8	11	38
	21.1	28.9	21.1	28.9	100.0
Mean*:	1.75	1.55	1.75	1.82	
Number of Firms Contacted	10	13	10	12	45

* Where 1 = very good/good

$\chi^2 = 4.04$

d.f. = 6

$p > 0.10$

Cells with Expected Frequency (EF) < 5 : 83%

Significance should be interpreted with care, since EF > 5 criteria is not met.

Calculations in Table 4.35 show that even at $p = 0.10$ level there is no relation between the evaluations for the quality of the labor force and the type of channel. Hence, the H_{0b} is rejected for the labor force quality factor in the processing of Turkish WRW products.

Although statistically not significant, based on the distribution of responses in Table 4.35 it can be observed that the best ratings were given by wholesalers and the worst ones were given by retailers with mean values 1.88 and 2.36, respectively.

Table 4.35
Evaluations for the Quality of the Labor Force by Channel Types
(Responses to Question II.3/b)

Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very good/good	2	4	2	1	9
	22.2	44.4	22.2	11.1	23.1
	25.0	33.3	25.0	9.1	
	5.1	10.3	5.1	2.6	
neither good/nor poor	4	5	5	5	19
	21.1	26.3	26.3	26.3	48.7
	50.0	41.7	62.5	45.5	
	10.3	12.8	12.8	12.8	
poor/very poor	2	3	1	5	11
	18.2	27.3	9.1	45.5	28.2
	25.0	25.0	12.5	45.5	
	5.1	7.7	2.6	12.8	
Column Total	8	12	8	11	39
	20.5	30.8	20.5	28.2	100.0
Mean:	2.00	1.92	1.88	2.36	
Number of Firms Contacted	10	13	10	12	45

* Where 1 = very good/good

$\chi^2 = 3.90$

d.f. = 6

$p > 0.10$

Cells with Expected Frequency (EF) < 5 : 83%

Significance should be interpreted with care, since EF > 5 criteria is not met.

Frequency distributions show that 50.0 per cent of producers, 41.7 per cent of sourcing firms 62.5 per cent of wholesalers and 45.5 per cent of retailers evaluated the labor force quality factor of Turkish WRW products as "neither good nor poor". For another 45.5 per cent of the retailers this quality factor is rated as "poor" or "very poor".

In general, it can be concluded that according to the evaluations of Turkish WRW products based on processing quality factors, the least satisfied channel members are retailers. Sourcing firms are the most satisfied channel members with the quality of the manufacturing technique and the quality of the equipment used. The best rating for the labor force quality was given by wholesalers.

The calculations throughout the Tables 4.33 to 4.35 show that statistical significance cannot be ensured for H_{6b} that the evaluations based on the processing quality factors of Turkish WRW products differ among the four channel types, hence, H_{6b} is rejected.

4.5.4. Evaluations about the Manufacturing Technique Quality

a) Importance Attached to Manufacturing Technique Quality Factors for WRW Products

The level of importance attached to the manufacturing technique quality was measured based on four determinant factors; namely, cutting technique, sewing, coloring and finish processing/refinement. The manufacturing technique quality was measured for knitwear and woven WRW products. Knitwear products were grouped as I: T-shirt and sweatshirt knit, and II: pullover knit.

The ordinal nature of the scale used to measure the importance of manufacturing technique quality factors allowed for calculations of the weighted mean ranks in order to reveal the slight differences in rank.

As seen in Table 4.36, for knitwear and woven garments, the most important factor for the manufacturing technique quality is the "cutting technique", followed by "sewing", "coloring"; and at fourth place is the "finish processing/refinement". However, "cutting technique" seems to be most important in the case of woven garments, followed by knitwear I, and knitwear II. "Sewing" seems to be more important for knitwear I than for knitwear II and woven garments. The lowest importance rankings were attached to "finish processing/refinement" in the case of both knitwear I and woven garments.

Table 4.36
Importance Level of Manufacturing Technique Quality Factors
 (Responses to Question II.4/a)

Quality Factors			Product Items		
			Knitwear I	Knitwear II	Woven Garments
Cutting technique	ranked as*	1	13	11	15
		2	3	2	2
		3	3	3	2
		4	2	3	1
	missing		<u>24</u>	<u>26</u>	<u>25</u>
			45	45	45
	Mean Rank:		1.71	1.89	1.45
Sewing	ranked as	1	5	3	1
		2	12	13	14
		3	2	2	5
		4	1	1	1
	missing		<u>25</u>	<u>26</u>	<u>24</u>
			45	45	45
	Mean Rank:		1.95	2.05	2.30
Coloring	ranked as	1	1	2	1
		2	5	5	3
		3	9	8	8
		4	4	4	7
	missing		<u>26</u>	<u>26</u>	<u>26</u>
			45	45	45
	Mean Rank:		2.84	2.74	3.11
Finish Processing/Refinement	ranked as	1	2	3	2
		2	-	-	1
		3	5	5	5
		4	12	10	11
	missing		<u>26</u>	<u>27</u>	<u>26</u>
			45	45	45
	Mean Rank:		3.42	3.22	3.32

* Where 1 = most important.

b) Manufacturing Technique Quality Evaluations for Turkish WRW Products

Table 4.37 shows the satisfaction levels with the manufacturing technique quality factors for Turkish WRW products, together with the respective means and standard deviations.

The "cutting technique" was rated mainly as being satisfactory (mean = 2.73). The three components of cutting technique were evaluated as follows: The "sit and fit" of Turkish WRW products to the body was mainly rated as being satisfactory (mean = 2.65), "cut and style" and the "avoidance of diagonal stretch" were rather evaluated neutrally with means 2.80 and 2.81, respectively. Consensus can be observed for evaluations related to "sit and fit" and "cut and style" in the replies, as indicated by the small standard deviations (Table 4.37).

"Sewing" was rated as "neither satisfactory nor unsatisfactory" by the responding firms (mean = 3.00). Among the three components of sewing, "fineness of seams" and "straightness of seams" were mainly rated neutrally. For "cleanliness of seams and borders", although the replies mainly expand from satisfactory to unsatisfactory intervals with a mean of 2.98, this component also shows a neutral rating (Table 4.37).

"Coloring" was rated to be mainly as being somewhat satisfactory (mean = 2.86). The most observed coloring defects are stated to be "color stains" (mean = 3.07). "Deviations in colors" occur sometimes, "run of colors" and "deviations in designs" for Turkish WRW products occur "sometimes" or "rarely". For the coloring defects, a dispersion among the replies can be observed at each part of the rating scale as indicated by the large standard deviations (Table 4.37).

"Finish Processing/Refinement" is a factor of manufacturing technique quality which helps to ensure "durability" of a WRW product. In this refinement step of manufacturing, the WRW product is treated in a way to obtain solidity for wash and dry clean; elasticity and resistance to different factors. These treatments prevent product wear.

The ratings in Table 4.37 show that for Turkish WRW products the "solidity for wash and dry clean" and the "elasticity and stretch" are at somewhat satisfactory level with means of 2.67 and 2.69, respectively. For "finish ironing" and "resistance to shrink" the ratings were at "neither satisfactory nor unsatisfactory" level with means 3.00 and 3.03, respectively. Among the replies consensus can be observed for evaluations related to "resistance to wear out", "solidity for wash and dry clean", and "crease resistance" mainly, as indicated by the small standard deviations.

Table 4.37

Evaluations for Turkish WRW Products with Respect to the Manufacturing Technique Quality Factors
(Responses to Question II.4/b)

<u>Evaluations</u> about	very satisfactory (n)	satisfactory (n)	neith.satisf./ nor unsatisf. (n)	unsatisfactory (n)	very unsatisfactory (n)	No answer (n)	Mean*	Standard Deviation	
<u>Cutting Technique:</u>	1	11	9	4	1	19	2.73	0.919	
. the sit and fit of WRW	1	19	15	3	2	5	2.65	0.864	
. cut and style	1	13	20	3	2	6	2.80	0.833	
. avoidance of diagonal stretch	5	7	16	6	2	9	2.81	1.064	
<u>Sewing:</u>	3	4	5	8	1	24	3.00	1.183	
. fineness of seams	4	7	19	9	1	5	2.90	0.955	
. cleanness of seams and borders	2	11	15	12	1	4	2.98	0.935	
. straightness of seams	3	6	21	9	2	4	3.02	0.935	
<u>Coloring:</u>	3	10	15	5	3	9	2.86	1.046	
Coloring defects are:	very often (n)	often (n)	sometimes (n)	rarely (n)	very rarely (n)	never (n)	No answer (n)	Mean*	Standard Deviation
. Color stains	3	12	13	8	5	1	3	3.07	1.218
. Deviations in colors	5	8	15	8	6	1	2	3.12	1.276
. Run of colors	2	9	13	8	10	-	3	3.36	1.206
. Deviations in designs	3	7	13	7	11	2	2	3.51	1.352
<u>Finish Processing/Refinement to ensure Durability</u>	very satisfactory (n)	satisfactory (n)	neith.satisf./ nor unsatisf. (n)	unsatisfactory (n)	very unsatisfactory (n)	No answer (n)	Mean*	Standard Deviation	
. solidity for wash and dry clean	1	14	14	3	1	12	2.67	0.816	
. elasticity and stretch	2	14	14	5	1	9	2.69	0.889	
. resistance to wear out	1	13	17	4	-	10	2.69	0.718	
. crease resistance	1	14	11	8	-	11	2.77	0.855	
. resistance to color run	1	11	17	5	2	9	2.89	0.887	
. finish ironing	2	6	16	4	3	14	3.00	1.000	
. resistance to shrink	1	8	18	5	3	10	3.03	0.923	

* For calculating the mean, the rating scale has been coded as 1 = very satisfactory, 5 = very unsatisfactory and 1 = very often, 6 = never

In general, it can be concluded that manufacturing technique quality of the Turkish WRW products has been evaluated to be close to "neither satisfactory nor unsatisfactory" level for all the factors considered.

c) Manufacturing Technique Quality Evaluations for Turkish WRW Products by Channel Types

The ratings for manufacturing technique quality factors of Turkish WRW products were cross-tabulated with different levels of the distribution channel network in order to test hypothesis H_{6c} , which is stated as:

H_{6c} : The evaluations for Turkish WRW products based on factors of manufacturing technique quality differ among the four channel types.
(Question II.4/b)

The findings are presented in Tables 4.38 to 4.41, for the manufacturing technique quality factors cutting technique, sewing, coloring and finish processing separately.

For the evaluation of Turkish WRW products based on the cutting technique quality level by channel types, the evaluations for three different attributes of cutting technique (given in Table 4.37) and the general ratings for this factor were summed up. The rating scale was also condensed from five points to three (Table 4.38).

Calculations show that even at $p = 0.10$ level there is no relation between the ratings for cutting technique and the type of channel. Therefore, H_{6c} is rejected for the cutting factor of manufacturing technique quality.

Although statistically not significant, based on the distribution of responses presented in Table 4.38 it can be observed that the producers and retailers are the most satisfied channel members with mean values 1.67 and 1.68, respectively. Among all four channel types the satisfaction level is not very low. The majority in all four channel types evaluated the cutting technique of Turkish WRW products as "very satisfactory/satisfactory" or there is a neutral rating.

Frequency distributions of the responding producers, sourcing firms and retailers concentrate at scale values specified as "very satisfactory/satisfactory" and are at the "neutral" position. More than 1/2 of the responding wholesalers evaluated the cutting technique of Turkish WRW products neutrally (Table 4.38).

Table 4.38
Evaluations for Quality of Cutting Technique by Channel Types
 (Responses to Question II.4/b)

Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very satisfactory/satisfactory	12	18	9	19	58
	20.7	31.0	15.5	32.8	41.2
	44.4	42.9	29.0	46.3	
	8.5	12.8	6.4	13.5	
neither satisfactory/nor unsatisfactory	12	16	16	16	60
	20.0	26.7	26.7	26.7	42.5
	44.4	38.1	51.6	39.0	
	8.5	11.3	11.3	11.3	
unsatisfactory/very unsatisfactory	3	8	6	6	23
	13.0	34.8	26.1	26.1	16.3
	11.1	19.0	19.4	14.6	
	2.1	5.7	4.3	4.3	
Column Total	27	42	31	41	141
	19.1	29.8	22.0	29.1	100.0
Mean*:	1.67	1.76	1.90	1.68	
Number of possible mentions for 4 attributes	40	52	40	48	180

* Where 1 = very satisfactory/satisfactory $\chi^2 = 3.29$ d.f. = 6 $p > 0.10$

Cells with Expected Frequency (EF) < 5 : 8%

EF > 5 criteria is met.

In short, the evaluations of the four channel types are rather similar and are positive when not neutral.

For the evaluation of Turkish WRW products based on the sewing quality level by channel types, the evaluations for three different attributes of sewing (given in Table 4.37) and the general ratings for this factor were summed up. The rating scale was also condensed from five points to three points (Table 4.39).

Table 4.39
Evaluations for Quality of Sewing by Channel Types
 (Responses to Question II.4/b)

Count
 Row Percent
 Column Percent
 Total Percent

Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very satisfactory/satisfactory	9	15	8	8	40
	22.5	37.5	20.0	20.0	28.0
	31.0	34.9	26.7	19.5	
	6.3	10.5	5.6	5.6	
neither satisfactory/nor unsatisfactory	14	15	13	18	60
	23.3	25.0	21.7	30.0	42.0
	48.3	34.9	43.3	43.9	
	9.8	10.5	9.1	12.6	
unsatisfactory/very unsatisfactory	6	13	9	15	43
	14.0	30.2	20.9	34.9	30.1
	20.7	30.2	30.0	36.6	
	4.2	9.1	6.3	10.5	
Column Total	29	43	30	41	143
	20.3	30.1	21.0	28.7	100.0
Mean*:	1.90	1.95	2.03	2.17	
Number of possible mentions for 4 attributes	40	52	40	48	180

* Where 1 = very improved/satisfactory $\chi^2 = 4.17$ d.f. = 6 $p > 0.10$

There are no cells with Expected Frequency (EF) < 5.

Hence EF > 5 criteria is met.

Calculations show that even at $p = 0.10$ level there is no relation between the ratings for sewing and the type of channel. Therefore, H_{6c} is rejected for the sewing factor of manufacturing technique quality.

Although statistically not significant, based on the distribution of responses presented in Table 4.39 it can be observed that among all four channel types the mean values show a neutral rating for the sewing quality of Turkish WRW products.

Frequency distributions of the responding firms show that all the scale values from "very satisfactory" to "very unsatisfactory" were stated for the sewing quality attributes at least by 20.0 per cent of the firms.

In short although all four channel types show nearly an equal distribution of their replies at three scale positions, for producers and sourcing firms the evaluations are rather in positive direction whereas, for retailers it is in negative direction and for wholesalers it is highly neutral.

For the evaluation of Turkish WRW products based on coloring quality level in manufacturing by channel types, the evaluations for four different attributes of coloring (given in Table 4.37) were summed up. The rating scale was also condensed from six points to three points (Table 4.40).

Calculations show that even at $p = 0.10$ level there is no relation between the ratings for quality of coloring and the type of channel. Therefore, H_{6c} is rejected for the coloring quality factor of manufacturing technique.

Although statistically not significant, based on the distribution of responses presented in Table 4.40 it can be observed that all responding channel members mainly stated coloring defects to occur "sometimes" or "rarely", as shown by mean values 1.91, 2.02, 1.74 and 1.98, respectively. Among the sourcing firms 32.7 per cent of the replies present a positive evaluation and among wholesalers 35.9 per cent of the replies present a negative evaluation for the occurrence of coloring defects. Hence, the worst rating about the coloring defects in manufacturing of Turkish WRW products was given by wholesalers.

Finish processing, as the final step in manufacturing technique, ensures also the durability of the WRW products. For the evaluation of Turkish WRW products based on this factor by channel types, the evaluations for seven different attributes of finish processing (given in Table 4.37) were summed up. The rating scale was also condensed from five points to three points (Table 4.41).

Table 4.40
Coloring Defects by Channel Types
 (Responses to Question II.4/b)

Occurrence of coloring defects	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very often/often	9	16	14	10	49
	18.4	32.7	28.6	20.4	28.8
	28.1	30.8	35.9	21.3	
	5.3	9.4	8.2	5.9	
sometimes/rarely	17	19	21	28	85
	20.0	22.4	24.7	32.9	50.0
	53.1	36.5	53.8	59.6	
	10.0	11.1	12.4	16.5	
very rarely/never	6	17	4	9	36
	16.7	47.2	11.1	25.0	21.2
	18.8	32.7	10.3	19.1	
	3.5	10.0	2.4	5.3	
Column Total	32.0	52	39	47	170
	18.8	30.6	22.9	27.7	100.0
Mean*:	1.91	2.02	1.74	1.98	
Number of possible mentions for 4 attributes	40	52	40	48	180

* Where 1 = very often/often

$$\chi^2 = 10.23$$

$$d.f. = 6$$

$$p > 0.10$$

There are no cells with Expected Frequency (EF) < 5.

Hence, EF > 5 criteria is met.

Table 4.41
Evaluations for the Quality of Finish Processing by Channel Types
 (Responses to Question II.4/b)

Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very satisfactory/satisfactory	30	28	11	20	89
	33.7	31.5	12.4	22.5	37.1
	60.0	32.9	39.3	26.0	
	12.5	11.7	4.6	8.3	
neither satisfactory/nor unsatisfactory	19	32	16.0	40	107
	17.8	29.9	14.9	34.4	44.6
	38.0	37.6	57.1	51.9	
	7.9	13.3	6.7	16.7	
unsatisfactory/very unsatisfactory	1	25	1	17	44
	2.3	56.8	2.3	38.6	18.3
	2.0	29.4	3.6	22.1	
	0.4	10.4	0.4	7.1	
Column Total	50	85	28	77	240
	20.8	35.4	11.7	32.1	100.0
Mean*:	1.42	1.96	1.64	1.96	
Number of possible mentions for 7 attributes	70	91	70	84	315

* Where 1 = very satisfactory/satisfactory $\chi^2 = 30.27$ d.f. = 6 p = 0.005

There are no cells with Expected Frequency (EF) < 5.

Hence, EF > 5 criteria is met.

Statistical calculations show that there is a relation between the ratings for finish processing quality of Turkish WRW products and the type of channel. Therefore, H_{6c} is accepted for this factor as ensuring the durability of WRW products.

Based on the distribution of responses presented in Table 4.41 it can be observed that the most satisfied channel members are producers, followed by wholesalers with mean values 1.42 and 1.64, respectively. Sourcing firms and retailers evaluated the quality of finish processing of Turkish WRW products rather neutrally (mean values = 1.96).

Frequency distributions show that level of dissatisfaction is only 2.0 per cent of the responding producers and 3.6 per cent of the responding wholesalers. However, the response rate of wholesalers to the seven attributes of finish processing quality was 40.0 per cent, which is quite low.

In general it can be concluded that related to the manufacturing technique quality in processing the Turkish WRW products, the best ratings were given by producers for the factors cutting, sewing and finish processing; by sourcing firms for the coloring factor. The worst ratings were given by wholesalers for cutting and coloring; by retailers for sewing and by retailers and sourcing firms for finish processing. Even the worst ratings do not give a negative picture but rather a neutral evaluation about the manufacturing technique quality of Turkish WRW products, and the best ratings for sewing and coloring fall also close to the "neutral" interval of the scale.

Comparison of the ratings for the four manufacturing technique quality factors shows that for producers and wholesalers finish processing of Turkish WRW products are better than the other three factors. Cutting is at second place, followed by sewing and at least satisfactory is the coloring. For sourcing firms and retailers cutting is evaluated better than the other three factors. For sourcing firms, the second best evaluation is given for sewing, followed by finish processing and coloring. For retailers finish processing gets the second best evaluation, followed by coloring and sewing.

4.5.5. Quality Control for WRW Products

The execution of quality control practices, the methods used for quality control and the reactions of firms in case of quality defects and reasons behind quality defects are analysed in this part of the study.

a) Execution of the Quality Control Practices

The quality control practices are executed in Turkey through the producer, in Turkey and/or in FRG through the distribution channel members importing WRW products and/or a specialized quality control firm. More than one of the parties may be involved in the quality control practices.

Table 4.42 shows that 71.1 per cent of the firms contacted mentioned "producers in Turkey" being involved in quality control practices. When this type of quality control execution is chosen, it is used by 62.5 per cent of firms both during and after production.

For 97.8 per cent of the firms contacted, distribution channel members execute the quality control. This quality control practice is used by 22.7 per cent of the responding firms, both during and after production in Turkey as well as after sample and complete delivery in FRG. For the execution of the quality control practices only 33.3 per cent of the firms contacted utilized the services of a specialized quality control firm. When this type of quality control execution is used, it is either during production in Turkey (26.7 per cent) or both during and after production in Turkey (20.0 per cent) or both after sample and complete delivery in FRG, as mentioned by again 20.0 per cent of the responding firms (Table 4.42).

In general, it can be concluded that the most preferred way to practice quality control is execution of the quality control both during and after production in Turkey, when the quality control is executed through the producers in Turkey. When the quality control is executed through the distribution channel members in FRG, the most preferred way to practice it is both during and after production in Turkey as well as after sample and complete delivery in FRG.

b) Methods of Quality Control Used

The methods of quality control chosen by the firms contacted were analysed based on four major categories: Initial sample control, incoming inspection, vendor rating and vendor survey (Sandholm, 1987). "Initial sample control" stated in the field study has a different meaning than that defined in the literature review part of the study. It is rather related to the quality control done by the distributor itself, i.e. the contacted firm, after receiving the sample ordered. It does not cover the sample inspection of the firms' customers. "Incoming inspection" is the control of raw materials before the production of WRW products starts. "Vendor rating" is the study of results of previous deliveries ordered. "Vendor survey" is expert opinion

Table 4.42
The Execution of Quality Control Practices
(Responses to Question II.5)

Quality Control Executed through	n	%	%
<u>Producers in Turkey</u>	<u>32</u>	<u>71.1</u>	
. during production	4	8.9	12.5
. after completion of production	8	17.8	25.0
. during and after poduction	20	44.4	62.5
. No answer	13	28.9	-
<u>Distributors in FRG</u>	<u>44</u>	<u>97.8</u>	
. during production in Turkey	4	8.9	9.1
. after production before delivery in Turkey	5	11.1	11.4
. during and after production in Turkey	9	20.0	20.5
. after sample delivery in FRG	4	8.9	9.1
. after complete delivery in FRG	4	8.9	9.1
. after sample and complete delivery in FRG	8	17.8	18.2
. in Turkey and in FRG in all cases stated above	10	22.2	22.7
. No answer	1	2.2	-
<u>Quality Control Firms Contacted</u>	<u>15</u>	<u>33.3</u>	
. during production in Turkey	4	8.9	26.7
. after production before delivery in Turkey	1	2.2	6.7
. during and after production in Turkey	3	6.7	20.0
. after sample delivery in FRG	-	-	-
. after complete delivery in FRG	2	4.4	13.3
. after sample and complete delivery in FRG	3	6.7	20.0
. in Turkey and in FRG in all cases stated above	2	4.4	13.3
. No answer	30	66.7	-

development and covers also the quality measures taken such as random sampling control during various stages of production, control of the finished product before and after delivery at the plant and at the warehouse as well as the control of packaging (Sandholm, 1987).

"Initial sample control" is used by 90.5 per cent of the responding firms, "incoming inspection" by 54.8 per cent and "vendor rating" by 40.5 per cent. The responding firms use more than one method of quality control. Here again firms only doing "initial sample control" are 21.4 per cent of the respondents; "initial sample control" and "incoming inspection" together are done by 16.7 per cent; "initial sample control", "incoming inspection" and "vendor rating" together are done again by 16.7 percent of the responding firms. Firms using all four methods of quality control make up 9.5 per cent of the responding ones.

In general it can be concluded that the firms contacted mainly use initial sample control and incoming inspection as methods of quality control.

c) Methods of Quality Control Used by Channel Types

The methods used for quality control of WRW products were cross tabulated with different levels of the distribution channel network in order to test hypothesis H₇, which is stated as:

H₇: The methods of quality control executed differ among the four channel types.
(Question II.6)

The findings are presented in Table 4.44.

Calculations show that even at $p = 0.10$ level there is no relation between the methods of quality control used and the type of channel. Hence, the H₇ is rejected.

Although statistically not significant, based on the distribution of responses in Table 4.44 it can be observed that all four channel types prefer mainly "initial sample control" as the method of quality control. For producers incoming inspection and vendor rating are at the second place after ISC method. For sourcing firms and retailers incoming inspection is the second most frequently used method of quality control and for wholesalers vendor rating and vendor survey are the two most frequently used methods in addition to ISC.

Table 4.43
The Methods of Quality Control
(Responses to Question II.6)

	n	%
Methods:		
Initial Sample Control (I.S.C.)	38*	90.5
Incoming Inspection (I.I.)	23*	54.8
Vendor Rating (V.R.)	17*	40.5
Vendor Survey (V.S.)	15*	35.7
No answer	3*	-
Chosen Combinations:		
I.S.C.	9	21.4
I.S.C. and I.I.	7	16.7
I.S.C., I.I. and V.R.	7	16.7
I.S.C., I.I. and V.S.	4	9.5
I.S.C., I.I., V.R. and V.S.	4	9.5
I.S.C. and V.S.	3	7.1
I.S.C., V.R. and V.S.	3	7.1
V.R.	2	4.8
I.I.	1	2.4
V.S.	1	2.4
I.S.C. and V.R.	1	2.4
No answer	<u>3</u>	<u>-</u>
	45	100.0

* Number of responses exceeds the sample size 45 since multiple responses are observed.

Table 4.44
The Methods of Quality Control by Channel Types
 (Responses to Question II.6)

Quality Control Methods	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
Initial Sample Control - I.S.C.	7	12	7	12	38
	18.4	31.6	18.4	31.6	40.9
	35.0	36.4	41.2	52.2	
	7.5	12.9	7.5	12.9	
Incoming Inspection - I.I.	5	11	2	5	23
	21.7	47.8	8.7	21.7	24.7
	25.0	33.3	11.8	21.7	
	5.4	11.8	2.2	5.4	
Vendor Rating - V.R.	5	5	4	3	17
	29.4	29.4	23.5	17.6	18.3
	25.0	15.2	23.5	13.0	
	5.4	5.4	4.3	3.2	
Vendor Survey - V.S.	3	5	4	3	15
	20.0	33.3	26.7	20.0	16.1
	15.0	15.2	23.5	13.0	
	3.2	5.4	4.3	3.2	
Column Total	20	33	17	23	93*
	21.5	35.5	18.3	24.7	100.0
Number of Responding Firms	8	13	9	12	

* Number of responses exceeds the sample size 45 since multiple responses are observed.

$$\chi^2 = 6.12$$

$$d.f. = 9$$

$$p > 0.10$$

Cells with Expected Frequency (EF) < 5 : 50%

Significance should be interpreted with care, since EF > 5 criteria is not met.

While seven out of eight of the responding producers do initial sample control, 12/13 of sourcing firms, 7/9 of wholesalers and all retailers prefer ISC. Hence, retailers and sourcing firms are more inclined to use ISC as a method of quality control.

d) Reactions in Case of Quality Defects

The reactions of the firms in case of quality defects have been examined by asking respondents to rank order the actions they take when faced with quality defects.

The ordinal nature of the scale used about reactions in case of quality defects allowed for calculations of the weighted mean ranks in order to reveal the slight differences in ranking these reactions according to their preference level.

Table 4.45 shows that the responding firms prefer to solve the quality control problems of the WRW products received from Turkey mainly by "eliminating the quality defects in Turkey". The second ranking action is "requiring a price cut", at third place is "preventing the delivery of the product" from Turkey to FRG. The least likely action to be taken by importing firms is "to go to court".

These findings show that firms rather tend to prefer negotiations and close contact with producers in Turkey. As mentioned by one respondent person: "stopping all further relations would result in finding no more supplier anywhere because in business relations there aren't any without problems, whether big or small.

e) Reasons behind Quality Defects and the Complaint Rates in Case of Quality Defects

The responding people in the firms contacted stated the possible reasons behind the quality defects in Turkish WRW products. The evaluation of the replies to the open ended part of Question 8 are presented in Table 4.46. The response rate for the question was 62.2 per cent.

Among the responding people 46.4 per cent mentioned "different perception of quality and lack of quality consciousness in Turkey with less care in quality control after production" as the reason behind quality defects. The technical deficiencies such as bad coloring and cutting techniques, non-correct measurement tables used are evaluated to be also a strong reason for quality defects (39.3 per cent). The least frequently mentioned reason was the "use of cheap supply material", stated by 10.7 per cent of the responding people (Table 4.46).

The evaluations show that first of all there is a managerial problem. Without solving this, it is difficult to ensure quality. Second there is a technical problem, which can only be solved through the improvements in techniques used in manufacturing as well as through a more qualified labor force.

Table 4.45
Reactions in Case of Quality Defects
(Responses to Question II.7)

Type of Reaction	Ranked as:									Mean Rank
	1	2	3	4	5	6	7	8	Missing	
Trying to eliminate quality defects in Turkey	12	3	3	-	-	-	-	-	27	1.50
Requiring a price cut	6	8	5	1	1	-	-	-	24	2.19
Preventing the delivery of the product	4	6	4	2	1	-	-	-	28	2.41
Sending the delivery back	1	6	5	4	-	2	-	-	27	3.11
Other: Preventing the further delivery to customers and letting production be done in Turkey by another firm	-	-	3	2	-	-	-	-	40	3.40
Letting production be done in another country	-	-	-	3	4	3	-	-	35	5.00
Letting production be done somewhere else and requiring the cost difference from Turkish former supplier	-	-	-	3	3	3	2	-	36	5.36
Stopping all relations	-	-	2	2	3	1	6	1	30	5.67
Going to court	-	-	-	1	-	2	2	7	34	7.18

The firm representatives contacted also stated the complaint rates of their firms to suppliers of WRW products and the complaint rates of their customers to their firm in case of quality defects observed. Complaint rates show the resistance to buying the ordered amounts.

Table 4.47 shows the percentage distributions for complaints to suppliers and for complaints from customers for WRW products from Turkey and in general.

Table 4.46
Reasons Behind Quality Defects
(Responses to Question II.8/c)

Reasons	n*	%
Different perception of quality; lack of quality consciousness and quality control after production	13	46.4
Technical deficiencies; bad coloring and cutting techniques used and use of non-correct measurement tables	11	39.3
Lack of time planning and management for production; capacity overestimation	9	32.1
Lack of diligence, care and interest; short term thinking; mentality	8	28.6
Lack of technical and general know-how; lack of information	7	25.0
Lack of mid-level managers and foremen at intermediate level	5	17.9
Use of cheap supply material	3	10.7
No answer	17	-

* Number of responses exceeds the sample size 45 since multiple responses are observed.

Table 4.47
Complaint Rates for WRW Products in Case of Quality Defects
 (Responses to Question II.8/a,b)

Complaints	n	%
to suppliers of Turkish WRW products		
for: up to 5% of the amount purchased	13	44.8
5% to 10%	8	27.6
11% to 30%	7	24.1
more than 30%	1	3.5
No answer	<u>16</u>	<u>-</u>
	45	100.0
to suppliers of WRW products from other countries		
for: up to 5% of the amount purchased	11	42.3
5% to 10%	11	42.3
11% to 30%	2	7.7
more than 30%	2	7.7
No answer	<u>19</u>	<u>-</u>
	45	100.0
from customers in general		
for: up to 5% of the amount purchased	13	56.5
5% to 10%	7	30.4
11% to 30%	2	8.7
more than 30%	1	4.3
No answer	<u>22</u>	<u>-</u>
	45	100.0
from customers because of Turkish WRW products		
for: up to 5% of the amount purchased	10	52.6
5% to 10%	2	10.5
11% to 30%	4	21.1
more than 30%	3	15.8
No answer	<u>26</u>	<u>-</u>
	45	100.0

The findings reveal that complaint rates, i.e. the resistance to buy the ordered amounts, show similarities for Turkish WRW products and WRW products from other countries. In both cases, the major choice was for amounts "up to five per cent" of the ordered amount. In case of Turkish WRW products the complaint rates from 11 up to 30 per cent of the ordered amounts carry a larger share of the responses than the same percentage rate for WRW products from other countries.

4.5.6. Country Based Comparative Evaluation of Quality for WRW Products

For a country based comparative evaluation of the quality criteria covered so far, the responding firms' representatives had to name up to four countries for each quality criteria, doing "better than", "same as" and "worse than" Turkey.

The findings are summed up in Table 4.48: Among countries evaluated to be doing better in individual quality categories of WRW products, FRG and Italy have been consistently rated as "better than Turkey". In material quality categories, besides FRG and Italy also Hong Kong was rated as "better than Turkey" in all categories and France in colors and input products. Greece was evaluated "same as Turkey" in all three material factors, Portugal was rated as "same as Turkey" for textile fabrics and colors but rated better than Turkey for input products. Countries evaluated as "worse than Turkey" are India and Pakistan in quality of all three material factors, China in colors and input products and East Europe in textile fabrics and colors. For input products, East Europe was rated "same as Turkey".

In case of processing quality, besides the evaluations for FRG and Italy being "better than Turkey", Hong Kong, Far East in general and Europe in general were rated to be "better than Turkey". Countries evaluated "same as Turkey" are Greece and Portugal in all processing quality categories, France in the equipment used; Yugoslavia in all processing categories except in sewing and finish processing/refinement where Yugoslavia was rated as being "worse than Turkey"; North Africa was rated to be also "same as Turkey" except for the quality of the labor force where North Africa was evaluated as "worse than Turkey". Countries evaluated "worse than Turkey" are East Europe, India, Pakistan and China in all processing categories.

In case of durability/sturdiness of a WRW product, besides FRG and Italy also France, Far East and Greece were evaluated to be "better than Turkey". Countries evaluated "same as Turkey" are Yugoslavia, Hong Kong and Portugal except in the case resistance to shrink, where Portugal was rated as being "better than Turkey". Countries evaluated "worse than Turkey" are East Europe, China, India and Pakistan

Table 4.48
Country Based Comparative Quality Evaluation for WRW Products
(Responses to Question II.9)

Quality Criteria Material	Better than Turkey (Mean Rank: 1.00-1.66)*		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
Textile Fabrics	FRG	1.00	Greece	1.77	Yugoslavia	2.50
	Italy	1.27	Portugal	1.94	East Europe	2.67
	Hong Kong	1.33	All Countries	2.20	India	2.75
	Korea	1.33			Pakistan	3.00
	Far East (general)	1.50				
Colors	FRG	1.00	Far East (general)	1.75	India	2.44
	France	1.00	Greece	1.77	Other Far East Countr.	2.60
	Italy	1.13	All Countries	2.00	East Europe	2.67
	Hong Kong	1.43	Portugal	2.18	China	3.00
			Yugoslavia	2.33	Pakistan	3.00
Input Products	FRG	1.00	Greece	1.75	India	2.75
	France	1.00	All Countries	1.83	Pakistan	3.00
	Italy	1.00	Yugoslavia	2.00	Other Far East Countr.	3.00
	Far East (general)	1.25	East Europe	2.00	China	3.00
	Hong Kong	1.33	Korea	2.00		
	Portugal	1.60				

* For calculating the mean the ranking scale is coded as: 1 = Better than Turkey, 2 = Same as Turkey, 3 = Worse than Turkey

Table 4.48
(continued)

Quality Criteria Processing	Better than Turkey (Mean Rank: 1.00-1.66)		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
Equipment used	FRG	1.00	Asia (general)	1.67	East Europe	2.67
	Europe (general)	1.00	Greece	1.77	China	3.00
	Italy	1.22	Portugal	1.82	India	3.00
	Hong Kong	1.25	France	2.00	Pakistan	3.00
	Korea	1.25	Yugoslavia	2.00		
	Far East (general)	1.33	Tailand	2.00		
			North Africa	2.00		
			All Countries	2.00		
			Other Far East Countr.	2.33		
Manufacturing Technique	FRG	1.00	Greece	1.75	East Europe	2.67
	Far East (general)	1.00	All Countries	1.83	India	2.71
	Europe (general)	1.00	Portugal	1.94	Pakistan	3.00
	Italy	1.14	North Africa	2.00	China	3.00
	Hong Kong	1.29	Yugoslavia	2.25		
	France	1.50	Other Far East Countr.	2.33		
	Korea	1.50				
Cutting Technique	FRG	1.00	Yugoslavia	1.67	India	2.57
	Italy	1.00	Greece	1.77	East Europe	2.67
	Europe (general)	1.00	All Countries	1.86	China	3.00
	Far East (general)	1.25	Portugal	1.88	Other Far East Countr.	3.00
	Hong Kong	1.33	North Africa	2.00	Pakistan	3.00
	Korea	1.50	Asia (general)	2.00		
			Tailand	2.00		

Table 4.48
(continued)

Quality Criteria	Better than Turkey (Mean Rank: 1.00-1.66)		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
Sewing	FRG	1.00	Greece	1.71	Yugoslavia	2.50
	Italy	1.00	Portugal	1.93	India	2.57
	Europe (general)	1.00	North Africa	2.00	East Europe	2.67
	Far East (general)	1.25	Asia (general)	2.00	China	3.00
	Hong Kong	1.33	Tailand	2.00	Pakistan	3.00
	Korea	1.50	All Countries	2.17	Other Far East Countr.	3.00
Coloring	FRG	1.00	Greece	1.75	India	2.38
	Europe	1.00	Portugal	1.88	East Europe	2.67
	Italy	1.14	Asia (general)	2.00	Pakistan	3.00
	Hong Kong	1.20	North Africa	2.00	China	3.00
	Far East (general)	1.25	Yugoslavia	2.33	Other Far East Countr.	3.00
	Korea	1.50				
Finish Processing/Refinement	FRG	1.00	Greece	1.75	Yugoslavia	2.50
	France	1.00	Portugal	1.75	East Europe	2.67
	Europe	1.00	Asia (general)	2.00	India	2.71
	Italy	1.13	North Africa	2.00	Pakistan	3.00
	Far East (general)	1.33			China	3.00
	Hong Kong	1.43			Other Far East Countr.	3.00
	Korea	1.50				
	All Countries	1.55				

Table 4.48
(continued)

Quality Criteria	Better than Turkey (Mean Rank: 1.00-1.66)		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
Quality of the Labor Force	FRG	1.00	Greece	1.75	India	2.50
	France	1.00	Portugal	1.81	North Africa	2.50
	Italy	1.00	All Countries	1.80	East Europe	2.70
	Europe (general)	1.00	Asia (general)	2.00	China	3.00
	Hong Kong	1.33	Korea	2.00	Other Far East Countr.	3.00
	Far East (general)	1.33	Tailand	2.00	Pakistan	3.00
			Yugoslavia	2.20		
<u>Durability/Sturdiness:</u> Solidity for Wash/Dry Clean	FRG	1.00	Portugal	1.83	East Europe	2.50
	France	1.00	Yugoslavia	2.00	China	3.00
	Far East	1.00	Hong Kong	2.00	India	3.00
	Europe (general)	1.00	North Africa	2.00	Pakistan	3.00
	Italy	1.33	All Countries	2.00		
	Greece	1.50				
Resistance to Shrink	FRG	1.00	Yugoslavia	2.00	East Europe	2.50
	France	1.00	Hong Kong	2.00	India	3.00
	Far East	1.00	North Africa	2.00	Pakistan	3.00
	Europe (general)	1.00	All Countries	2.00	China	3.00
	Portugal	1.25			Other Far East Countr.	3.00
	Italy	1.25				
	Greece	1.50				

Table 4.48
(continued)

Quality Criteria	Better than Turkey (Mean Rank: 1.00-1.66)		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
Resistance to Color Run	FRG	1.00	Portugal	1.83	East Europe	2.50
	France	1.00	Yugoslavia	2.00	India	3.00
	Far East	1.00	Hong Kong	2.00	Pakistan	3.00
	Italy	1.40	All Countries	2.00	China	3.00
	Greece	1.50	Europe (general)	2.00	Other Far East Countr.	3.00
	North Africa	1.50				

in all three categories of durability of WRW products.

In general, it can be concluded that the responding firms evaluated the material, processing and durability quality of WRW products from FRG, Italy, France, Hong Kong and Far East as being better than that of Turkish WRW products. WRW products from Greece, Portugal and Yugoslavia were evaluated to be at same quality level as Turkish WRW products, and those from India, Pakistan and China were rated to be worse than the Turkish WRW products in terms of quality factors covered.

In this preceeding part of the study, quality is analysed as the major physical-functional characteristic of a WRW product; based on material, processing and durability factors and their components. Material quality factors are standardization of texture on textile fabrics, solidity of colors and quality of input products such as zips and buttons. Processing quality factors are the equipment used, manufacturing technique chosen and the labor force quality. Durability quality is ensured through finish processing or refinement of the WRW product as a factor of the manufacturing technique used.

The analysis covers the evaluations of executives from the firms contacted related to the importance attached to these factors as well as to the ratings for Turkish WRW products based on these factors.

In addition, quality control methods used and practices executed are analysed, the reactions of the firms in case of quality defects are stated, and the complaint rates are determined. A country based comparative evaluation of quality for WRW products helps to position different countries operating in the textile and apparel sectors and exporting to the FRG market.

4.6. Evaluations abot the Aesthetic Characteristics of WRW Products

This part of the study concentrates on the optic and haptic attributes which are the major factors of the aesthetic characteristics of a WRW product. Optic attributes appeal to the sense of seeing, haptic attributes appeal to the sense of touching.

4.6.1. Evaluations about Optic and Haptic Attributes

a) Evaluations for Turkish WRW Products

The degree of success of Turkish producers in contributing to the aesthetic characteristics of a WRW product is analysed in this section of the study. A five point rating scale ranging from very good to very poor was used to measure evaluations for seven attributes.

The findings presented in Table 4.49 show that the level of creativity of Turkish producers as related to the aesthetic characteristics of WRW products almost corresponds to market expectations.

The mean ratings revealed that among the optic attributes, "designs and designing" for Turkish WRW products were rated better than "product style and cut" and the "colors, color compositions". Among the haptic attributes, for Turkish WRW products softness related ones were rated to be better than the brilliance or paleness of these products. A larger consensus among the responses can be observed for haptic attributes compared to the optic attributes, as indicated by the standard deviations (Table 4.49).

b) Evaluation of Optic and Haptic Attributes for Turkish WRW Products by Channel Types

The ratings for optic and haptic attributes of aesthetic characteristics of Turkish WRW products were cross tabulated with different levels of the distribution channel network in order to test hypothesis H_8 , which is stated as:

H_8 : The evaluations for Turkish WRW products based on attributes of aesthetic characteristics differ among the four channel types.
(Question II.10)

In order to obtain a clear picture of the evaluations of channel types for optic and haptic attributes individually, the hypothesis H_8 was tested in two separate parts:

H_{8a} : The evaluations for Turkish WRW products based on optic attributes differ among the four channel types.
(Question II.10)

H_{8b}: The evaluations for Turkish WRW products based on haptic attributes differ among the four channel types.
(Question II.10)

The findings are presented in Tables 4.50 to 4.51 for optic and haptic attributes of the aesthetic characteristics of Turkish WRW products.

For the evaluation of Turkish WRW products based on the optic attributes by channel types, the evaluations for three different components (given in Table 4.49) were summed up. The rating scale was also condensed from five points to three points (Table 4.50).

Statistical calculations show that there is a relation between the ratings for optic attributes of Turkish WRW products and the type of channel. Therefore, H_{8a} is accepted for the optic attributes of aesthetic product characteristics.

Based on the distribution of responses presented in Table 4.50 it can be observed that the best ratings for optic attributes were given by retailers and the worst ratings belonged to sourcing firms, with mean values 1.48 and 2.25 respectively. For 1/2 of producers, for about 7/10 of retailers, optic attributes of Turkish WRW products are evaluated as "good" or "very good". For about 1/2 of sourcing firms it is at middle level, for nearly 2/5 of them it is "poor" or "very poor". Among the responding wholesalers 2/5 rated optic attributes as good or very good; and nearly 2/5 stated a neutral evaluation.

For the evaluation of Turkish WRW products based on haptic attributes by channel types, the evaluations for four different components (given in Table 4.49) were summed up. The rating scale was also condensed from five points to three points (Table 4.51).

Statistical calculations show that there is a relation between the ratings for haptic attributes of Turkish WRW products and the type of channel. Therefore, H_{8b} is accepted for the haptic attributes of aesthetic product characteristics.

Based on the distribution of responses presented in Table 4.51 it can be observed that the best ratings for haptic attributes were given by wholesalers and the worst ratings belonged to sourcing firms with mean values 1.5 and 2.10, respectively. For producers and retailers the evaluations fall between positive and neutral points. Among the responding wholesalers 1/2 gave a positive evaluation whereas the other half gave a neutral evaluation. Among the sourcing firms 6/10 gave a neutral evaluation whereas, 3/10 of the evaluations were negative.

Table 4.49

Evaluations for Turkish WRW Products with Respect to the Optic and Haptic Attributes
(Responses to Question II.10)

Aesthetic Attributes	very good		good		neither good/ nor poor		poor		very poor		No answer		Mean*	Standard Deviation
	n	%	n	%	n	%	n	%	n	%	n	%		
<u>Optic Attributes:</u>														
Designs, designing	4	10.0	13	32.5	16	40.0	6	15.0	1	2.5	5	-	2.68	0.944
Product style and cut	3	7.5	14	35.0	13	32.5	7	17.5	3	7.5	5	-	2.83	1.059
Colors, color composition	2	5.0	14	35.0	12	30.0	10	25.0	2	5.0	5	-	2.90	1.008
<u>Haptic Attributes:</u>														
(Surface Attributes)														
Soft touch-softness	2	5.4	14	37.8	15	40.5	5	13.5	1	2.7	8	-	2.70	0.878
Soft fall-elasticity	2	5.6	13	36.1	15	41.7	5	13.9	1	2.8	9	-	2.72	0.882
Smoothness/stiffness	1	2.7	14	37.8	18	48.6	2	5.4	2	5.4	8	-	2.73	0.838
Brillance/paleness	1	2.8	8	22.2	21	58.3	4	11.1	2	5.6	9	-	2.94	0.826

* For calculating the mean, the rating scale has been coded as: 1 = very good, 2 = good, 3 = neither good/nor bad, 4 = bad, 5= very bad.

Table 4.50
Evaluation of Optic Attributes by Channel Types
(Responses to Question II.10)

Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very good/good	12	4	11	23	50
	24.0	8.0	22.0	46.0	41.7
	50.0	11.1	40.7	69.7	
	10.0	3.3	9.2	19.2	
neither good/nor poor	8	19	10	4	41
	19.5	46.3	24.4	9.8	34.1
	33.3	52.8	37.0	12.1	
	6.7	15.8	8.3	3.3	
poor/very poor	4	13	6	6	29
	13.8	44.8	20.7	20.7	24.2
	16.7	36.1	22.2	18.2	
	3.3	10.8	5.0	5.0	
Column Total	24	36	27	33	120
	20.0	30.0	22.5	27.5	100.0
Mean*:	1.67	2.25	1.81	1.48	
Number of possible mentions for 3 attributes	30	39	30	36	135

* Where 1 = very good/good

$\chi^2 = 26.22$

d.f. = 6

p = 0.05

There are no cells with Expected Frequency (EF) < 5.

Hence, EF > 5 criteria is met.

Table 4.51
Evaluation of Haptic Attributes by Channel Types
 (Responses to Question II.10)

Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very good/good	14	6	16	19	55
	25.5	10.9	29.1	34.5	37.7
	46.7	13.6	50.0	47.5	
	9.6	4.1	11.0	13.0	
neither good/nor poor	14	26	16	13	69
	20.3	37.7	23.2	18.8	47.3
	46.7	59.1	50.0	32.5	
	9.6	17.8	11.0	8.9	
poor/very poor	2	12		8	22
	9.1	54.5		36.4	15.1
	6.7	27.3		20.0	
	1.4	8.2		5.5	
Column Total	30	44	32	40	146
	20.5	30.1	21.9	27.4	100.0
Mean*:	1.60	2.10	1.50	1.70	
Number of possible mentions for 4 attributes	40	52	40	48	180

* Where 1 = very good/good

$\chi^2 = 24.12$

d.f. = 6

p = 0.05

Cells with Expected Frequency (EF) < 5 : 17%

EF > 5 criteria is not met.

A comparison of Tables 4.50 and 4.51 shows that the haptic attributes of Turkish WRW products obtained better ratings than the optic attributes from producers, sourcing firms and wholesalers. Only retailers gave a better evaluation for optic attributes compared to that of haptic attributes.

A general hypothesis testing for H_8 was also done through statistical calculations in Table 4.52. In this table, evaluations about the optic and haptic attributes of Turkish WRW products are combined to find out the overall aesthetic appeal.

Table 4.52
Evaluation of Optic and Haptic Attributes by Channel Types
(Responses to Question II.10)

Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very good/good	26 24.8 48.1 9.8	10 9.5 12.5 3.8	27 25.7 45.8 10.2	42 40.0 57.5 15.8	105 39.5
neither good/nor poor	22 20.0 40.7 8.3	45 40.9 56.3 16.9	26 23.6 44.1 9.8	17 15.5 23.3 6.4	110 41.4
poor/very poor	6 11.8 11.1 2.2	25 49.0 31.3 9.4	6 11.8 10.2 2.2	14 27.5 19.2 5.3	51 19.1
Column Total	54 20.3	80 30.1	59 22.2	73 27.4	266 100.0
Mean*:	1.63	2.20	1.64	1.62	
Number of possible mentions for 7 attributes	70	91	70	84	315

* Where 1 = very good/good

$\chi^2 = 42.91$

d.f. = 6

p = 0.05

There are no cells with Expected Frequency $EF < 5$,

Hence $EF > 5$ criteria is met.

Statistical calculations show that there is a relation between the evaluations for aesthetic characteristics of Turkish WRW products and the type of channel. Therefore, H_8 is accepted for aesthetic product characteristics in general.

The best rating was done by retailers (mean value = 1.62) and the worst rating was done by sourcing firms (mean value = 2.20). The ratings of producers, wholesalers and retailers are almost the same (mean values are 1.63, 1.64 and 1.62, respectively) and reflect near positive evaluations. Among the sourcing firms nearly 6/10 stated a neutral rating and about 3/10 stated a negative rating (Table 4.52).

In short, it can be concluded that for optic attributes a positive evaluation was obtained from retailers and also producers; the rating of wholesalers was rather neutral and that of sourcing firms were near negative. For haptic attributes positive ratings were obtained from wholesalers and also producers. The evaluation of retailers was at the middle level, that of sourcing firms were near negative. For both attributes of aesthetic characteristics, positive and neutral evaluations were given by producers, wholesalers, retailers; and negative evaluations were given mostly by sourcing firms.

4.6.2. Country Based Comparative Evaluation of Aesthetic Characteristics for WRW Products

For a country based comparative evaluation of the aesthetic characteristics covered in the preceeding section, the responding firms' representatives were asked to name up to three countries, doing "better than", "same as" and "worse than" Turkey.

The findings are summed up in Table 4.53: In the seven categories of optic and haptic attributes, the same countries were consistently rated to be "better than Turkey". These countries are: FRG, France, Italy, Greece and also European countries in general. Hong Kong and Portugal were consistently rated as being "same as Turkey" in all seven categories of the aesthetic characteristics. Except for colors and color compositions in optic attributes, also Yugoslavia was rated "same as Turkey" in all other categories. Countries evaluated as "worse than Turkey" are mainly East Europe, the Far East in general, Pakistan and China. India was also rated as "worse than Turkey" for designs, designing and product style and cut in optic attributes as well as for smoothness versus stiffness and brilliance versus paleness in haptic attributes.

Table 4.53

Country Based Comparative Evaluation of Aesthetic Characteristics for WRW Products
(Responses to Question II.11)

Aesthetic Characteristics	Better than Turkey (Mean Rank: 1.00-1.66)		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
<u>Optic Attributes:</u> Designs & Designing	FRG	1.00	Hong Kong	1.75	India	2.43
	France	1.00	Portugal	2.00	East Europe	2.50
	Italy	1.00	Other European Coun.	2.00	Far East (general)	2.50
	Europe (general)	1.00	All Countries	2.20	Pakistan	2.75
	Greece	1.56	Yugoslavia	2.33	China	3.00
					Other Far East Countr.	3.00
Product Style & Cut	FRG	1.00	Hong Kong	1.75	East Europe	2.50
	France	1.00	Portugal	2.00	Far East (general)	2.50
	Italy	1.00	Other European Coun.	2.00	India	2.71
	Europe (general)	1.00	All Countries	2.00	Pakistan	2.75
	Greece	1.56	Yugoslavia	2.00	North Africa	3.00
			Asia (general)	2.00	China	3.00
Colors & Color Composition	FRG	1.00	Hong Kong	1.75	East Europe	2.50
	France	1.00	Asia (general)	2.00	Yugoslavia	2.50
	Italy	1.00	Israel	2.00	Far East (general)	2.50
	Europe (general)	1.00	Other European Coun.	2.00	Pakistan	2.75
	Greece	1.56	Portugal	2.10	North Africa	3.00
			All Countries	2.25	China	3.00
			India	2.29	Other Far East Countr.	3.00

Table 4.53
(continued)

Aesthetic Characteristics	Better than Turkey (Mean Rank: 1.00-1.66)		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
<u>Haptic Attributes:</u> Soft touch-softness	FRG	1.00	Hong Kong	1.75	East Europe	2.50
	France	1.00	Portugal	1.80	Far East (general)	2.50
	Italy	1.00	Yugoslavia	2.00	Pakistan	2.67
	Europe (general)	1.00	Other European Coun.	2.00	North Africa	3.00
	Greece	1.60	Asia (general)	2.00	China	3.00
			India	2.25	Other Far East Countr.	3.00
					South America	3.00
Soft fall-elasticity	FRG	1.00	Hong Kong	1.75	East Europe	2.50
	France	1.00	Portugal	1.80	Far East (general)	2.50
	Italy	1.00	Yugoslavia	2.00	Pakistan	2.67
	Europe (general)	1.00	Other European Coun.	2.00	North Africa	3.00
	Greece	1.60	Asia (general)	2.00	China	3.00
			All Countries	2.00	Other Far East Countr.	3.00
			India	2.25	South America	3.00
Smoothness vs Stiffness	FRG	1.00	Hong Kong	1.75	India	2.50
	France	1.00	Portugal	1.80	East Europe	2.50
	Italy	1.00	Yugoslavia	2.00	Far East (general)	2.50
	Europe (general)	1.00	Other European Coun.	2.00	Pakistan	2.67
	Greece	1.60	Asia (general)	2.00	North Africa	3.00
			All Countries	2.00	China	3.00
					Other Far East Countr.	3.00
					South America	3.00

Table 4.53
(continued)

Aesthetic Characteristics	Better than Turkey (Mean Rank: 1.00-1.66)		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
Brilliance vs paleness	FRG	1.00	Hong Kong	1.75	East Europe	2.50
	Europe	1.00	Portugal	1.80	Far East (general)	2.50
	Italy	1.18	Yugoslavia	2.00	India	2.60
	France	1.29	Asia (general)	2.00	Pakistan	2.67
	Greece	1.60	All Countries	2.25	China	3.00
					South America	3.00

In general it can be concluded that in "aesthetic characteristics" which are related to creativity, FRG, France, Italy and Greece are evaluated as better than Turkey; Hong Kong, Portugal, Yugoslavia and in some attributes India are evaluated same as Turkey; East Europe and the Far East in general, Pakistan, China and in some attributes again India are evaluated worse than Turkey.

In the preceeding part of the study, optic and haptic attributes are analysed as the major aesthetic characteristics of a WRW product. The analysis covers the evaluations of executives from the firms contacted related to the ratings for Turkish WRW products based on these attributes. A country based comparative evaluation of aesthetic characteristics for WRW products helps to position different countries operating in the textile-apparel sector and exporting to the FRG market.

4.7. Evaluations about the Social Characteristics of WRW Products

This part of the study concentrates on the social characteristics of WRW products. Two major factors shape the social characteristics of WRW products: fashion and image. Fashion is related to creativity in trend setting. Image is developed based on the country of origin perceptions.

4.7.1. Fashion Related Evaluations

a) Evaluations about Fashion Creation for Turkish WRW Products

The contribution of Turkish producers and of the distributors in FRG to the development of the models in collections as well as the creativity of Turkish fashion-trend makers and designers in developing the collections are analysed in this section of the study.

Table 4.54 shows the opinions and evaluations of the responding firms related to the choice of certain channel members as trend makers in fashion and as collection developers.

Table 4.54
Channel Members Determining Models of Collections and the Reasons
(Responses to Question II.12/a)

The models are determined by:	Producers from Turkey		Wholesalers in FRG		Retailers in FRG	
	n	%	n	%	n	%
Yes	8	22.2	24	85.7	15	57.7
No	28	77.8	4	14.3	11	42.3
No answer	9	-	17	-	19	-
Total	45	100.0	45	100.0	45	100.0
<u>The stated reasons are:</u>						
. Lack of knowledge about the market trend	8	32.0	-	-	-	-
. Knowledge about the market: consumer and customer expectations, market trend, tastes	4	16.0	13	65.0	11	64.7
. The responding firm develops its own models through its designer team	7	28.0	4	20.0	2	11.8
. Model development is done partially in cooperation with producer or wholesaler	3	12.0	1	5.0	2	11.8
. Model development is done by the wholesaler and not the retailer because the retailers require this creative activity from the wholesaler	-	-	1	5.0	2	11.8
. Following developments in fashion in advance: predetermining colors, models collecting information in trade fairs	1	4.0	1	5.0	-	-
. Lack of developing new creative ideas for collections	2	8.0	-	-	-	-
. No answer	20	-	25	-	28	-
Total	45	100.0	45	100.0	45	100.0

As stated by 77.8 per cent of the responding firms, the producers in Turkey do not develop models of collections. Among the reasons mentioned for producers in Turkey not being engaged in this activity is "lack of knowledge about the market trend" at first place (with 32.0 per cent). The second most frequently mentioned reason with 28.0 per cent of responses: "the firms have their designer teams which develop the models".

With 85.7 per cent reply rate, the wholesalers in FRG create models to develop collections. Among the reasons stated "having knowledge about the market" such as consumer and customer expectations, market trend and tastes is the most frequently one, mentioned by 65.0 per cent of the responding firms.

The same reason, "having knowledge about the market" was most frequently (with 64.7 per cent) stated for the retailers as well. With 57.7 per cent response rate, the retailers in FRG determine the models and collections. For both the wholesaler and the retailer groups the second most frequently stated reason is again: "the firms have their designer teams which develop the models" with 20.0 per cent response for wholesalers and 11.8 per cent response rate for retailers, respectively.

The efforts of Turkish fashion trend makers and designers were also evaluated by another question directed to the respondents. Among the responding firms 36.8 per cent think that "Turkish designers and fashion makers are not trend setters yet". Their efforts are still insufficient in creating high fashion outlook and in developing fashion ideas. They have to follow the trends and tastes in the export market so that style development becomes better. About 31.5 per cent stated to have "no experience" with Turkish fashion makers and designers, 21.1 per cent stated to "give their own models to the Turkish producer firms" where these models are just imitated, adapted and applied by Turkish designers. The respondents stated that the fashion leaders and top designers mainly work in Italy and France. Turkish designers were evaluated to be flexible and in positive efforts but compared to designers from Italy, France, Greece or England less flexible and less creative. The strength of competitor countries' designers was stated to be their ability to meet the expectations of the German consumers. According to the respondents, there are also top fashion designers from Turkey in this sector. But they either work in Turkey for the domestic market or create in world's most famous fashion centers (like Rifat Özbek in London). The attractive designs, styles, collections developed in Turkey can only be met in shop windows of stores in big cities in Turkey but not in the export markets of Turkey. Hence, more efforts are required for developing the creativity in fashion, such as following the trends in advance by learning about the tastes in the export markets.

In short, "knowledge about the market expectations and trends" helps the channel members to develop the collections. In the German market, models for collections are mainly determined by wholesalers, because Turkish designers and fashion trend makers are still insufficient in their efforts to become trend setters for fashion.

b) Evaluations about Fashion Creation for Turkish WRW Products by Channel Types

The evaluations about the fashion factor of social characteristics of Turkish WRW products were cross-tabulated with different levels of the distribution channel network in order to test hypothesis H_{9a} , which is stated as:

H_{9a} : The evaluations for Turkish WRW products based on fashion differ among the four channel types.
(Question II.12/a).

The findings are presented in Table 4.55.

Statistical calculations show that there is a relation between the evaluations for fashion factor of Turkish WRW products and the type of channel. Therefore, H_{9a} is accepted.

Based on the distribution of responses in Table 4.55 it can be observed that according to the majority of the responding producers and sourcing firms, the models and collections for Turkish WRW products are developed mainly by the "wholesalers in FRG". "Wholesalers in FRG" again were mentioned as the major source of models and collections for Turkish WRW products by all responding wholesalers. All responding retailers on the other hand mentioned "retailers in FRG" as the major source of models and collections used for Turkish WRW products.

Table 4.55
Fashion-Development of Collections by Channel Types
(Responses to Question II.12/a)

ğ45

Count Row Percent Column Percent Total Percent Models and Collections are developed by:	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
Producer in Turkey	2	2	2	2	8
	25.0	25.0	25.0	25.0	17.0
	22.2	15.4	15.4	16.7	
	4.25	4.25	4.25	4.25	
Wholesaler in FRG	5	9	9	1	24
	20.8	37.5	37.5	4.2	51.1
	55.6	69.2	69.2	8.3	
	10.6	19.1	19.1	2.1	
Retailer in FRG	2	2	2	9	15
	13.3	13.3	13.3	60.0	31.9
	22.2	15.4	15.4	75.0	
	4.25	4.25	4.25	19.1	
Column Total	9	13	13	12	47
	19.1	27.7	27.7	25.5	100.0

$$\chi^2 = 16.18$$

$$d.f. = 6$$

$$p = 0.025$$

Cells with Expected Frequency (EF) < 5 : 75.0%

Significance should be interpreted with care, since EF > 5 criteria is not met.

4.7.2. Image Related Evaluations

The image for WRW products is also shaped through the importance attached to country of origin.

4.7.2.1. Country of Origin Related Evaluations

a) Evaluations about the Country of Origin of WRW Products

Besides fashion, the country of origin is also an important factor in shaping up the social characteristics of a WRW product.

This part of the research presents the findings about the country of origin of WRW products in general, as well as the reasons stated for its effects.

Table 4.56 presents the importance level attached to the country of origin of WRW products:

There was a large consensus among the replies of firms contacted as indicated by the small standard deviation of 0.782. The mean rating of 2.21 shows that according to the consumers the country of origin is rather "somewhat important".

The reasons stated in the open ended part of the question show that for 44.8 per cent of the responding firms "the important choice criteria of the consumer is the price-performance relation". The consumer evaluates the WRW product mainly according to the paid quality and is willing to pay a little more for the quality. If the product quality is good, the country of origin is not important for the consumer. For 24.1 per cent of the responding firms the "consumer is not interested in the country of origin" because in most cases the name of the producer country is not indicated on the label so that the consumer has no idea about the origin of the product. For again 24.1 per cent of the responding firms "image" plays a role in the choice of consumers. If there is no indication about country of origin, this is not a reason for not buying this WRW product. But if there is an indication as "Made in Italy" or "Made in France" this can be an additional incentive for the consumer to buy that WRW product. This shows that some countries can benefit from the positive image they have built. It was also stated that if to write the country of origin on the label of a WRW product would become a requirement in FRG, then the consumers would have the chance to compare Turkish WRW products with those from different countries. Hence they would learn to rate the Turkish WRW products without prejudgements and Turkey would benefit from this.

Table 4.56
The Importance Level of Country of Origin
with Respect to WRW Products and Reasons for it
(Responses to Question II.13/a)

Ratings	n	%
The country of origin of WRW products is:		
important	9	21.4
somewhat important	15	35.7
not important at all	18	42.9
No answer	3	-
	45	100.0
Mean:	2.21	
Standard Deviation:	0.782	

Reasons	n*	%
Important criteria for choice is price/performance relation	13	44.8
Consumers are not interested in the country of origin	7	24.1
Image is important for the consumer	7	24.1
Important choice criteria is fashion; actuality of the model	6	20.7
Important choice criteria is the optic view	4	13.8
Turkey has a "cheap product" image	1	3.4
No answer	16	-

* Number of replies exceeds the sample size 45 since multiple responses are observed.

In short, for the purchase decision of German consumers the price/performance relation, that is, the paid quality is more important than the country of origin of the WRW product since in most cases the labels do not give the information about the producer country. Country of origin is only important if a positive image was created through fashion leadership in this sector.

b) Evaluations about the Country of Origin of WRW Products by Channel Types

The opinions about the country of origin factor of social characteristics of WRW products were cross tabulated with different levels of the distribution channel network in order to test hypothesis H_{9b} , which is stated as:

H_{9b} : The importance attached to the country of origin of WRW products differ among the four channel types.
(Question II.13/a).

The findings are presented in Table 4.57.

Statistical calculations show that there is no relation between the evaluations for the level of importance attached to the country of origin of WRW products and the type of channel. Therefore, H_{9b} is rejected.

Although statistically not significant, based on the distribution of responses in Table 4.57 it can be observed that the highest level of importance to the origin of WRW products was attached by the producers, followed by the sourcing firms; these channel members rated the country of origin as being just somewhat important for WRW products. For 1/2 of wholesalers and about 5/11 of the responding retailers the country of origin is not important at all.

4.7.2.2. Product-Image Related Evaluations

a) Evaluations about the Image of Turkish WRW Products

Product image is a factor of social characteristics of WRW products and is developed based on the factors of country of origin and fashion.

This part of the study presents the insights about the image of WRW products from Turkey, as well as the reasons for the stated evaluations.

The findings presented in Table 4.55 show that the image for Turkish WRW products was rated to be rather as "somewhat good". There was a large consensus among the replies as indicated by the small standard deviation of 0.667.

The reasons stated in the open ended part of the question show that for 58.3 per cent of the responding firms "efforts to build a positive image for Turkish WRW products are lacking" in Turkey. The second most frequently stated reason is that the

Table 4.57
Importance of Country of Origin by Channel Types
 (Responses to Question II.13/a)

Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
Important	3	3	1	2	9
	33.3	33.3	11.1	22.2	21.4
	37.5	23.1	10.0	18.2	
	7.1	7.1	2.4	4.8	
Somewhat important	2	5	4	4	15
	13.3	33.3	26.7	26.7	35.7
	25.0	38.5	40.0	36.4	
	4.8	11.9	9.5	9.5	
Not important at all	3	5	5	5	18
	16.7	27.8	27.8	27.8	42.9
	37.5	38.5	50.0	45.5	
	7.1	11.9	11.9	11.9	
Column Total	8	13	10	11.0	42
	19.0	31.0	23.8	26.2	100.0
Mean*:	2.00	2.15	2.40	2.27	
Number of Firms Contacted	10	13	10	12	

* Where 1 = important

$\chi^2 = 2.23$

d.f. = 6

p = 0.897

Cells with Expected Frequency (EF) < 5 : 91.7%

Significance should be interpreted with care, since EF > 5 criteria is not met.

"positive image is lacking because of quality defects of Turkish WRW products and the delivery problems" such as not being on time (Table 4.58).

In short, elimination of quality defects and delays in delivery as well as better promotional efforts will help to improve the image of Turkish WRW products in the FRG market.

Table 4.58
Evaluations Related to the Image for Turkish WRW Products
 (Responses to Question II.13/b)

Ratings	n	%
The product image for Turkish WRW products is:		
good	5	15.2
somewhat good	18	54.5
poor	10	30.3
No answer	12	-
	45	100.0
Mean:	2.15	
Standard Deviation	0.667	

Reasons	n*	%
Lack of positive image building efforts	14	58.3
Lack of positive image because of quality defects and delivery problems	8	33.3
Lack of positive image due to the negative economic indications in Turkey	3	12.5
Good trade relations and improvements in partnership	2	8.3
Not important at all	2	8.3
No answer	21	-

* Number of replies exceeds the sample size 45 since multiple responses are observed.

b) Evaluations about Product-Image of Turkish WRW Products by Channel Types

The opinions about the product-image factor of social characteristics of Turkish WRW products were cross tabulated with different levels of the distribution channel network in order to test hypothesis H_{9c} , which is stated as:

H_{9c}: The evaluations for Turkish WRW products based on image differ among the four channel types.
(Question II.13/b).

The findings are presented in Table 4.59.

Statistical calculations show that there is no relation between the evaluations for the image of Turkish WRW products and the type of channel. Therefore, H_{9c} is rejected.

Although statistically not significant, based on the distribution of responses in Table 4.59 it can be observed that the best evaluation for the image of Turkish WRW products was given by wholesalers. Here 5/8 of the responses concentrated on the "somewhat good" and 1/4 on "good" scale positions. The worst rating was given by sourcing firms where 2/3 of the responses concentrated on "somewhat good" and 1/3 concentrated on "poor" scale points.

4.7.3. Country Based Comparative Evaluation of Social Characteristics for WRW Products

For a country based comparative evaluation of the social characteristics covered in this section of the study, the responding firms' representatives had to name up to three countries for the attributes: fashion related "creativity", and "image" based on the product and country of origin, doing "better than", "same as" and "worse than" Turkey.

The findings are summed up in Table 4.60: Both in fashion related creativity and image; FRG, France, Italy, USA-Canada, Japan were rated to be "better than" Turkey. In product and country image Hong Kong and Greece are also "better than Turkey" whereas, these two countries were rated to be "same as Turkey" in fashion related creativity. Portugal was also rated to be "same as Turkey" in both attributes. Countries evaluated as "worse than Turkey" are Yugoslavia, China, East European countries, Asia in general, North Africa and India in both attributes; as well as Pakistan in only fashion related creativity.

In general, it can be concluded that countries like FRG, France, Italy, USA-Canada and Japan are mainly evaluated to be better than Turkey in both "fashion" and "image". Greece and Hong Kong are better in image but same as Turkey in fashion creativity. Countries evaluated as worse than Turkey are mainly East European countries and countries from Asia.

Table 4.59
Product Image by Channel Types
 (Responses to Question II.13/b)

Count
 Row Percent
 Column Percent
 Total Percent

The Image for Turkish WRW
 Products is:

	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
good	1		2	2	5
	20.0		40.0	40.0	15.2
	14.3		25.0	22.2	
	3.0		6.1	6.1	
somewhat good	3	6	5	4	18
	16.7	38.3	27.8	22.2	54.5
	42.9	66.7	62.5	44.4	
	9.1	18.2	15.2	12.1	
poor	3	3	1	3	10
	30.0	30.0	10.0	30.0	30.3
	42.9	33.3	12.5	33.3	
	9.1	9.1	3.0	9.1	
Column Total	7.0	9	8	9	33
	21.2	27.3	24.2	27.3	100.0
Mean*:	2.29	2.33	1.88	2.11	
Number of Firms Contacted	10	13	10	12	

* Where 1 = good

$\chi^2 = 4.11$

d.f. = 6

p = 0.662

Cells with Expected Frequency (EF) < 5 : 100%

Significance should be interpreted with care, since EF > 5 criteria is not met.

Table 4.60
Country Based Comparative Evaluation of Social Characteristics for WRW Products
(Responses to Question II.14)

Social Characteristics	Better than Turkey (Mean Rank: 1.00-1.66)		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
Fashion related creativity	FRG	1.00	Greece	1.67	Yugoslavia	2.50
	France	1.00	Portugal	2.00	China	2.50
	Italy	1.00	Hong Kong	2.00	East European Countr.	2.67
	Europe (general)	1.00	Far East (general)	2.00	India	2.86
	USA-Canada	1.00	All Countries	2.17	Pakistan	3.00
	Japan	1.00			Asia (general)	3.00
	Other Eur.Countr.	1.25			North Africa	3.00
Image-product and country	FRG	1.00	Portugal	1.78	All Countries	2.40
	France	1.00	Middle East-Israel	2.00	China	2.50
	Italy	1.00			Far East (general)	2.50
	USA-Canada	1.00			Yugoslavia	2.50
	Japan	1.00			East European Countr.	2.67
	Other Eur.Countr.	1.25			North Africa	2.67
	Hong Kong	1.50			India	2.86
	Greece	1.63			Asia (general)	3.00
					Other Far East Countr.	3.00

In this preceeding part of the study, fashion and image factors are analysed as the major social characteristics of a WRW product. The analysis covers the evaluations of executives from the firms contacted related to the importance attached to the country of origin as well as evaluations related to the ratings for Turkish WRW products based on fashion creation and image. The analysis also aims to define the influential parties of interest in determining models of collections. A country based comparative evaluation of social characteristics helps to position different countries operating in the textile-apparel sector and exporting to the FRG market.

4.8. Evaluations about the Identification Factors of WRW Products

This part of the study concentrates on the three identification factors of WRW products: Brand name, label, and package.

4.8.1. Brand Name Related Evaluations

Brand name related issues cover the level of importance attached to this factor by the firms contacted, the effectiveness of Turkish brand names in the German market, investigating who set the brand names and why. The expectations of consumers and distributors as related to the brand name of WRW products in general are also a part of the analyses.

a) Importance Attached to Brand Names of WRW Products

Importance given to brand names by the firms contacted and their awareness about Turkish brands were measured by two different questions. The results are presented in Table 4.61.

For 58.3 per cent of the responding firms, brand name is "very important" and for 33.3 per cent of them it is "important" when used for WRW products. The response rate related to the awareness about the Turkish brand names was low. Most of the replies show that Turkish brand names are "not effective" and that they are "unknown" or "unimportant" in the German Market. If a Turkish WRW product carries a brand name, it is not Turkish but rather German or English (Table 4.61).

Table 4.61
The Importance and Awareness Levels for Brand Names
 (Responses to Question II.15/a,b)

Importance Level	n	%
the brand name is:		
very important	21	58.3
important	12	33.3
neither important nor unimportant	1	2.8
unimportant	2	5.6
No answer	<u>9</u>	<u>-</u>
Total	45	100.0
Mean:	1.56	
Standard Deviation:	0.809	

Awareness of Turkish brand names	n	%
not effective	8	33.3
satisfactory	1	4.2
unknown, unimportant	6	25.0
mostly sold without brand name	1	4.2
not Turkish, rather German or English brand names are used if not without brand name	6	25.0
cannot evaluate at all	2	8.3
No answer	<u>21</u>	<u>-</u>
Total	45	100.0

b) Importance Attached to Brand Names by Channel Types

Brand name evaluations with respect to the level of importance attached to this factor were cross tabulated with different levels of the distribution channel network in order to test hypothesis H_{10a} , which is stated as:

H_{10a}: The importance attached to brand name of WRW products differs among the four channel types.
(Question II.15/a)

The findings are presented in Table 4.62.

Statistical calculations show that there is no relation between the evaluations for the level of importance attached to the brand name of WRW products and the type of channel. Therefore, H_{10a} is rejected.

Although statistically not significant, based on the distribution of responses in Table 4.62 it can be observed that the brand name is almost "very important" for the responding producers and also sourcing firms. For the responding wholesalers and retailers it is "important".

c) Evaluations on Turkish Brand Names

In setting the brand name for Turkish WRW products, producers in Turkey are not an influential group. The other channel types have a higher influence in determining the brand name for Turkish WRW products, as presented in Table 4.63.

In 53.7 per cent of mentions, wholesalers were reported as brand name setter. The second influential group is producers and sourcing firms in FRG.

The firms stated various reasons for a channel member to set a brand name. Those channel members who carry costs and risks of the WRW product and who make use of promotional tools to create an image are the ones who have a voice in determining the brand name. The brand setter is in some cases the contacted firm itself. These firms stated that they want to launch the product under their own name. As stated also for the effectiveness of brand names, 38.5 per cent of the responding firms mentioned that Turkish WRW products are rather sold without brand names or under foreign brand names (Table 4.63).

Table 4.62
Importance Level of Brand Name by Channel Types
 (Responses to Question II.15/a)

Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very important	5	8	3	5	21
	23.8	38.1	14.3	23.8	58.3
	71.4	72.7	42.9	45.5	
	13.9	22.2	8.3	13.9	
important	2	2	3	5	12
	16.7	16.7	25.0	41.7	33.3
	28.6	18.2	42.9	45.5	
	5.6	5.6	8.3	13.9	
neither important nor unimportant			1		1
			100.0		2.8
			14.3		
			2.8		
unimportant		1		1	2
		50.0		50.0	5.6
		9.1		9.1	
		2.8		2.8	
Column Total	7	11	7	11	36
	19.4	30.6	19.4	30.6	100.0
Mean*:	1.29	1.45	1.71	1.73	
Number of Firms Contacted	10	13	10	12	

* Where 1 = very important

$\chi^2 = 8.09$

d.f. = 9

p = 0.52

Cells with Expected Frequency (EF) < 5 : 87.5%

Significance should be interpreted with care, since EF > 5 criteria is not met.

Table 4.63
Brand Name Setters and the Reasons Behind this Effort
 (Responses to Question II.15/c)

Brand Name Setters	n	%
Producer in Turkey	8	19.5
Producer/Sourcing Firm in FRG	19	46.3
Import Agent/Merchant in FRG	8	19.5
Wholesaler	22	53.7
Retailer	11	26.8
No answer	4	-

Reasons	n	%
Turkish efforts to develop brand names are not sufficient	1	3.8
Turkish products are rather sold without brand name or under foreign brand names	10	38.5
It is a matter of marketing and use of promotional tools, creating an image	11	42.3
He is the one who carries costs and risk	11	42.3
He is the one who wants to launch the product under own name	7	26.9
All can set the brand name	2	7.7
Other: Turkish products are only part of the collection Turkey is not a designer, only a producer country so that brand name is not set by Turkish firms	2	7.7
No answer	19	-

* Number of responses exceeds the sample size 45 since multiple responses are observed.

d) Market Expectations Related to Brand Name of WRW Products

Market expectations are composed of consumer expectations and distributors' expectations.

The firms contacted were asked to rank the factors to be associated with a brand name from their own point of view and from that of consumers. The findings are presented in Table 4.64.

Table 4.64
Factors Associated with Brand Name of WRW Products
(Responses to Question II.16)

	First Mention	2nd Mention	3rd Mention	4th Mention	5th Mention	Missing	Mean Rank
<u>According to Consumers:</u>							
Image	11	5	6	6	1	16	2.34
Exclusivity	5	11	4	6	-	19	2.42
High Quality	9	5	10	3	2	16	2.45
Popularity	9	8	3	7	2	16	2.55
High Price	-	2	7	3	15	18	4.14
<u>According to Distributors:</u>							
Firm Image	16	12	3	1	-	13	1.66
A guarantee for sales	9	9	10	-	-	17	2.04
Quality Standardization	7	10	12	-	-	16	2.17

The ordinal nature of the scale used about factors associated with a brand name allowed for calculations of the weighted mean ranks in order to reveal the slight differences in ranking these attributes according to their level of importance.

According to the consumers, the brand name is first of all associated with "image". The second attribute stated for brand name is the "exclusivity" of the product. "High quality" is at third place, followed by "popularity". The replies of the firms show that "high price" is the last attribute to associate with a brand name (Table 4.64).

According to the distributors, the brand name is first of all associated with "firm image". The second attribute stated is "a guarantee for sales", followed by "quality standardization" (Table 4.64).

In general, it can be concluded that brand name is evaluated to be highly important (mean = 1.56), especially by the producers and sourcing firms among the channel types contacted. The brand names of Turkish WRW products on the other hand are not effective and not important. They are not known to the firms contacted because Turkish WRW products are rather sold under foreign brand names. These brand names are mainly determined by wholesalers and also producers or sourcing firms in the FRG market. Firms which carry costs and risks and which use promotional tools to create an image mainly set the brand name of the Turkish WRW products. The

distributors and consumers associate image with the brand name of a WRW product at first place. Distributors associate with brand name also its being a guarantee for sales and consumers associate with brand name also exclusivity.

4.8.2. Label Related Evaluations

Label evaluations and expectations cover the level of importance attached to label attributes and evaluations of labels on Turkish WRW products based on these attributes.

a) Importance Attached to Labels for WRW Products

The level of importance attached to label was measured through the following attributes: Presenting the necessary information for the consumer, readability after washing, being correctly attached and use as quality indicator.

The ordinal nature of the scale used about label attributes allowed for calculations of the weighted mean ranks in order to reveal the slight differences in ranking these attributes according to their level of importance, as presented in Table 4.65.

Table 4.65
Importance Level of Label Attributes
(Responses to Question II.18/a)

Label Attributes	Ranked as					Mean Rank
	1	2	3	4	Missing	
Presenting the necessary information	17	7	2	2	17	1.61
Readability after washing	6	7	10	4	18	2.44
Being correctly attached	5	7	5	8	20	2.64
Use as quality indicator	1	7	8	9	20	3.00

The label of a WRW product should first of all "present the necessary information"; the second important attribute is its "readability after washing" the product, with mean values 1.61 and 2.44 respectively. The third important attribute is "being correctly attached", followed by the "suitability as quality sign", with mean ranks 2.64 and 3.00 respectively (Table 4.65).

b) Label Evaluations for Turkish WRW Products

Evaluations for Turkish WRW products with respect to the label attributes are presented with the means and standard deviations in Table 4.66.

Table 4.66
Evaluations for Turkish WRW Products with Respect to the Label Attributes
(Responses to Question II.18/b)

Evaluations	Presenting the necessary information		Readability after washing		Being correctly attached		Use as quality indicator	
	n	%	n	%	n	%	n	%
very adequate	9	25.7	5	15.2	5	16.1	4	12.9
adequate	15	42.9	16	48.5	13	41.9	14	45.2
neither adequate nor inadequate	7	20.0	7	21.2	9	29.0	9	29.0
inadequate	4	11.4	4	12.1	4	12.9	4	12.9
very inadequate	-	-	1	3.0	-	-	-	-
No answer	10	-	12	-	14	-	14	-
Total	45	100.0	45	100.0	45	100.0	45	100.0
Mean*	2.17		2.39		2.39		2.42	
Standard Deviation	0.954		0.998		0.919		0.886	

* Where 1 = very adequate

The ratings show that the labels of Turkish WRW products are at satisfactory level based on the four attributes. The best evaluation was done for the "necessary information presented by the label" with a mean value of 2.17; the worst evaluation

was done for the "use as quality indicator" with mean value 2.42, but still at satisfactory level (Table 4.66).

c) Label Evaluations for Turkish WRW Products by Channel Types

The ratings for the label attributes of Turkish WRW products were cross tabulated with different levels of the distribution channel network in order to test hypothesis H_{10b} , which is stated as:

H_{10b} : The evaluations for the label of Turkish WRW products differ among the four channel types.
(Question II.18/b).

The findings are presented in Table 4.67.

For the overall evaluation of label on Turkish WRW products by channel types, the ratings for four different attributes (given in Table 4.66) were summed up. The rating scale was also condensed from five points to three points (Table 4.67).

Statistical calculations show that there is a relation between the ratings for label attributes of Turkish WRW products and the type of channel. Therefore, H_{10b} is accepted.

Based on the distribution of responses presented in Table 4.67 it can be observed that the most satisfied channel type is sourcing firms, followed by retailers with mean values 1.30 and 1.44 respectively. Evaluations of producers and wholesalers are rather neutral (mean values 1.74 and 1.79).

Frequency distributions show that only 4.2 per cent, of the responding sourcing firms are dissatisfied with labels; and 74.5 per cent were satisfied with labels on Turkish WRW products.

In general, it can be concluded that the label on a WRW product first of all has to present the necessary information for the consumer. It is also important that the label is readable after washing the product. The other two attributes of a label are its being correctly attached to the WRW product and its suitability as quality sign. Evaluations show that in all four attributes, especially in "presentation of the necessary information" to the consumer, the labels on Turkish WRW products are at satisfactory level. All four channel types made rather positive evaluations. The most satisfied ones with the label factor are sourcing firms, followed by retailers.

Table 4.67
Label Attributes by Channel Types
(Responses to Question II.18/b)

Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very adequate/adequate	13	35	9	24	81
	16.0	43.2	11.1	29.6	62.3
	56.5	74.5	37.5	66.7	
	10.0	26.9	6.9	18.5	
neither adequate nor inadequate	3	10	11	8	32
	9.4	31.3	34.4	25.0	24.6
	13.0	21.3	45.8	22.2	
	2.3	7.7	8.5	6.1	
inadequate/very inadequate	7	2	4	4	17
	41.2	11.8	23.5	23.5	13.1
	30.4	4.2	16.7	11.1	
	5.4	1.5	3.1	3.1	
Column Total	23	47	24	36	130
	17.7	36.1	18.5	27.7	100.0
Mean*:	1.74	1.30	1.79	1.44	
Number of possible mentions for 4 attributes	40	52	40	48	180

* Where 1 = very adequate/adequate

$\chi^2 = 18.08$

d.f. = 6

p = 0.01

Cells with Expected Frequency (EF) < 5 : 25.0%

Hence, EF > 5 criteria is met.

4.8.3. Package Related Evaluations

This part of the study covers the evaluations about the parties of interest setting the package specifications as well as the reasons behind it, and the evaluations about the package of Turkish WRW products based on the important package specifications such as form, material used and functionality.

a) Determination of Package Specifications for WRW Products

The package specifications are mainly determined by the firms contacted, as shown by 76.7 per cent of the replies in Table 4.68.

Table 4.68
Parties of Interest Determining Package Specifications
(Responses to Question II.17/a)

Parties of Interest	n	%
The Responding Firm Itself	33	76.7
Producer in Turkey	4	9.3
Producer and Responding Firm together	3	7.0
Customers, Wholesalers	2	4.7
Producer and Customers together	1	2.3
No answer	<u>2</u>	<u>-</u>
	45	100.0

Reasons	n*	%
Firm standardizes for all kinds of dispatch as a regulation	7	63.6
Considering customer expectations, desires	4	36.4
Considering warehouse, stocking, shelftype capacities	3	27.3
It is a compromise	3	27.3
Considering the product type	2	18.2
No answer	34	-

* Number of mentions exceeds the sample size 45 since multiple responses are observed.

Although the response rate for reasoning the determination of package specifications is only 11/45 (about 24.4 per cent) of the firms contacted, 63.6 per cent of the replies concentrate mainly on the reason that the package is standardized for all kinds of dispatch as a regulation of the firm (Table 4.68).

More than 90.0 per cent of the responding firms determine the package specifications for all WRW suppliers from different countries they are in contact with, without exception. This is their own regulation as a presentation and distribution policy of the firm. There is also the necessity to consider customer expectations as well as to ensure standardization according to shop and warehouse capacity utilization.

b) Evaluations about the Package of Turkish WRW Products

Evaluations for Turkish WRW products with respect to the package are presented with means and standard deviations in Table 4.69.

There is no consensus among the respondents on ratings for package, as shown by the large standard deviations (Table 4.69).

The replies of the firms contacted show that the best rating was given for the format of the package and the worst rating was given for the social role i.e. the promotional aspect of the package, that is, its use as a "media for advertising". Positive evaluations were also given for the functionality of the package such as its informativeness and protecting the product, as well as for the material used (Table 4.69).

c) Evaluations about the Package of Turkish WRW Products by Channel Types

The ratings for package factors of Turkish WRW products were cross tabulated with different levels of the distribution channel network in order to test hypothesis H_{10c} , which is stated as:

H_{10c} : The evaluations for the package of Turkish WRW products differ among the four channel types.
(Question II.17/c).

Table 4.69
Evaluations for Turkish WRW Products with Respect to Package Factors
(Responses to Question II.17/c)

Factors	very good		good		neither good/ nor bad		poor		very poor		No answer		Mean*	Standard Deviation
	n	%	n	%	n	%	n	%	n	%	n	%		
Format of the Package	8	23.5	16	47.1	6	17.6	2	5.9	2	5.9	11	-	2.24	1.075
Functionality:														
Informativeness	7	22.6	11	35.5	9	29.0	2	6.5	2	6.5	14	-	2.39	1.116
Protection	4	12.5	15	46.9	8	25.0	3	9.4	2	6.3	13	-	2.50	1.047
Material Used:	4	12.1	15	45.5	8	24.2	2	6.1	4	12.1	12	-	2.61	1.171
i.e. Promotional Aspect														
Social Role of the Package:														
Attractive outlook	1	3.4	8	27.6	8	27.6	7	24.1	5	17.2	16	-	3.24	1.154
Advertising intent	1	3.8	4	15.4	7	26.9	10	38.5	4	15.4	19	-	3.46	1.067
Reuse	2	6.9	8	27.6	5	17.2	6	20.7	8	27.6	16	-	3.35	1.344

* Where 1 = very good

The findings are presented in Table 4.70.

For the evaluation of package by channel types, the ratings for seven different package factors (given in Table 4.69) were summed up.

The rating scale was also condensed from five points to three points (Table 4.70).

Table 4.70
Package Factors by Channel Types
(Responses to Question II.17/c)

Count Row Percent Column Percent Total Percent Evaluations	Channel Types				Row Total
	Producer	Sourcing Firm	Wholesaler	Retailer	
very good/good	23	35	21	25	104
	22.1	33.7	20.2	24.0	48.6
	48.9	52.2	47.7	44.6	
	10.7	16.4	9.8	11.7	
neither good nor poor	13	9	19	10	51
	25.5	17.6	37.3	19.6	23.8
	27.7	13.4	43.2	17.9	
	6.1	4.2	8.9	4.7	
bad/very poor	11	23	4	21	59
	18.6	39.0	6.8	35.6	27.6
	23.4	34.3	9.1	37.5	
	5.1	10.7	1.9	9.8	
Column Total	47	67	44	56	214
	22.0	31.3	20.6	26.2	100.0
Mean*	1.74	1.82	1.61	1.93	
Number of possible mentions for 7 attributes	70	91	70	84	315

* Where 1 = very good/good

$\chi^2 = 20.30$

d.f. = 6

p = 0.005

There are no cells with Expected Frequency (EF) < 5.

Hence EF > 5 criteria is met.

Statistical calculations show that there is a relation between the ratings for package factors of Turkish WRW products and the type of channel. Therefore, H_{10c} is accepted.

Based on the distribution of responses presented in Table 4.70 it can be observed that the best ratings were given by wholesalers with a mean value of 1.61; and the worst ratings were given by retailers with a mean value of 1.93 rather at neutral level. For producers and sourcing firms the evaluations fall between positive and neutral ratings. Among the producers with a response rate of 47/70 or 67.1 per cent, nearly 1/2 gave a positive evaluation and nearly 3/10 gave a neutral evaluation. Among the sourcing firms with a response rate of 67/91 or 73.6 per cent, about 1/2 gave a positive evaluation and 34.3 per cent gave a negative evaluation (Table 4.70).

In general, it can be concluded that the package specifications are mainly determined by the firms contacted, for all supplier firms of WRW products without country differentiation, in order to ensure standardization of dispatch as a presentation and distribution policy of the firm, considering also customer expectations such as those related to shop, shelf and warehouse capacities.

The package of Turkish WRW products is evaluated to be good in format and the information presented on it, but rather poor as a media for advertising and for reuse. The general ratings for package factors of Turkish WRW products show that the best ratings were given by wholesalers, a positive evaluation; the worst ratings in general were given by retailers.

4.8.4. Country Based Comparative Evaluation of Identification Factors for WRW Products

For a country based comparative evaluation of the identification factors covered in the preceeding section, the responding firms' representatives were asked to name countries doing "better than", "same as" and "worse than" Turkey.

The findings are summed up in Table 4.71: In 'Brand Name' categories, Italy, France and Europe in general have been consistently rated as better than Turkey. Greece has been consistently rated as same as Turkey and countries evaluated as worse than Turkey in all five brand name categories have been India, North African Countries, Far East in general and East European Countries. Hong Kong was rated better than Turkey except in exclusivity attribute of brand name. FRG is better than Turkey in "popularity", "high quality" and "guarantee for sales" attributes of brand name; Portugal is better than Turkey in "image", "high quality" and "guarantee for

sales" tied with the brand name of a WRW product; she is same as Turkey for popularity and exclusivity attributes.

In "Label" categories, FRG and Hong Kong have been consistently rated as "better than Turkey". Italy is "better" in two label attributes, readability after washing and being correctly attached. France is also "better" in label readability after washing. Countries evaluated as "same as Turkey" are Portugal and Yugoslavia in all three label attributes. Related to information presentation of the label, also Italy, USA-Canada and India were rated to be "same as Turkey". India was evaluated "same as Turkey" for the readability of the label after washing the WRW product. Greece, North African countries, Far East in general and East European countries were evaluated to be "worse than Turkey" related to all three label attributes.

In "Package" categories, FRG, Hong Kong and Europe in general have been consistently rated as "better than Turkey". Portugal is "better than Turkey" in material, outlook and reuse of the package. Italy is "better than Turkey" in material and outlook of the package. France is "better than Turkey" in functionality, outlook and reuse of the package. Countries evaluated "same as Turkey" in all five package attributes are Greece, Yugoslavia, Asia in general. Also "all countries" indication falls in this group. Far East countries were evaluated "same as Turkey" for material and functionality of the package; Portugal is "same as Turkey" in format and functionality of the package; Pakistan is "same as Turkey" for functionality and outlook. Countries evaluated as "worse than Turkey" in all five package attributes are India, North African Countries and East European countries. In format, outlook and reuse of the package Far East in general is "worse than Turkey". Pakistan is worse than Turkey in format, and China in functionality of the package used for WRW products.

In general, it can be concluded that among the identification factors, brand names of WRW products from Italy, France, Portugal, FRG, Hong Kong and Europe in general are evaluated as being better than that of Turkish WRW products. Brand names of WRW products from Greece are at same level as those of Turkish WRW products. Label of WRW products from Hong Kong and FRG and package of WRW products from Hong Kong, FRG, France are better than those of Turkish WRW products. Europe in general is evaluated as being better than Turkey for all three identification factors.

Portugal and Yugoslavia are evaluated to be "same as Turkey" for label and package; Greece for package of WRW products. In all three identification factors, countries evaluated as "worse than Turkey" are India, North Africa, Far East in general and East European countries as well as Greece for the label factor.

In this preceeding part of the study, brand name, label and package of WRW products are analysed as the major identification factors. The analysis covers the

Table 4.71
Country Based Comparative Evaluation of Identification Factors for WRW Products
(Responses to Question II.19)

Identification Factors	Better than Turkey (Mean Rank: 1.00-1.66)		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
<u>Brand Name:</u> Popularity	Italy	1.00	Portugal	1.80	India	2.60
	France	1.00	All Countries	2.00	North Africa	3.00
	FRG	1.00	Greece	2.33	Far East (general)	3.00
	Europe (general)	1.00			East European Countr.	3.00
	USA-Canada	1.00				
	Hong Kong	1.50				
Exclusivity	Italy	1.00	Hong Kong	1.67	India	2.60
	France	1.00	Portugal	1.75	North Africa	3.00
	Europe (general)	1.00	Greece	2.33	Far East (general)	3.00
	All Countries	1.60			East European Countr.	3.00
Image	Italy	1.00	All Countries	1.75	India	2.80
	France	1.00	Greece	2.25	North Africa	3.00
	Europe (general)	1.00			Far East (general)	3.00
	Hong Kong	1.50			East European Countr.	3.00
	Portugal	1.60				

Table 4.71
(continued)

Identification Factors	Better than Turkey (Mean Rank: 1.00-1.66)		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
High Quality	Italy FRG France Europe (general) Hong Kong Portugal	1.00 1.00 1.00 1.00 1.50 1.60	All Countries Greece	2.00 2.33	India North Africa Far East (general) East European Countr.	2.80 3.00 3.00 3.00
Sales Ensurance	Italy FRG France Europe (general) Portugal Hong Kong	1.00 1.00 1.00 1.00 1.50 1.50	All Countries Greece	2.00 2.33	India North Africa Far East (general) East European Countr.	2.60 3.00 3.00 3.00
<u>Label:</u> Information Presentation	FRG Hong Kong	1.00 1.00	Italy All Countries Portugal Yugoslavia USA-Canada India	1.67 2.00 2.00 2.00 2.00 2.25	Greece North Africa Far East (general) East European Countr.	2.50 3.00 3.00 3.00
Readability after washing	FRG Hong Kong Italy France	1.00 1.00 1.50 1.50	Portugal All Countries Yugoslavia India	1.67 2.00 2.00 2.25	Greece North Africa Far East (general) East European Countr.	2.50 3.00 3.00 3.00

Table 4.71
(continued)

Identification Factors	Better than Turkey (Mean Rank: 1.00-1.66)		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
Being Correctly Attached	FRG Hong Kong Italy	1.00 1.00 1.50	Portugal Yugoslavia All Countries	2.00 2.00 2.17	India Greece North Africa Far East (general) East European Countr.	2.50 2.50 3.00 3.00 3.00
<u>Package:</u> Material	FRG Europe (general) Portugal Italy Hong Kong	1.00 1.00 1.50 1.50 1.50	Far East (general) Greece All Countries Yugoslavia Asia (general)	1.67 2.00 2.00 2.00 2.00	India North Africa East European Countr.	2.43 3.00 3.00
Format	FRG Europe (general) Hong Kong	1.00 1.00 1.50	Portugal All Countries Italy Yugoslavia Middle East-Israel Asia (general) Greece	1.67 2.00 2.00 2.00 2.00 2.00 2.00	India Far East (general) North Africa Pakistan East European Countr.	2.60 3.00 3.00 3.00 3.00

Table 4.71
(continued)

Identification Factors	Better than Turkey (Mean Rank: 1.00-1.66)		Same as Turkey (Mean Rank: 1.67-2.34)		Worse than Turkey (Mean Rank: 2.35-3.00)	
	Country	Mean Rank	Country	Mean Rank	Country	Mean Rank
Functionality	FRG	1.00	Portugal	1.67	India	2.50
	France	1.00	Greece	2.00	China	3.00
	Europe (general)	1.00	Far East	2.00	North Africa	3.00
	Hong Kong	1.50	All Countries	2.00	East European Countr.	3.00
			Italy	2.00		
			Yugoslavia	2.00		
			Pakistan	2.00		
			Asia (general)	2.00		
Outlook	FRG	1.00	Greece	2.00	India	2.75
	France	1.00	Yugoslavia	2.00	North Africa	3.00
	Europe (general)	1.00	All Countries	2.00	Far East (general)	3.00
	Portugal	1.33	Asia (general)	2.00	East European Countr.	3.00
	Italy	1.50	Pakistan	2.00		
	Hong Kong	1.50				
Reuse	FRG	1.00	Greece	2.00	India	2.75
	France	1.00	All Countries	2.00	North Africa	3.00
	Europe (general)	1.00	Italy	2.00	Far East (general)	3.00
	Portugal	1.33	Yugoslavia	2.00	East European Countr.	3.00
	Hong Kong	1.50	Asia (general)	2.00		

evaluations of executives from the firms contacted related to the importance attached to brand name, to the factors associated with a brand name and to the label of a WRW product, as well as evaluations related to the ratings for Turkish WRW products based on label and package. The analysis also aims to define the influential parties of interest in setting the brand name and the package specifications. A country based comparative evaluation of identification factors helps to position different countries operating in the textile-apparel sector and exporting to the FRG market.

4.9. Customer Expectations in General

In this part of the study expectations of retailers and consumers with respect to WRW products will be analysed.

The firms contacted were asked to rank order the factors that are important for purchasing a WRW product from the point of view of their customers. The findings are presented in Table 4.72 and Table 4.73.

The ordinal nature of the scale used about individual factors allowed for calculations of the weighted mean ranks in order to reveal to slight differences in ranking these factors according to their level of importance.

According to the firms contacted, for the customer group retailers, the most important factor is "price", followed by "style, design and colors" of the product. "Processing quality" was rated at the third place, followed by "material quality" and "durability through easy care". The least important factors were the identification factors of a WRW product (Table 4.72).

According to the firms contacted, for the consumers, the most important factor is "style, design and colors" of the WRW product, followed by "price". "Processing quality" was rated at the third place, followed by "country of origin" and "material quality". The importance attached to "durability through easy care", "label" and "package" were lowest (Table 4.73).

There are similarities in rankings of the firms related to the importance attached to individual factors of WRW products from retailer and end-user perspectives: The most important factors in both cases were "price" and "style, design and colors" of the product. The least important factors in both cases were "package" and "label".

Table 4.72
Factors of WRW Products Important for Retailers
 (Responses to Question II.20/b)

Factors	Ranked as						Not Ranked	Mean Rank
	1	2	3	4	5	6		
Price	3	9	4	3	-	-	26	2.37
Style, Design, Colors	8	3	2	2	2	1	27	2.44
Processing Quality	4	6	3	3	1	1	27	2.67
Material Quality	1	1	6	4	3	1	29	3.63
Durability through Easy Care	1	1	1	4	4	-	34	3.82
Country of Origin	1	-	-	-	-	2	42	4.33
High Fashion Creation	2	-	1	1	2	6	33	4.58
Package	-	-	1	-	1	1	42	4.67
Label	-	1	-	-	1	2	41	4.75
Brand Name	-	-	2	2	4	4	33	4.83

Table 4.73
Factors of WRW Products Important for Consumers
(Responses to Question II.20/b)

Factors	Ranked as						Not Ranked	Mean Rank
	1	2	3	4	5	6		
Style, Design, Colors	9	4	4	2	-	-	26	1.95
Price	4	9	2	5	1	-	24	2.52
Processing Quality	2	6	6	3	1	2	25	3.05
Country of Origin	1	-	1	-	1	1	41	3.75
Material Quality	2	1	2	4	6	2	28	4.00
High Fashion Creation	3	-	-	1	3	3	35	4.00
Brand Name	1	-	4	4	3	3	30	4.13
Durability/Sturdiness through Easy Care	-	1	2	2	2	4	34	4.55
Label	-	-	1	-	1	1	42	4.67
Package	-	1	-	-	2	3	39	5.00

4.10. Country Preferences in General

The firms contacted purchase WRW products from different countries. Different factors determine the preference to purchase WRW products from a certain country, and these factors differ for choosing one or another country.

The last question of the study tries to identify the countries to be preferred for the individual factors related to WRW products. The findings are presented in Table 4.74.

For the purchase of WRW products, the firms stated to prefer Turkey at the first place related to the import price, cotton quality, price cut in case of quality defects, processing quality, possibility for quick reorder and quick delivery. The secondly preferred country for import price and cotton quality is India, for processing quality it is Portugal, for quick reorder it is Italy and FRG, and for quick delivery it is FRG. Portugal is the most preferred country for material quality, followed by Italy. Durability of the WRW product is the same in all countries. Italy is at the first place for being fashion trend maker, success in styling and design, and in colors and color compositions; Italy is at the second place for durability of the product along with FRG, Portugal and Hong Kong and also for quick reorder like FRG. France is the second most preferred country for being fashion trend maker, success in styling and design, and in colors and color compositions (Table 4.74).

In short, it can be concluded that Turkey, Italy, France, Portugal, FRG and India are mainly the preferred countries by the firms contacted for the purchase of WRW products based on different factors which determine the choice of a country.

Table 4.74
Countries Preferred for Different Factors Related to WRW Products
(Responses to Question II.21)

Factors	Country Name	n*
Import Price	Turkey	13
	India	7
	Hong Kong	6
	Far East (general)	4
	Asia (general)	4
	Portugal	3
	All Countries	2
	Yugoslavia, China, East European Countries, Europe (general)	1
	No answer	15
Material Quality	Portugal	7
	Italy	6
	Hong Kong	5
	Turkey	5
	All Countries	3
	FRG	2
	Far East (general)	2
	India, Korea, Greece, Europe (general)	1
	No answer	21
Cotton Quality	Turkey	15
	India	3
	Far East (general)	3
	Greece	3
	All Countries	2
	Portugal, Hong Kong, Asia (general), Europe (general)	1
	No answer	20
Price Cut in Case of Quality Defects	Turkey	6
	All Countries	4
	Italy	2
	Greece, Portugal, India	1
	No answer	32

Table 4.74
(continued)

Factors	Country Name	n*
Processing Quality	Turkey	7
	Portugal	6
	Hong Kong	6
	FRG	3
	Far East (general)	3
	All Countries	3
	Yugoslavia	2
	Italy	2
	Greece	2
	Korea, East European Countries	1
	No answer	20
Durability of the WRW Product	All Countries	3
	FRG	2
	Italy	2
	Portugal	2
	Hong Kong	2
	Yugoslavia, Turkey	1
	No answer	32
Being Fashion Trend Maker	Italy	11
	France	5
	FRG	3
	Hong Kong	3
	Turkey	2
	All Countries	2
	No answer	26
Success in Styling and Design	Italy	9
	France	5
	All Countries	3
	Turkey	2
	Hong Kong, India, FRG, Portugal, Greece, Japan	1
	No answer	26

Table 4.74
(continued)

Factors	Country Name	n*
Colors and Color Compositions	Italy	6
	France	4
	All Countries	3
	India	2
	Turkey	2
	Hong Kong, Japan, FRG, Portugal	1
	No answer	30
Possibility for Quick Reorder	Turkey	16
	Italy	4
	FRG	4
	Greece	2
	Yugoslavia, Far East (general), All Countries	1
	No answer	23
Possibility for Quick Delivery	Turkey	16
	FRG	5
	Italy	4
	Greece	2
	Yugoslavia	2
	Portugal, Far East (general), East European Countries, All Countries	1
	No answer	20
Good Sales Promotion Efforts	FRG, Italy, France, Turkey, Hong Kong, All Countries	1
	No answer	40

V. SUMMARY, CONCLUSION AND IMPLICATIONS

In this chapter the findings of the field survey are summarized and based on the conclusions drawn from the results, implications are highlighted for the future researchers and third parties in the textile and apparel sectors.

5.1. Summary

The tendency for internationalization in the textile and apparel sectors is mainly influenced by the developments in communication, transportation and by the globalization of production techniques, international fashion trends and of similarities in consumption habits. Consumption habits show similarities among countries close to each other in their life styles. Since the tastes for colors and style of textiles and apparel products can differ from country to country, the firms involved in international and global marketing efforts have to concentrate on national marketing strategies in exporting these products, based on the expectations of the export market. Hence, the textile or apparel product has to be individualized to the tastes and specific needs of the export market, to meet the same use conditions as in the domestic market or in other countries' markets.

In order to specify the export market expectations, the textiles and apparel products are analysed based on their physical-functional, aesthetic and social characteristics as well as their identification factors. The quality of material, processing and durability of the product constitute the physical-functional characteristics. Optic and haptic attributes shape the aesthetic characteristics. Fashion and image determine the social characteristics. Identification factors of the textiles and apparel products are brand name, label and package.

The export market chosen for the study was FRG (Federal Republic of Germany), where imports in the form of purchase of collections, ordering and CMT (cutting-making-trimming) from developing countries have been increasing. Among the textile and apparel product classes, higher monetary returns and higher import shares are observed for ready to wear products in the FRG market. There are higher

consumption levels for WRW (women's ready to wear) products compared to MRW (men's ready to wear) products in FRG and higher export shares and monetary returns for Turkey in exporting to FRG (see Table 1.1, Table 1.2 and Figure 1.1). Hence, the field survey investigated the strengths and weaknesses of the Turkish WRW products in the FRG market. Producers, sourcing firms, wholesalers and retailers contacted in the distribution channel network in FRG have provided the expert opinion required for the study.

Both face to face and mail communication were utilized in contacting the responding firms. The primary data were obtained through questionnaires self administered in the presence of the researcher. The first part of the questionnaire covered firm specific questions, the second part concentrated on WRW products.

5.1.1. General Information about Firm Characteristics

Majority of the firms contacted are in business relations with Turkey for more than six years. The yearly gross sales volume is lowest for the firms at producer stage and highest for those at retailer stage of the distribution channels. The majority of the firms do not have and also do not plan any investments in the textile and apparel sectors in Turkey mainly because of the political and economic instability in the environment; but they have contact offices in Turkey for the purchase of WRW as the major product line. The product types mostly preferred and purchased are cotton and mixed fibre T-shirts, sweatshirts in a large color and model variety, pullovers in various colors, blouses, shirts, and skirts, shorts, trousers in a large size variety. These products then appeal to German consumers in the age bracket of 18 to 50 with low up to middle income levels who want to have a young and sporty outlook.

The flow of the WRW products from the Turkish producers to the German consumers shows that producers in Turkey are the major suppliers of WRW products for all four channel types contacted. Besides the producers in Turkey, import merchants and also export merchants from Turkey in the FRG market are the second big source for Turkish WRW products, especially for the retailers. The WRW products are then sold mainly to retailers and also to wholesalers by the producers, sourcing firms and wholesalers. The retailers sell their product line directly to the German consumers.

The most preferred type of WRW production is ordering. The firms are involved in ordering activities in Far East and Mediterranean countries. This fact supports the statements related to the developments in textile-apparel world trade

that imports of developed countries from the South European and South East Asian countries tend to increase. Other types of production chosen are in descending order the purchase of collections, CMT and own production activities of the firms contacted.

For the selection of WRW suppliers and for the analysis of the German market, the firms contacted collect information through visits to supplier markets, trade fairs and fashion centers, through close contact with competitor firms, customers and agents, and also through printed material about the developments in the sector.

The analyses about the WRW products concentrated on physical-functional, aesthetic and social product characteristics, and on the product identification factors.

5.1.2. Evaluations for Physical-Functional Characteristics of Turkish WRW Products

Among quality factors, "material" is the most important one, followed by "processing" quality and "durability" in case of knitwear WRW products. In case of woven WRW products, processing is the most important quality factor. Material quality of Turkish WRW products is evaluated as being better than their processing quality and their durability. The quality of Turkish WRW products is rather at middle level (i.e. neither good nor poor), based on the three quality factors. Turkish WRW products received also somewhat positive evaluations, that is, they were rated as good besides neutral for the material and processing quality. Producers and sourcing firms gave mainly positive ratings for the material quality; they gave positive and neutral ratings for the processing quality.

Among material quality factors, for both knitwear and woven WRW products, the quality of texture in textile fabrics is the most important one (especially in case of woven WRW products), followed by solidity of colors and quality of input products like zips and buttons used. Quality of input products for Turkish WRW products is evaluated to be better than the standardization level of texture in textile fabrics and solidity of colors. Nevertheless, zips, press buttons and buttons are not at a satisfactory quality level.

The most frequently occurring quality defects are warp and weft faults; slacks, failing fibres, holes and stretches in the textile fabrics, and color deviations, color stains disturbing the solidity of colors. The occurrence of these defects is not often. Although retailers made a rather neutral evaluation about the quality of textile fabrics and colors of the material for Turkish WRW products, they are the most satisfied

channel members with these two material quality factors. Although the sourcing firms gave the best ratings for material quality in the general evaluation of quality factors of Turkish WRW products, they are the least satisfied group in individual ratings for the material quality factors such as textile fabrics and colors. Input products were rated best by sourcing firms based on their quality level and worst by the wholesalers, rather negative besides neutrally.

Among processing quality factors, "equipment" used is the most important one for knitwear products. For woven goods "labor force" is the most important factor, followed by equipment. Equipment quality of Turkish WRW products is evaluated as better than their manufacturing technique quality. The quality of the labor force is in the third place and received a neutral rating. Sourcing firms are the most satisfied channel members with the equipment used and manufacturing technique of Turkish WRW products. The ratings are highly positive. Satisfaction with labor force is not high for all four channel types.

Among manufacturing technique factors, "cutting technique" is the most important one for all three product types, followed in descending order by sewing, coloring and finish processing. The "cutting technique" of Turkish WRW products is better than, and their sewing is worse than their finish processing. Cutting technique and finish processing are evaluated as satisfactory. Sewing is evaluated as neither satisfactory nor unsatisfactory. Coloring defects occur rather often. Rather positive evaluations when not neutral, were given by "producers" for finish processing at first place and also for cutting technique. Producers again gave the best ratings for sewing while sourcing firms gave it for coloring, which is in both cases a neutral evaluation. The worst ratings for sewing are given by the retailers, for coloring by wholesalers, for cutting by wholesalers again, and for the quality of finish processing by sourcing firms and retailers.

Quality control is done nearly by all contacted firms during and after production in Turkey, and after sample and complete delivery in FRG. It is conducted by the producer in Turkey and the distributor from FRG. Specialized quality control firms are not preferred much. The main quality method used is initial sample control. In addition, incoming inspection is used by more than 1/2 of the responding firms; about 2/5 prefer vendor rating, and 1/3 prefer vendor survey also. There is no difference between the methods used by channel types.

In case of quality defects the firms first of all try to eliminate these defects in Turkey; as a second reactive alternative they require a price cut, thirdly they prevent the delivery of the product. The least preferred type of reaction is going to court. They rather try to solve the conflict through close communication and coordination with the suppliers.

The major reasons behind the occurrence of quality defects are: different perception of quality, lack of quality consciousness; technical deficiencies such as bad coloring, and lack of time planning and management.

The WRW products from Italy, France, Hong Kong, Far East and FRG are rated better than the Turkish WRW products in quality factors: material, processing and durability. Turkish WRW products are at the same quality level as Greek, Portuguese and Yugoslavian WRW products. The quality of Indian, Pakistani and Chinese WRW products is worse than that of the Turkish WRW products.

5.1.3. Evaluations for Aesthetic Characteristics of Turkish WRW Products

Among the optic attributes, designs and designing of Turkish WRW products are better than their style and cut, and their colors and color composition. For all three attributes, the ratings mainly range from good to poor. A positive evaluation was given by retailers mainly, followed by producers for the optic attributes of Turkish WRW products.

Among the haptic attributes of Turkish WRW products, the softness related ones are better than the brilliance or paleness of the product. For the haptic attributes the ratings are rather neutral. A positive evaluation was given by mainly wholesalers, and also by the producers.

The evaluations for optic and haptic attributes together show that designs and designing of Turkish WRW products are better than the other optic and haptic attributes such as product style and cut, colors and color compositions, soft touch, soft fall, smoothness or stiffness, and brilliance or paleness. The most satisfied channel members with the aesthetic characteristics of Turkish WRW products in descending order are retailers, producers and wholesalers.

The WRW products from Italy, France, Greece and FRG are evaluated as being better than the Turkish WRW products in optic and haptic attributes. Countries evaluated to be at the same level as Turkey are Hong Kong, Portugal in all optic and haptic attributes, and Hong Kong in colors, color compositions, softness and elasticity of the WRW product. The optic and haptic attributes of the WRW products from East Europe, Far East, Pakistan and China are evaluated to be worse than those of the Turkish WRW products.

5.1.4. Evaluations for Social Characteristics of Turkish WRW Products

Models for the collections of WRW products are mainly determined by wholesalers in FRG and retailers in FRG. Turkish producers' contribution to creation of collections is still low, mainly due to the lack of knowledge about market trends. Knowledge about consumer and customer expectations, tastes and the general market trend is the major factor for having a significant role in creation of models to develop the collections. A channel type based evaluation shows that for the retailers mainly "retailer in FRG" is stated to develop the collections. The other three channel types mainly stated the "wholesalers in FRG" as the group determining the models of WRW collections. Besides the fashion factor, the image is important in shaping the social characteristics of a WRW product. Here, also the importance attached to the country of origin of a WRW product plays a role. The country of origin is mainly stated to be not important at all. The important choice criteria is the price-performance relation, and consumers are not highly interested in the country of origin of a WRW product. For about 1/3 of the responding firms it is somewhat important. The highest importance to country origin was attached by the producers, followed by the sourcing firms, as rather somewhat important. The image of Turkish WRW products is somewhat good in the German market. The best evaluations for the image of Turkish WRW products was given by wholesalers, the worst rating was given by the sourcing firms. Elimination of quality defects, of the delays in delivery and better promotional efforts are stated to be needed to improve the image for the WRW products from Turkey in the German market.

Countries like Italy, France, FRG, USA, Canada and Japan are evaluated as being better than Turkey in both fashion and image. Greece and Hong Kong are evaluated to be better in image but same as Turkey in fashion creativity. East European countries and Asian countries are evaluated to be worse than Turkey in both fashion and image factors for WRW products.

5.1.5. Evaluations for Identification Factors of Turkish WRW Products

Brand name is a very important identification factor of WRW products, especially from the point of view of producers and sourcing firms; that is, firms mainly involved in production activities. Brand names of Turkish WRW products are rather unknown in the German market. In setting the brand name for a Turkish WRW product, producers in Turkey are not an influential group. Turkish WRW products are either sold under German or English brand names or without any brand name. The

most influential channel members which set the brand name for Turkish WRW products are wholesalers; and are those channel members who carry costs and risk, who make use of promotional tools to create an image. According to the consumers, brand name is first of all associated with "image". It also reflects "exclusivity" of the WRW product. According to the distributors, brand name is first of all associated with "firm image". It is also a guarantee for the sales of the firm.

Label, first of all should "present the necessary information" about the WRW product, and should still be readable after washing. Labels of Turkish WRW products are at satisfactory level, especially as rated for the information presentation attribute. The most satisfied channel members with the label of Turkish WRW products are sourcing firms and retailers.

Package specifications are mainly determined by the firms contacted, as a regulation of the firm to ensure standardization of dispatch. The format of the package of Turkish WRW products and the informativeness of the package are good but the social i.e. promotional role such as the intent for advertising, and the possibility to reuse the package were evaluated to be rather poor. Retailers are the least satisfied group with the packaging elements of Turkish WRW products.

The brand names of WRW products from Italy, France and Europe in general are evaluated as being better than those of Turkish WRW products; at the same level as Turkey are Greece, and also Portugal for brand name popularity and exclusivity. India, North African countries, Far East and East European countries are worse than Turkey in brand name image of WRW products. The labels on WRW products from France, Hong Kong and also from Italy are evaluated as being better than those of Turkish WRW products; labels from Portugal, Yugoslavia and also India are at the same level as labels from Turkey; labels from Greece, North African countries, Far East and East European countries are worse than those from Turkey. In FRG, Hong Kong and in Europe in general, the package of WRW products are better than in Turkey. The packages from Greece, Yugoslavia, Asian countries and also from Italy are at the same level as those from Turkey. The package of WRW products from India, North African and East European countries are worse than that of Turkish WRW products.

For the customers, the most important factors in the purchase decision of a WRW product are price and the style, design, colors of the product. The least important factors are package and label.

Turkey, Italy, France, Portugal, FRG and India are the countries mainly preferred for the purchase of WRW products based on different factors. Turkey obtained high ratings on the possibility for quick reorder and quick delivery, cotton quality and import price of WRW products; but low ratings on sales promotion efforts,

durability of the WRW product, success in styling and design, colors and color compositions, and in being fashion trend maker.

5.2. Conclusion and Implications

Although very competitive in nature, FRG is an attractive export market for especially WRW producers in Turkey, operating in the textile and apparel sectors; since the consumption levels and monetary returns are higher in FRG for WRW compared to other product line alternatives in the textile and apparel product family. In order to capture a higher market share and to increase the sales level, it is a necessity to adapt the WRW product to the needs and expectations in the German market. Similarities observed in the life styles in Germany, Austria, Switzerland and Benelux countries (Tietz, 1990) will help to standardize the necessary product modifications on the WRW for the German market along with these similar export markets.

One of the healthiest ways to find out the needs and wants of the end-users in the export market (FRG) is to search for the expectations of the different distribution channel members.

Due to the mark-ups, profit margins and size of the firms increasing from the producer stage to the retailer stage in the distribution channel network, the yearly gross sales volume is highest for the retailer firms.

In developing business relations with the distribution channel members in FRG, the contact offices of especially sourcing firms and retailers from FRG play an important role for the Turkish WRW producers. The German firms prefer direct contact to the Turkish producers for the WRW products they want to purchase. Those producers which can offer cotton or mixed fibre made T-shirts and sweatshirts in a large variety of colors, models; pullovers in various colors; blouses, shirts; and different sized skirts, shorts, trousers for a sporty and young outlook have an advantage over the others. The sourcing firms and retailers mainly do ordering in Turkey, wholesalers also prefer to purchase collections from Turkey. The improvement in the development and creation of collections by the Turkish producers will increase also the interest of retailers and other channel members in FRG to purchase collections from Turkey.

To ensure this, the efforts to educate and train designers and fashion trend makers should be improved. This in turn will create Turkish trend setters for fashion, whose models are highly demanded in export markets in the long run.

Better business relations with German distribution channel members in textile and apparel sectors can be built when Turkey can provide opportunities for contacts through fashion trade fairs and fashion centers in cities like Izmir and Istanbul where the textile and apparel industries are concentrated.

Fashion trade fairs for ready to wear products organized in fashion metropolises in Turkey will activate the competition among producers and force them to develop new fashion ideas and attractive collections prior to the season. It will also provide broad choice alternatives among collections presented for the visitors, mainly the retailers and other distributors as the purchasers of collections.

Fashion trade fairs for textile fabrics organized in textile production regions in Turkey will help ready to wear producers to gather information and generate ideas about new trends for the next year and develop their collections based on a healthy trend-information, so that a successful marketing plan can be developed, avoiding the ready to wear products manufactured being marginal to the international fashion requirements.

Fashion centers will help distribution channel members from Turkey and other countries to find suppliers and compare their products in one main location; and hence also activate building contacts and sales, following the consumption patterns in the market.

Based on the physical functional characteristics of Turkish WRW products it can be concluded (see Figure 5.1) that related to the quality in general, the major improvement should be done for the durability of Turkish WRW products. Through the finish processing in the manufacturing technique chosen, the durability can be ensured. Here, the Turkish WRW producers have to control mainly the resistance to color run, finish ironing and the resistance of the WRW product to shrink.

Reasons behind color run and shrinkage should be defined, and the resistance to color run and shrinkage of the product should be modified accordingly. During finish processing steps, the instructions for washing or ironing should be defined in more detail in order to avoid possible non-standard production.

Although the material quality of the Turkish WRW products was rated better than the processing and durability quality, there are problems first of all in the solidity of colors of the material used, in the textile fabrics and also in the quality of input products used. The quality defects to be eliminated first of all are warp and weft faults, slacks, failing fibres, holes and stretches occurring in textile fabrics, and deviations in colors of the material used. Among the input products especially zips, press buttons and also buttons need improvement.

In order to improve the material quality, production techniques used for manufacturing the textile fabrics and input products should be advanced through the

adoption of advanced know-how for the current technology requirements. This will in turn ensure standardization in textile fabrics, eliminating texture and color related defects. The investments in new technologies and the use of advanced know-how can help to improve the products in the backward linkage industries for ready to wear sector and help to cope with the competition forced through the import of these materials. The success depends on following the customer expectations, which highly depend on the consumption patterns in the export market. This fact shows that market research activities in the export markets are a necessity to detect a market niche.

Among the processing quality factors special care should be attached to the quality of the labor force. Even the best material, best equipment and manufacturing techniques chosen can result in defective WRW products when used by the unqualified labor force.

Elimination of old processing technologies, the improvement of the existing processing technologies, the increased usage of computerization techniques such as computer aided manufacturing CAM will help to eliminate the processing defects and ensure flexibility in the market.

But only advanced know how and technology transfer are not sufficient to eliminate the defects. Special care should be attached to the training of the labor force at all levels in order to improve first of all the labor quality. To ensure this, education at technical schools for the textile branch and at universities for textile engineering should be widespread, fed and also the industry should not hesitate to invest for the education and training of the labor force, within and outside the firm. Besides the efforts of the schools, universities and the industry, the state should set a budget to increase the number of schools and the education level for the education of people operating or intending to operate at various levels in this sector. Besides the textile techniques, also ready to wear production techniques should be taught.

A joint effort of the industry with education centers like technical schools and universities can help to establish various course programs for further contribution to the on the job training programs.

In manufacturing technique there are problems in sewing, which is a rather labor force dependent factor. Straightness and fineness of seams and also the cleanliness of seams and borders are lacking and should be ensured. In cutting, special care should be attached to the avoidance of diagonal stretch. This problem occurs when less care is taken of the texture when cutting the textile fabrics. During the coloring process especially color stains and deviations in colors cause quality defects in the Turkish WRW products. Although these problems appear to be technical in nature, they can be eliminated through hiring more qualified and attentive

labor force.

Based on the proximity to the consumers, retailers are the least satisfied channel members related to the individual quality factors. They rated, in descending order the labor force quality and durability quality, processing quality, and sewing in manufacturing technique of Turkish WRW products in negative direction. Based on the proximity to production, sourcing firms and producers stated to observe textile fabrics quality defects more than the other channel members (Figure 5.2).

There is a very tight quality control observed on the Turkish WRW at various steps during and after production. Besides the Turkish WRW producers the German firms purchasing WRW products from Turkey are actively involved in the quality control. These firms work in close connection and coordination with Turkish WRW producers to ensure quality control. In order to eliminate quality defects and to prevent price cuts on Turkish WRW products, the Turkish producers should first of all find out the quality perception and quality expectations of German firms in detail and try to produce the WRW putting the main emphasis on the quality in a well organized and professional way, tightening the controls when necessary.

Solutions to the problem can be to increase the number of quality control laboratories, and to delegate the supervision authority for quality control to the Institute for Turkish Standards (Türk Standartları Enstitüsü, TSE) or another similar organization or firm in the field, as an external auditor.

Only these efforts to eliminate the present quality problems can help to improve the Turkish WRW products and to place them at the same quality level as those WRW products from Italy, France, Hong Kong, Far East or FRG.

Based on the aesthetic characteristics of Turkish WRW products it can be concluded (see Figure 5.3) that improvements are needed to ensure the necessary brilliance or paleness in haptic attributes, and more importance should be attached to the colors, color compositions as well as to the product style and cut in optic attributes.

These attributes can be improved through the use of advanced technologies and through visits to fashion fairs for textile fabrics and apparel products, which help to collect the necessary information about the fashion trends in the world.

Retailers gave mainly positive ratings to the optic attributes of Turkish WRW products. The close contact of retailers to the end users shows that Turkish WRW products could meet the optic expectations of German consumers. Turkish WRW producers should try to find out the optic and haptic attributes related expectations of the sourcing firms, since these channel members rated the Turkish WRW products rather neutrally or negatively based on optic and haptic attributes (Figure 5.4).

Improving the aesthetic characteristics of Turkish WRW products will help to

place them at the same appeal level as the WRW products from Italy, France, Greece or FRG.

Based on the social characteristics of Turkish WRW products it can be concluded that Turkish WRW producers have to increase their efforts in developing collections appealing to the export market through hiring creative teams, and in developing fashion ideas through following the international fashion trends in "advance". This can only be achieved through visiting international fashion fairs on textile fabrics such as Interstoff/Frankfurt a.M. to collect information about the colors and designs; visiting the fashion fairs on WRW such as IGEDO/Düsseldorf to collect information about the creativity efforts of competitor countries in the textile-apparel market. In fashion metropolis like Paris, Milan, Florence, Düsseldorf, Frankfurt and Munich there are international fashion fairs throughout the year. The creative teams should design collections using a specific theme for the season, fitting to the international trends in the well known fashion centers in export markets. Efforts to develop the fashion creativity are not sufficient to create a better image for Turkish WRW products, unless the quality defects and delays in delivery are not eliminated and more is not invested in promotional activities. Especially for the sourcing firms the image of Turkish WRW products is poor when not evaluated as somewhat good.

Active involvement in promotional activities following the international fashion trends in advance, visits of trade fairs abroad and investing efforts for the organization of fashion fairs and for the establishment of fashion centers in Turkey will help to increase the image and fashion creativity for Turkish WRW products to the level of WRW products from Italy, France, FRG, USA, Canada or Japan. For the success of the fashion fair in the competitive environment, the most well known international fashion fairs and their organization as well as strategy developments should be detected well in advance.

Based on the identification factors of Turkish WRW products it can be concluded (see Figure 5.5) that Turkish WRW producers should increase their efforts to develop brand names for their products which appeal to the consumers in the export market. Selling without brand names make the Turkish WRW products anonymous. Turkish WRW producers can brake the pressures related to the imposed brand names from the importing firms only by developing attractive brand names which are short, easy to remember and easy to spell. An easy start for developing brand names can be the choice for a multiple country name. Here the brand is specified by a name informing both about the exporter and importer country. This effort can be supported through the use of promotional tools. Supportive promotional efforts help to ensure an image and exclusivity idea for the Turkish WRW products in the export market in the long run.

Labels of Turkish WRW products are at satisfactory level, however there are poor ratings for package factors. An attractive outlook and a short advertising message are helpful to use the package of WRW products as a promotional tool, an advertising media. In an export market like FRG where the population is highly concerned with and actively involved in environmental protection issues, a package for reuse can increase the attention to the product.

Sourcing firms and retailers gave mainly positive ratings for the label. The Turkish WRW producers should try to find out the package related expectations of retailers and sourcing firms, since the ratings of these channel members are in neutral direction (Figure 5.6).

Efforts to develop brand names, and to improve the label and package will help to place the Turkish WRW products at the same levels as those WRW products from Italy, France or Hong Kong.

Turkey can remain as one of the major suppliers of FRG for WRW products in the future, as long as the advantages in this position through quick reorder and delivery, advanced cotton quality and appropriate export prices are kept. Possible price increases can force the German buyers to decrease their imports from Turkey and to shift them to other countries. The efforts of Turkish WRW producers to improve the quality of durability, colors and color compositions, creativity in fashion, styling and design, and to concentrate more on promotional activities can help to overcome problems related to export prices.

Special care should be attached to advertising through international fashion and textile-apparel journals, direct mail and catalogs; and to sales promotion through publicity where in all these promotional efforts the message content should inform the target audience about the advantages of Turkish ready to wear products.

Turkish WRW producers which export or plan to export to the FRG market can make use of this research study to gain a general insight about the distribution channel structure in FRG market. They can specify the factors of WRW products important to the channel members in FRG. The evaluations of the Turkish WRW products give valuable information about the strengths and weaknesses as well as about the country comparative positioning of the Turkish WRW products with respect to other countries. These highlights can help the Turkish WRW producers in evaluating their own products to be exported to FRG market.

German firms in the ready to wear sector which import or plan to import WRW products from Turkey can make use of this research study to see the strengths and weaknesses of Turkish WRW products. These highlights can help the German firms in comparing the WRW products from Turkey with WRW products from other countries and to specify the advantages and problems on Turkish WRW

products.

Based on the results and related highlights of this field survey, government agencies such as export promotion centers, and textile and apparel export associations can specify the advantages and problems on Turkish WRW products sold in the FRG market, and take the necessary measures to improve the WRW exports to FRG market.

In this respect, organization of textile-apparel export seminars at national and international level will be very helpful to exchange specific information about the developments in this sector.

The economic integration of the European Community in 1992 and the efforts of German firms in the apparel sector to open up to the former East German Market will have a pushing effect on the Turkish WRW sector to eliminate the problems on WRW products as soon as possible and to preserve the advantageous position of Turkish WRW products related to the strengths in the export market.

Finally, the study as a whole provides a basis for cross-cultural studies through the information presented in the literature review part about sectoral developments and product related specifications; through the hypotheses developed and data collection procedure, instrument and sampling process as described by the methodology; and through the findings obtained.

Similar studies in other European Community countries can be conducted in order to make cross cultural evaluations and to develop information systems. Such studies are then helpful for Turkish WRW producers as well as for the importers in these countries in choosing their export or import markets, when involved in export or import activities at global level.

Figure 5.1
Evaluations Related to Quality Factors of WRW Products

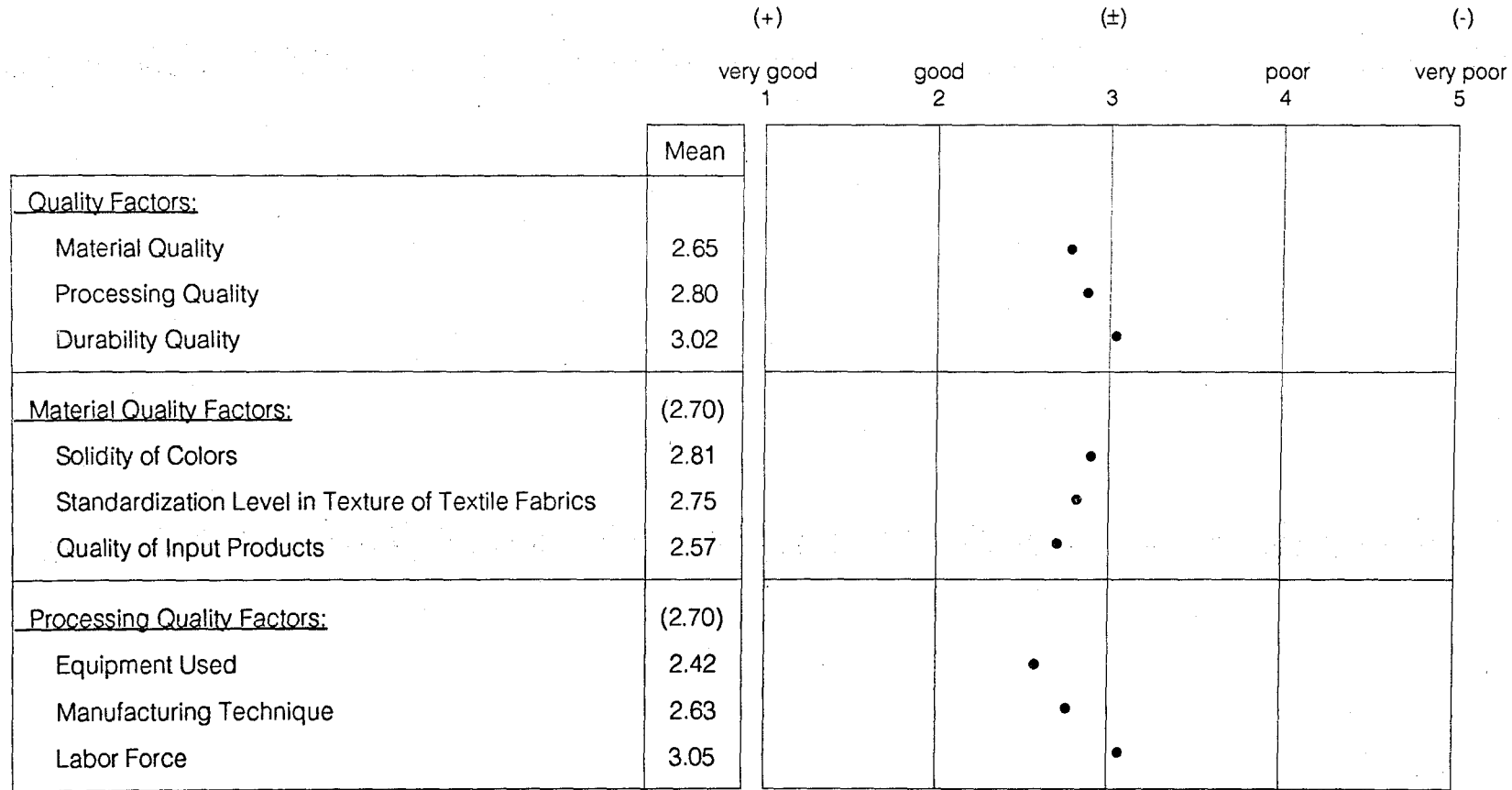


Figure 5.1
(continued)

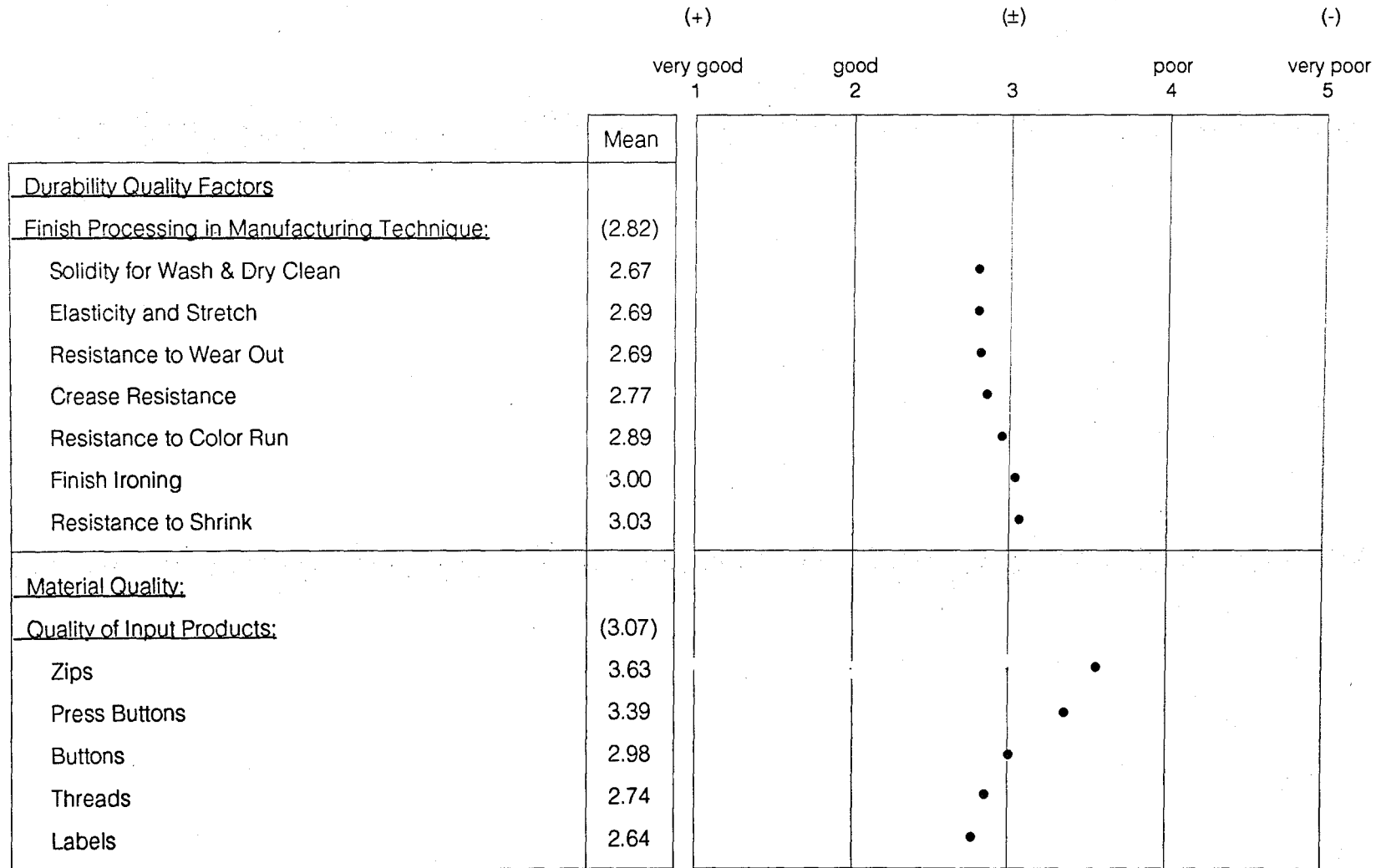


Figure 5.1
(continued)

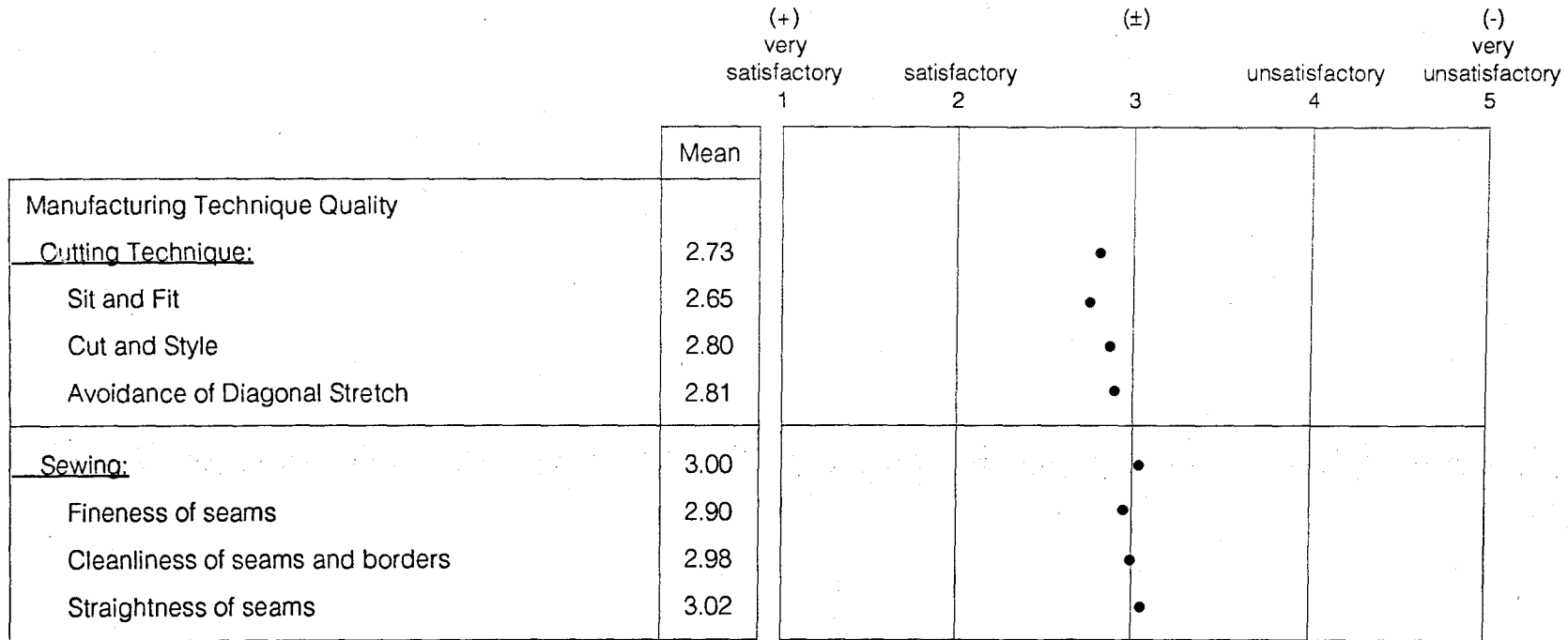
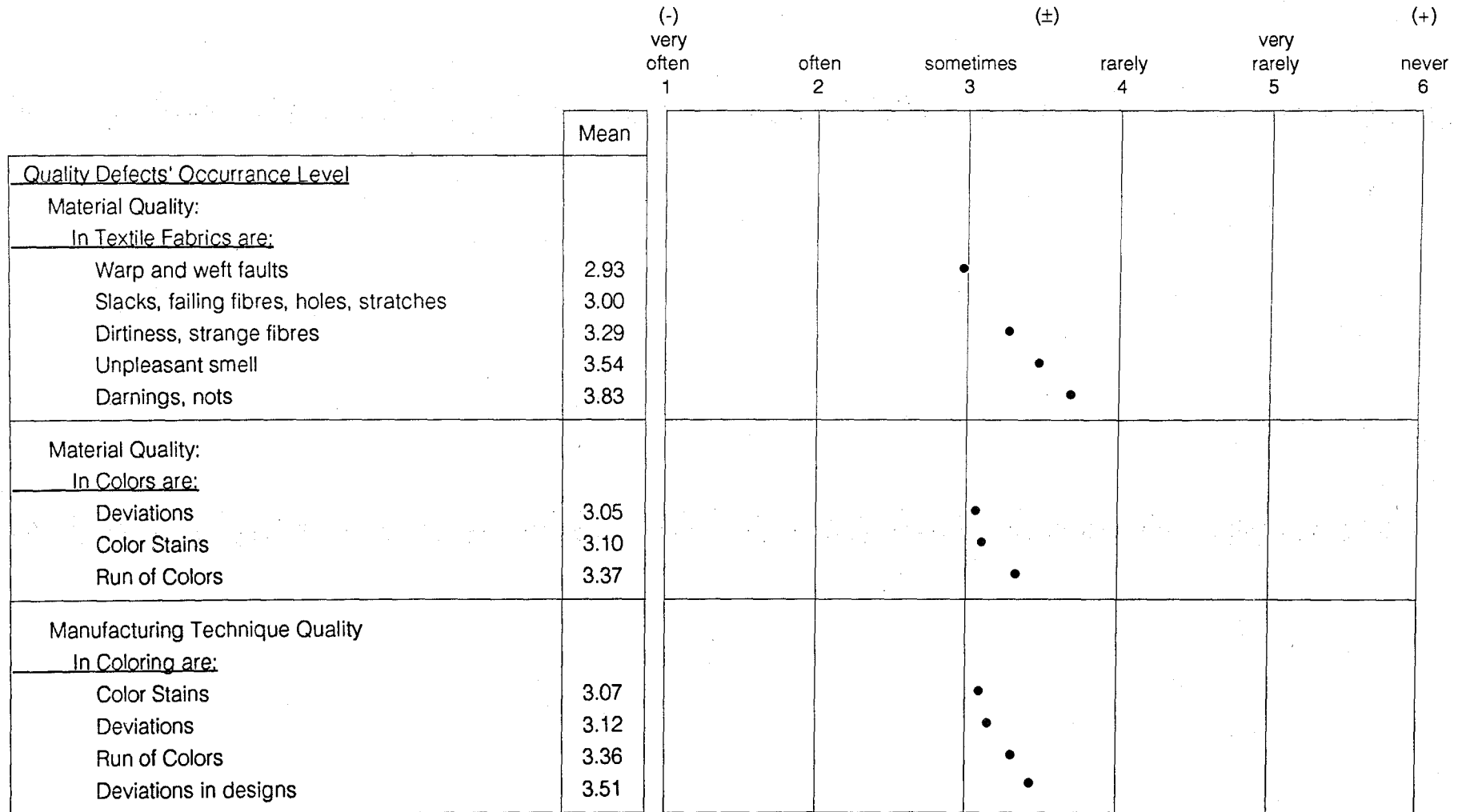
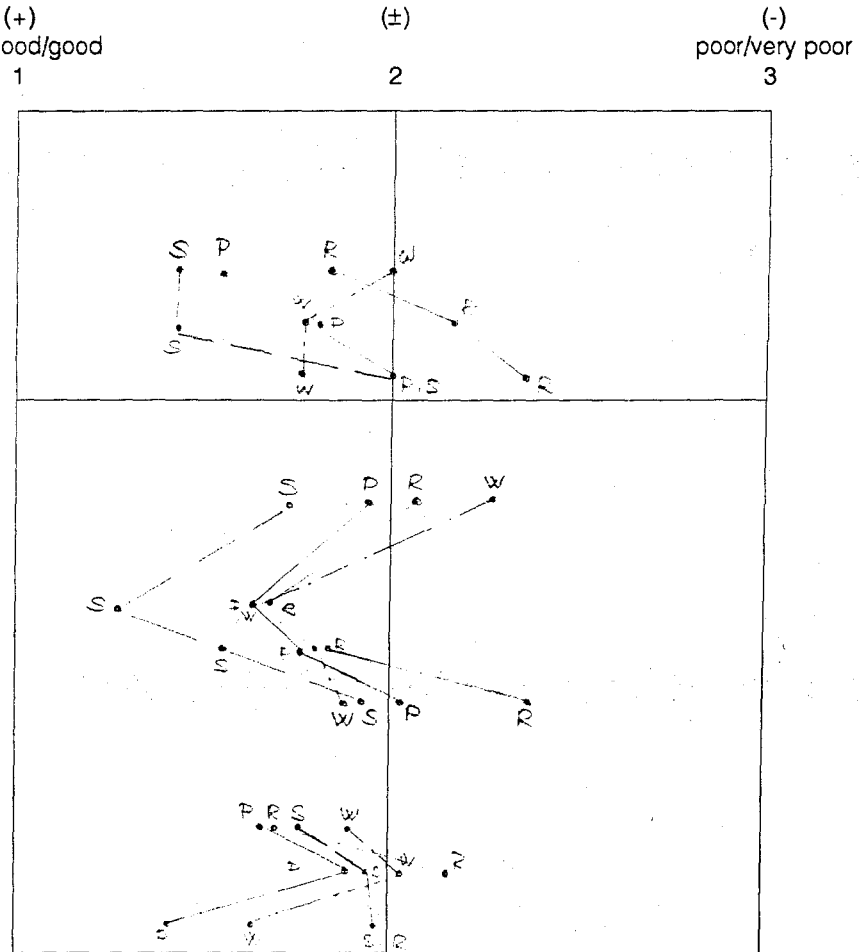


Figure 5.1
(continued)



Quality Factors' Evaluations by Channel Types

Quality Factors by Channel Types	Mean			
	P	S	W	R
Material Quality	1.56	1.54	2.00	1.83
Processing Quality	1.80	1.54	1.78	2.17
Durability Quality	2.00	2.00	1.78	2.36
Material Quality:				
Quality of Input Products	1.93	1.72	2.27	2.06
Processing Quality:				
Equipment Used	1.63	1.27	1.63	1.64
Manufacturing Technique	1.75	1.55	1.77	1.82
Labor Force Quality	2.00	1.92	1.88	2.36
Manufacturing Technique				
Cutting	1.67	1.76	1.90	1.68
Sewing	1.90	1.95	2.03	2.17
Finish Processing to ensure Durability	1.42	1.96	1.64	1.96



Where P = producer, S = sourcing firm, W = wholesaler, R = retailer.

Figure 5.2
(continued)

Quality Defects' Occurrence Level	Mean			
	P	S	W	R
<u>Material Quality:</u>				
Textile Fabrics Quality Defects	1.89	1.81	1.96	2.02
Color Defects	1.96	1.71	1.93	1.97
<u>Manufacturing Technique:</u>				
Coloring Defects	1.91	2.02	1.74	1.98

(-) often 1 (±) 2 (+) very rarely/never 3

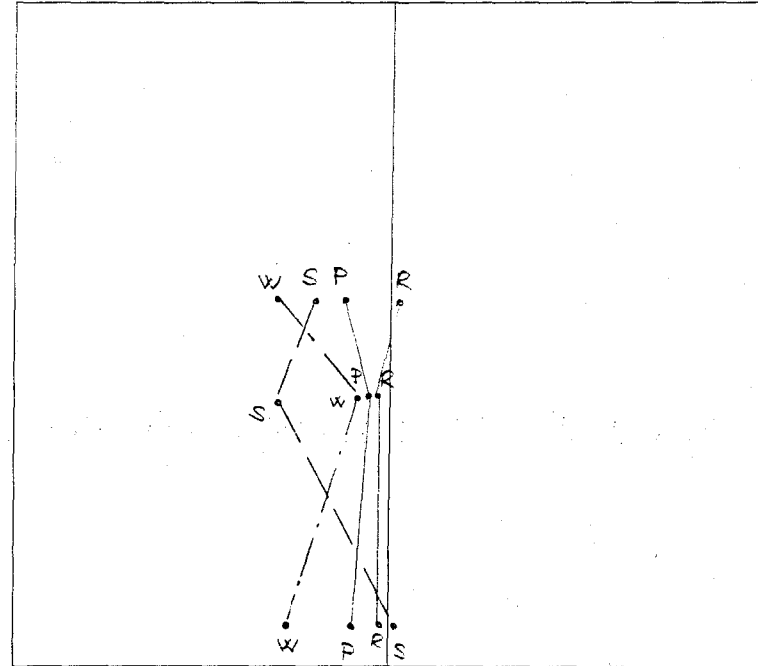


Figure 5.3
Evaluations Related to Aesthetic Characteristics of WRW Products

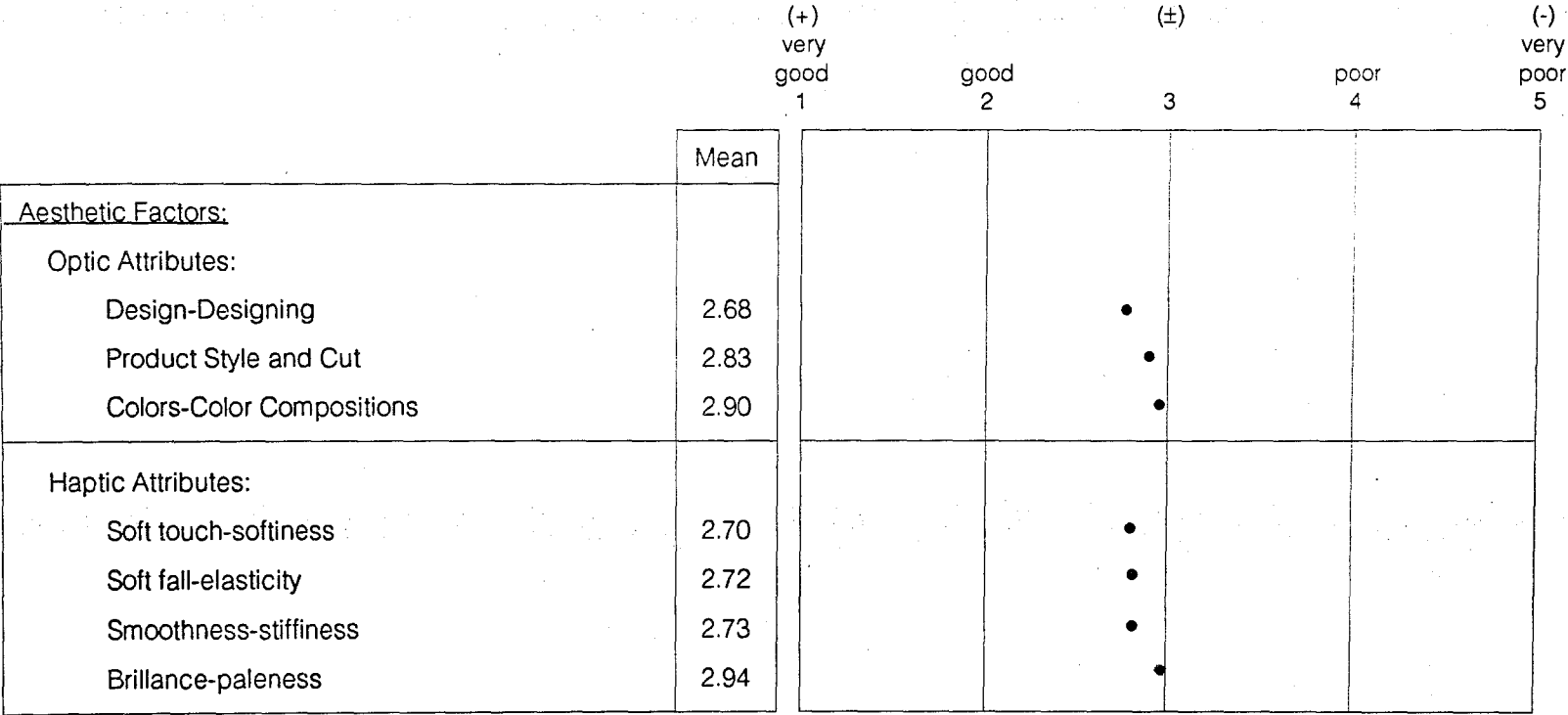
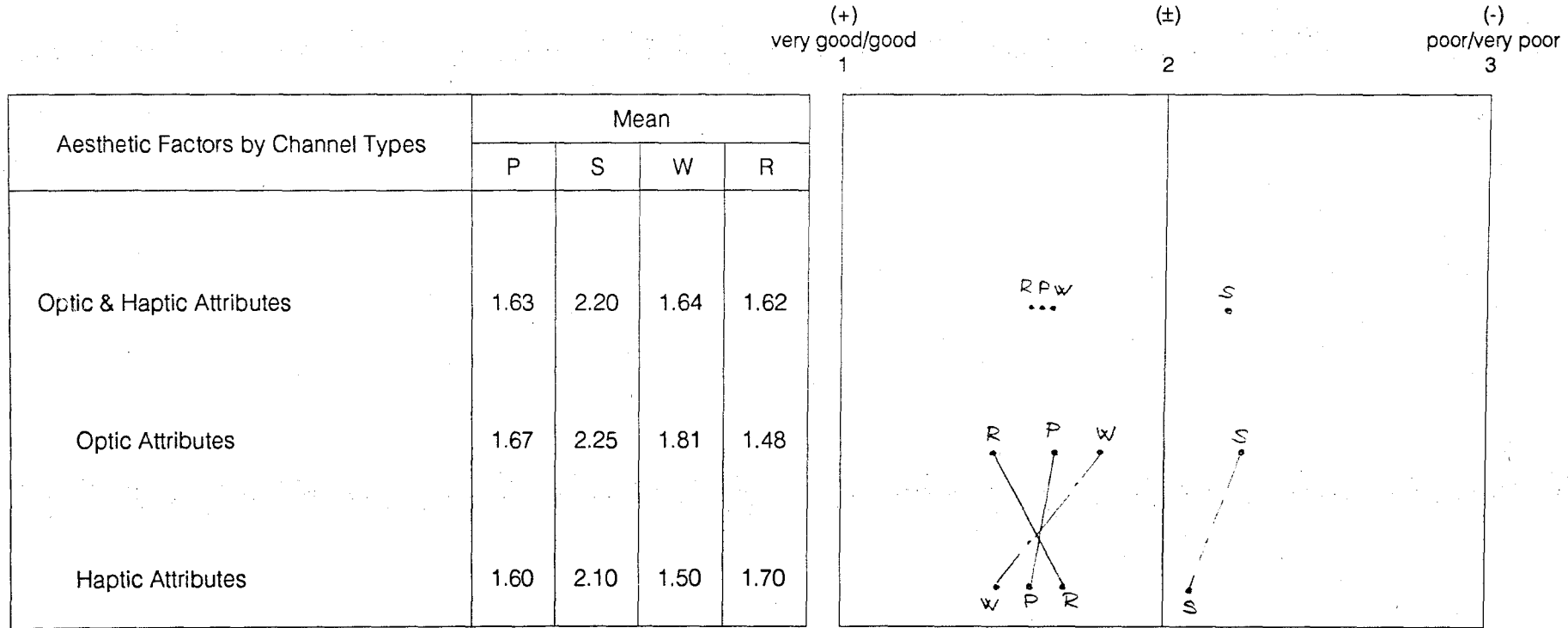


Figure 5.4
Evaluations of Aesthetic Characteristics by Channel Types



Where P = producer, S = sourcing firm, W = wholesaler, R = retailer.

Figure 5.5
Evaluations Related to the Identification Factors of WRW Products

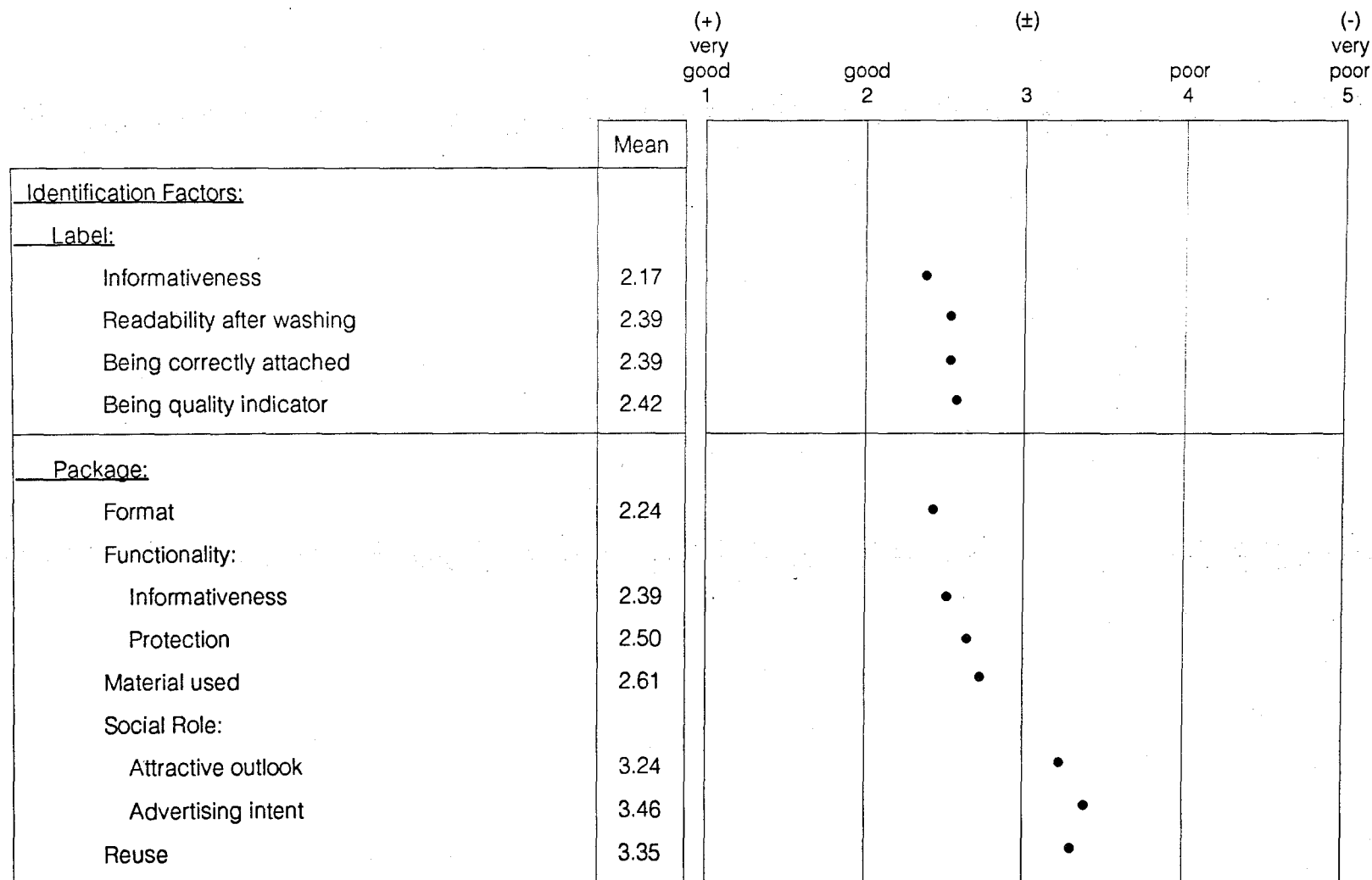
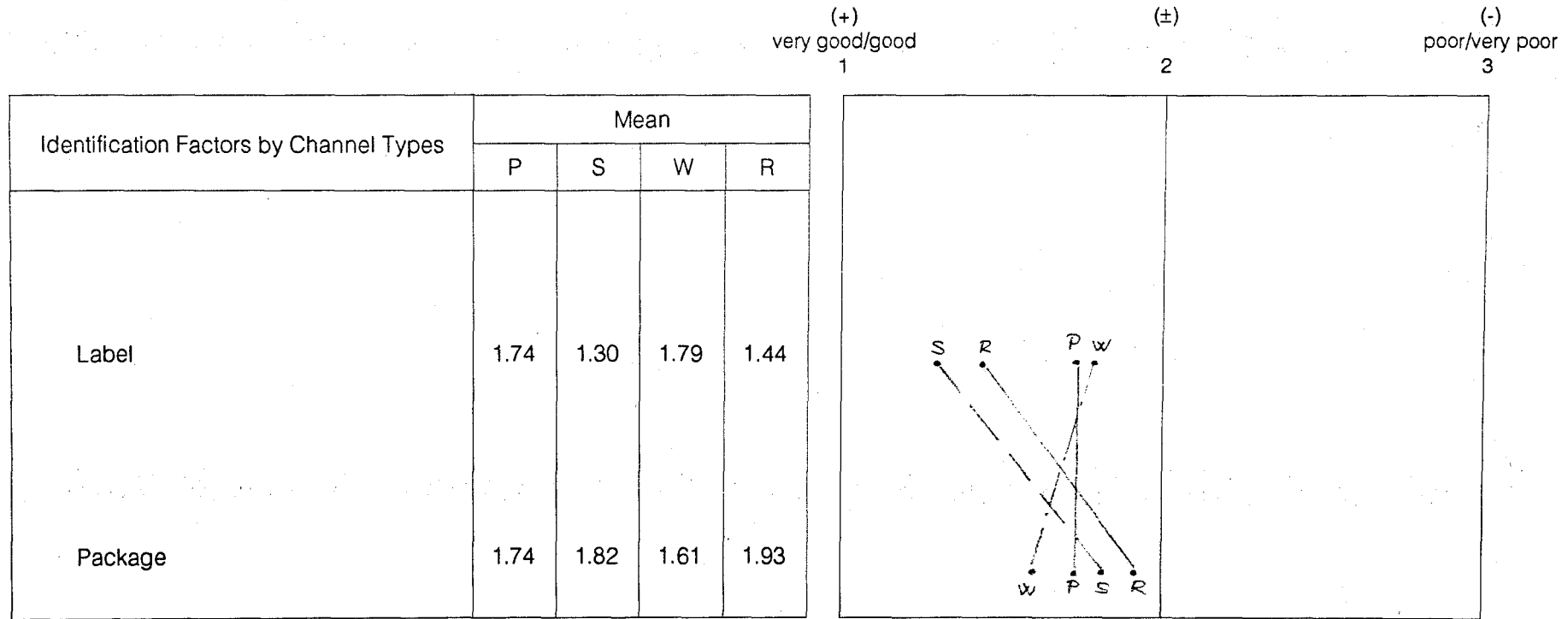


Figure 5.6
Evaluations of Identification Factors by Channel Types



Where P = producer, S = sourcing firm, W = wholesaler, R = retailer

APPENDIX

QUESTIONNAIRE

QUESTIONNAIRE

PART I. Firm Characteristics

1. For how long are you in business relations with Turkey?

- ☐ 1 year
- ☐ 2-5 years
- ☐ 6-10 years
- ☐ more than 10 years

Your occupation in the company is: _____

2. What type of Ready to Wear products do you purchase from Turkey?

(put a "x" in the blanks)

Knitwear

- ☐ pullover
- ☐ T-shirts
- ☐ sweatshirts
- ☐ shorts/skirts/trousers
- ☐ suits

Woven Goods

- ☐ blouses/shirts
- ☐ shorts/skirts/trousers
- ☐ suits
- ☐ dresses

Other type of weave

- ☐ wind jackets
- ☐ ski i.e. sportpants

Type of fibre

- ☐ wool
- ☐ cotton
- ☐ silk
- ☐ synthetics
- ☐ mixed fibre

Grouping according to

- ☐ Women's Ready to Wear - WRW
- ☐ Men's Ready to Wear - MRW
- ☐ Children's Ready to Wear - CRW

3. How many colors, sizes and models do you offer with each product?

(Write the name of the products you offer in the blank)

	Product (e.g. blouse, pullover etc.)
. Colors : 1-3	_____
4-6	_____
More than 6	_____
. Sizes : 36-48	_____
S-XL	_____
Standard size	_____
. Models : 1-2	_____
3-5	_____
More than 5	_____

4. What per cent of your WRW products are manufactured in Turkey, FRG and other countries?

	in Turkey	in FRG	in
. own production	_____	_____	_____
. ordering	_____	_____	_____
. purchase of collections	_____	_____	_____
. cutting-making-trimming	_____	_____	_____

5. What kind of market/marketing research do you conduct for the selection and distribution of your products?

6. Which of the below functions describe your firm's business?

Producer

- : ☐ with own plant in Turkey
☐ with own plant in FRG
☐ as Sourcing Company

Merchant/Agent

- : ☐ Broker/Import Agent
 (works on commission basis for a firm)
☐ Trade Representative
 (works tied to a firm)
☐ Import Merchant/Merchant
 (buys and sells under the own name)

In Wholesale Business:Central Purchasing Organization
(cooperative buying group)

- : ☐ for only textiles & apparel products
☐ with textiles & apparel products in the product line

Wholesaler

- : ☐ for only textiles & apparel products
☐ with textiles & apparel products in the product line

In Retail Business:

- . Retailer for Textiles & Apparel Products : ☐ Textile Specialized Store
☐ Textile Mail-Order Store
☐ Textile Chain Store

- . Retailer with Textiles & Apparel Products : ☐ Department Store
☐ Mail-Order Retailer
☐ Retailer not specializing in Textiles and Apparel (e.g. Food store)

or: in Retail business as

: _____ Producer
 _____ Wholesaler
 _____ Merchant/Agent

7. What portion of your sales are directed to the following groups?

- . Wholesaler _____ %
- . Retailer _____ %
- . Producer in FRG _____ %
- . Final Consumer _____ %

8. Who is your supplier for Turkish WRW products?

(Put a "x" and give reasons whenever possible)

In Turkey

- . Producer in Turkey _____
Reason:
- . Export Merchant in Turkey _____
Reason:
- . Own Plant in Turkey _____
- . Others? _____

In FRG

- . Export Merchant from Turkey _____
Reason:
- . Import Merchant in FRG _____
Reason:
- . Central Purchasing Organization _____
Reason:
- . Wholesaler _____
Reason:
- . Retailer _____
Reason:
- . Others? _____

9. What is the

a) Number of outlets?

- ☐ 1
- ☐ 2 - 10
- ☐ 11 - 20
- ☐ 21 - 50
- ☐ 51 - 100
- ☐ More than 100

b) Yearly Gross Sales of the firm?

- ☐ under 100 T.DM
- ☐ 101-250 T.DM
- ☐ 251-500 T.DM
- ☐ 501 T.DM - 1 Mill.DM
- ☐ 1.1 - 2 Mill.DM
- ☐ 2.1 - 5 Mill.DM
- ☐ 5.1 - 10 Mill.DM
- ☐ 11 - 100 Mill.DM
- ☐ 101 - 250 Mill.DM
- ☐ 251 - 500 Mill.DM
- ☐ 501 Mill. - 1 Bill.DM
- ☐ higher than 1 Bill.DM

10. Do you have either investments or joint ventures in the textiles-apparel sector?

in Turkey

☐ Yes

☐ No

. Which kind?

. Do you plan joint venture activities or investments in Turkey?

☐ Yes

☐ No

. Why / Why not?

. In which countries do you have investments/joint venture activities?

. Do you have contact-offices in Turkey?

☐ Yes

☐ No

. In which countries do you have contact offices (purchase offices)?

Part II. Product Related Questions

Quality

1. The quality of a WRW product is determined by the following factors:

a) Rank these according to the level of importance for quality from 1 to 3!

	Knitwear I	Knitwear II	Woven Goods
. Material	_____	_____	_____
. Processing	_____	_____	_____
. Durability through easy care	_____	_____	_____

b) Evaluate the Turkish WRW products according to the quality of:

	very good				very poor
. Material	_____	_____	_____	_____	_____
. Processing	_____	_____	_____	_____	_____
. Durability through easy care	_____	_____	_____	_____	_____

2. The following criteria determine the material quality in the ready to wear industry:

a) Rank these according to the level of importance for quality from 1 to 3 or 4!

	Knitwear I	Knitwear II	Woven Goods
. Standardization level of texture in textile fabrics	_____	_____	_____
. Solidity of colors	_____	_____	_____
. Quality of input products	_____	_____	_____
. Other criteria	_____	_____	_____

3. The following criteria determine the processing quality in the ready to wear industry:

a) Rank these according to the level of importance for quality from 1 to 3 or 4!

	Knitwear I	Knitwear II	Woven Goods
. Equipment used			
. Manufacturing technique			
. Labor force quality			
. Other criteria?			

b) Evaluate the production in Turkey according to the:

	very good	very poor
. Equipment used		
. Manufacturing technique		
. Labor force quality		

4. The manufacturing technique chosen determines the processing quality through the following factors:

a) Rank these according to their level of importance for quality from 1 to 4!

	Knitwear I	Knitwear II	Woven Goods
. Cutting technique			
. Sewing			
. Coloring			
. Finish Processing/Refinement			

b) Evaluate the Turkish WRW products according to the manufacturing technique quality!

	very satisfactory				very unsatisfac.
<u>Cutting technique:</u>					
. sit and fit					
. avoidance of diagonal stretch					
. cut and style					
<u>Sewing:</u>					
. cleanliness of seams and borders					
. fineness of seams					
. straightness of seams					
<u>Coloring:</u>					
<u>Durability ensured through easy care and finish processing:</u>					
. elasticity and stretch					
. crease resistance					
. resistance to wear out					
. finish ironing					
. solidity for wash and dry clean					
. resistance to:					
. shrink					
. color run					
. Other?					

very
often

never

In coloring there occur:

- . deviations in colors
- . color stains
- . deviations in designs
- . color run

Quality Control

5. Who conducts the quality control? How?

___ Producer in Turkey

___ during the production

___ after completion of the production

___ Merchant/Wholesaler/Retailer from FRG

___ in Turkey: ___ during the production

___ after completion of the production prior to delivery

___ in FRG: ___ after the sample delivery

___ after the complete delivery

___ Quality Control Firm

___ in Turkey: ___ during the production

___ after completion of the production prior to delivery

___ in FRG: ___ after the sample delivery

___ after the complete delivery

6. What kind of quality control is executed for WRW products?

- ☐ initial sample control
- ☐ incoming inspection
- ☐ vendor rating
- ☐ vendor survey
- ☐ what else? _____

7. How do you react in case of observed quality defects?

(Please rank your reactions in the sequence they appear)

- ☐ go to court
- ☐ cutt all relations
- ☐ require a price cut
- ☐ send the delivery back
- ☐ prevent the delivery
- ☐ try to eliminate quality defects in Turkey
- ☐ order in another country
- ☐ order somewhere else and require the cost difference from the problem country
- ☐ other? _____

8. With what percentage of your purchase do you have complaints?

a) Your complaints to:

- . Suppliers of Turkish WRW products _____ %
- . Suppliers of WRW products from other countries _____ %

b) Complaints of your customers _____ %

- . because of Turkish WRW products _____ %

c) What are the reasons behind the quality defects of Turkish WRW products?

9. Make a country based comparative evaluation for WRW products considering quality criteria.

(Assumption: all other factors such as price, delivery service etc. are same)

	Comparative Evaluation		
	better than Turkey	same as Turkey	worse than Turkey
<u>Quality Criteria</u>			
<u>Material:</u>			
. Texture	_____	_____	_____
. Coloring	_____	_____	_____
. Input Products	_____	_____	_____
<u>Processing:</u>			
. Equipment used	_____	_____	_____
. Manufacturing technique	_____	_____	_____
. cutting technique	_____	_____	_____
. sewing	_____	_____	_____
. coloring	_____	_____	_____
. finish processing	_____	_____	_____
. Labor Force Quality	_____	_____	_____
<u>Durability through:</u>			
. solidity for wash/dry clean	_____	_____	_____
. resistance to shrink	_____	_____	_____
. resistance to color run	_____	_____	_____

Optic and Haptic Attributes

10. How well can Turkish producers design the aesthetic characteristics fitting to the expectations of the German consumer or market?

	very good			very poor
. Product style and cut	_____	_____	_____	_____
. Colors/Color compositions	_____	_____	_____	_____
. Designs, designing	_____	_____	_____	_____
. Surface Attributes				
. Brillance/paleness	_____	_____	_____	_____
. Soft fall	_____	_____	_____	_____
. Soft touch	_____	_____	_____	_____
. Smoothness/stiffness	_____	_____	_____	_____

11. Make a country based comparative evaluation for WRW products considering design of aesthetic attributes.

(Assumption: all other factors such as price, delivery service etc. are same)

Comparative Evaluation			
	better than Turkey	same as Turkey	worse than Turkey
. <u>Design of aesthetic attributes</u>			
. Product style and cut	_____	_____	_____
. Colors/Color compositions	_____	_____	_____
. Designs, designing	_____	_____	_____
. Surface Attributes			
. Brillance/paleness	_____	_____	_____
. Soft fall	_____	_____	_____
. Soft touch	_____	_____	_____
. Smoothness/stiffness	_____	_____	_____

Fashion

12. a) Who determines the models in the collection?

___ Producer in Turkey
Why/Why not?

___ Yes

___ No

___ Wholesaler in FRG
Why/Why not?

___ Yes

___ No

___ Retailer in FRG
Why/Why not?

___ Yes

___ No

b) How do fashion trend makers/designers in Turkey work?

Compare their efforts/work methods with those of the other countries!

Origin

13. For the German consumer

a) The country of origin of WRW products is:

___ important

___ somewhat important

___ not important at all

Why? _____

b) The product image of Turkish WRW products is:

___ good

___ somewhat good

___ poor

Why?

14. Make a country based comparative evaluation for WRW products considering social characteristics.

(Assumption: all other factors such as price, delivery service etc. are same).

	Comparative Evaluation		
	better than Turkey	same as Turkey	worse than Turkey
<u>Social characteristics</u>			
· Fashion related creativity	_____	_____	_____
· Image	_____	_____	_____

Brand Name

15. a) How important is in general the brand name for WRW products?

very
important _____ _____ unimportant

b) How effective are the brand names chosen by Turkish firms (with management in FRG)?

c) Who determines the brand name for Turkish WRW products?

- _____ agents/merchants in FRG
- _____ wholesaler
- _____ retailer
- _____ producer in Turkey
- _____ producer (importer) in FRG)

Why/Why not? (i.e. without brand name)

16. What do the following groups associate with a brand name in case of WRW products?

Rank order from 1 to 5 or 4!

a) Consumers:

- ___ high quality
- ___ popularity
- ___ exclusivity
- ___ image
- ___ high price
- ___ other? _____

b) Sellers (Wholesaler or Retailer)

- ___ firm image
- ___ quality standardization
- ___ sales ensurance

Packaging

17. When it is about the packaging of WRW products:

a) Who determines the standards?

- ___ Producer in Turkey
- ___ You
- ___ Others? _____

Why?

b) If you set the package standards:

____ You do this just for certain countries like Turkey and accept the package of other countries.

Why?

____ You do this for all countries without exception.

Why?

c) How do you evaluate the packaging from Turkey?

	very good			very poor
. Format of the package				
. Material used				
. Functionality:				
. Protection				
. Informativeness				
. Social Role with:				
. attractive outlook				
. advertising intent				
. Reuse				

Labelling

18. The following factors are important for labelling:

a) Rank these according to the level of importance from 1 to 4!

- _____ covering the necessary information for the consumer
- _____ readability after washing
- _____ being correctly attached
- _____ use as quality indicator

b) How satisfactory are labels attached to Turkish WRW products?

	very adequate				very inadequate
. covers the necessary information	_____	_____	_____	_____	_____
. is readable after washing	_____	_____	_____	_____	_____
. is correctly attached	_____	_____	_____	_____	_____
. is used as quality indicator	_____	_____	_____	_____	_____

19. Make a country based comparative evaluation of WRW products considering identification factors!

(Assumption: all other factors such as price, delivery service etc. are same).

	Comparative Evaluation		
	better than Turkey	same as Turkey	worse than Turkey
<u>Identification Factors</u>			
<u>Package</u>			
. Material	_____	_____	_____
. Format	_____	_____	_____
. Functionality	_____	_____	_____
. Outlook/appearance	_____	_____	_____
. Reuse	_____	_____	_____
<u>Brand Name</u>			
. Popularity	_____	_____	_____
. Exclusivity	_____	_____	_____
. Image	_____	_____	_____
. High Quality	_____	_____	_____
. Sales ensurance	_____	_____	_____
<u>Label</u>			
. Information	_____	_____	_____
. Readability after washing	_____	_____	_____
. Correct attachement	_____	_____	_____

20. a) When it is about the consumers for WRW products:

Please define your target group!
(according to age, income, style etc.)

b) Which of the following WRW product factors are important for the German customers (retailers and consumers)?

Rank from 1 to 6 according to the level of importance!

	Customers	
	Retailer	Consumer
<u>Criteria</u>		
. Price		
. Style, Design, Colors		
. Durability through easy care		
. Country of Origin		
. Label		
. Processing Quality		
. Brand Name		
. Material Quality		
. High Fashion Creation		
. Package		
. Other?		

21. What are the most important factors determining the preference to purchase WRW products from a certain country?

(Give the names of the countries for each criteria)

In case of:

Country:

- . Import Price
- . Material Quality
- . Cotton Quality
- . Price cut in case of quality defects
- . Processing Quality
- . Durability of the product
- . Being Fashion trend maker
- . Success in Styling and Design
- . Colors and Color Compositions
- . Possibility for quick reorder
- . Possibility for quick delivery
- . Good Sales Promotion Efforts

THANK YOU!

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