CONSUMER BEHAVIOR ANALYSIS AND MARKETING COMMUNICATIONS STRATEGY DEVELOPMENT: THE CASE OF TUBORG

A THESIS
Submitted to the Department of Management
and Graduate School of Business Administration
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in Partial Fulfillment of the Requirements
For the Degree of
Master of Business Administration

By

MEHMET ALI DENIZ

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MEHMET ALI DENIZ

JUNE 1995

I certify that I have read this thesis and in my opinion it is fully adequate, in scope and reality, as a thesis for the degree of Master of Business Administration

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ABSTRACT

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June 1995

Efes Pilsen and Tuborg have enjoyed an oligopolistic market structure in the Turkish Beer Industry for decades. This has caused the companies to adopt a sales and product orientation and exert little effort on marketing. However, the market conditions and competition have begun to change recently, by the recent introduction of a new brand, feasibility studies of world giants to enter the Turkish market, and the Customs Union which will decrease the customs tax on import beer. On the other hand, Efes Pilsen has entered into market development efforts in foreign markets. The above competitive moves in the industry by various actors have changed the long-prevailing competitive structure in the industry, especially for the disadvantage of Tuborg.

Thus, in this thesis, it is argued that the study of the consumer behavior in the Turkish Beer Market, that has long been underestimated by the agents in the industry, is crucial for Tuborg to compete the changes in the market and find differentiation points that are significant in the eyes of the consumers. It is also discussed that the adoption of a consumer orientation, which takes the current needs and perceptions of the consumers into consideration, is crucial for the success of the communications strategy, which is a sustainable differentiation factor. Therefore, a marketing research has been conducted for the beer market (taking Ankara as a pilot region for application) in order to better understand the needs of the consumers, to find out significant differences as well as similarities among the consumers. Depending on the marketing research conducted, a communications strategy has been suggested for Tuborg . This strategy has been designed to serve to differentiate the brand in the market through communications and also to constitute an entry barrier against the new entrants. On the other hand, the necessary adaptations in the organizational structure of Tuborg to the suggested consumer orientation have also been discussed within the thesis.

Keywords: Segmentation, targeting, positioning, image, marketing orientation, communications strategy

ÖZET

TÜKETİCİ DAVRANIŞLARI ANALİZİ VE PAZARLAMA KOMUNİKASYONU STRATEJİSİ GELİŞTİRİLMESİ: TUBORG

Danışman: Doç. Dr. Güliz Ger

Efes Pilsen ve Tuborg, uzun yıllar boyunca Türk Bira Pazarı'nda oligopolistik bir pazar yapısında faaliyetlerini yürütmüşlerdir. Bu durum, bu şirketlerin satış ve ürün oryantosyonuyla davranmalarına ve pazarlama çalışmalarına az ağırlık vermelerine sebep olmuştur. Fakat son zamanlarda, pazara yeni bir markanın girmesi, bira endüstrisindeki dünya devlerinin Türk Pazarı'na girmek için yaptıkları fizibilite çalışmaları ve biradaki gümrük vergisini düşürecek olan Gümrük Birliği'nin yaklaşmasıyla, pazardaki durum ve rekabet şartları değişmeye başlamıştır. Bu arada, Efes Pilsen de dış piyasalarda yeni pazar arayışlarına girmiştir. Yukarıda bahsedilen rekabet faaliyetleri, uzun zamandır statükosunu koruyan Türk Bira Pazarı'nın yapısını, özellikle Tuborg'un dezavantajına olacak bir biçimde değiştirmiştir.

Bu tezde, uzun zamandır bira endüstrisinde ihmal edilen Türk Bira Pazarı'ndaki tüketici davranışlarının incelenmesiyle, ve tüketici gözünde önemli olan ayırım noktalarının belirlenmesiyle, Tuborg'un değişikliklere adaptasyonunun sağlanabileceği ve pazarda önemli bir rekabet avantajına sahip olabileceği tartışılmaktadır. Ayrıca, tüketicilerin ihtiyaç ve algılarının gözönüne alındığı tüketici oryantasyonu sayesinde, Tuborg'un

devamlı bir farklılaşma noktasına sahip olacağı söylenilmektedir. Bu noktaları kanıtlamak amacıyla, ve tüketicilerin ihtiyaçlarını, ve tüketiciler arasındaki farkları ve benzerlikleri bulmak amacıylaAnkara pilot bölgesinde bir pazar araştırması yapılmıştır. Bu pazar araştırmasının sonucunda, Tuborg için bir pazarlama komunikasyonu stratejisi önerilmiştir. Bu arada, önerilen pazarlama oryantasyonuna şirketin adapte olabilmesi için yeni bir organizasyon yapısı da öneriler arasında yer almaktadır.

Anahtar kelimeler: Pazar bölümlemesi, pazar hedefleme, ürün konumlandırma, imaj, pazarlama komunikasyonu, pazarlama oryantasyonu

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TABLE OF CONTENTS

APPENDICES

I. INTRODUCTION

The activities of the business world have been affected by many paradigms in the last fifty years. For decades, manufacturing paradigm was the center of strategic management and the popular hero was the man who could get things out of the factory door - the manufacturing man. Later, mass marketing was invented to sell standardized mass-produced products to a similarly standardized, undifferentiated mass of consumers (Schultz et al, 1994). In 1972, the positioning theory was articulated by Trout and Ries, who claimed that most marketing plans were conceived as though products existed in isolation. They also argued that companies need to determine what position their products already occupy in the consumers' mind relative to other products and act to reinforce or change that position. Consequently, the motto of the age of the manufacturer-*caveat emptor*, let the buyer beware-is replaced by *cave emptorum*, beware of the buyer (Schultz et al, 1994).

According to the new paradigm, which is based on consumer orientation, traditional marketing variables such as product development, pricing, form or distribution or channels are no longer as effective ast they once were. In a less developed, less sophisticated, less informed marketplace these traditional marketing concepts worked well. Today, however, the marketing mix variables on which marketers traditionally relied on such as a better product design, more production efficiency have lost their value as competitive weapons (Schultz et al, 1994).

In a parity marketplace, the only real differentiating feature that a marketer can bring to consumers is what those consumers believe about the company, product, or service and their relationship with that brand. The only place that real product or brand value exists is within the minds of the customers or prospects. All the other marketing variables such as product design, pricing, distribution, and availability can be duplicated, or overcome by competitors. Although this is what people believe, rather than what is true, one should take into consideration that 'reality' is the perception of the customer in the final analysis.

Within this framework, the practice of integrated marketing communications, which integrates demographics, psychographics, category network as well as segmentation, classification, contact management, objectives, brand network, objectives, tools and communications tactics in a whole, is emerging as one of the most valuable tools companies can use to gain competitive advantage. Thus, customer orientation which inherently includes understanding the needs and perceptions of the consumers, is becoming a very effective strategic approach in the competitive market environment, where perceptions, rather than reality counts. In the light of this framework, advertising, sales promotion, direct response marketing, and public relations practitioners are busy finding common ground to meet the coming challenge of selling to *consumers* rather than to *markets* (Schultz et al, 1994).

On the other hand, the degree of competition within the industries is a very important criterion in the adoption of innovative tools like consumer orientation, which help to differentiate from the competitors. The less intense the extent of competition in an industry, the less incentive the companies have, to differentiate from the competitors. The market behavior of the firms in the brewery industry in Turkey is an example for this situation. Until very recently, the beer market in Turkey consisted of the products of three breweries, two of which (namely, Tuborg and Efes Pilsen) constituted 97% of the total sales. Although the beer production was initially started by Tekel in Turkey, this public company has started to withdraw from the market. Coupled with the shrinking market share of Tekel and new investments of the two companies, Efes Pilsen and Tuborg have enjoyed an oligopolistic market structure for decades. This has caused the companies to adopt a sales and product orientation and exert little effort on marketing. Thus, the companies have adopted a product-variety marketing approach (Kotler, 1991), without doing any segmentation in the market. However, the market conditions and competition have begun to change recently, by the introduction of the 'Marmara Beer' in May 1995, the feasibility studies of brewery giants Anheuser Busch, Miller, and Heineken to enter to the Turkish Beer Market as producers, and the Customs Union which will decrease the customs tax on import beer. On the other hand, Efes Pilsen has entered into foreign markets in a strategic alliance with Coca Cola Company and made new investments especially in Romania and CIS.

The above mentioned activities of the new entrants and the market development efforts of Efes Pilsen have changed the long-prevailing competitive structure in the industry, especially for Tuborg. Although beer is by definition a fast moving 'consumer good' (Kotler, 1991), the firms have, to a great extent, neglected the consumer behavior part of the business, because of the oligopolistic nature of the market. Due to the new conjuncture, effects of the change in the industry structure, consumer behavior for the product, as well as counter-actions that could be adopted by Tuborg are worth studying.

Thus, in this thesis, it is argued that the study of the consumer behavior in the Turkish Beer Market, that has long been underestimated by the agents in the industry, is crucial for Tuborg to compete the changes in the market and find differentiation points that are significant in the eyes of the consumers. It is also discussed that the adoption of a consumer orientation, which takes the current needs and perceptions of the consumers into consideration, is crucial for the success of the communications strategy, which is a sustainable differentiation factor, as mentioned by Schultz et al (1994). Therefore, a marketing research has been conducted for the beer market (taking Ankara as a pilot region for application) in order to better understand the needs of the consumers, to find out significant differences as well as similarities among the consumers. Depending on the marketing research conducted, a communications strategy has been suggested for Tuborg. This strategy has been designed to serve to differentiate the brand in the market through communications and also to constitute an entry barrier against the new entrants. On the other hand, the necessary adaptations in the organizational structure of Tuborg to the suggested consumer orientation have also been discussed within the thesis.

II. LITERATURE SURVEY

Market orientation is a business culture that is focused on creating superior value for buyers. According to Slater and Narver (1992), market orientation consists of three behavioral components: customer orientation, competitor orientation, and interfunctional coordination These behaviors are concerned with intelligence generation and dissemination and managerial action. The result is that market orientation provides a set of values that focuses the efforts of all employees on creating superior value for the firm's customers, thereby leading to competitive advantage.

The bottom line of the findings of Slater and Narver (1992) is that, as a result of dynamic and hostile market conditions, being market oriented is more important than ever. There is also much more to being market oriented than being attuned to customer, and it definitely doesn't mean being dependent on the marketing department. In fact, as all of a firm's employees become market oriented, the importance of the marketing department may even diminish.

On the other hand, the marketing literature dictates that, under the current market conditions, a company that decides to operate in some broad market should recognize that it normally cannot serve all customers with one product. The customers are too numerous, dispersed and varied in their buying requirements. According to Kotler (1991), the heart of modern strategic marketing can be described as STP marketing- namely, segmenting, targeting, and positioning. He argues that the companies pass through three stages of marketing: Mass marketing- where the seller engages in the mass production, mass distribution and mass promotion of one product for all buyers; product-variety marketing- where the seller produces several products that exhibit different features, styles, qualities, sizes, and so on, to offer variety to buyers rather than to appeal to different market segment; target marketing-where the seller distinguishes the major market segments, targets one or more of these segments, and develops products and marketing programs tailored to each segment.

The first step of target marketing is market segmentation. The concept of market segmentation is implicit in the decisions of what consumer groups to serve and how to combine marketing variables to appeal to a particular group of potential purchasers (Corey, et al., 1981). This is based on the following propositions:

- Consumers are different,
- Differences between consumers are related to differences in market behavior,
- Segments of consumers can be isolated within the overall market according to such factors as their personal characteristics, geographical location, life-styles, needs they seek to satisfy, and their buying behavior (Corey, et al., 1981).

Kotler (1991) defines the procedure of segmentation as three stages: Survey stage where the researcher conducts informal interviews and focus groups with consumers to gain insight into their motivations, attitudes and behaviors. In the analysis stage, the researcher applies factor analysis to the data to remove highly correlated variables and cluster analysis to create a specified number of maximally different segments. Finally, in the profiling stage, each cluster is profiled in terms of distinguishing attitudes, behavior, demographics, psychographics, and media-consumption habits.

Solomon (1994) classifies the variables for segmentation as demographic - age, sex, social class, occupation income, ethnic group, religion, stage in life, purchaser versus user; geographic - region in the country, type of residence; psychographic - self-concept, personality, life-style; behavioral - brand loyalty, extent of usage, usage situation, benefits desired.

Benefit segmentation is another model that has been used frequently and successfully in a real marketing environment (Haley, 1985). It depends on the premise that even though all people would be physically exposed to all themes, themes would be selectively retained, and it would be possible to predict which individuals would retain which themes through knowledge of the benefits each person considers important.

The requirements for effective segmentation are defined as follows by Kotler:

- Measurability: The degree to which the size and purchasing power of the segments can be measured
- Sustainability: The degree to which the segments are large and/or profitable enough
- Accessibility: The degree to which the segments can be effectively reached and served.
- Actionability: The degree to which effective programs can be formulated for attacking and serving the segments.

While market segmentation reveals the market-segment opportunities facing the firm, the firm has to evaluate the various segments and decide how many and which ones to serve. In evaluating different market segments, the firm must look at three factors: Segment size and growth, segment structural effectiveness, and company objectives and resources (Kotler, 1991).

Kotler argues that a company must differentiate its offer to target customers and thereby secure a competitive advantage. The tools for competitive differentiation are classified as: Product differentiation - features, performance, conformance, durability, reliability, reparability, style, design; services differentiation - delivery, installation, repair, customer training, consulting service; personnel differentiation; image differentiation - symbols, written and audio/visual media, atmosphere, events. (Porter, 1985; Garvin, 1987).

According to Dickson and Ginter (1987), a strategy of product differentiation does not require the existence of market segments, but may be used in conjunction with market segmentation strategy when segments are perceived to exist. Moreover, a strategy of segment development is feasible only when product differentiation either already exists or is an accompanying strategy.

After targeting the segments according to the above criteria, the company must position its product to fit best to the needs of the consumers in the particular segment. The positioning decision often means selecting those associations which are to be built upon and emphasized and those associations which are to be removed or de-emphasized (Aaker and Shansby, 1982). The positioning decision is often the crucial strategic decision for a company or brand because the position can be central to customers' perception and choice decisions. Aaker and Shansby classify positioning strategies as:

- Positioning by attribute
- Positioning by price-quality
- Positioning by use or applications
- Positioning by product-user
- Positioning with respect to a product-class
- Positioning with respect to a competitor

Aaker and Shansby further define the stages of developing positioning strategies as: Identifying competitors, determining how they are evaluated, determining the competitors' positions, analyzing customers, selecting position, monitoring position.

Ries and Trout (1986) define the leader positioning strategies as covering all bets, taking power from the product, covering with multibrands and covering with a broader name. The follower positioning strategies, which are defined as filling the holes in the market, on the other hand, are classified as filling size creneau (hole), filling high-price crenau, and filling low-price crenau.

On the other hand, the importance of image concept in the positioning strategies has increased more than ever, since technological and market changes have made markets increasingly complex and less transparent to consumers, Moreover, products and brands have become more homogenous in the consumers' perception, even though these products can be highly different from a technical point of view. The increasing complexity of markets, products and information is accompanied by a change in the theorizing of consumer information processing. As a result of the growing interest in the limited motivation and information-processing ability of consumers, the 'rational' problem-solving consumer is gradually replaced by one who tends to process information and to make decisions on the basis of the following factors (Poiesz, 1989):

- Normative-affective factors (Etzioni, 1988)
- Memory residues of past consumption experiences. By the late 1970's, consumer researchers had begun to recognize that consumers' stored knowledge in memory strongly influences their cognitive processes (Walker et al, 1987)
- Affect preceding cognition which contrasts the information processing approach to consumer decision making, as the latter approach requires cognitions to precede itself (Zajonc and Markus, 1982).
- Simplifying information cues in attitude change and persuasion processes as focused upon by Petty and Cacioppo (1984)
- Simplified choice rules or heuristics (Hoyer, 1984)
- Symbolic information. Holbrook and Hirschman (1982) describe experiential aspects of consumption, focusing on the symbolic, hedonic and aesthetic nature of consumption.

- Non-conscious processes. The literature reflects an increasing interest in processes that are of a non-conscious nature. Most of the memory and attention factors that affect our judgment are simply unavailable to consciousness (Lynch and Srull, 1982).

Summarizing these developments, we may note an increasing emphasis on limited consumer information processing and on the unconscious processing of incomplete or simplified information, and simplifying product symbols and cues. With regard to product and brand conceptualizations, there is a parallel shift in attention: away from physical aspects and functional benefits of products to their symbolic associations, expressiveness, psychosocial aspects, and surplus product value or augmented product (Poiesz, 1989).

In addition to the above implications, the following definitions of image have been made by the marketing authors:

- General characteristics, feelings, or impressions (Jain and Etgar, 1976)
- Perceptions of products (Lindquist 1974; Marks 1976)
- Sum of all product meanings conveyed to the consumer (Martineau, 1957)
- A processing mode in which multisensory information is represented in a Gestalt form in working memory (McInnis and Price, 1987).
- A processing mode in which multisensory information is represented in a Gestalt form in working memory (McInnis and Price, 1987).
- A combination of product aspects that are distinct from the physical product characteristics but are nevertheless identified with the product. Examples are brand name, symbols used in advertising, endorsement by a well-known figure, and country-of-origin (Erickson et al, 1984)

As seen from the different definitions above, images range from holistic, general impressions to very elaborate evaluations of products, brands, stores or companies. Several possible functions of images as conceived by Poiesz are:

- An image may serve to reduce the extensiveness and complexity of information processing, storage and retrieval
- An image may serve as a precursor or gatekeeper to more extensive elaboration. A positive holistic impression may increase the likelihood of attention to an interest in information on the object and vice versa.
- An image may function as a heuristic, a simplifying choice rule, in low involvement decision-making. similarly, an image may possibly serve as a persuasion cue if a peripheral route to attitude change is being followed.

On the other hand, the image of a product in the mind of the consumer is created by the perception the consumer has of that product. Perception is the process by which basic stimuli as light, color, and sound are selected, organized, and interpreted (Solomon, 1994). Solomon (1994), furthermore, defines the stages in perceptual process as:

- Primitive categorization, in which the basic characteristics of a stimuli are isolated
- Cue check, in which the characteristics are analyzed in preparation for the selection of a schema.
- Confirmation check, in which the schema is selected
- Confirmation completion, in which a decision is made as to what the stimulus is.

External stimuli or sensory inputs, can be received on a number of channels. Sensory inputs evoke history imagery and fantasy imagery (Solomon, 1994). Marketers rely heavily on visual elements in advertising, store design, and packaging. Color is one of the most potent aspects of visual communication. Colors are rich in symbolic value and cultural meanings.

The choice of color is frequently a key issue in package design. Some color combinations come to be strongly associated with a corporation that they become known as the company's trade dress, and the company may be even granted the exclusive use of these colors. Since the number of competing brands has proliferated for many types of products, the color of a package can be a crucial spur to sales (Solomon, 1994).

According to Peirce's Triadic Semiosis (Mick, 1986), every marketing message has three basic components: an object, a sign or symbol, and an interpretant. The object is the product that is the focus of the message. The sign or symbol is the sensory imagery that represents the intended meanings of the object. The interpretant is the meaning derived.

McCracken and Pollay (1981) argue that advertising seeks regularly to bestow a product with properties beyond its intrinsic features by exploiting two principles that frequently figure into semiotic inquiry: contiguity and similarity. The former involves bringing together in the ad a select set of objects, persons, and activities with the product. The latter takes over as the audience is invited to acknowledge resemblances and, in effect, transfer properties between the co-present entities.

The consumer, who is exposed to all of these communication activities is to decide which product to choose among the various brands competing for his/her attention. The stages in the classical decision-making process are defined as Problem Recognition - Information Search - Evaluation of Alternatives - Product Choice - Outcomes (Solomon, 1994). The types of decision-making process are classified as habitual decision making, extended problem solving and limited problem solving. Decisions involving extended problem solving correspond most closely to the traditional decision-making perspective. In limited problem solving, which is more straightforward and simple, buyers are not as motivated to search for information or to rigorously evaluate each alternative. Decisions that are made with little or no conscious effort are classified as habitual decisions. Many purchase decisions, especially the ones concerning fast moving consumer goods like beer are so routinized that consumers may not realize they have made them. Habitual decision making takes place in low-risk, consumer goods (Solomon, 1994).

Reference groups are also influential in the decision-making and purchase behavior of the individuals. The three forms of reference group influence on the individual consumer are defined as follows (Park and Lessig, 1977):

- Informational influence- where the individual seeks information about various brands of the product from an association of professionals or independent group of experts
- Utilitarian influence - which serves to satisfy the expectations and preferences of the people with whom the consumer is in social interaction
- Value-expressive influence - where the individual feels that the purchase or use of a particular brand will enhance the image others have of him or her.

The group effects on individual behavior have been classified by Solomon (1994) as effects on shopping patterns, social loafing and the risky shift. On the other hand, Venkatraman (1989) argues that consumers who are both opinion leaders and adopters - play important yet different roles in the diffusion of continous innovations. In his 1989 paper, he shows that communicative adopters can be characterized as 'Change agents', opinion leaders as 'Interpersonal communicators', and adopters as 'Nonpersonal influencers.'

Consequently, the very complicated nature of consumer behavior, which is affected by the large number of factors mentioned above, makes it crucial for companies to make it as the core concept of strategy design and implementation. For the marketing practice, the developments that were mentioned above imply that brand positioning cannot take place on the basis of intrinsic, functional product characteristics. Instead, brand positioning should be based more upon subjective, attributed characteristics, thus taking into account symbolic and intangible aspects. For the combination of these aspects marketing usually refers to the image of a brand (store or company/corporate image). In fact, the term is abundantly employed in present day marketing practice (Poiesz, 1989).

Finally, developing a market-oriented culture, that takes consumer behavior as the starting point of strategies, is difficult but not impossible (Desphande and Webster, 1989). The research by Slater and Narver (1992) strongly suggests that a learning-based approach to culture change is most effective. Successful efforts to change are results oriented, focused, flexible, and based on learning from specific market problems or experiences.

While there is always the perception that a business can get away with a minimal commitment to being market oriented under some conditions, such as high market growth, in the long run, market growth always slows and competitive hostility intensifies. Businesses that prepare for these changes will be successful in this environment (Slater and Narver, 1992). Now that Tuborg faces intense competition in the market, the implication of this view for Tuborg is that, it also has to adopt a market orientation strategy, taking into account the consumer needs and perceptions.

III. METHODOLOGY

In this thesis, both qualitative and quantitative methods of research have been employed. Explorative, as well as descriptive research techniques were used to achieve the research goals. The surveyquestionnaire and focus group methods were the main tools of the research.

The questionnaire, which is presented in Appendix 1, was conducted on 153 people in Ankara. The questionnaire was conducted at several different locations throughout Ankara, in order to capture the differences in lifestyles of consumers. University campuses of Bilkent, Hacettepe, and METU, were covered with about 60 questionnaires. The reason for giving college campuses such emphasis lied in the fact that Tuborg is planning on targeting college students in their future marketing efforts, as well as to extract the differing lifestyles among students at these universities. Other questionnaires were conducted at locations as Ulus, Genclik Park, Karum, and Kizilay, where the respondents showed differing socio-economical lifestyles. Moreover, night spots such as bars and clubs (Cabare Bar, Replik, Dipsomania, Valor, Bar M, some bars at Sakarya Street), targeting different segments of the population, were also covered. On the other hand, eight people participated to the focus group. The participants were all male, 24-27 age, single, university or master's students, and beer drinkers.

The aim of the questionnaire was to understand how and why people buy beer, as well as the reasons for brand preference. The stages in the decision making and buying process, as well as the sources of influence, were the information mainly sought. Another objective was to extract information concerning consumption, such as: consumption frequency, consumption amount at one time, and consumption occasions. A final goal was to probe the brand images in the minds of the consumers through the use of profiles.

The first six questions in the questionnaire aim to find out the demographic characteristics of the respondent, such as sex, age, occupation, education, income. The questions from seven to eleven are asked to extract AIOs (Activities, Interests, Opinions) of the person. The twelveth, thirteenth, and fourteenth questions aim to learn the alcoholic drink consumption frequency of the respondent. Sixteen to twenty-eighth questions were designed to learn about associations with beer, product benefits in the eyes of the consumer, consumption patterns for beer, influencers in the stage of decision-making, brand preference, and criteria for brand preference. 29., 32.,33., and 34. questions were designed to find out the effectiveness of the communications of the two brands. 35. and 36. questions were asked to extract the consumer image of the drinkers of the two brands. Finally, 37. question served to find the product substitute. In last part, the reasons for not drinking alcoholic drink or beer as well as the perceived profile of the consumers of these drinks were asked.

In order to better understand the decision making and buying process, consumption patterns, motives and perceptions of consumers in the university students with high income segment, as well as images and perceived positioning of the brands, a focus group was held.

Before the focus group a thorough research, the details of which are given below, has been conducted in order to understand the methodology deeper. The literature survey reveals that the focus group interview is a technique that grew out of the group therapy method used by psychiatrists. The concept is based on the assumption that individuals who share a problem will be more willing to talk about it amid the security of others sharing the problem (Bellenger et al, 1976). Some qualifications of the moderator in the focus group are defined by Chase as: Kind but firm, permissiveness, involvement, incomplete understanding, encouragement, flexibility, sensitivity. Some of the uses that the researchers extract from the method are:

- To generate hypotheses that can be further tested quantitatively;
- To generate information helpful in structuring consumer questionnaires;
- To provide overall background information on a product category;
- To get impressions on new product concepts for which there is little information available;
- To stimulate new ideas about older products;
- To generate ideas for new creative concepts;
- To interpret previously obtained quantitative results (Bellenger et al., 1976).

Wheatley and Flexner (1988) define the dimensions that make focus groups work as purpose, quality of data, expectations of the moderator, expectations of the interviewees, framing the group dynamic, legitimizing the opinions, and the questions.

Mariampolski (1988) argues that probing correctly uncovers truth behind answers in focus group. He suggests the following techniques for the researchers who pursue open-ended responses: The silent probe, request elaboration, request definition, request word association, request context or situation, shift context or situation, request clarification, request comparison, request classification or typology, compare and contrast to a previous statement, compare and contrast to remarks by other group members, challenge veracity, challenge completeness, confrontational probes, echo probe, interpretive probe, summary probe, purposive misunderstanding, playing naive, wrong answers, projective probe.

The focus group, which was conducted in the light of the above literature survey, lasted for two and a half hours. It was not conducted in a highly structured manner. However, basic ground rules were set and communicated to enhance the flow of discussion. The underlying backbone of the focus group was formed of the following structure:

A narrative guide was used to extract the product concept, benefits, and motives. This was accomplished through "making the familiar strange", where the participants were asked to describe the concepts, to a make belief person, namely 'Holls', an alien from Venus who has no idea about such products. This procedure has been adopted from Jane Farley Templeton (1987). The issues covered in the focus group were: Discussion of alcoholic drinks and drinking habits, beer concept, purchase reasons and processes, occasions, brand concepts, images and perceptions, product types, packages, logos and advertisements. At the end of the focus group, a blind taste test was conducted.

Other sources of primary data used in this thesis are the interviews conducted with Tuborg managers, a three-day market research in the sales points in Ankara, Sincan, and Polatli, with the employees of Tuborg marketing department. In addition to the above primary sources of data, secondary sources of data were also used in the thesis. These include information acquired from Tuborg on the Turkish and world beer market, a market research on Turkish music consumers conducted for Raks, and articles in some montly and weekly journals like Capital, Ekonomist, etc.

IV. FINDINGS AND RESULTS

1. THE TURKISH BEER INDUSTRY AND THE KEY PLAYERS

1.A. History

The beer production in Turkey was started in 1890 by the Bomonti Brothers. In 1940 this company was purchased by the government and became a state monopoly. Until 1969, Tekel, the only government brand, was available. In that year, Turk Tuborg and Efes Pilsen, which were privately owned breweries, started to produce beer. From 1969 to 1994, these three producers have been in the market. The sector experienced continuous growth in the 1970s and early 1980s and reached a peak in 1983. A year later, in 1984, this trend turned around when new restrictions on advertising and sale of beer, and new taxes and licensing requirements for points of sale were placed. Beer was classified as a high alcoholic drink, and its sale in 'kahvehane's, which at the time constituted 40% of the market, were prohibited. The companies of the Turkish brewery sector did not make any capital investments between 1983 and 1990. Total consumption dropped from 322 million liters annually in 1983 to 189 million liters in 1986, hitting the lowest figure of the last 6 years. However, this trend reversed in 1986 due to increasing tourism activities, changing demographic conditions towards city life and western tendencies, as well as beer producing companies' efforts to promote home consumption. As a result, in 1990, for the first time, the beer consumption exceeded its 1983 level. Until 1994 this trend continued with an annual market growth rate of 15.6%, and total production reached 550 million liters. Nevertheless, in August 1994, beer ads in all public and private televisions and radios were prohibited. This fact, coupled with the economic crisis experienced throughout the country, caused beer consumption to stabilize by 1994. Another change in the environment was Refah party's success in the 1994 municipality elections, after which some social and economic pressure was exerted on beer sales points to stop selling alcohol. However, one favorable progress in the environment was that, the legislation prohibiting the sale of alcoholic beverages in the non-municipality residential areas (basically villages) was withdrawn.

1.B. The Beer Market

Currently, Efes Group and Türk Tuborg are the major producers and distributors of beer in Turkey. Their market shares are 72% and 25% respectively. Tekel, the third and the smallest beer producer in Turkey, has a market share of 3% (Appendix 2). However, these figures will be subject to change due to the new entrant Marmara Beer. Tekel is gradually being eliminated from the market as a result of insufficient capacity, locational disadvantage, and lack of marketing. The current capacities in the Turkish beer market (excluding Marmara Beer which has a current capacity of 40 million liters) can be seen in Appendix 3.

In spite of the significant beer market growth in the last 25 years, the beer consumption in Turkey still remains very low compared to the world average (Appendix 4). While the annual consumption per capita is 9 liters in Turkey, it is 167 liters in Czechoslovakia, 143 liters in Germany, 38 liters in Greece, with a world average of 22 liters.

Moreover, the national consumption is concentrated in the Western part of Turkey with a percentage figure of 84. The market is divided as 62 to 38% between the urban and rural regions, where 40% of the total beer sales takes place in the 7 big cities. In addition, beer is a seasonal product, with a three fold increase in consumption in the summer months. 20 % of all beer consumption during the summer months takes place around the Aegean and Mediterranean coast, where the touristic towns are located.

The changing socioeconomical conditions as well as the legal constraints since 1983 have favored the take-home market and the size of this market has reached 60% lately. In Turkey, beer consumption rate is 13% in the 15-64 age group, who are the potential beer consumers and constitute a 36 million population. The consumption rate is 5% for females and 20% for males. In spite of these low figures, the consumption per capita has increased throughout years (Appendix 5).

1.C. Products

Currently, Efes and Tuborg beer producers have several brands, product types, and sub-product categories available in the market.

Efes Group's product line for the Turkish market consists of Efes Pilsen, Efes Extra, Efes Light, and Lowenbrau. **Efes Pilsen** is the best selling beer in Turkey, available in bottle, can and keg, with an alcohol percentage of 4%. **Efes Extra** is a premium beer, available in 50 cl blue cans. **Efes Extra** was the last beer to enter the premium market and is positioned against Venüs Mavi 44 and Tuborg Special. **Efes Light** is the second light beer that has been introduced in the Turkish market and currently the only available one. Despite heavy marketing efforts, its market share is 1%. Although the market share is insignificant, Efes retains the brand in order to expand the market and attract non-users as the market leader. **Löwenbrau** is produced under license agreement. It has a low penetration in the market (10%) and a low market share (1%).

Tuborg Gold is the most selling beer of Turk Tuborg. It is a full-bodied beer, meaning that its extract is higher than Pilsner type beers. Turk Tuborg mostly emphasizes this brand in the market and tries to position it as 'the international beer'. **Tuborg Special** is the first high-alcohol beer in the Turkish market. Introduced in 1980, it was a seasonal beer produced only in bottles in the new-years until 1990. Starting from that year, it was marketed in red cans throughout the year. Tuborg

Special was successful among a certain, though limited group of consumers and achieved brand loyalty in the premium beer market. **Tuborg Classic** was marketed only for the 25th annual celebration of Tuborg, in green cans. Tuborg now considers producing it for the new-years season. **Venus** was first produced in 1989 under the name 'Venus Light' after the success of light beers in the US market. It was the first light beer in the market, but was not advertised substantially. Moreover, because Turkish consumers differed in their consumption habits and preferences, it did not receive much attention in the market. In 1990, Tuborg withdrew light and started producing **Venus Pilsner** which was the first beer to be produced in 50 cl. cans in Turkey. Turk Tuborg tries to position this beer as 'true Turkish beer' in the market against Efes Pilsen. Following the success of Tuborg Special, **Venus Mavi 44** was introduced as the second premium beer in Turkey. The brand is still the only one available in 44 cl. cans. Today, the total market share of the two Venus brands is 5 %. This low share is attributed to the fact that it is available in cans and to its low advertising and promotion budget resulting in low product awareness.

In this thesis, I will be concentrating on Tuborg as the prime brand and Efes as the comparative brand, excluding Venus and Lowenbrau brands.

1.D. Pricing

Pricing is directed by the market leader, Efes Group, and is usually followed by Türk Tuborg. Efes Group's pricing policy is to increase their prices twice a year, in April, before the high season, and also in October or November. The price increases are set slightly below the increase in the rate of inflation of that year. The current beer prices in Turkey are around 25,000 TL for 50cl cans, and 20,000 TL for returnable bottles, which are lower than those in European countries. The prices by brands and packages are shown in Appendix 6. It can be seen that the price range is very narrow and does not reflect the differences in the product types. For instance, in the world markets, Gold type of beer is priced 20 % higher than Pilsner type. However, due to the price sensitivity of the Turkish beer market, Tuborg Gold is sold at the same price as Efes Pilsen.

1.E. Distribution

Turk Tuborg has two types of distribution channels: Direct sales are made in major cities that account for 40% of the sales: Izmir, Istanbul, Ankara, Adana, Bursa, Antalya and Samsun. The second channel for distribution is via the 239 dealers throughout Turkey. Efes's distribution network coverage is similar to Tuborg's, having approximately the same regions for direct sales and for dealer intermediation.

Consumption points for beer is divided into two: On-premise, where beer is consumed at the location of purchase and off-premise, where beer is consumed domestically. The sales points that serve the off-premise market are grocery stores, supermarkets, buffets, and hipermarkets, whereas the on-premise market is served by hotels, restaurants, cafes, discos, and bars (ho-re-ca). Due to the nature of the sales points, keg beer is sold only in the horeca market along with other package types.

1.F. Promotion

Both Tuborg and Efes have two main sales promotions that are held periodically. Five-to-one promotion is targeted to dealers and sales points, and consists of giving one case free to every five cases purchased. The sales points, in turn, reflect this promotion to consumers in the form of discounts. Another widely used promotion targets the consumers directly, and gives one Tuborg glass to the customers who buy six bottles of beer.

During the early years of the company, Tuborg advertised its brand as the "King of Beers" (Kral Bira, Luks Bira). It associated itself with the upper class, featuring tennis accessories as well as other status symbols in its advertisements. Especially in one ad, Tuborg was shown as replacing champagne in a romantic dinner. Meanwhile, Efes was emphasizing the home market in their advertisements, showing beer being consumed domestically. In the serials Efes was running, it was using the still most recalled slogan of "Bira bu kapaðýn altýndadýr". Until August 1994, when beer advertisements were prohibited totally on all TV and radio channels, Tuborg was using mainly two TV ads. In one of these, a Tuborg Bottle Cap was shown covering the screen and used as several different musical instruments from different countries and cultures, symbolizing the international nature of the brand. In the second one, Tuborg bottles are shown as being opened one after another, with the foam of the beer overflowing. Most recently, Tuborg has been trying to associate itself with football; accordingly they have aired an ad during the World Cup '94, as well as advertisements at cinemas showing some scenes from football matches, and the extensive rental of sideboards at several football stadiums. Moreover, they have published ads in football magazines, associating Tuborg packages with different major teams. Meanwhile, Efes had been using an ad showing several different occasions where Efes was being consumed. Also, Efes Light was being heavily promoted by the "Oooooo Light" ads on TV and print magazines (Fast Break Magazine). Similar to Tuborg, Efes was also giving ads during the World Cup '94, but although it was the 25th year in the industry for both companies, Efes was emphasizing this fact to a much greater extent.

Another implication that the restrictions on advertisements brought was the importance these companies gave to public relations. For example, Efes has achieved strong grounds, especially in the minds of teenagers, through several efforts such as the support it gave to its basketball team, its sponsorship of Festivals (Beer Festivals, Istanbul Festivali, etc.), as well as other sponsorships of sports activities (Billiard World Championship '93 Istanbul). On the other hand, Tuborg has a Sports Club located at its main campus, which serves to increase interactions with the general public. Especially after the success of Efes in basketball, Tuborg also decided to establish a basketball team in 1993, as a branch of their sports club. Other public relation efforts of Tuborg include sponsorships of various sports activities, as well as parties on college campuses, and organizing beer contests at bars or night clubs.

2. MARKETING RESEARCH RESULTS

2.A. Questionnaire Results

2.A.i. Grouping Questionnaire Respondents into Segments

The questionnaires were used to come up with a segmentation basis among the consumers, which would be used in targeting of the profitable segments and positioning the brand accordingly. In segmenting the questionnaire respondents, age, income, as well as income with profession, were checked to find out the existence of clusters within important consumption patterns, perceived product benefits, decision making process, consumption occasions, brand preference criteria. This was done manually, extracting the percentages of each question in respect to each segmentation basis considered. However, income with profession segmentation proved to be most successful in maximizing homogeneity within and heterogeneity among the groups.

As a result of the survey analysis, 5 different segments of beer users were identified as: (1) Professionals (doctors, engineers, architects), (2) Creative Interactives (Artists, tourism, public relation people), (3) Low-average skills and education (LASE) (Technicians, soldiers, etc.) (4) Students with high incomes, (5) Students with low incomes.

The characteristics of the consumers are presented in Appendix 7.

2.A.ii. Findings for each Segment

Segment 1: Professionals

They are medium-frequency users of alcoholic beverages, with 59% of the segment adopting a consumption frequency of one to three times a week. Moreover, they are light users, with over 75% of the segment consuming three or less bottles of beer at one time. In this segment, the frequency of Raki and wine consumption are the closest to beer, in comparison to all other segments. It is also important to note that this segment sees non-alcoholic drinks as the closest substitute for beer. Coupled with the facts that alcohol percentage is not important for brand preference, and "getting drunk" is ranked as the lowest perceived product benefit among all the segments, we can say that this segment perceives beer as more of a refreshing and beverage type of drink. Another fact that supports this argument is that this segment has the highest off-premise consumption tendency, indicating that they perceive beer as a lighter beverage to be consumed mostly at home. In terms of the buying process for beer, this segment again differs from others in that these consumers are almost indifferent in making the decision to buy beer during purchase or before-hand, where as the other segments tend to make the decision before purchase. Another significant feature of this segment is, the fact that they mostly get their information on beer through trial (highest among all segments). Concerning the criteria for this segment's brand preferences, taste is very important, followed by quality and image, respectively. As is in all segments, this segment's brand preference lies with Efes. As for the brand substitutes of this segment, although competitor brand is ranked highest within the segment, it is important to note that other alcoholic drinks are ranked highest in comparison to the other segments. In terms of the profiles for the brands extracted from the survey, we can state the following: Efes is perceived to be more special, refreshing, relaxing, easy to drink, expensive, high quality, leaving taste, younger and sweeter than Tuborg. On the other hand, Tuborg is perceived as more filling, stronger, and older.

Segment 2: Creative Interactive

In addition to being a segment with a high frequency of alcohol consumption, the consumers in this segment are also heavy users of beer. The most important attribute of this segment is that it is more price sensitive than others; only in this segment, price is cited among the 3 most important criteria for brand preference. Accordingly, this is the only segment with a brand preference for Tekel, as high as 14%. The refreshment property of beer is very important. Although getting drunk scores low in perceived product benefits, this segment makes its purchase decision beforehand and tends to substitute with other alcoholic drinks when beer is not available. Taking into consideration that this segment is price-sensitive, we can conclude that these consumers also use beer when they want to get drunk but have a limited budget. As professionals, they rely on their own experiences, mainly trial, as a source of information. Like all other segments, creative-interactives prefer Efes, but are likely to substitute with the competitor brand when it is not available. According to this segment, Efes is more special, refreshing, strong, relaxing, easier to drink, slightly sweeter, leaves more after taste and is of higher quality. Tuborg, on the other hand, is slightly more filling, and is perceived as expensive and as old as Efes.

Segment 3: LASE (low - average skills and education)

Similar to the second segment, these consumers, are high frequency alcohol users and heavy drinkers of beer. One differentiating point is that the perceived product attribute of getting drunk is high relative to other segments although the importance of benefits are close to each other. Unlike other segments whiskey instead of wine is mentioned among the three most frequently consumed drinks. This shows that they like high alcohol drinks, reinforced by the facts that alcohol percentage is an important criterion for brand preference and that beer is likely to be substituted by alcoholic drinks rather than non-alcoholics. Moreover, this segment is less likely to substitute beer with any other drink. The most important source of influence for this segment is their friends. According to this segment, Efes is more special, of high quality, slightly easier to drink, sweeter, older and leaves slightly more after taste; whereas Tuborg is as refreshing, relaxing, expensive, strong, filling as Efes.

Segment 4: Students with High Income

The consumers in this segment are medium consumers of alcohol, and tend to consume beer more than students with low income. The beer concept for this segment is a tool for socializing which is apparent from perceived product benefits, beer substitutes and consumption occasions. A differentiating attribute of this segment is that 20% use beer also during meals. Another important point is that 24% of this segment do not have a brand preference. Trial is an important source of information for these consumers, who are also influenced by their friends. These consumers perceive Efes as more special, slightly more refreshing, easier to drink, leaving more after taste and slightly older. Among other characteristics, they do not perceive differences between the two brands.

Segment 5: Students with Low Income

The alcohol consumption of these consumers is lower with respect to those in other segments. Unlike the students with high income, they consume less beer at a time and do not consider beer as a food accompanier. Moreover, the effect of trial and friends weigh almost equally as influencers. Similar to the other student segment, however, they use beer for socializing and they tend to substitute beer with other alcoholic and nonalcoholic drinks equally. Although they prefer Efes, they have a high tendency to substitute with the competitor brand when it is not available. According to this segment, Efes is more special, of high quality, slightly more refreshing and relaxing, easier to drink, and slightly older than Tuborg. On the other hand, Tuborg is perceived to be leaving more taste after drinking, and as strong and expensive as Efes.

2.A.iii. Examination of the Survey Results

The results of the questionnaire provide information on the product concept and substitutes, procedure and reasons of purchase behavior, procedure, occasion, and frequency of consumption, sources of information and influences on beer consumption, as well as brand preference and brand images. The examination of the consumer belief/ thought profiles for Efes Pilsen and Tuborg reveals that Efes Pilsen is thought to be more special, refreshing, relaxing, high quality,filling, as well as easier to drink and younger when compared to Tuborg. Moreover, although brand awareness is equally high for both of the brands, brand preference of most of the consumers is for Efes Pilsen. This suggests that Efes Pilsen has a better marketing communications strategy and positioning in the beer market in Turkey. A brief examination of the questionnaire results according to segments and the profiles of Efes Pilsen and Tuborg brands in terms of consumer beliefs and thoughts are provided in Apendices 8 and 9, respectively.

2.B. Targeting

After conducting and analyzing the questionnaires, I decided to concentrate on the fourth segment, namely Students with High Incomes. Professionals were not a profitable segment to target, as they were light and medium-frequency users. Moreover, since this segment regards beer as a more beverage type of drink, targeting this segment would impair the image of beer in the eyes of the other segments. The creative-interactive segment, on the other hand, is price-sensitive and therefore can be captured through sales promotions. The LASE segment consumes beer for alcohol, and can be reached through communicating the high-alcohol attribute of beer (premium beers). Keeping in mind the fact that the younger generation in Turkey is above 50% of the population, capturing this new coming generation will help in future success of product. For the beer, as students with low income are infrequent users, students with high income was chosen as the segment to be analyzed in depth. Creating an image for this segment will also help in capturing the other one, as a result of the spillover effect. In order to better understand this segment, a focus group was conducted.

2.C. Focus Group

The focus group was held in order to better understand the decision making and buying process, consumption patterns, motives and perceptions of consumers in the university students with high income segment, as well as images and perceived positioning of the brands. The information that has been extracted from the focus group are given below.

2.C.i. Focus Group Results

Alcoholic drinks concept:

- is not consumed only for taste
- more difficult to drink compared to water because of gas it includes and usually bitter taste
- a parameter informing about the society and culture

- consumed for socializing, getting drunk, building up courage, enjoying oneself, forgetting about the problems
- yet, main reason for consumption is to feel happy: to forget about troubles, to lose oneself, totally emptying the mind.
- lets the unconscious thoughts surface
- causes numbness in the brain
- consumed usually after evening hours
- choice of alcoholic beverage changes according to occasion: drinks to accompany meals are wine, beer, raki
- wine is seen as the perfect meal accompanying drink; suits all occasions
- raki especially suits meze tables
- beer is perceived unsuitable for formal meals, but goes well with fast-food
- of the above three meal drinks, beer is the most suitable one to consume in a bar environment
- due to societal and religious pressures, alcohol is consumed in covered places (domestically or in restaurants, bars, cafes, etc.), and usually during after-dark hours, with day-time consumption only in touristic places.

Beer Concept:

- Beer is a refreshing, cooling, and an informal drink.
- But, contrary to other drinks, beer is not a relaxing drink due to its low alcohol content.
- Beer is perceived as a burden when drunk only for taking alcohol, because of its swelling effect. But it is preferable when the person wants to thirst-quench and to get some alcohol.
- Since the alcohol percentage is low in beer, it is frequently the first alcoholic drink that people have in their lives. However, it pulls down the drinking age.

- Because price plays an important role in alcohol selection, beer and wine are consumed most due to their low prices.
- Because beer is the cheapest alcoholic drink at a bar, and the young people usually can not afford more expensive drinks, it is very popular among this group.
- The categorization in the minds of consumers is with respect to alcohol percentage and the bitterness of the taste of beer.
- Light beer is easier to consume, because of its lower alcohol percentage. However, it is perceived as a women's drink due to its image, package and advertising.
- It is perceived that premium beer drinkers are either the people who have been drinking only beer and who are in the transition stage to higher alcoholic drinks or heavy beer consumers who are not satisfied with just a couple of glass a night.
- Premium beer consumption also rises as consumers with financial constraints want to get drunk with less amount of beer. Because premium beer is only one thousand TL. more than regular beer, people spend less.
- It is perceived that places where keg beer is sold, host people who want to enjoy night-life but cannot afford it. Therefore, keg beer selling places are perceived inferior.
- Keg beer is perceived to be lighter in color, more acidic and lighter in alcohol content which causes the taste to change.
- Two words which directly remind people of beer are pomfrittes and football matches.

Beer Consumption Occasions:

- Beer is consumed when with friends, in joyous environment, while watching TV, and after sports activities.
- Some consume it after work hours in the office.

- Although people prefer to drink one kind of heavy-alcoholic beverage at one session, while trying to get drunk, they don't mind to drink a couple of beers inbetween.
- Beer can be consumed before meals for refreshment, although not preferred in proper meals.
- Unlike other drinks, beer can be consumed in day-time. (The respondents especially emphasized that they drank it in day-time during summer holidays, on the beach. It is a tool for socializing. However only regular beer and not premium beer is consumed on those occasions.
- Beer is a convenient drink in bars, since it lasts long to consume it. One can drink it all night long.
- Beer is easy to carry anywhere and to consume; whereas raki is difficult because it requires water and two glasses, and wine requires a particular type of glass.
- In day-time, premium beers are not consumed due to their high alcohol percentage.

Influences:

- One of the influencers on consumption occasions is friends' patterns for consumption: Seeing friends consume beer with fast foods such as pizza or pomfrittes influences some consumers.
- The brand choice of parents is passed on to younger generations who are also affected by the preferences of close friends.

Package:

- Beer is easy to consume in bottles especially in bars.
- Consumers associate a metallic taste with can beer.

- The advantage of bottle is the low price due to the returnability. However, can is more practical to carry outdoor as there is no danger of breaking it.
- In terms of drinking beer from glasses, the mug-type (Argentina) glass is the most preferred one.
- Tuborg's bottle is found more delicate-looking whereas Efes's bottle is preferred because of its smoother curves. Efes's bottle is found more sympathetic.
- Efes's bottle is perceived to be 'the beer bottle'. Consumers find Tuborg's bottle too ordinary claiming that it could have contained anything. Tuborg's bottle is also perceived to be too big to hold comfortably. Efes's bottle, on the other hand, is shorter and does not fit into the palm, giving a fuller feeling.
- Tuborg's bottle is personified as a male, and Efes' as an older but upbeat person.
- The fact that Tuborg uses darker colors in packaging creates the image that the beer is bitter and more expensive. Moreover the dark colors give the signal that the product is to be consumed at an older age.
- Tuborg cans confuse the consumer because the colors of the package and logo are close to each other.
- Efes's cans are perceived as having eye-catching and vivid colors and particularly the white base is found to be more attractive. Tuborg's colors are perceived to be more serious, some are even reminded of the army. There is a conflict of opinion between participants; some argue that because beer is an alcoholic drink, its packaging should look serious, whereas others believe that vivid colors should be used since beer is consumed in relaxed and informal environments.
- For premium beer cans, Efes uses a completely different logo, enabling consumers to clearly distinguish premium beers from regular ones. However, Tuborg uses exactly the same logo in both regular and premium cans causing a confusion.

Brand Concept:

- Beer tends to be associated with Efes. For home consumption, most people prefer Efes without knowing why, although some people strictly prefer Efes for its taste. All of the participants except one believe that Tuborg has a bitter taste and is harder to drink.
- Brand preference is mainly determined by individual taste preferences. However consumers acknowledge that there is a taste difference between the two brands, they also admit that they may not be able to identify their brand at a bar without seeing the logos. Moreover they believe that the taste of the beer is directly affected by the individual's mood.
- Consumers who do not drink beer for its taste but rather for its refreshing aspects, do not have brand preferences.
- Trial rate for Efes' new products is higher. Consumers are confused about Tuborg's brands.
- Tuborg Special is perceived as a strong beer, hence hard to drink. Those people who want to get drunk but have a limited budget drink Special, whereas the ones with financial power prefer other high-alcoholic drinks.
- Brand preference exists only during off-premise purchases; at on-premise locations, whatever is available is accepted.

Image:

- Efes is perceived to have a more effective promotion strategy, which increases the mind-share through more intense advertising, PR activities, an extremely successful basketball team, etc.
- Image directly affects brand preferences. For instance, people who go out at night are left with either a positive or a negative image of that night along with the brand they consumed there. A positive image that is reinforced several times

usually results in brand preference. Similarly, the image of sales points carrying the brands affect the brand images.

- A negative image source for Tuborg was giving commercials on TV during football matches by interrupting the matches.
- Consumers see Efes as trying to associate itself with Turkey just as Coca Cola's success in associating itself with the US. Efes's basketball team arises nationalistic feelings. Moreover, consumers feel that Efes is a true Turkish brand name which has overcome the Turkish consumers' general tendency for favoring what sounds foreign.
- TV commercials were the strongest medium for communicating the desired image. Efes commercials tried to portray Efes consumers as not necessarily rich, but people living quality lives. However participants do not perceive a difference among Efes and Tuborg consumers.
- Consumers remember Efes commercials as portraying several different consumption occasions whereas Tuborg is remembered trying to reinforce its brand name. (primary demand)

Logo:

- Because Efes uses the same logo on its basketball team, it directly reminds consumers of beer.
- Participants easily recalled Efes's logo, but none of them could remember Tuborg's logo.
- As Tuborg bottle labels were darker in color, participants said that Efes was more eye-catching.
- The image communicated by the logos is that Efes is a more carefree and joyous beer whereas Tuborg is serious and royal. Tuborg is also perceived to be slightly more expensive.

2.C.ii. Conclusions of Focus Group

The examination of the focus group reveals that this segment uses alcohol for socializing, enjoying themselves, forgetting about the problems and feeling happy, and for getting drunk. They consume alcohol in evening hours, in closed environments, and during day-time at touristic places. They decide which alcoholic drink to consume based on the occasion and price. When compared to other alcoholic drinks, beer is regarded as an informal, refreshing, and cooling drink, which has the benefit of thirst-quenching and alcohol providing. Moreover, beer is a socializing drink for this segment. They categorize beer in terms of alcohol percentage and taste (bitterness). They are mainly influenced by their friends, and to some extent, from their parents. The occasion to consume beer is when with friends, in a joyous environment, after sports, when watching TV, or football matches, during day-time at the beach. The abstraction for this segment is given in Appendix 10.

3. COMPARISON OF COMMUNICATIONS OF TUBORG AND EFES PILSEN

The examination of the results of the questionnaire and focus group provide precious information on the effectiveness of the communication strategies of the Tuborg and Efes Pilsen brands on the consumers. The detailed analysis of the information, that is extracted from the marketing research provided below, enables us to gain insight about the consumer behavior in the beer market.

The comparison of the packaging of the two brands in terms of bottles reveals that Tuborg's bottle is perceived as more delicate-looking whereas Efes's bottle is more preferable because of its smoother curves. Moreover, Efes's bottle is found more sympathetic. Efes's bottle is perceived to be 'the beer bottle'. Consumers find Tuborg's bottle too ordinary claiming that it could have contained anything. Tuborg's bottle is also perceived to be too big to hold comfortably. Efes's bottle, on the other hand, is shorter and does not fit into the palm, giving a fuller feeling. Tuborg's bottle is personified as a male, and Efes' as an older but upbeat person.

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Efes's cans are perceived as having eye-catching and vivid colors and particularly the white base is found to be more attractive. Tuborg's colors are perceived to be more serious, some are even reminded of the army. There is a conflict of opinion between participants; some argue that because beer is an alcoholic drink, its packaging should look serious, whereas others believe that vivid colors should be used since beer is consumed in relaxed and informal environments.

For premium beer cans, Efes uses a completely different logo, enabling consumers to clearly distinguish premium beers from regular ones. However, Tuborg uses exactly the same logo in both regular and premium cans causing a confusion.

Because Efes uses the same logo on its basketball team, it directly reminds consumers of beer. Participants easily recalled Efes's logo, but none of them could remember Tuborg's logo. As Tuborg bottle labels were darker in color, participants said that Efes was more eye-catching. The image communicated by the logos is that Efes is a more carefree and joyous beer whereas Tuborg is serious and royal. Tuborg is also perceived to be slightly more expensive.

Tuborg's label is confusing, as it is not easily perceived as a whole at first sight. There are too many words within the label: 'Gold Bira. Dunyaca Meshur. TUBORG. 1895'ten beri. TSE. T.S. 2259. Türk Tuborg Bir Yaþar Holding Kuruluþudur. Türk Tuborg Bira ve Malt Sanayi A.Þ.'. Two hub images also appear symmetrically in the label. There are too many borders that distract attention. The colors used are dull: Gray, black, red, white, ivory, khaki. The crown at the top of the label, which is also used as Tuborg's logo in the lighted or unlighted store signs, and glasses, symbolizes royalty, high class, power. However, it should be noted that the colors used on the crown are found to be highly ordinary, repulsive in the focus group.

Efes's label, which is also same as its logo, is plain compared to Tuborg's and more comprehensible. There are two barley heads that point to Efes name. The colors are bright and in harmony: Bright blue, gold, and white. Moreover, on the label, four medals that Efes won in international beer quality contests, are shown, communicating the quality image of the beer. The outside border of the logo resembles the shape of the bottle, and the same logo is used on store signs, basketball team uniforms, resulting in a clear communication.

When we look at the print advertisements of Tuborg, we see that they are all static with no sign of dynamism as the bottle, can or glass of beer stand rigidly alone. Moreover, no motion is communicated through changes in direction or differing character fonts. The colors in the advertisements are dull, not communicating any warmth. In most of the advertisements, people are not present, which gives an antisocial image for the brand. Furthermore occasions are not communicated, making it harder for the consumers make associations in their minds. Tuborg bottle or can is shown as separate from the background completely, not taking part in the scene. All of the print advertisements look as if they are cut-and-paste.

Efes, on the other hand, uses people in its advertisements, communicating the socializing benefit. Moreover, dynamism in the print ads is achieved using italic or changing character fonts, changing directions in figures. There are no rigid figures, and the objects are arranged in different angles. Refreshingness and vividity are reinforced by the use of ice in the print ads.

The themes that are used in Tuborg ads are football, targeting the supporters of different teams, with slogans like 'Şerefli renklerin şerefine!', 'İşte sari, işte kırmızı. En büyük Cim Bom, en büyük Tuborg!', world cup, with a slogan 'Bu bir Dünya Kupasıdır', and touristic places for Tuborg Special: Gokova, Cesme, Oludeniz, Kas, and Nemrut. In the supporter theme, Tuborg aims to link the supporter's preference of the team to Tuborg. Moreover, Tuborg reinforces its football image by giving extensive advertisements to side-pannels in football stadiums. In the touristic places theme, Tuborg wants to associate the consumption of its beer with those places. However, the campaign is run in 'Barket' which is a magazine targeting the POSs, rather than the consumers.

The themes Efes uses in its ads are mainly centered around consumption activities, with a significant difference from Tuborg, where they use socializing as a theme. This theme is reinforced by party scenes, sports activities, fishing and chatting with friends.

Efes Pilsen sponsors Istanbul Jazz Festival, Theater Plays, Turkish National Olympic Committee, International Efes Pilsen Billiard Tournament, Efes Pilsen Tennis Tournament, trying to build a sophisticated and modern image. Tuborg, on the other hand is the sponsor of Beach Volley Tournament in Izmir, and was the sponsor of 'The Game of the Month' football match on TV for some time.

In behavioral terms, Efes wants to communicate that it is a beer to be consumed in all occasions, both at home and outside, by all age groups (who are in the drinking age).

The settings are conveyed as social, fun, joyous, but mostly streamline. By the use of sponsorsips, on the other hand, the company is able to reach the higher-end segment, without imposing a negative effect on its streamline consumers. Meanwhile, Tuborg communicates only brand name and package, without any image building or consumption occasion communications.

Neither of the brands believe that segmentation is possible in the market, and try to go for the mass market. Another point to be made, is the lack of calculated positioning of the brands in the market. One exception to this might be seen as Efes Light, which is targeting the health conscious, and above average income segment. However, this targeting has not been successful in attracting males; the brand is now perceived as a feminine drink.

As a result, when the communication plans of the two brands are compared, it becomes obvious that Efes has a more effective plan.

In terms of exposure, Efes has the lead in the market through its sales points which are comparably more than Tuborg's, its sponsorships, and its basketball team. Currently, both brands advertise only to inform about their sales promotions, therefore no image building communication is done on print media.

Both brands have listener, viewer, reader recognition and the consumers are aware of the brands. However, Tuborg does not communicate a clear message to be comprehended by the consumers, whereas Efes's 'Beer' message has a great mind share. In terms of the message acceptance, brand attitude and purchase intent are more favorable for Efes, which contributes to retention over time. Moreover, Efes communicates benefits of the brand through an image achieved by using people and occasion. Tuborg does not communicate any of the attributes or image (except for football which was executed erroneously and discontinued) to be associated with a benefit All these factors lead to Efes achieving greater purchase behavior among consumers.

Thus, the examination of the consumer behavior in the beer market has very important strategic implications for Tuborg. To begin with, the market research has revealed that, in contrast to the common belief in the industry, there exist market segments that can be targeted by the company. The reearch also provides information about the importance of the communications strategies and image building activities to gain market acceptance. The fact that Efes's communication strategy is more successful in affecting consumers implies that Tuborg has to differentiate itself in the market through adopting a consumer orientation and image building activities.

V. RECOMMENDATIONS FOR TUBORG:

As there is no current clear image of 'Tuborg', a repositioning strategy is a must. Tuborg should reposition itself to make use of the opportunity presented by the younger generation (Appendix 11). As this segment wants to consume beer in joyous environments, with friends, for socialization, a position as a fun, upbeat, on-the-move, popular drink is appropriate. However, in order to differentiate from Efes and to attract the young segment, Tuborg has to place itself beyond the streamline. To build up this image, an opportunity exists in that, none of the brands have a clear user image. Thus, Tuborg can communicate a user image of young, active, cool people who know how to enjoy life. To reinforce this image, an animation character, carrying these characteristics has been created (Appendix 12). The themes communicated in the advertisements can be used to support this character, which will increase the perceived fit between the brand image and self-image of consumers.. As sports and music are the two main interests of the younger generation, and sports is used by Efes in terms of its basketball team, there remains the pop music as the communication tool to reach the masses. The association of Tuborg with pop music can be achieved through a number of ways, one of which is using a celebrity. A research sponsored by Raks (1995) revealed that 'Tarkan' is the most popular pop star in Turkey, with fans from a broad range of segments. Using Tarkan as a celebrity can thus increase the popularity of the brand. Another supplementary strategy along these lines is giving 'Tuborg' concerts which can also be broadcasted in a TV channel. Music association can further be reinforced through beer-and-music parties held in touristic locations during the summer months and university campuses during the off-season. The slogan 'Heryerde Sizinle' can be used in all the print ads and activities sponsored by Tuborg for reminding the consumers the accompanying feature of the beer as well as different occasions for consumption. The relationship of components in Semiotic Analysis of Meaning are presented in Appendix 13.

One last strategy tool is establishing "Tuborg Houses" in big cities, where people can enjoy Tuborg beer in a German Beer House like environment, with special attractions on different days of the week, like: specialty foods of different countries to communicate the international image of Tuborg; beer drinking contests; small concerts given by celebrities; and other brand preference increasing activities. Tuborg Houses can be established in cities like Istanbul, Ankara, Izmir, and Antalya, as well as mobile tents traveling vacation points during the high-season. The strategy in opening Tuborg Houses will be establishing the first one in Istanbul, and then giving franchises in the other cities, so that no extra burden will exist on the company. All these activities can be used as a PR tool. Moreover, using the advantage of being a Yasar Holding company joint promotions with other holding companies can be designed. Especially since Jordache tries to attract the same segment, giving free tickets for 'Tuborg Houses' and concerts to Jordache buyers can increase brand awareness and trial.

In addition to the above image building activities, a supporting communication tool is the package itself. Using the discussion made in the focus group, the color of the bottle labels and the color of the can for Tuborg Gold must be changed. We suggest that the new color for the can should be a shade of gold. This will have two advantages, the new color is vivid and attractive as consumers would like it to be, and it helps in communication of the "gold" brand. Moreover as the taste is mostly in the minds of the consumer, such a change in color can prevent the bitter image of Tuborg. In changing the color, a multi step approach can be used as was implemented by Coke in "Tab" in order to avoid a misperception of the consumers that the beer itself has changed.

The label of the brand should be simplified, taking the following steps: Single order lines, instead of four layered ones should be used. The words that should be removed from the label are 'Dunyaca Meshur. 1895'ten beri. TSE. T.S. 2259. Turk Tuborg Bir Yasar Holding Kurulusudur. Turk Tuborg Bira ve Malt Sanayi A.S.' The words that should be retained are 'Gold Bira. TUBORG. 1895. Heryerde Sizinle'. The gray and red colors should be removed from the label and substituted by the ground colors.

On the other hand, it is obvious that Tuborg cannot realize the recommendations above without adopting a marketing orientation. The first step that should be taken in order to reach this goal is the adaptation of the organizational structure to the needs of the company. Accordingly, because marketing and sales should be the most important function in Tuborg's value chain, it is only natural that the company benchmark against one of the most successful companies in the world concerning this field; namely P&G (Sheddy, 1993). Thus, it is appropriate to modify Bimpas's (the marketing company) structure benchmarking against P&G's. The reason for having only Bimpas' structure modified, is because Tuborg only covers production, engineering, and finance, whereas Bimpas is the company covering marketing and distribution, and these are the areas which need improvement.

VI.CONCLUSION AND DISCUSSION

The practice of integrated marketing communications, which integrates demographics, psychographics, category network as well as segmentation, classification, contact management, objectives, brand network, objectives, tools and communications tactics in a whole, is one of the most valuable tools companies can use to gain competitive advantage. Thus, customer orientation which inherently includes understanding the needs and perceptions of the consumers, is becoming a very effective strategic approach in the competitive market environment, where perceptions, rather than reality counts.

In the light of the above framework, the examination of the consumer behavior in the beer market has revealed very important strategic implications for Tuborg. To begin with, the market research has revealed that, in contrast to the common belief in the industry, there exist market segments that can be targeted by the company. The research also provides information about the importance of the communications strategies and image building activities to gain market acceptance. The fact that Efes's current communication strategy is more successful in affecting consumers implies that Tuborg has to differentiate itself in the market through adopting a consumer orientation and image building activities.

Therefore, the establishment of a strong and effective image, targeting the selected segments, through the use of a cartoon character and a music celebrity to reinforce the aimed image, coupled with some modifications in the packaging has been emphasized in the recommendations. Moreover, some suggestions have been made concerning the organizational structure. These suggestions aim to modify the company's structure to fit to the recommended marketing orientation.

Although this study helps us to gain insight into the consumer behavior in the beer market, it has also some limitations. One of these limitations is that the marketing research activities' scope has been limited to Ankara, Sincan, and Polatli regions. In spite of the fact that precious information has been extracted from the research with these consumers, more research is needed in other geographical areas of Turkey to generalize these results countrywide.

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APPENDICES

APPENDIX 1

TÜKETİM ANKETİ

1)Cinsiyetiniz:kadın O, erkek O

2)Yaşınız:...........

3)Mesleğiniz: (lütfen açıklayınız)

4)Eğitiminiz: (Öğrenciyseniz şu anda okumakta olduğunuz okul, değilseniz en son bitirdiğiniz okul)

O ilkokul O ortaokul O lise O yüksek lisans

O üniversite O açıköğretim O doktora

5)Medeni Durumunuz:

O evli O bekar O dul O ayrılmış

Çocuğunuz var mı?................ Kaç tane?................

Evde kaç kişi yaşıyorsunuz?...................................

6)Ailenizin toplam aylık geliri:

O 5 milyondan az O 5-10 milyon arası O 10-20 milyon arası

O 20-30 milyon arası O 30-45 milyon arası O 45 milyondan fazla

7)Hangi kulüplere üyesiniz?...

8)Boş zamanlarınızda aşağıdakilerden hangilerini yaparsınız: (lütfen en sık ve en az yaptığınız üç taneyi sıralayınız)

(spor, alışveriş, sinema, tiyatro/konser, televizyon, arkadaşlarla buluşma, kitap/dergi, diğer) en çok 3:

en az 3 :

10)Hangi sıklıkta tatile çıkarsınız:................................

Tatiliniz ortalama ne kadar sürer:................................

Tatillerinizde nereye gidersiniz:...................................

Tatillerinizde nerede kalırsınız:.................................

11)Hangi gazete ve dergileri okursunuz:...........................

12)Alkollü içki kullanıyor musunuz?...............................

Eğer kullanmıyorsanız, lütfen beşinci sayfaya geçiniz.

13)Hangi sıklıkta alkollü içki kullanıyorsunuz?

O haftada 1-3 kere Ohaftada 3'den fazla

O ayda 1-3 kere O yılda 1-3 kere

14)Aşağıdakileri hangi sıklıkta içersiniz:(1=çok nadir, aynı sayıları verebilirsiniz)

bira	1	2	3	4	5	6
rakı	1	2	3	4	5	6
şarap	1	2	3	4	5	6
cin	1	2	3	4	5	6
votka	1	2	3	4	5	6
viski	1	2	3	4	5	6
kokteyl	1	2	3	4	5	6
diğer	1	2	3	4	5	6

lütfen belirtiniz:.......................................

Eğer bira içmiyorsanız, lütfen son sayfaya geçiniz.

15)En çok hangi tür müziği ve şarkıcıları dinlemeyi tercih edersiniz:................

16)Bira denince aklınıza ne geliyor?

17)Bira: O serinletir O rahatlatır O çakır keyiflik / sarhoşluk verir
O sosyal bir ortam yaratır / eğlenmeye yardımcı olur
O diğer.....................................

18)Birayı hangi ortamlarda tüketirsiniz: (birden fazla işaretleyebilirsiniz)

Ev: O maç seyrederken
O yemek yerken
O televizyon seyrederken
O arkadaşlarla/aile ile sohbet ederken
O ev partilerinde
O diğer..

Dışarıda: O yemekte
O bar/disko/meyhane/birahane
O plajda/tatilde
O piknikte
O kafelerde
O diğer.....................................

19)Birayı, bir seferde ortalama ne miktarda tüketirsiniz?
O bir şişe O 2-3 şişe O 3-5 şişe O 5 şişeden fazla

20)Biradan önce veya sonra içmeyi tercih ettiğiniz alkollü içki var mı?........................

21)Bira ürünleri hakkında bilgileri hangi kaynaklardan ediniyorsunuz?
(arkadaş, aile, komşu sohbetlerinden, reklamlardan, bakkal, büfe, barmen, gazete, dergi, deneyerek, vs.)

22)Bira satın alma sürecinde:
O önceden bira içeceğime karar verir, öyle alırım
O alışveris sırasında, barda, restoranda, vs., karar veririm

23)Birayı nereden alırsınız?
O büfe O bar O kuruyemişçi O hipermarket
O disko O restoran O kafe, kafeterya O bakkal, market
O diğer...................................

24)Belirli bir marka tercihiniz yoksa, hangi birayı alacağınıza nasıl karar veriyorsunuz?
O satıcının verdiğini alırım O fiyatı ucuz olanı alırım
O görünüşü güzel olanı alırım O kampanyada/ucuzlukta olanı alırım
O dükkandaki poster ve reklamlardan etkilenirim
O diğer...

25)Aklınıza gelen bira markalarını sıralar mısınız?

26)Birada tercih ettiğiniz bir marka var mı? Varsa, hangisi:......................................

27)Tercih ettiğiniz markayı bulamadığınızda ne çersiniz?...

28)Bu markayı diğer markalara tercih etmenizin sebeplerini önem sırasına göre sıralayınız: (sizin için önemli olanları işaretleyiniz, 1=en önemli)
O fiyat O tat O kalite O alkol oranı
O renk O şekil O etiket O büyüklük
O kalori O reklamlar O aile O arkadaş grubu
O imaj O diğer...

29)Aklınıza ilk gelen bira reklamı anlatırmısınız; bu reklam hangi markaya aittir?

30)Efes Pilsen'i aşağıdaki özelliklere göre değerlendirir misiniz?

özel sıradan
O O O O O O

serinletici değil
O O O O O O

rahatlatıcı değil
O O O O O O

içimi kolay zor
O O O O O O

pahalı ucuz
O O O O O O

sert değil
O O O O O O

kaliteli kalitesiz
O O O O O O

tadı ağızda kalıcı değil
O O O O O O

şişkinlik verici değil
O O O O O O

tatlı acı
O O O O O O

yaşlı genç
O O O O O O

31)Tuborg'u aşağıdaki özelliklere göre değerlendirir misiniz?

özel sıradan
O O O O O O

serinletici değil
O O O O O O

rahatlatıcı değil
O O O O O O

içimi kolay zor
O O O O O O

pahalı ucuz
O O O O O O

sert değil
O O O O O O

kaliteli kalitesiz
O O O O O O

tadı ağızda kalıcı değil
O O O O O O

şişkinlik verici değil
O O O O O O

tatlı acı
O O O O O O

yaşlı genç
O O O O O O

32)Efes'in sloganı nedir?(örneğin Coca Cola'nın sloganı "Her zaman Coca Cola" gibi)...

Tuborg'un sloganı nedir?...

33)Efes'in çeşitlerini sayar mısınız?..

34)Tuborg'un çeşitlerini sayar mısınız?...

35)Efes'i genelde kimler içer?(yaş grubu, cinsiyet, meslek, eğitim düzeyi, gelir, yaşam tarzı, vs.)

36)Tuborg'u genelde kimler içer?(yaş grubu, cinsiyet, meslek, eğitim düzeyi, gelir, yaşam tarzı, vs.)

37)Canınız bira çektiğinde ve bira bulamadığınızda ne içersiniz?.............................

Anketimize katıldığınız için teşekkürler........

Alkollü içki içmeyenler için:

38)Alkollü içki içmemenizin belli başlı nedenleri nelerdir?..

39)Alkollü içkilerin hangi özelliği ortadan kalksa içki içmeyi düşünürsünüz?

40)Sizce alkollü içkileri ne tip insanlar içer? (yaş grubu, cinsiyet, meslek, eğitim düzeyi, gelir, yaşam tarzı, vs.)

Bira içmeyenler için:

41)Bira içmemenizin belli başlı nedenleri nelerdir?..

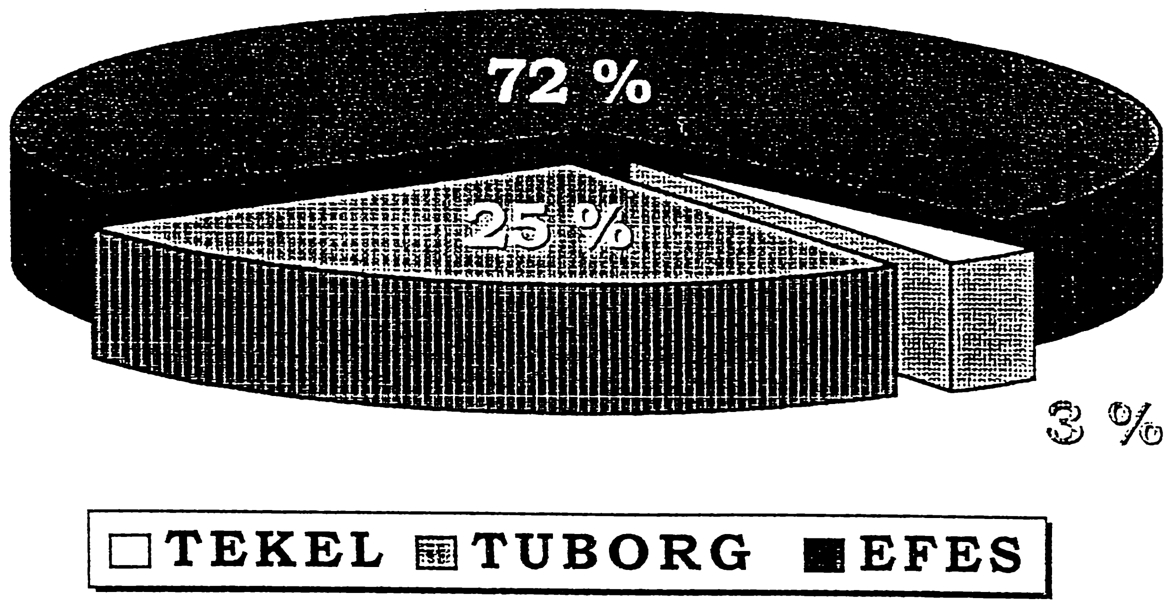
42)Biranın hangi özelliği ortadan kalksa bira içmeyi düşünürsünüz?

43)Sizce birayı ne tip insanlar içer?(yaş grubu, cinsiyet, meslek, eğitim düzeyi, gelir, yaşam tarzı, vs.)

Anketimize katıldığınız için teşekkürler........

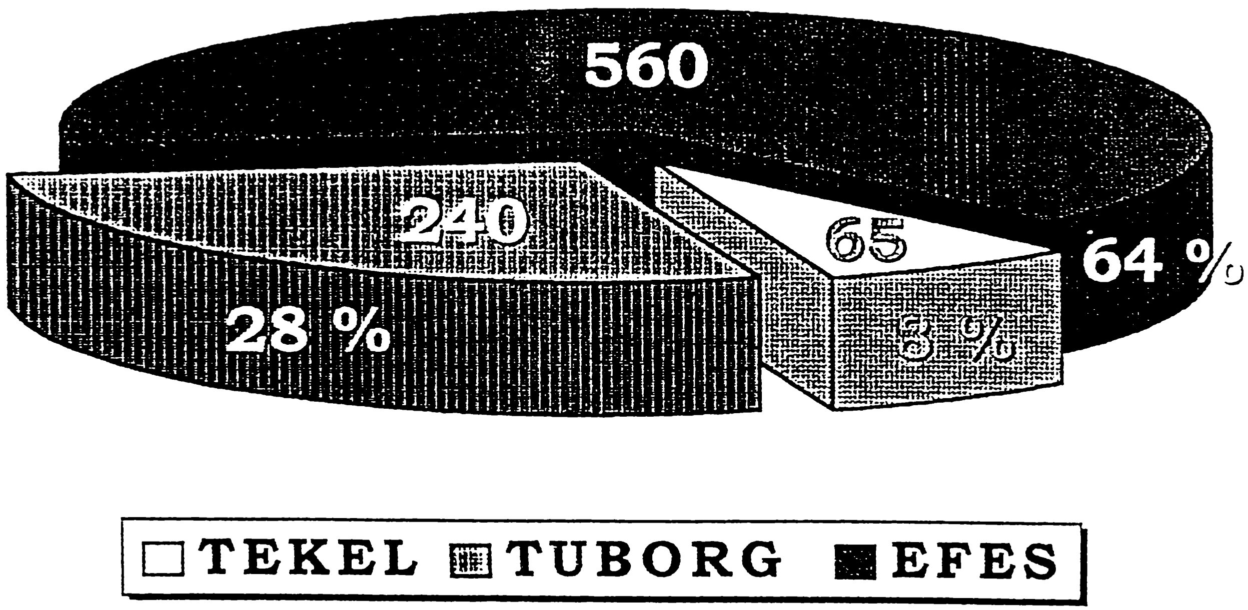
APPENDIX 2

MARKET SHARES OF THE FIRMS
1994



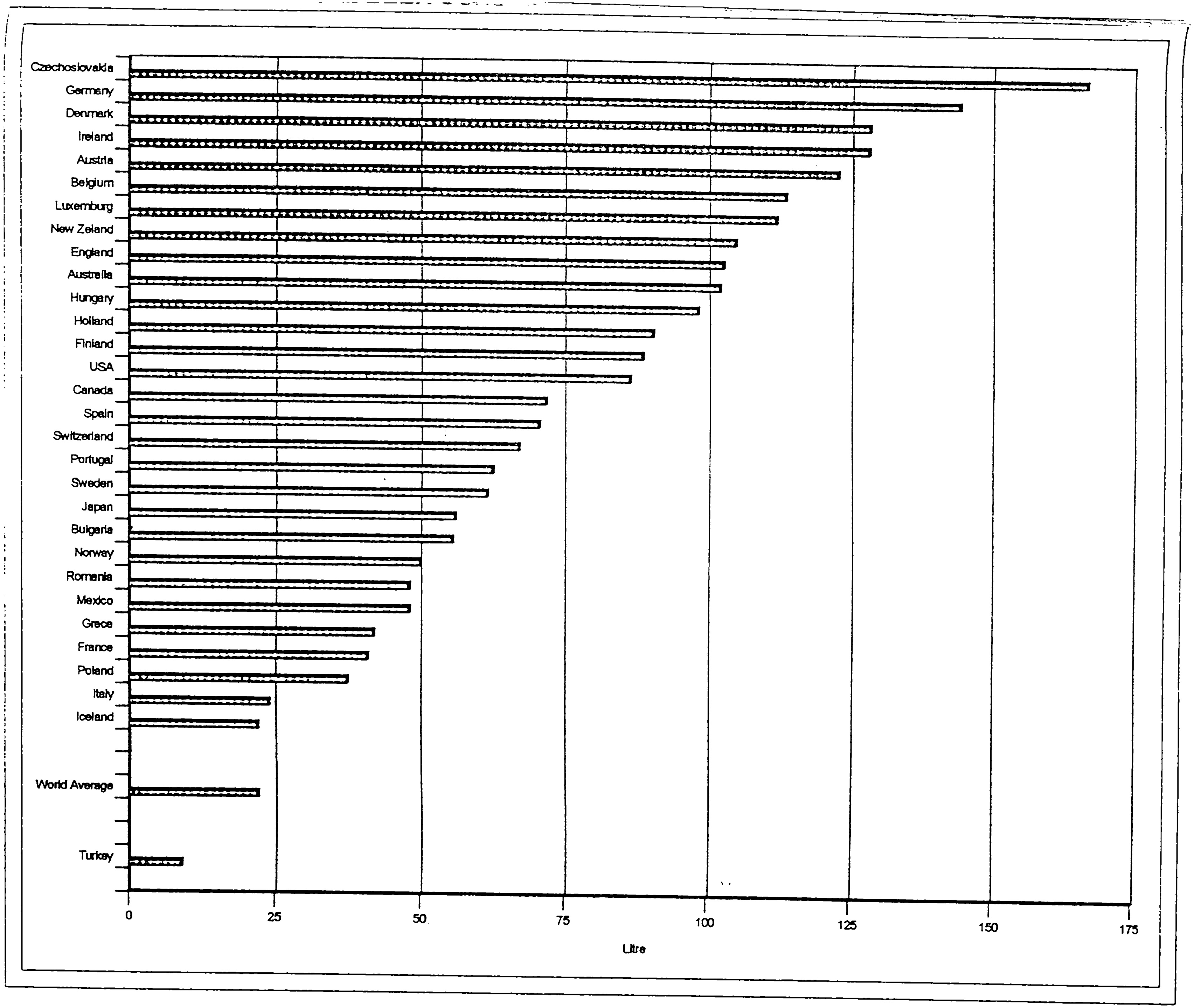
APPENDIX 3

THE CAPACITIES OF THE FIRMS 1994 (Mill.Lt)



total capacity 865

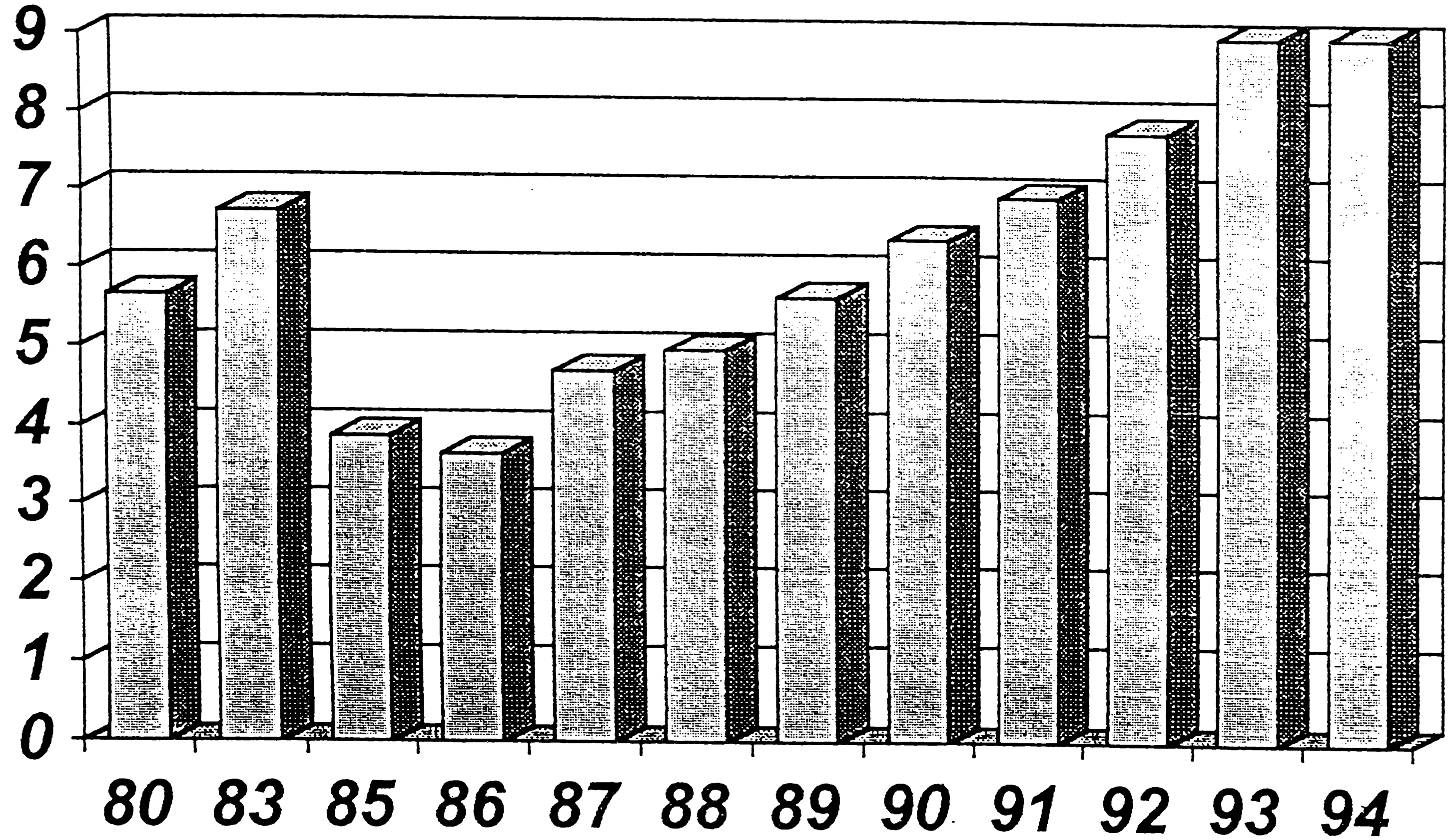
APPENDIX 4



Czechoslovakia
Germany
Denmark
Ireland
Austria
Belgium
Luxemburg
New Zeland
England
Australia
Hungary
Holland
Finland
USA
Canada
Spain
Switzerland
Portugal
Sweden
Japan
Bulgaria
Norway
Romania
Mexico
Grece
France
Poland
Italy
Iceland
World Average
Turkey
0
25
50
75
100
125
150
175
Litre

APPENDIX 5

CONSUMPTION PER CAPITA (LT)



APPENDIX 6

PRICES BY BRANDS AND PACKAGES IN THE TURKISH MARKET

BRAND	BOTTLE		CAN		
	50 cl	33cl	33cl	44 cl	50 cl
EFES PILSEN	20,000	16,000	20,000	-	25,000
EFES EXTRA	-	-	-	-	26,000
EFES LIGHT	-	16,000	20,000	-	25,000
LOWENBRAU	20,000	16,000	20,000	-	25,000
TEKEL	11,000	-	-	-	-
TUBORG GOLD	20,000	16,000	20,000	-	25,000
TUBORG SPECIAL	-	-	-	-	26,000
VENUS PILSNER	-	-	-	-	25,000
VENUS MAVI 44	-	-	-	20,000	-

APPENDIX 7

CHARACTERISTICS OF SEGMENTS

1)Professionals:

- 17% of the interviewees
- 33% of the segment between the ages of 21 to 25

  38% is between 26-30

  24% is between 31-40

  5% is above 40
- Their professions include: Doctors, Academicians, Engineers, Economists, Architects, Managers, Dentists, etc.
- 72% university, 14% with graduate degrees, and 14% with doctorates.
- 30% married, 65% single, 5% widowed.
- 27% between 10-20 million TL income in the family,

  27% between 20-30 million TL,

  19% between 30-45 million TL,

  27% more than 45 million TL.
- Their leisure activities mostly consist of: reading, meeting friends, going to the movies.
- They listen most to: pop, classical, and blues/jazz music.

2)Creative Interactive:

- 10% of the interviewees
- 38% of the segment is between the ages of 20 to 25

  38% is between 26-30

24% is between 31-40

- Their professions include: Musicians, Artists, Industrial Designers, Journalists
- 70% university, and 30% with graduate degrees
- 92% single, 8% widowed.
- 17% between 10-20 million TL income in the family,

  33% between 20-30 million TL,

  8% between 30-45 million TL,

  42% more than 45 million TL.
- Their leisure activities mostly consist of: reading, meeting friends, and watching TV.
- They listen most to: Jazz, rock, pop, and classical music.

3)Low-Average Skills and Income (LASE):

- 23% of the interviewees
- 31% of the segment is between the ages of 16 to 20

  25% is between 21-25

  11% is between 26-30

  11% is between 31-40

  3% is above 40
- Their professions include: Technicians, Cashiers, Civil Servants, Sales Representatives, Barmen, Accountant, Worker, Military Service, etc.
- 29% has primary or secondary school education, 45% high school, 19% university, and 7% with graduate degrees.
- 28% married, 72% single
- 7% less than 5 million TL income in the family,

  18% between 5-10 million TL,

  18% between 10-20 million TL,

25% between 20-30 million TL,

11% between 30-45 million TL,

21% more than 45 million TL.

- Their leisure activities mostly consist of: meeting friends, watching TV, going to the movies.
- They listen most to: pop, arabesque, ozgun music.

4)Students with high incomes:

- 30% of the interviewees
- 5% of the segment is between the ages of 16 to 20

  88% is between 21-25

  7% is between 26-30
- 90% undergraduate students, 10% graduate students.
- 2% married, 98% single.
- Their leisure activities mostly consist of: meeting friends, going to the movies, and sports.
- They listen most to: rock, pop, slow and new wave music.

5)Students with low incomes:

- 20% of the beer interviewees
- 44% of the segment is between the ages of 16 to 20

  48% is between 21-25

  8% is between 26-30

- 4% high school, 85% undergraduate students, 11% graduate students.
- All single.
- Their leisure activities mostly consist of: meeting friends, going to the movies, sports and watching TV.
- They listen most to: pop, rock, slow and arabesque music.

Non-Users:

- 13% of the interviewees
- 9% of the segment is between the ages of 16 to 20

  62% is between 21-25

  24% is between 26-30

  5% is between 31-40
- Their professions include: students, civil servants, and professionals.
- 24% married, 76% single.
- Their leisure activities mostly consist of: meeting friends and watching TV.
- 23% high school, 67% university, and 10% graduate degrees.
- 5% less than 5 million TL income in the family,

  5% between 5-10 million TL,

  38% between 10-20 million TL,

  33% between 30-45 million TL,

  14% more than 45 million TL.
- Reasons for not drinking are: 35% Health consciousness, 22% dislike of taste, 30% personal values and religion, 5% social pressure, 5% financial constraints.

APPENDIX 8

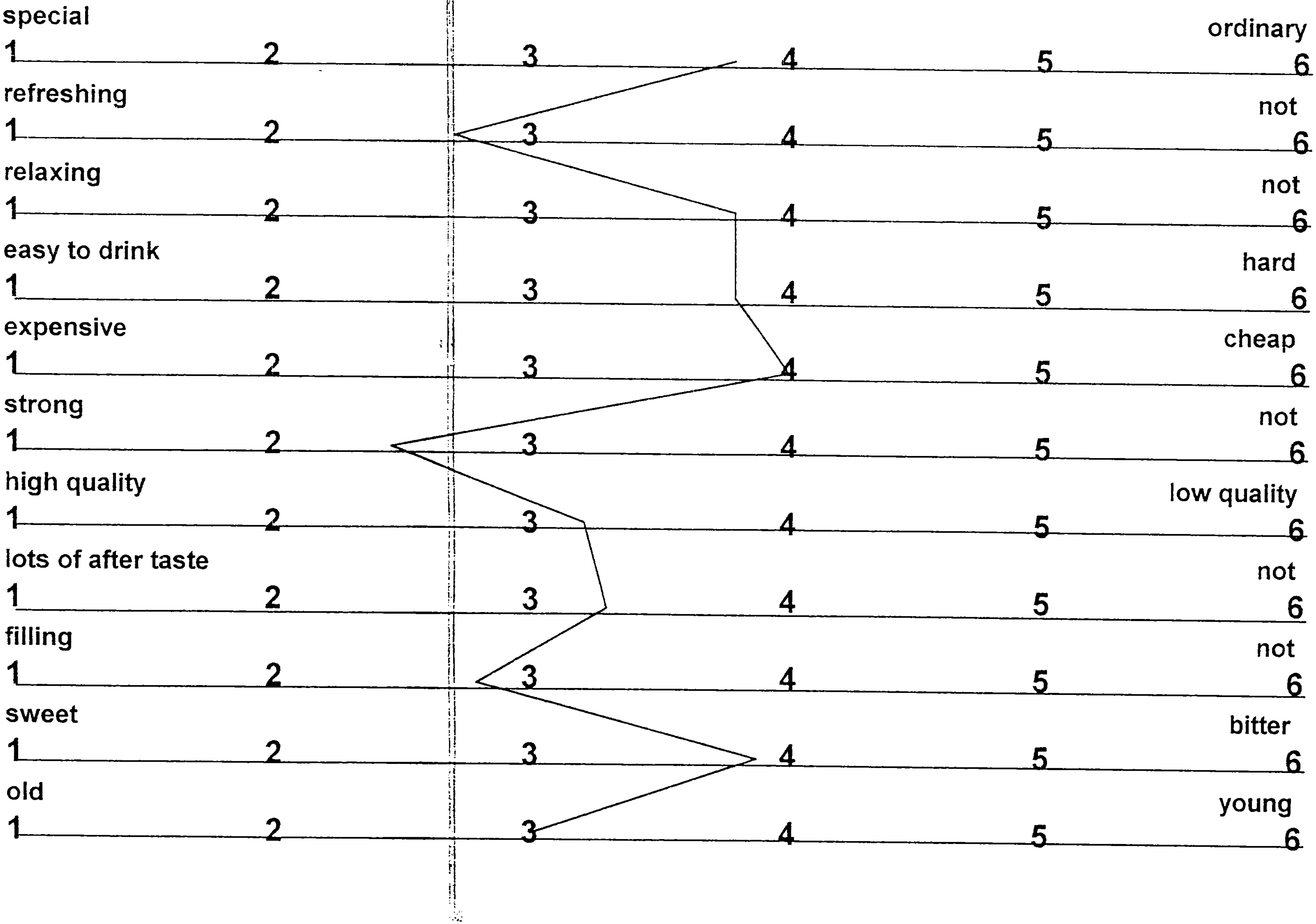
APPENDIX 2 SURVEY RESULTS CONTINUED

Questions	Options	Segment 1, n=22 Proffessionals	Segment 2, n=13 Creative interact.	Segment 3, n=29 LASE	Segment 4, n=40 Students with hig	Segment 5, n=27 Students with low
Frequency of alcohol consumption	more than 3 times a we	9%	31%	31%	7,5%	8%
	1-3 times a week	59%	46%	46%	42,5%	28%
	1-3 times a month	32%	23%	19%	50%	56%
	1-3 times a year	-	-	3%	-	8%
Evaluation		**medium freq.**	**high freq.**	**high freq.**	**medium freq.**	**low freq.**
3 Most frequently consumed drinks	beer=100	100	100	100	100	100
	raki	76	63	57	64	56
	wine	61	44		59	47
	Whisky			57		
Perceived Product Benefits	refreshing	33%	**40%**	26%	30%	18%
	relaxing	26%	27%	21%	19%	21%
	socializing	30%	20%	29%	**35%**	**43%**
	getting drunk	11%	13%	23%	16%	18%
Beer Consumption at one time	one bottle	27%	6%	12%	5%	4%
	2-3 bottles	50%	38%	32%	41%	50%
	3-5 bptt;es	18%	23%	24%	43%	27%
	more than 5 bottles	5%	23%	32%	11%	19%
Evaluation		**light users**	**heavy users**	**heavy users**	**medium users**	**medium users**
Sources of info on beer	friends	23%	33%	**44%**	30%	**38%**
	trial	**54%**	**42%**	28%	**43%**	34%
	advertisements	23%	25%	28%	27%	28%
Buying Process for beer	decision before purc.	47%	**67%**	**75%**	**61%**	**77%**
	decision during purc.	**53%**	33%	25%	39%	23%
Location of beer purchases (Highest 3)	grocery/market	46%	63%	28%	28%	28%
	bar		25%	36%	44%	39%
	buffet	25%	12%	36%	28%	
	kuruyemisci	29%				33%
Evaluation	off-premise con-sumption tendency	**high**	**edium to hig**	**edium to hig**	**medium**	**medium**

Questions	Options	Segment 1, n=22 Proffessionals	Segment 2, n=13 Creative Interact.	Segment 3, n=29 Technicians	Segment 4, n=40 Students with hig	Segment 5, n=27 Students with low
Consumption Occasions	Off-premise:					
	Friends/Family gather.	**42%**	**50%**	**48%**	**42%**	**49%**
	watching sports			29%	29%	14%
	watching TV	29%	21%	23%		
	home parties	29%	29%		29%	37%
	On-premise:					
	bar/disco	**50%**	**47%**	**41%**	**53%**	**58%**
	picnics	22%		29%		24%
	cafes		24%	29%		
	beach	28%	29%		27%	18%
	lunch/dinner				20%	
Brand Preference	Efes Pilsen	77%	72%	78%	69%	76%
	Tuborg	9%		17%	7%	14%
	Tekel		14%			
	Non	14%	14%	4%	24%	10%
Brand Substitutes	Competitor brand	58%	67%	58%	79%	81%
	Other alcaholic drinks	32%	22%	26%	12%	11%
	Nothing	10%	11%	16%	9%	8%
3 Most Important Criteria for Brand Preference	taste	50%	53%	38%	46%	36%
	quality	37%	29%	44%	40%	43%
	alcahol percentage			18%	14%	21%
	image	13%				
	price		18%			
Beer Substitutes	Other alcaholic drinks	33%	54%	48%	43%	40%
	Non-alcaholic drinks	53%	23%	20%	49%	50%
	Nothing	14%	23%	32%	8%	10%

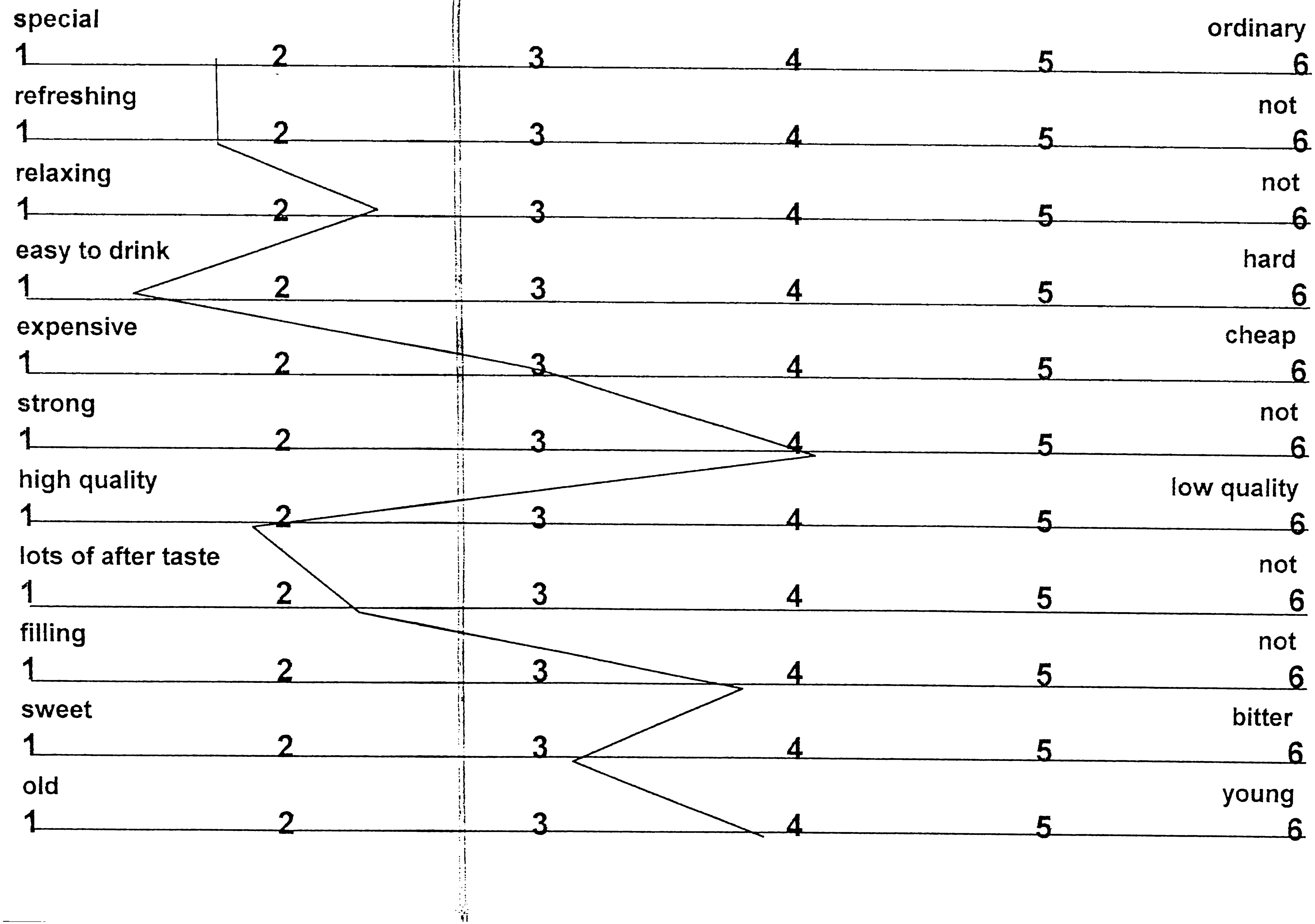
APPENDIX 9

SEGMENT 1 TUBORG PROFILE



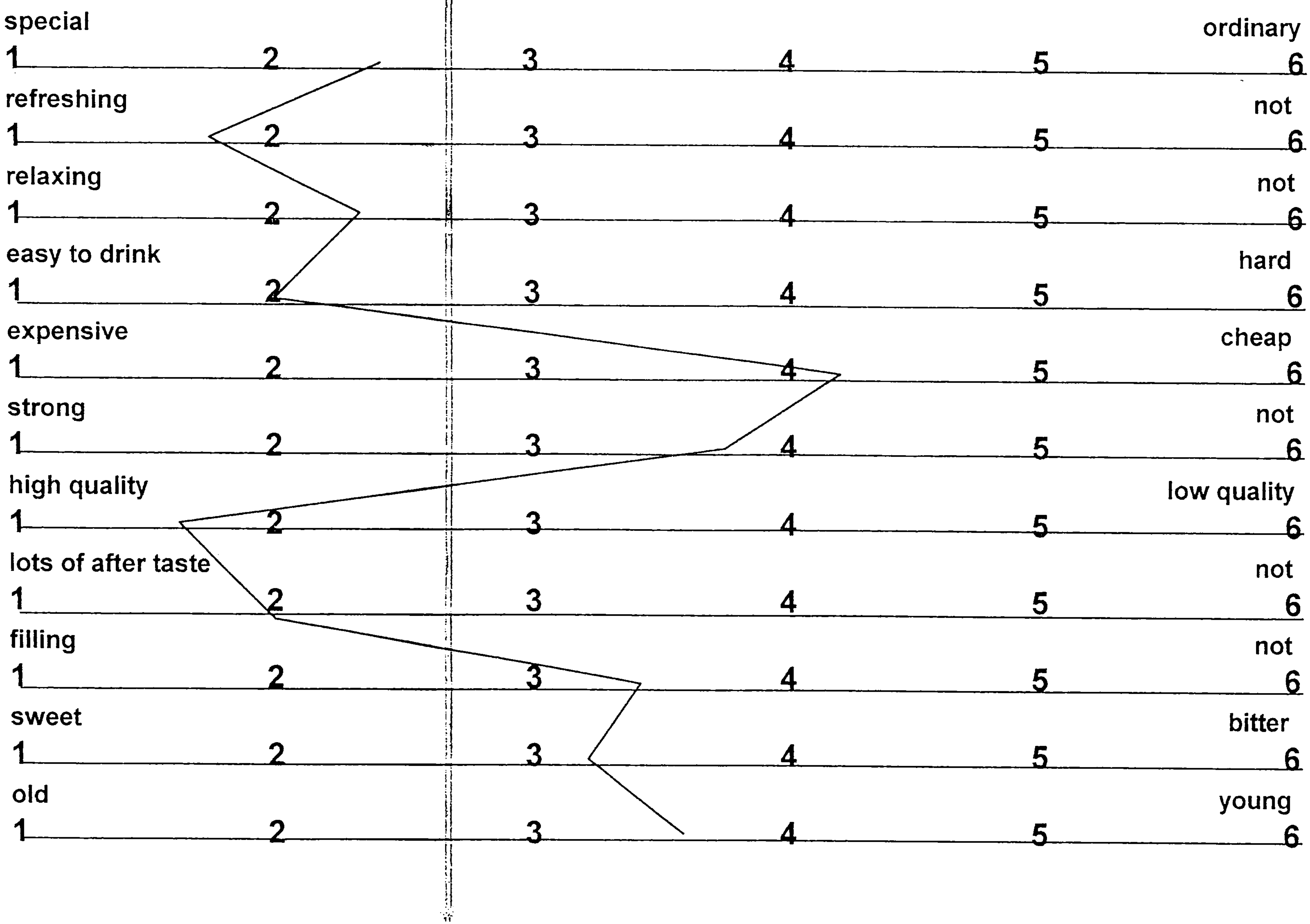
APPENDIX [illegible] (continued)

SEGMENT 1 EFES PROFILE



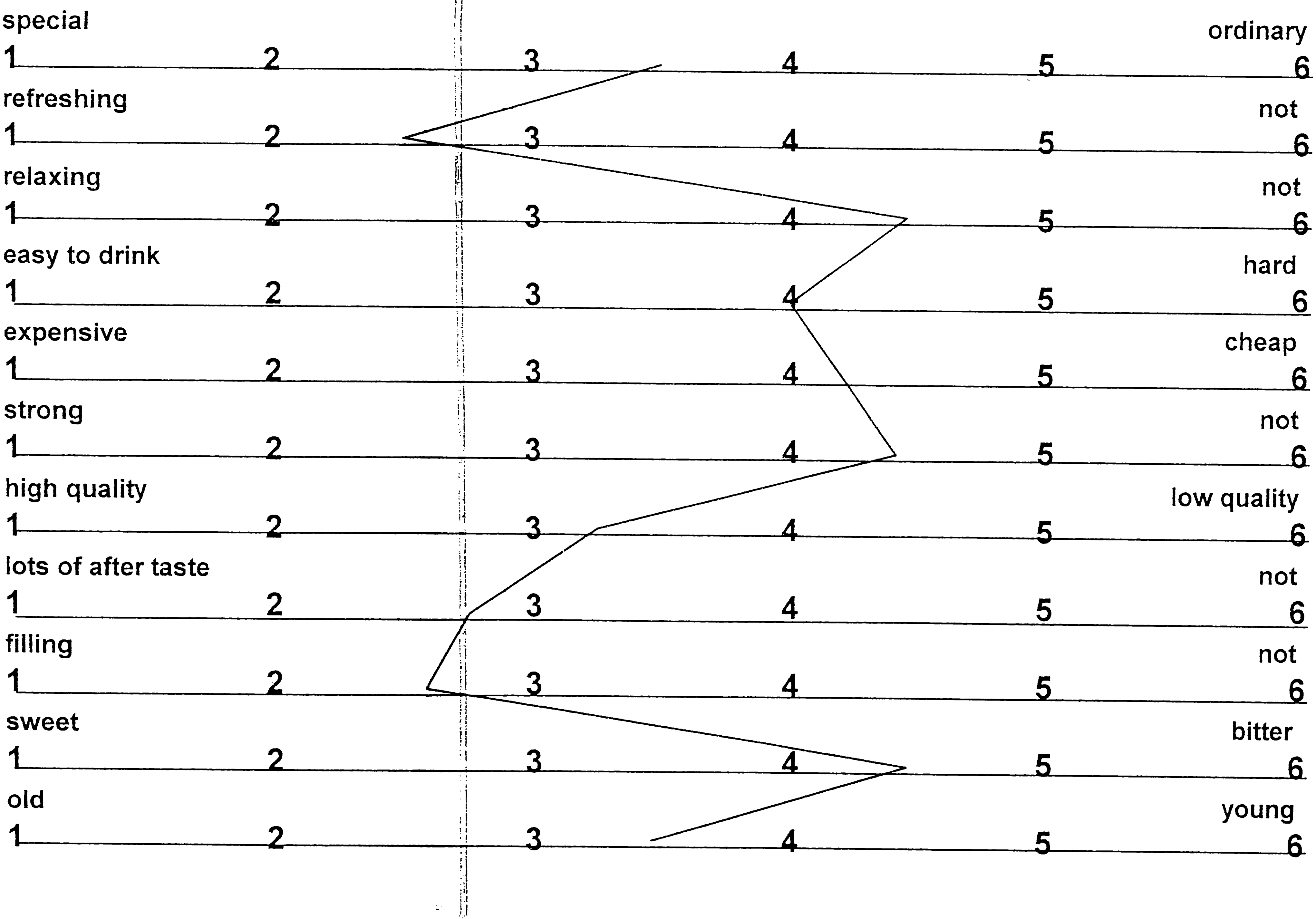
APPENDIX 4 (continued)

SEGMENT 2 EFES PROFILE



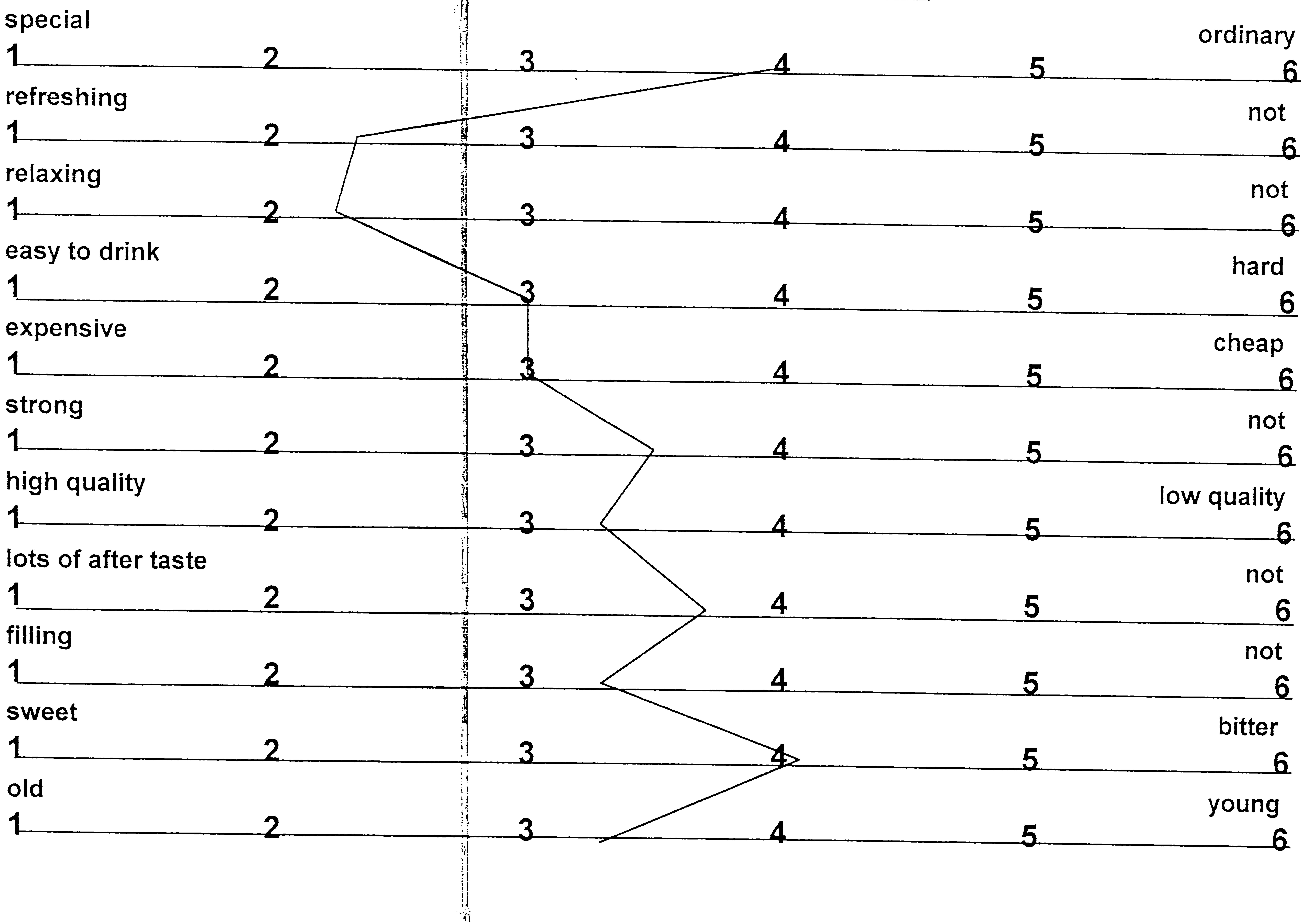
APPENDIX 14 (continued)

SEGMENT 2 TUBORG PROFILE



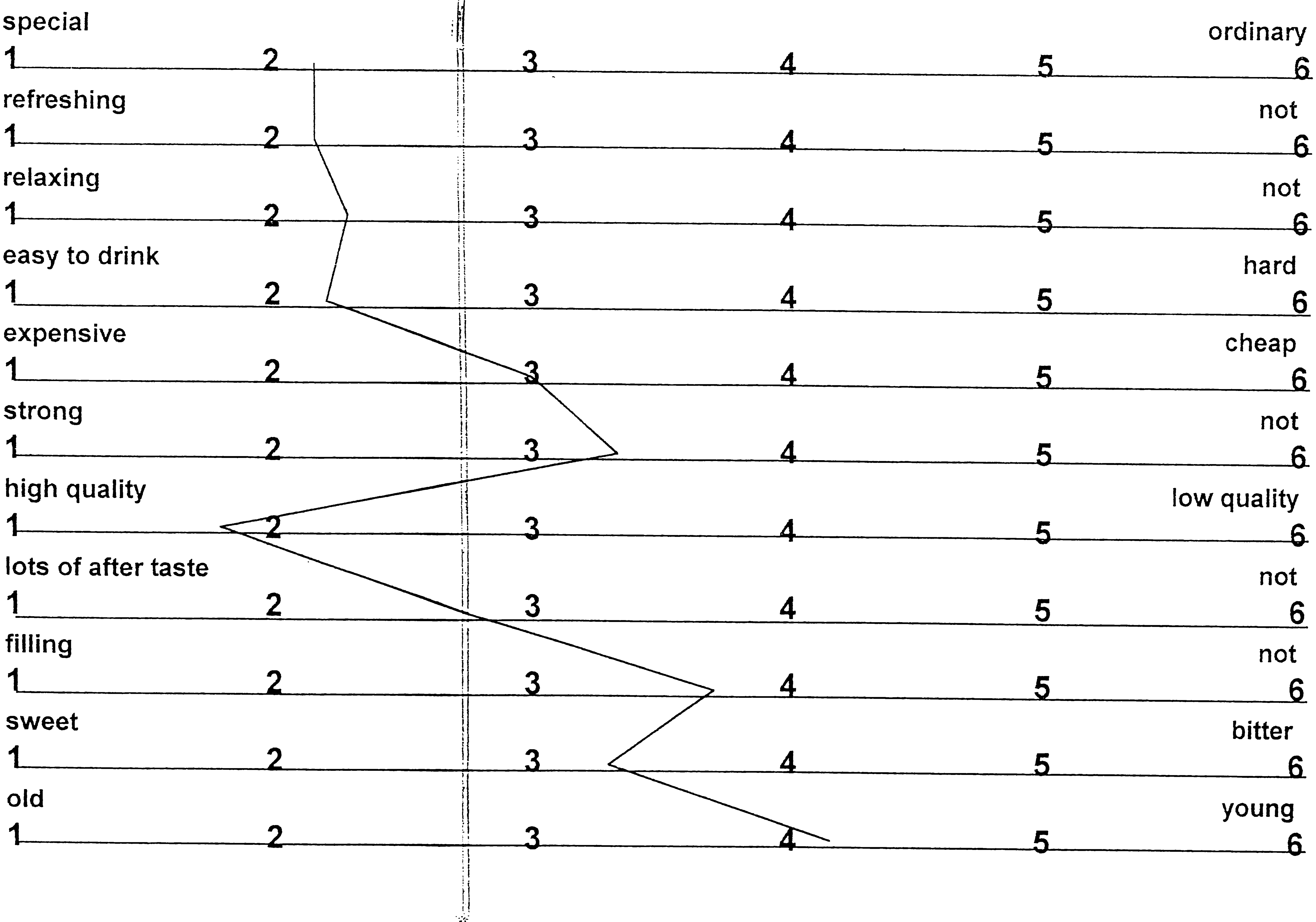
APPENDIX (continued)

SEGMENT 3 TUBORG PROFILE



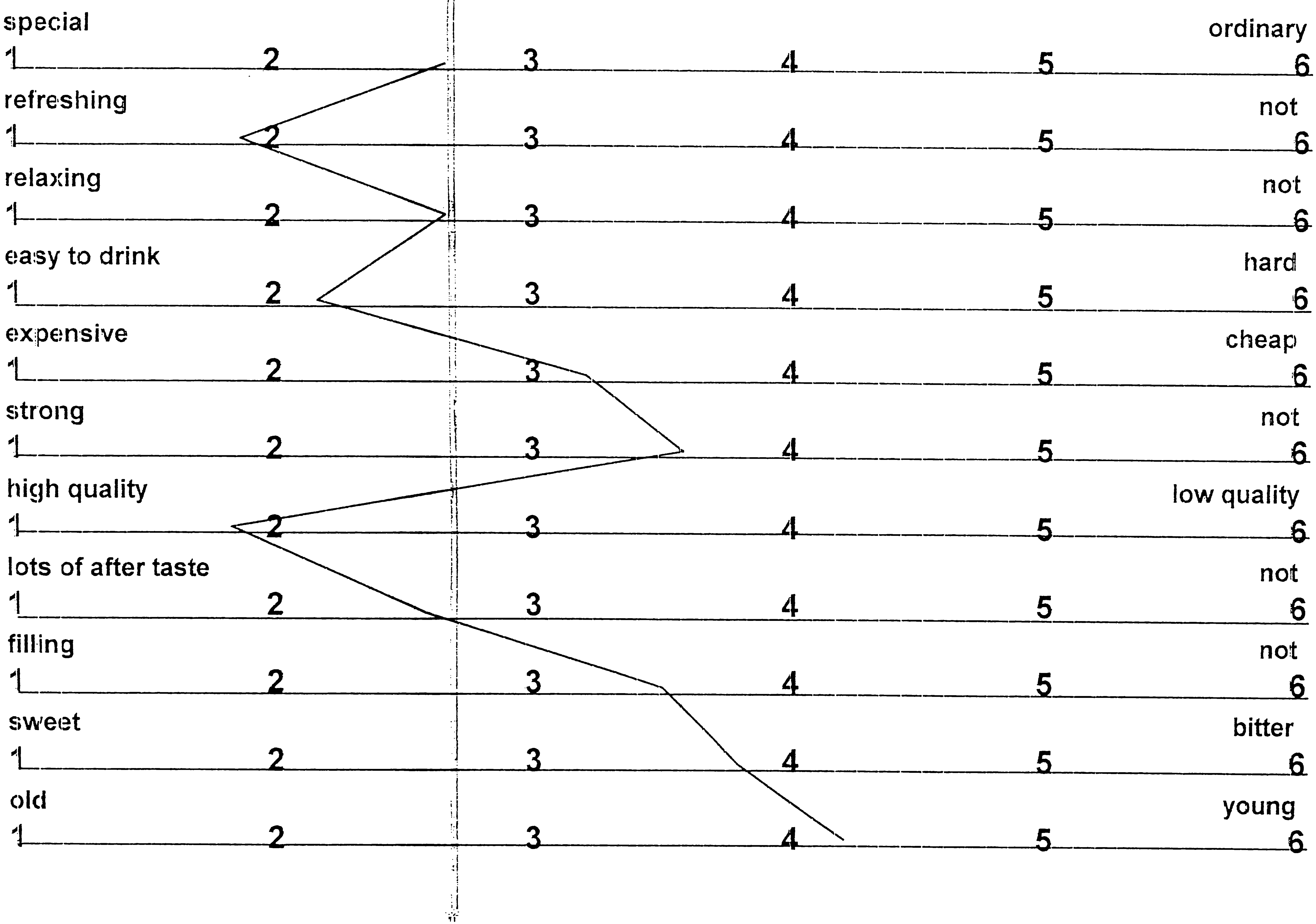
APPENDIX 4 (continued)

SEGMENT 3 EFES PROFILE



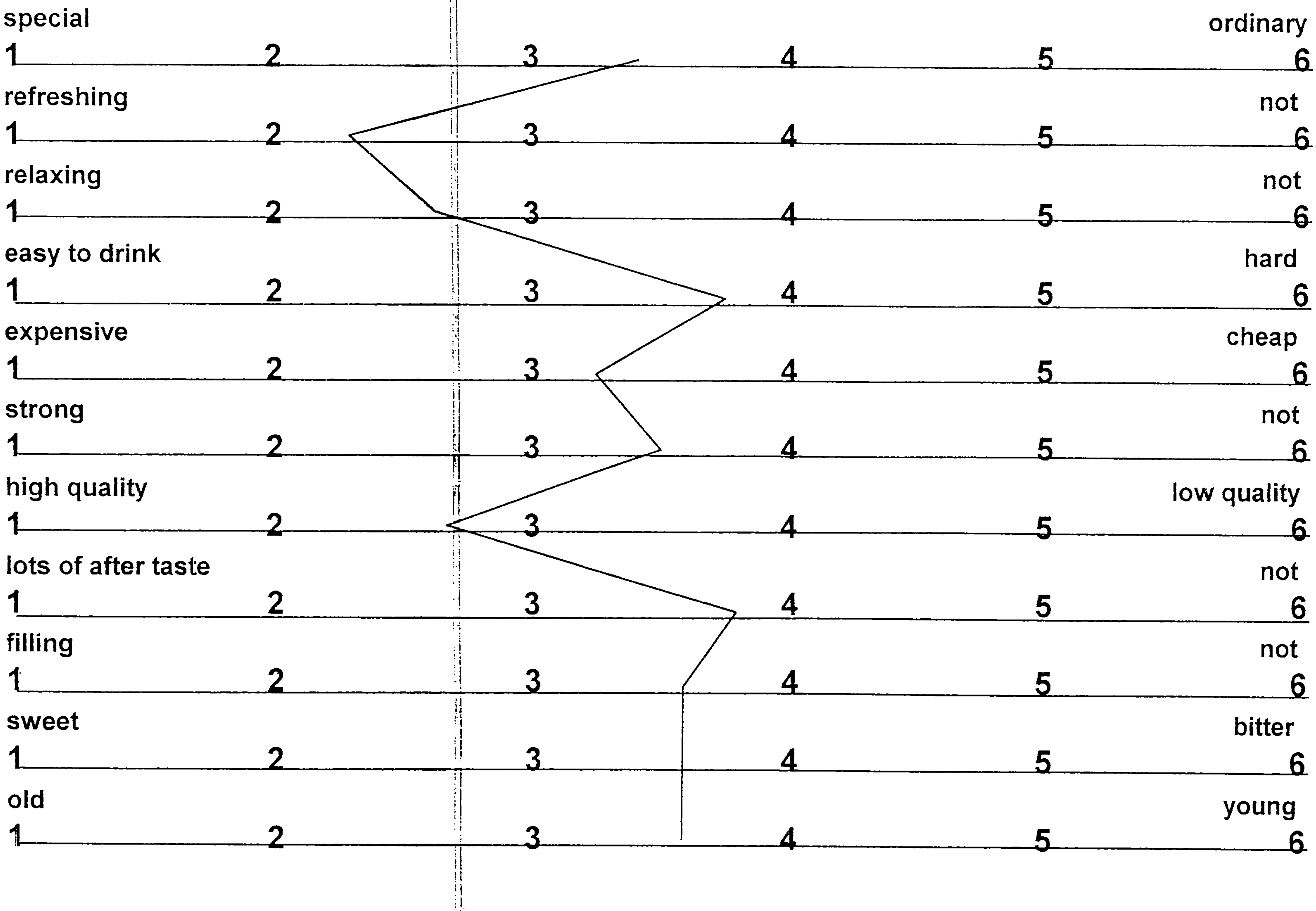
APPENDIX 4 (continued)

SEGMENT 4 EFES PROFILE



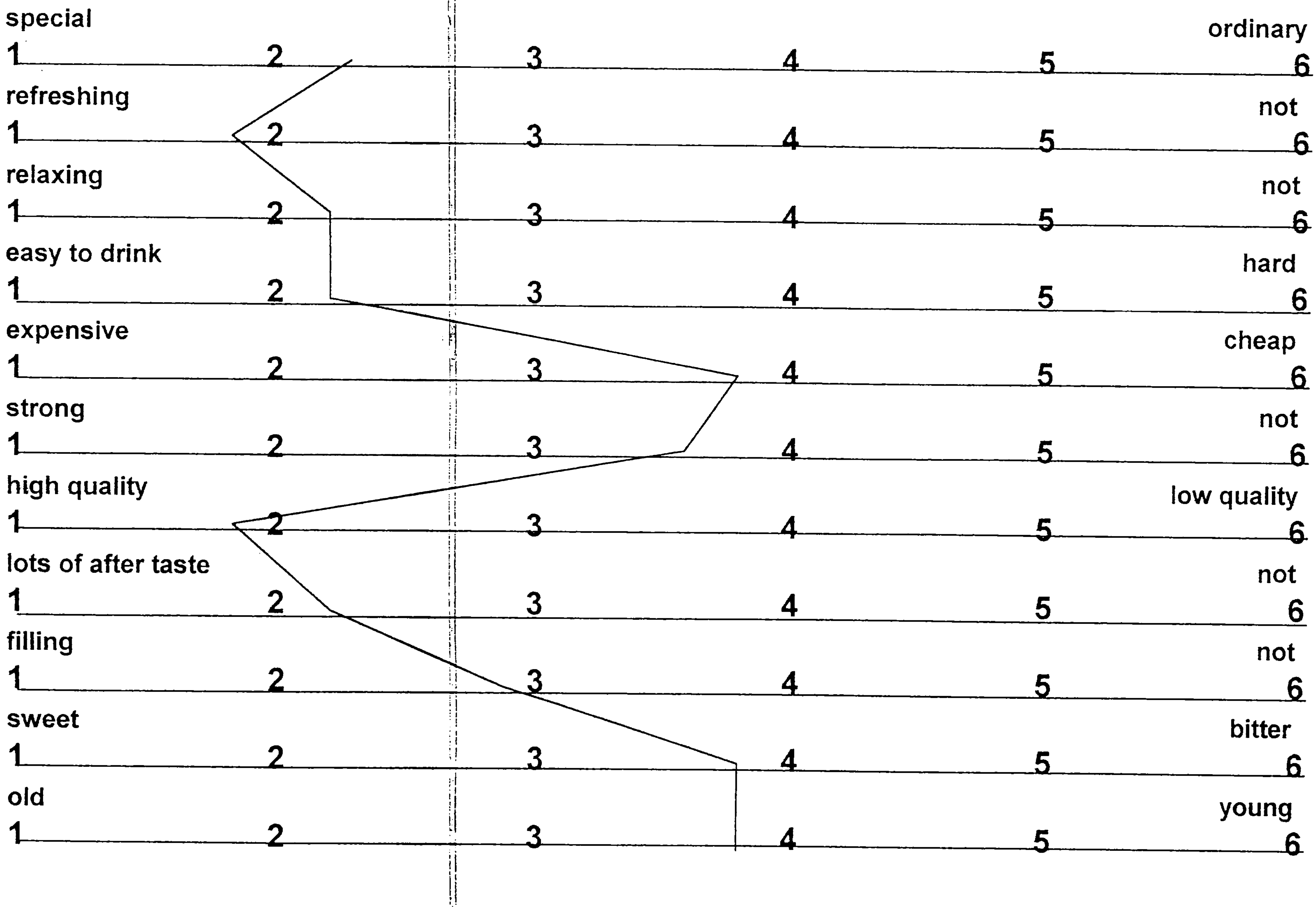
APPENDIX (continued)

SEGMENT 4 TUBORG PROFILE

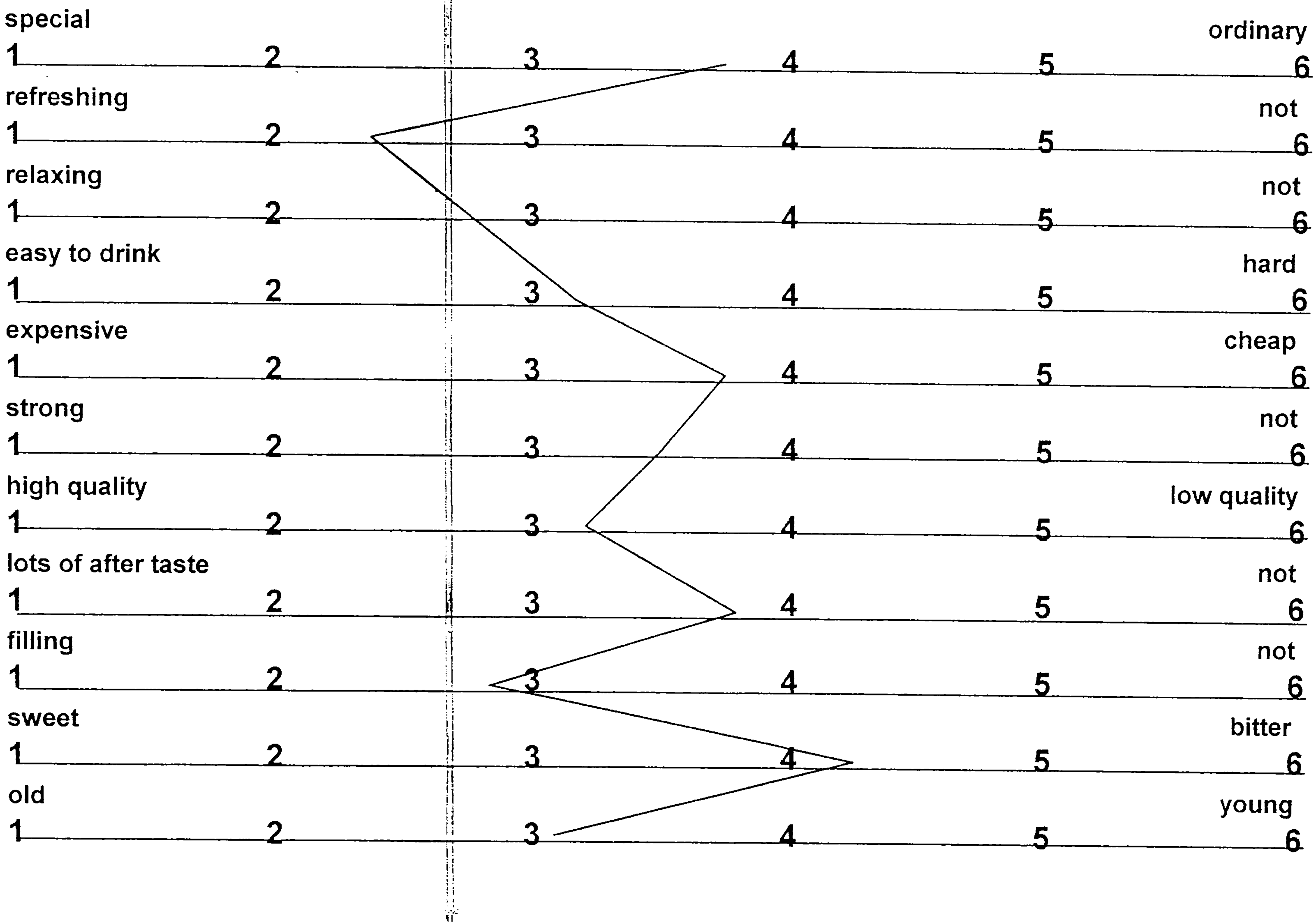


APPENDIX [illegible] (continued)

SEGMENT 5 EFES PROFILE



SEGMENT 5 TUBORG PROFILE



APPENDIX [illegible] (continued)

APPENDIX 10

Brands

Tuboorg

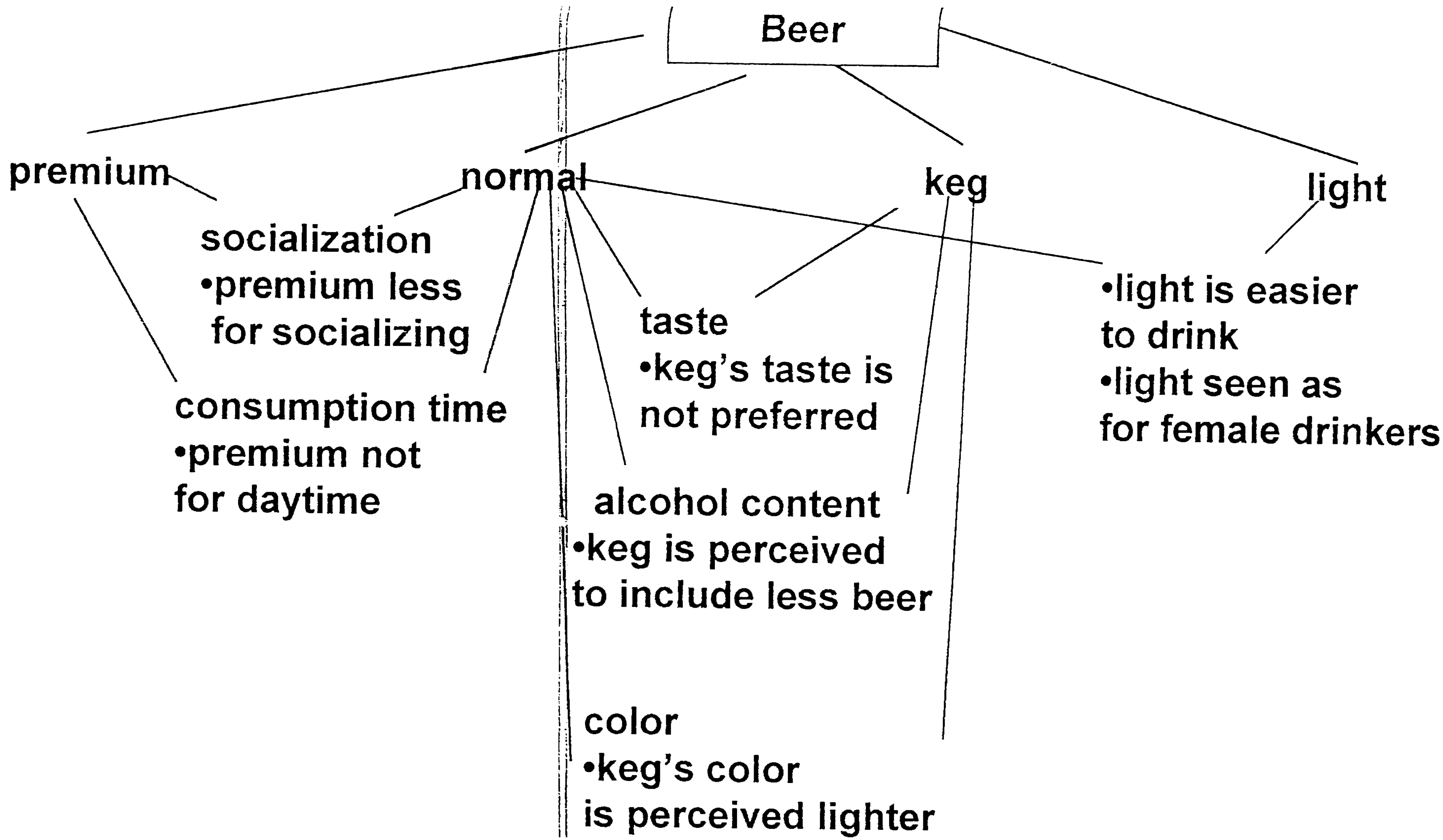
Efes

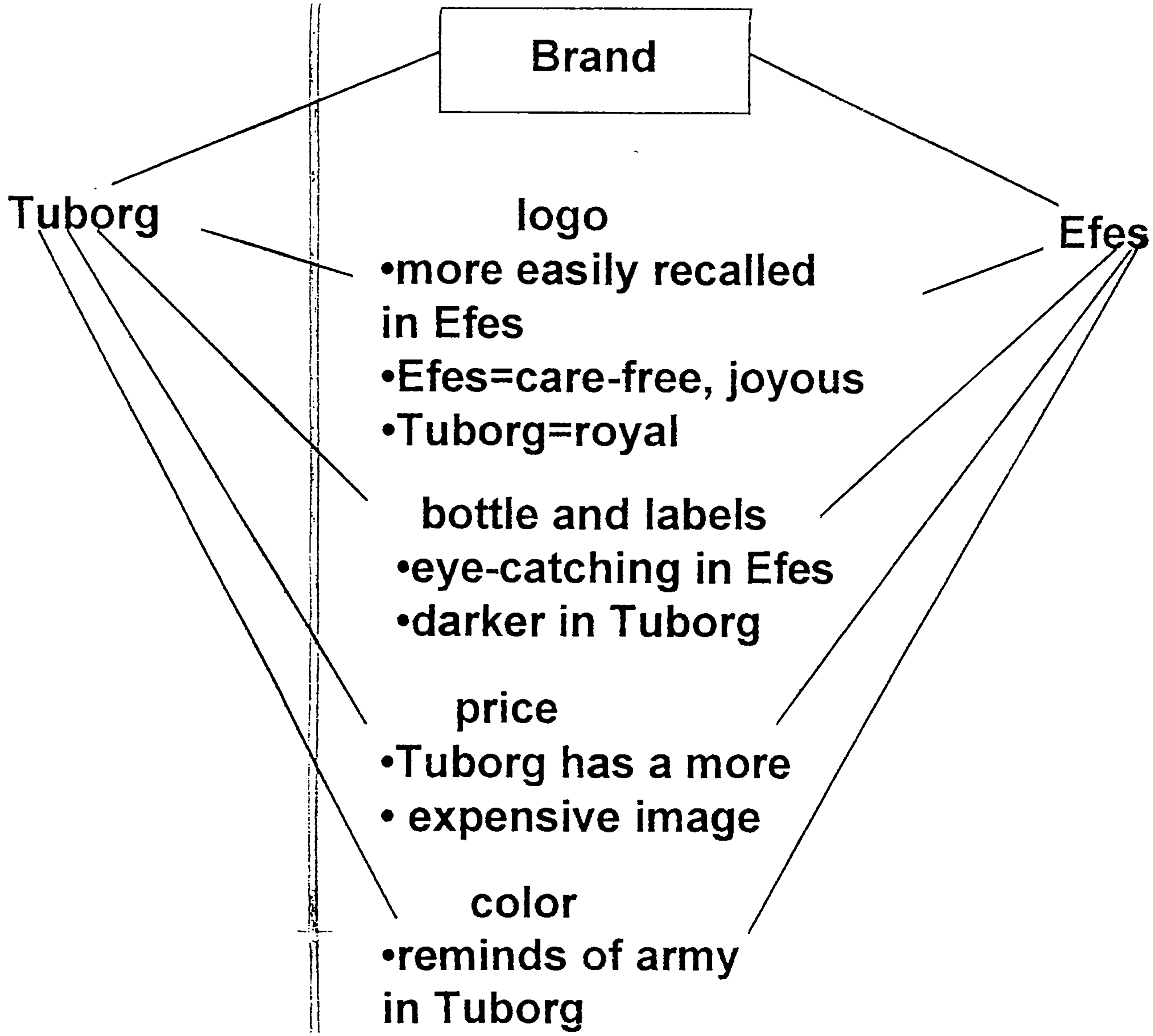
taste
- important for brand preference
- perceived different according to occasion
- Tuborg=harder to drink

place
- home=Efes

trial rate
- higher for Efes

image
- directly affects brand preference
- weak image of Tuborg
- better image building by Efes
- affected by sales points
- affected by more lighted store signs of Efes
- Efes reminds of Turkey due to
- its successful basketball team


Beer
premium
normal
keg
light
socialization
•premium less
for socializing
consumption time
•premium not
for daytime
taste
•keg's taste is
not preferred
alcohol content
•keg is perceived
to include less beer
color
•keg's color
is perceived lighter
•light is easier
to drink
•light seen as
for female drinkers


Brand
Tuborg
Efes
logo
•more easily recalled
in Efes
•Efes=care-free, joyous
•Tuborg=royal
bottle and labels
•eye-catching in Efes
•darker in Tuborg
price
•Tuborg has a more
• expensive image
color
•reminds of army
in Tuborg

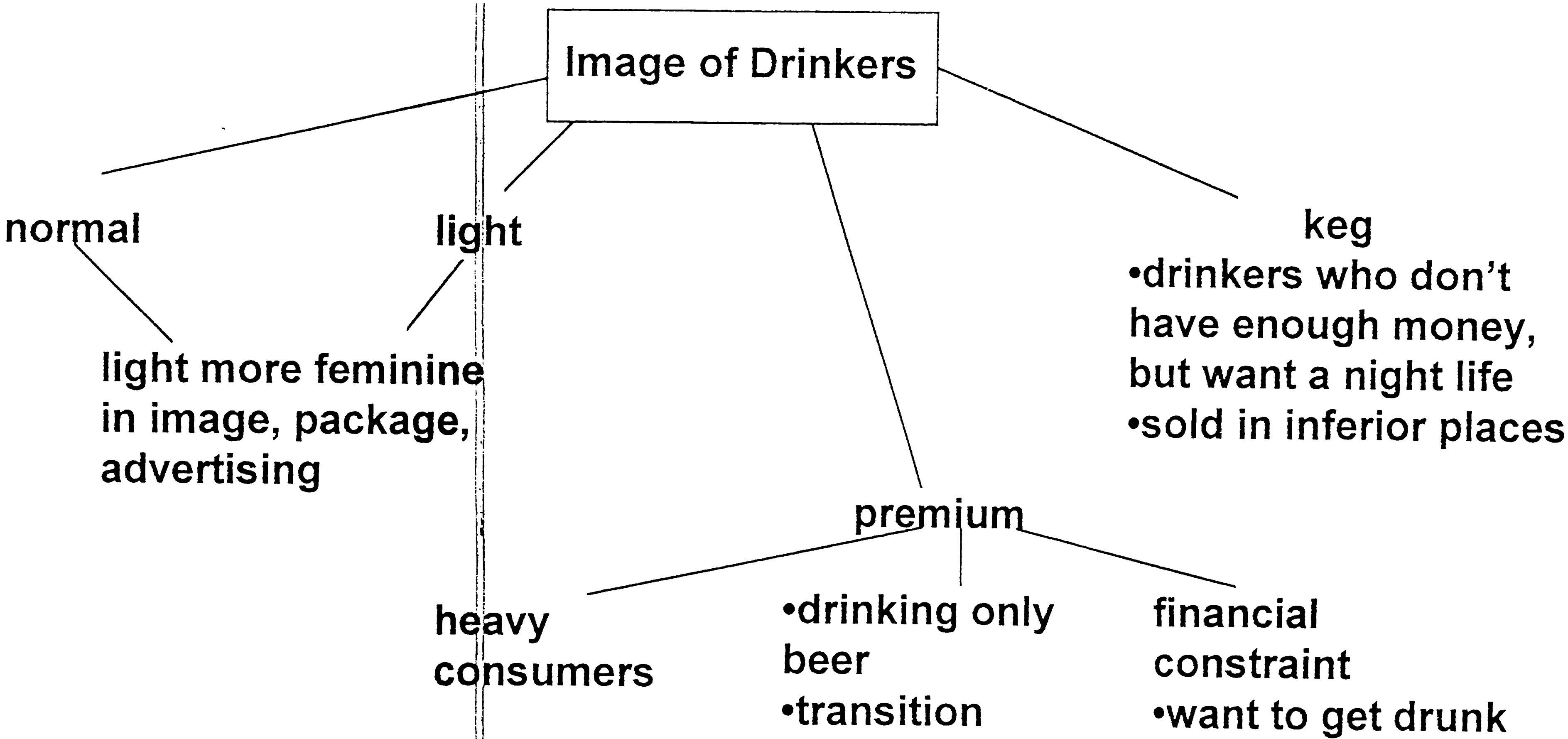
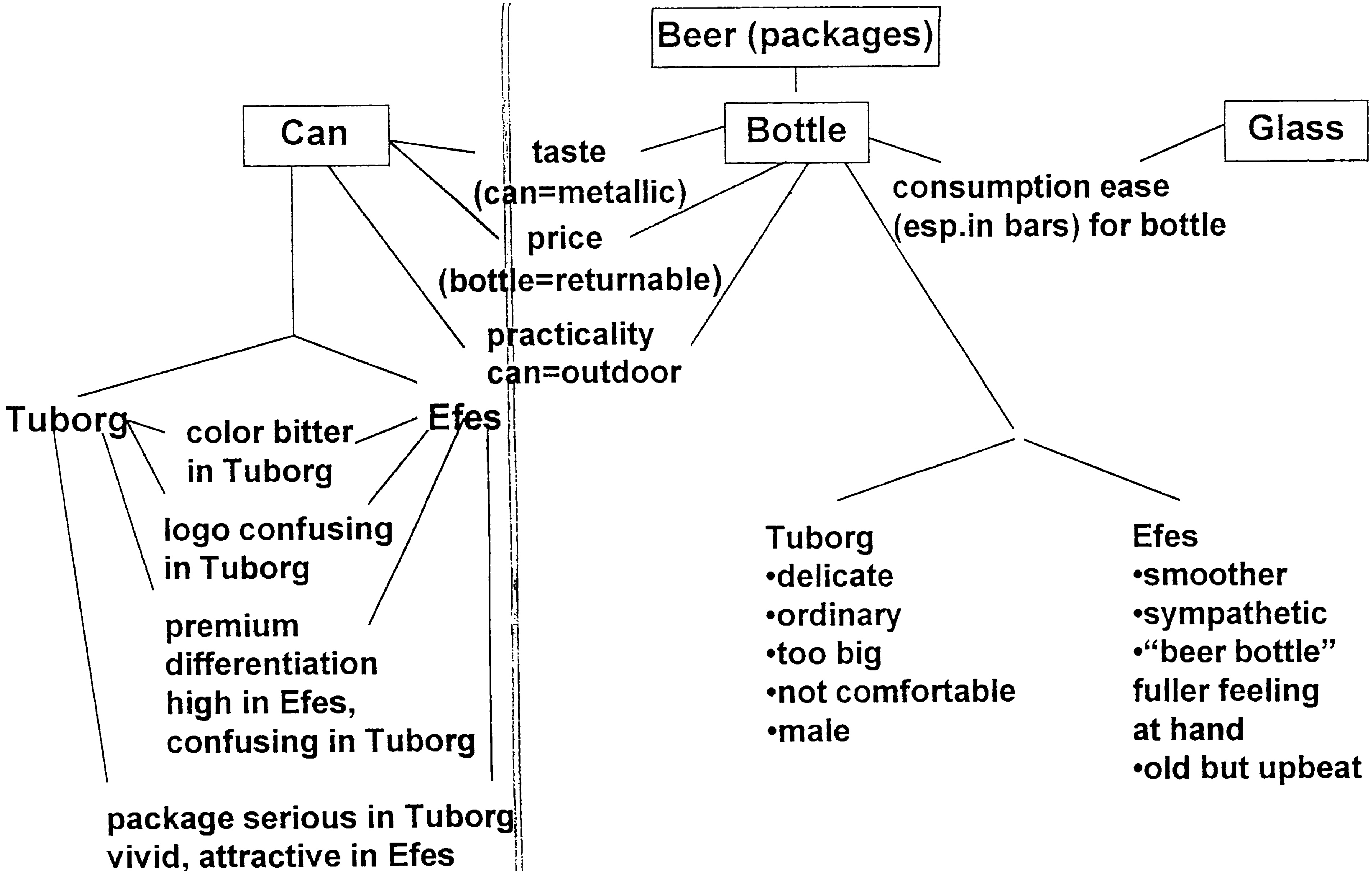
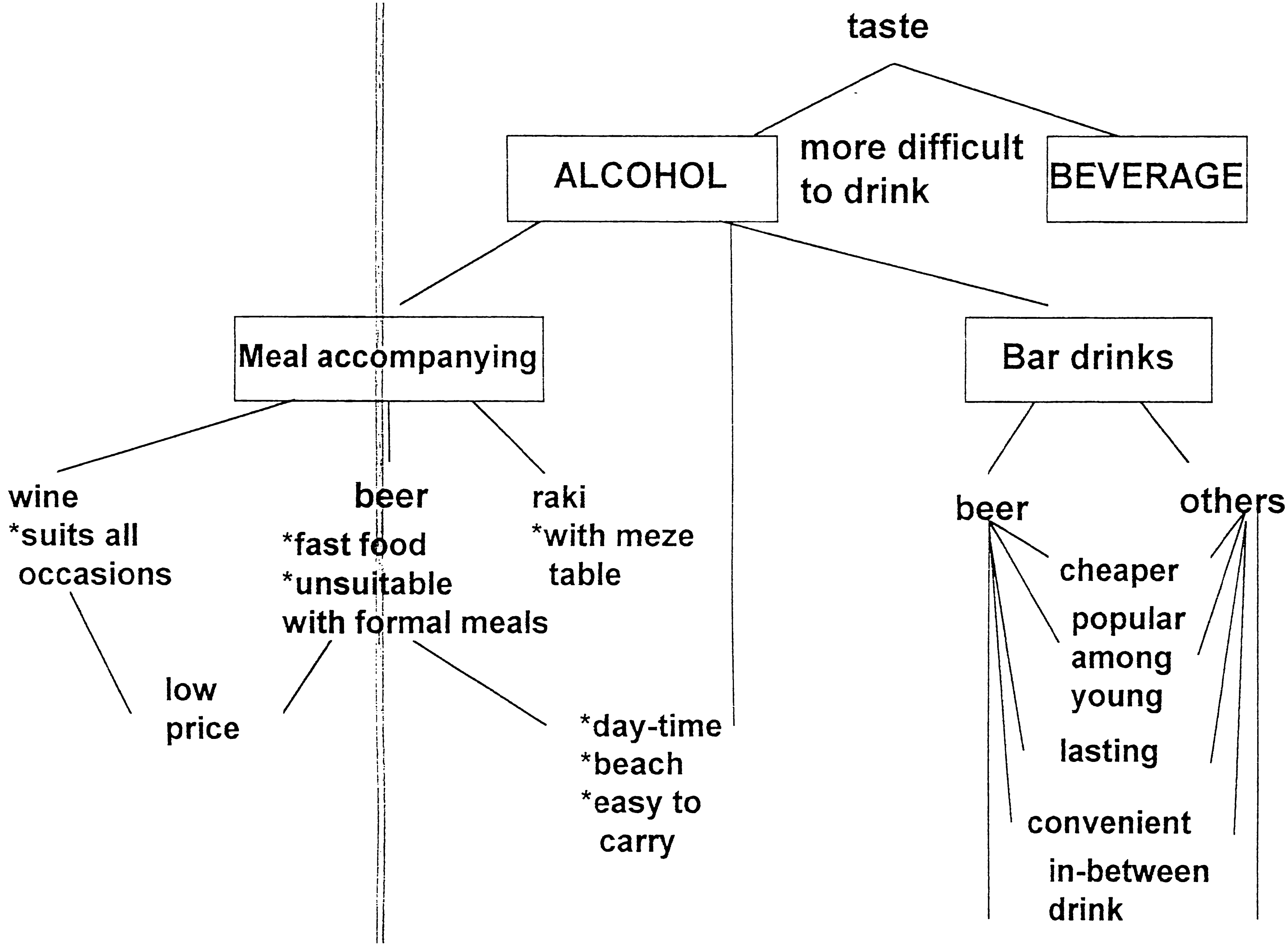


Image of Drinkers
normal
light
light more feminine in image, package, advertising
keg
•drinkers who don't have enough money, but want a night life
•sold in inferior places
premium
heavy consumers
•drinking only beer
•transition
financial constraint
•want to get drunk

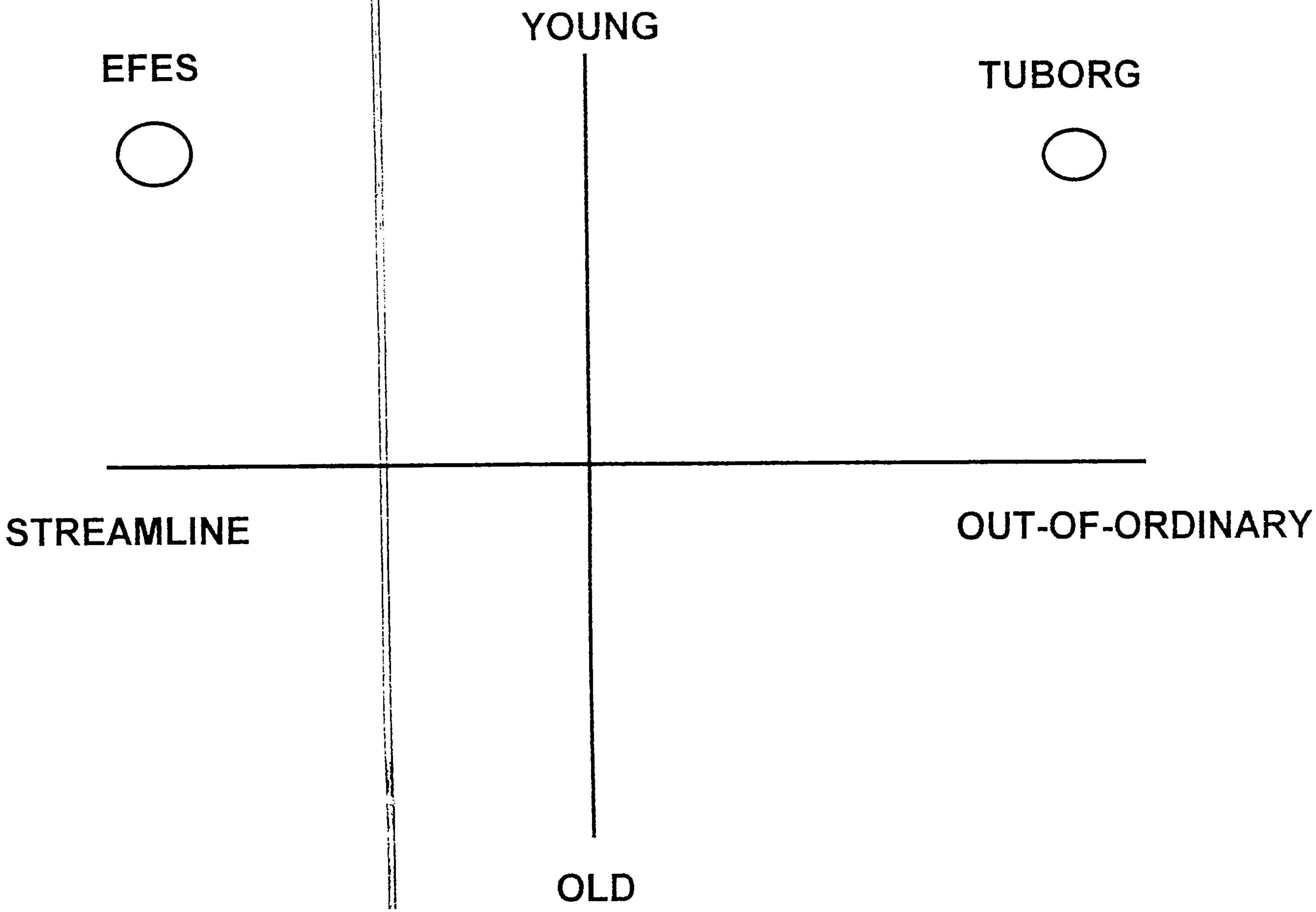


Beer (packages)
Can
Bottle
Glass
taste
(can=metallic)
price
(bottle=returnable)
practicality
can=outdoor
consumption ease
(esp.in bars) for bottle
Tuborg
Efes
color bitter
in Tuborg
logo confusing
in Tuborg
premium
differentiation
high in Efes,
confusing in Tuborg
package serious in Tuborg
vivid, attractive in Efes
Tuborg
•delicate
•ordinary
•too big
•not comfortable
•male
Efes
•smoother
•sympathetic
•"beer bottle"
fuller feeling
at hand
•old but upbeat


taste
ALCOHOL
more difficult to drink
BEVERAGE
Meal accompanying
Bar drinks
wine
*suits all occasions
beer
*fast food
*unsuitable with formal meals
raki
*with meze table
low price
*day-time
*beach
*easy to carry
beer
others
cheaper
popular among young
lasting
convenient
in-between drink

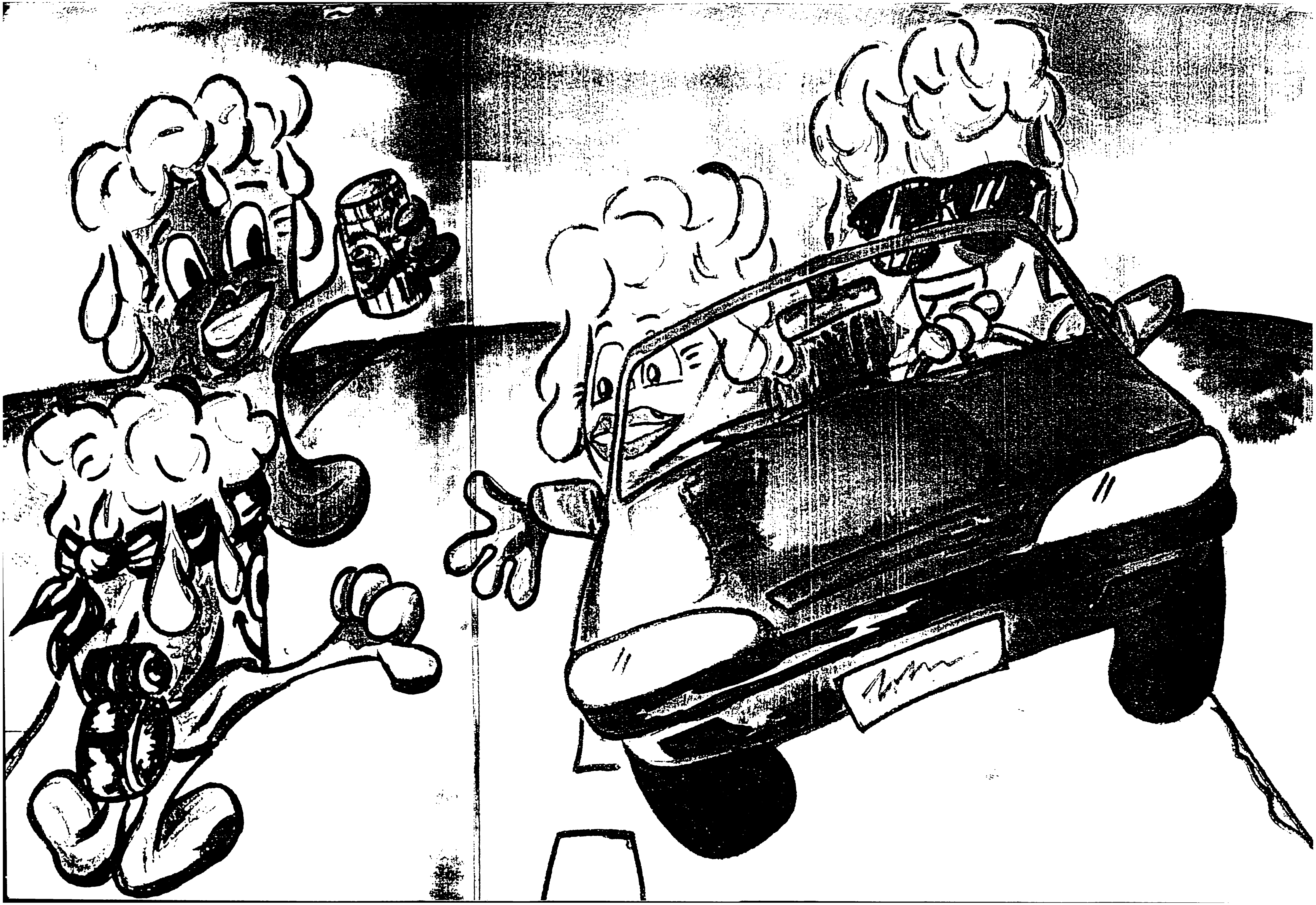
APPENDIX 11

POSITIONING FOR TUBORG

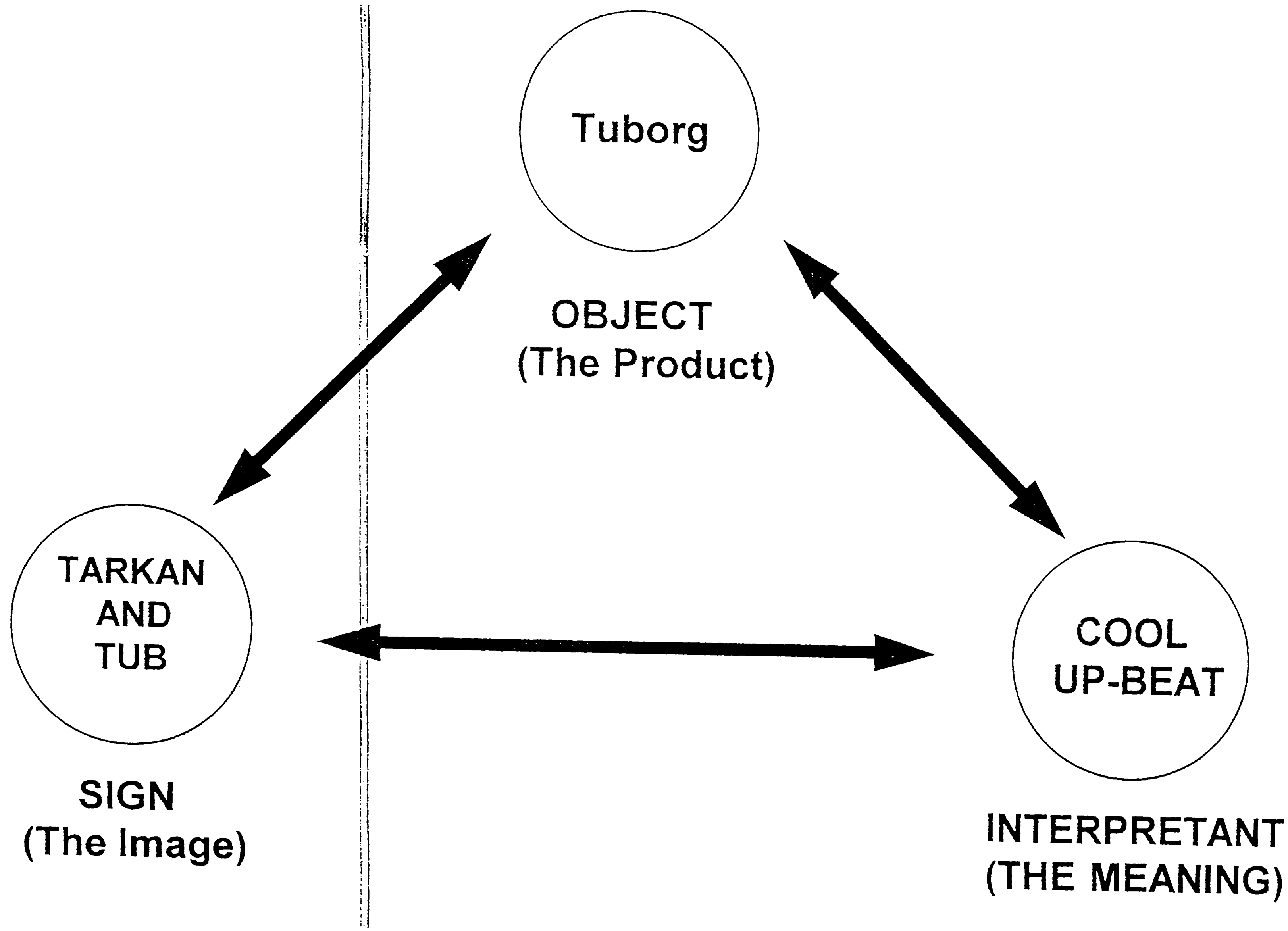


Appendix 8

APPENDIX 12



APPENDIX 13


Tuborg
OBJECT
(The Product)
TARKAN
AND
TUB
SIGN
(The Image)
COOL
UP-BEAT
INTERPRETANT
(THE MEANING)