



# FloraHolland

## How Royal FloraHolland can increase consumer spending on Dutch flowers and plants in Turkey



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**Date:** 24 January 2017

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## **Executive summary**

The primary research question for this project was “How can Royal FloraHolland increase the consumer spending on Dutch flowers and plants in Turkey?” with the aim to study causes and reasons for the low consumption of flowers and plants in Turkey.

The research question was answered through desk and field research. Field research included one interview with Bloemenbureau Holland, three interviews with flower and plant organisations in Turkey, several dozen questionnaires conducted in Istanbul, and information provided by florists and retailers visited in Istanbul. Desk research found that low spending on flowers and plants can be attributed to low activity levels in the flower and plant sector. For instance, advertising and marketing of flowers and plants is minimal because there is little cultural integration of flowers and plants in Turkey. In fact, there are currently no data at all on consumer behaviour towards flowers and plants in Turkey. Furthermore, Category Management in flower and plant stores should be re-organised in order to enhance the quality of the products and to create added value for consumers.

Based on the findings, a marketing plan was produced with the aim to increase consumer spending. The marketing plan is centred on push marketing, achieved through mobile marketing and marketing campaigns. This type of marketing will continuously remind people to think about flowers and plants. By positioning flowers and plants as products to express emotions, consumers may associate them with feelings such as happiness. In addition, it is important that consumers experience not only the receiving but also the giving of flowers. It may be conducive to design marketing campaigns accordingly - for example, a marketing campaign for victims on Democracy and National Solidarity Day on the 15<sup>th</sup> of July.

In short, the Turkish flower and plant sector should be developed when it comes to Category Management, as well as pricing and organisation – particularly at florists, retailers and do-it-yourself stores. In addition, Royal FloraHolland should make use of push marketing via mobile marketing and marketing campaigns.

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## **Preface**

This project is the final proof of competence for the Bachelor degree in European Studies at The Hague University, with a specialisation in the private sector. This research was supervised by The Hague University and executed for the University and for Royal FloraHolland. This research was carried out from September 2016 to January 2017.

Royal FloraHolland gave me the opportunity to conduct research for the Turkey Business Development Team. The research question was formulated together with my assignment provider, Monique Heemskerk, in order to study low consumer spending on flowers and plants in Turkey. Royal FloraHolland provided the opportunity to conduct field research in Istanbul by visiting retailers and conducting questionnaires, which was an amazing learning experience and probably the highlight of my degree. This research gave me varied skills and experience in writing a realistic marketing plan and applying and developing my Turkish language knowledge.

I would like to take this opportunity to thank my assignment provider, Ms. Heemskerk, for this special learning experience, as well as my University supervisor, Mr. van Leeuwen, for his continuous help and support. Furthermore, I would like to thank Henk van Ginkel for finding this placement for me through his network. I would not have found this placement without him. I also want to thank everyone in the business development team. My final thanks goes out to my family, boyfriend and friends, who never failed to support me.

The Hague, 4 January 2016

Çeçilya Sezer

## **Chapter 1. Introduction**

This report will be written on behalf of the business development Turkey team of the flower co-operative company Royal FloraHolland. The report examines consumer behaviour of the Turkish consumer, paying specific attention to consumer spending on Dutch flowers and plants in Turkey. Investigations previously conducted by Royal FloraHolland show that flowers and plants are currently an expensive luxury item, influencing both consumption and investment in production. As a result, it was determined that an opportunity exists to raise consumer spending on flowers and plants in Turkey. The current consumption of flowers and plants is low. The consumption per capita in 2014 was 15 euros in Istanbul, and 4 euros overall in Turkey. The three main areas of consumption are Istanbul, Ankara and Antalya. Therefore, the present research objective is to determine the reason for minimal flower and plant consumption in Turkey. In response to this research, a new marketing strategy will be advised. The marketing strategy will focus on the Turkish consumer in Istanbul (the primary target of the company).

The goal of this report is to advise Royal FloraHolland about Turkish consumers of flowers. This should assist the members of the co-operative company with increasing consumer spending in Turkey, and as a result also assist with increasing the market share of their members. This report therefore aims to answer the following central question:

***How can Royal FloraHolland increase the consumer spending on Dutch flowers and plants in Turkey?***

This research includes international context, and it is based on private specialisation. It focuses on Turkey and the Netherlands. To answer the central question mentioned above, various sub-questions were designed in support.

*The sub-questions are listed in this report as follows:*

1. How can the Turkish culture be described and what are the cultural differences in the country?
2. Which products compete with flowers and plants in Turkey?
3. What kinds of promotion and promotional tools are used in the flower industry in the Netherlands?
4. What kinds of promotion and promotional tools are used in the flower industry in Turkey?

5. What are the needs, behaviour and buying patterns of the Turkish customer and what influences their needs and behaviour?
6. What is the decision-making process for buying products of the Turkish customer?
7. Why are flowers and plants not popular in Turkey?

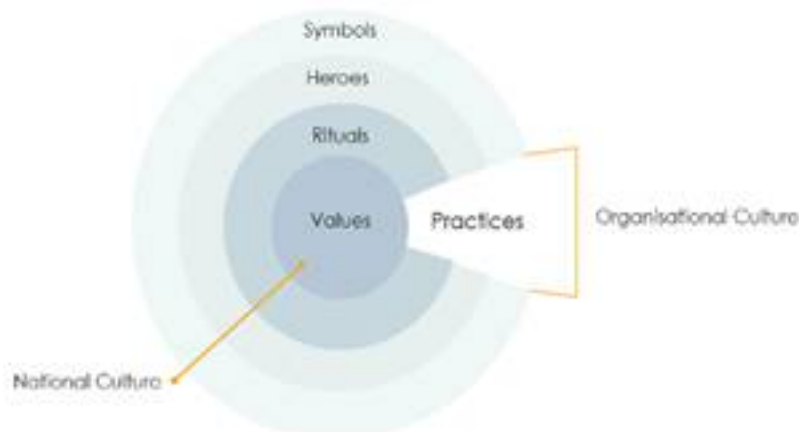
The theories which were used to conduct this research are explained in Chapter 3. A brief overview of the company is included in Chapter 4. In Chapter 5, all of the sub-questions are answered, illuminating why the purchase of Dutch flowers and plants in Turkey is low. The first sub-question involves a description of Turkish culture and the differences in culture between the East and the West of Turkey. The assignment provider from Royal FloraHolland specifically asked for such a comparison to be included. Chapter 6 to 11 are concerned with the development of a marketing plan, which was written to increase consumer spending of Dutch flowers and plants. This is followed by the conclusion, and then recommendations for future work. Finally, a reference list as well as appendices are provided.

## Chapter 2. Theory

In order to answer the research question “How can Royal FloraHolland increase the consumer spending on Dutch flowers and plants in Turkey”, sub-questions were designed to understand the low consumer spending. As a result, this report consists of two parts: 1) sub-questions in order to understand low spending and 2) a marketing plan, which advises how to increase consumer spending. The theoretical framework for the marketing plan was based on Wood’s Marketing Planning Handbook (Wood, 2014). The used layout was gathered from page 7 (Wood, 2014, p.7), which shows an overview of a marketing plan.

### Sub-question 1: How can the Turkish culture be described and what are the cultural differences in the country?

A theory by Geert Hofstede was used to answer this sub-question. Geert Hofstede wrote the book *Intercultural Communication* in which he analyses different cultures from different perspectives. As can be seen in the picture below, Hofstede divides culture into values (national and organisational culture), rituals, heroes, and symbols (Geert Hofstede, n.d. para.2). However, his primary focus was on cultural dimensions regarding power distance, individualism, masculinity, uncertainty avoidance, long term orientation and indulgence (Geert Hofstede, n.d. para.2). The company wished to investigate cultural differences in Turkey between East and West, and end with Istanbul.



(Geert Hofstede, n.d.)



**Sub-question 2: Which products compete with flowers and plants in Turkey?**

In the Netherlands, flowers are mainly perceived as gifts and plants mainly as an interior item. Therefore, the moments when Dutch people usually buy flowers as a gift were analysed and compared to gift moments in Turkey. These moments include birthdays, births and special occasions. Subsequently, the results were compared by analysing common gifts in Turkey during these days. The same information was gathered for interior items. Moreover, this sub-question was analysed by desk research and it was supported by field research through interviews with Süsbir (an organisation of ornamental plants producers), Orta Anadolu Süs Bitkileri Ihracatçileri Birliği (an organisation for flower and plant imports in Turkey), Lale Çiçek Evi (a florist) and questionnaires with consumers in Istanbul.

**Sub-question 3: What kinds of promotion and promotional tools are used in the flower industry in the Netherlands?**

This research question was answered through field and desk research. An interview with Bloemenbureau Holland was conducted in order to gain information about promotional tools and commonly used strategies in the Dutch flower and plant sector. The consumer types used in the horticultural sector were explained to give more in-depth information. Furthermore, this sub-question was supported by seeking out other retailers and organisations which promote their products. This research question is particularly significant because it involves comparisons which the company may use in Turkey.

**Sub-question 4: What kinds of promotions and promotional tools are used in the flower industry in Turkey?**

This sub-question was likewise answered through desk research and supported by field research. Interviews were held with: Süs Bir (an organisation of ornamental plants producers), Anadolu Süs Bitkileri Ihracatçileri Birliği (an organisation for flower and plant imports in Turkey), and Lale Çiçek Evi (a florist). This sub-question is relevant because it measures to which extent promotions are taking place, and because it involves a comparison to the Netherlands. This sub-question supports question “Why are flowers and plants not popular in Turkey?”

**Sub-question 5: What are the needs, behaviour and buying patterns of Turkish customers and what influences their needs and behaviour?**

Nowadays, consumers have unprecedented power to compare prices, find the best deals and make complaints (Edelman & Singer, 2015).

In fact, consumers and the world are changing together. Consumers seek social and mobile activities and a close relationship with their favourite brands. According to a recent study from the Consumer Consulting Board, it is necessary to adapt consumer needs to business strategies (Consulting, 2013 p. 16-17). It is essential to understand the Turkish consumer when adapting strategies as closely as possible to Turkish consumer behaviour (Consulting, 2013 p. 16-17).

In order to apply this theory to the flower and plant sector, information about consumer behaviour has to be gathered. Presently, Turkey has no consumer data about the consumption of flowers and plants. Turkstat, the Turkish statistics website, does not have this information either. Therefore, interviews and questionnaires were conducted.

**Sub-question 6: What is the decision-making process for buying products of the Turkish customer?**

According to Alek Flekel, the author of *Business2Community* (Flekel, 2013), the decision-making process is the process of the consumer from start to finish in five steps: 1) problem recognition, 2) information gathering, 3) evaluation of alternatives, 4) purchase of products, and 5) post purchase evaluation. To understand the decision-making process behind the purchase of flowers and plants in Istanbul, and because there was no consumer data available, this research question was answered using the questionnaires.

**Sub-question 7: Why are flowers and plants not popular in Turkey?**

This research question was investigated using field research because there was no pre-existing information (as described above). Field research took the form of interviews with flower and plant organisations in Turkey: Süsbir (an organisation of ornamental plants producers), Orta Anadolu Süs Bitkileri İhracatları Birliği (an organisation involved with flower and plant imports in Turkey), and the florist Lale Çiçek Evi.

## Marketing Plan

In order to properly write the marketing plan, the marketing planning handbook from Marian Burk Wood was used (Wood, 2014). This book divides the marketing plan in seven sections. These sections were written as sub- questions. All these sub-questions concern different topics, which are explained below.

Although the sub-questions are in line with the handbook, the fifth chapter was changed into the seven P's of marketing which were taught during the marketing and export classes at university. Also, *the metrics and control implementation* were excluded from the marketing plan, because there weren't any financial data of previous results available. Furthermore, the company is responsible for their own schedule of implementation.

### Chapter 6. What is the current marketing situation?

The current marketing situation is described by analysing the internal situation of the company. The internal situation consists of the mission and vision, resources, offering, previous results, business relationships and the structure of the company.

External situation: the external situation was described by the DESTEP method which analyses the Meso- and Macro environment. The DESTEP is an acronym for Demographics, Economic, Social - Cultural, Technological, Ecological and Political.

Competitive situation: in this section the competitors of the Dutch flower and plant market were described. Since Royal FloraHolland is not a company which sells products or owns brands, the competitors were described for the whole sector of the country and not only Istanbul. The analysis was divided into flowers and plants. Also, the Five Forces of Porter were described in order to describe the competitive situation in the flower and plant sector in Istanbul. The competitive situation also includes an industrial analysis.

Market situation: in the current market situation the market was described by analysing the current customer groups, needs and technologies. Furthermore, the ABELL-model and a positioning map were created. Since there is no distinct difference in quality and price from imported flowers and plants in Turkey, the positioning map is based upon consumers.

SWOT analysis: the SWOT analysis was made to clarify the prospects and set promising targets for the sector. However, the internal strengths and weaknesses are not based on the internal

situation of Royal FloraHolland, but for the whole sector in general. This is because the internal strengths and weaknesses are not relevant for this research question. The SWOT was therefore based on the internal strengths and weaknesses of clients and members who are trading with Turkey.

Confrontation matrix: the confrontation matrix was created in order to further analyse the output of the SWOT analysis. In the confrontation matrix the strengths and weaknesses are linked to the opportunities and threats (strengths and opportunities and strengths with threats, weaknesses with opportunities and weaknesses with threats).

### **Chapter 7. Target market, customer analysis, positioning**

In the segmentation, potential consumers were described by the following criteria: demographical criteria, psychographic criteria, behavioral criteria, geographical criteria. These are based upon the used consumer types in the horticulture sector. These consumer types are: the Cultivated Performer, Naturalistic, Disinterested 1 and 2, Individualistic Performer, Traditional Carer, Cosiness Seeker and the Conventional Smartshopper.

Targeting: in the targeting, consumer types were selected and described in the consumer analysis (consumer profile).

Positioning: the flowers and plants were described as it occupy in the mind of the consumer.

### **Chapter 8. Objectives and issues**

In the objectives and issues section, specific objectives were categorised and set up. The three categories are: financial objectives, marketing objectives and societal objectives. For each category, the specific objectives in the plan identify any issues that may affect whether the organisation will be able to achieve the objectives.

### **Chapter 9. Marketing strategy**

In this chapter, a summary of the overall marketing strategy and an indication how marketing will affect other stakeholders will be given.

## **Chapter 10. Marketing programs**

In this chapter the supporting programs for the marketing strategy were described, which also includes specific activities and schedules for marketing mix: product, price, place, promotion, people process and physical evidence.

## **Chapter 11. Financial and operational plans**

In this chapter, the expected revenues and profits will be described. However, the projected budgets, schedules and responsibilities, additional information or resources were excluded as these are the responsibility of the company.

### **Chapter 3. Methodology**

This final project has been driven by desk and field research. Field research took the form of interviews with Bloemenbureau Holland, Süsbir, Lale Çiçek Evi and Orta Anadolu Süs Bitkileri İhracatçıları Birliği (OAİB). Furthermore, questionnaires were distributed in Istanbul with 186 participants. Supermarkets and florists in Istanbul were visited to gain a better understanding of the way in which the market is organised in Turkey.

This report was based on qualitative as well as quantitative research. For instance, different English, Turkish and Dutch websites were used to gather information about the Dutch and Turkish flower and plant sector. English sources were used to describe general topics, such as Turkish culture, through cultural dimensions as determined by Geert Hofstede. Turkish Statistical Institute (Turkstat) was the primary source to gather statistics. This website was chosen because it is the most reliable and the well-known statistics website in Turkey, and includes statistics by theme and publication. To support the statistics, sector reports from Süsbir and Turkish Industry and Business Association (TÜSİAD) were used. Süsbir is supported by the government and serves as the representative of the plant sector, fulfilling duties assigned through legislation (Süsbir, 2016). TÜSİAD is a non-governmental organisation and represents 80% of the total foreign trade volume in Turkey. It is dedicated to public welfare through private enterprise (TÜSİAD, 2017). General information about consumer behaviour was gathered from Ipsos KMG Turkey. Ipsos is a global market and opinion research specialist (Ipsos KMG, 2017).

Most of the sub-questions were supported by interviews, such as sub-questions 3 and 4. To answer sub-question 3, an interview with Bloemenbureau Holland, the biggest marketing and communication organisation of the horticulture sector in Europe, was conducted. This was supported by websites such as Bloomon and Fleurop. To answer sub-question 4, different websites of Turkish flower and plant organisations were analysed. This made it possible to gather information about the Turkish flower and plant sector. Information has also been collected from Markaçiçek, Çiçekfilosofu, Anthea and Çiçeksepeti. These sources were chosen because they are the best known flower and plant organisations that promote in Istanbul. Consumer needs- and behaviour information was collected through questionnaires. Turkey was not in the possession of any consumer data with regard to flowers and plants. To collect information, interviews were held with the three organisations and statistics were requested from Turkstat. However, none of them were in possession of any consumer data either. Therefore, consumer behaviour towards flowers and plants was only gathered through questionnaires in Istanbul.

## **Chapter 4. Company description**

Royal FloraHolland is a marketplace for supply and demand for members and clients, with auctions at the heart of the company. The auction is the place where all offers and questions are gathered. Furthermore, Royal FloraHolland is a service provider for the Dutch horticulture sector. The company was established in 1911 in order to enable cooperation. It was set up by growers who decided to combine forces in order to find the optimum marketing strategy for their products. It is the biggest co-operation of cut flower auctions and plants in the world and also a market leader in floriculture. Royal FloraHolland is the trading centre for all flowers in the Netherlands (CBI, 2016, p.5). It cooperates to connect the horticultural sector and supports customer and member growth, which means that in reality Royal FloraHolland is owned by other members and flower growers. In this context, 'horticulture' should be understood as the science and art of producing, improving and marketing of flowers and plants (Extension, 2015). The role of Royal FloraHolland is to give their members and flower growers advice, which means that it fulfils a role as intermediary. Their goal is to share, consolidate, facilitate and help their members to be more successful and increase their market share in the horticultural sector (Royal FloraHolland, n.d.).

The biggest export auctions are located in Aalsmeer, Naaldwijk and Rijnsburg. These three big export auctions as well as regional auctions in Eelde and Venlo are working together as one company. The company consists of 38 auction clocks, a national agency, and over 3000 employees. Royal FloraHolland is not a commercial company and is therefore not aiming for profit. Consequently, their motto is "Flowering the World Together, Planting Seeds of Opportunity for our Members" (Royal FloraHolland, n.d., para.1). This motto signifies the company's existence as a co-operative organisation.

Every auction has its own role to fulfil. Aalsmeer was first set up in 1911, and has the biggest auction. The Naaldwijk auction was set up in 1923 in Poeldijk. In 1931 it was decided to merge and establish the auction at the Honselaarsedijk instead. Nowadays, the Naaldwijk auction is still located at the Honselaarsedijk. The flower auction in Rijnsburg was set up in 1914 and many flower bulbs and summer flowers are traded there. Nowadays, the auctions work together and have formed a co-operative in order to grow and help each other (Royal FloraHolland, n.d.).

## **Chapter 5. Results**

### **5.1 How can the Turkish culture be described and what are the cultural differences in the country?**

This sub- question was designed to understand the Turkish culture. It is essential to understand the culture in order to understand the business partner during trading and for better consumer understanding. Since Turkey is considered to be a big country with many citizens, it is rich with different national traditions and cultures. First of all, a short background of Turkey will be given. Subsequently, the cultural dimensions of Geert Hofstede will be applied to the Turkish culture. Afterwards, the differences in cultures and traditions from the East and West in Turkey will be given. After this sub-question the theory will focus on Istanbul.

Turkey, also called the Republic of Turkey, is in Southeastern Europe and Southwestern Asia. The location of the country makes it an attractive trading partner for international companies. A 4-hour flight from Turkey reaches 56 countries and 1,5 billion people. Turkey is centrally located in vicinity of the several growth markets, Russia, the Commonwealth of Independent States (CIS) and the Middle East. Therefore, its geographic location makes it a transit center for the region (Heemskerk, 2015, p.12).

Turkey has a high power distance, which means that the culture is hierarchically divided. Decisions are made by important people or the elderly. This counts for the working environment, but also within families. In families the man is seen as the boss at home and is the one who decides. In the working environment the employees listen to their boss and they rely on rules. Furthermore, it is normal for employees to expect to be told what to do. Furthermore, communications are indirect and the information is selective. However, the power distance is decreasing over the years (Geert Hofstede, n.d.).

In contrary to the Netherlands, Turkey has a collectivist culture, which means that it values the 'we' culture. A collectivist culture implies a strong emphasis on the group. The most important part of society is family, together with friends whom are seen as family (Hofstede, 2012, Chapter 2, p. 53). In Turkey, group harmony is seen as important and relationships have a priority over task fulfilment. Therefore, trust in a relationship is also highly valued. Turkey is an Islamic country and therefore the Turkish people share the same values. Furthermore, in Turkey communication is indirect in daily life and in the business environment. This also means that open conflicts are



avoided, since it is seen as 'a shame' to argue in public (Ezgi Burumoglu, n.d). Group harmony is seen as important and relationships have a priority over task fulfilment. Therefore, trust in a relationship is also highly valued and nepotism is common in the work field. Although Turkey tends to have a collectivist culture, it is moving forward to a more individualist culture (De Pauw University, n.d) (Geert Hofstede, n.d.).

When it comes to masculinity, Turkey is in between the masculine and feminine culture, because of the fact that it has traditional Islamic culture roles. According to Ezgi Burumoğlu from Gazi University, the traditional culture implies that men do not show their emotions, they protect their women and have as their goal earning money, whereas women take care of the household and have to show respect to their men and fathers (Ezgi Burumoglu, n.d., para.5). However, the government has tried to correct the imbalance in traditional roles. Nowadays, the government tries to change the traditional culture roles and provides equal work opportunities and wages for women. However, the traditional culture roles, values gender segregation in the working environment and other public places. The Turkish people focus on maintaining and establishing long-term relationships and valuing the family (Geert Hofstede, n.d.). Moreover, the family importance in combating traditional values make Turkey neutral as a feminine or masculine culture (De Pauw University, n.d).

According to Geert Hofstede uncertainty avoidance is "the degree to which the members of a particular culture feel threatened by uncertain or unknown situations" (Hofstede, 2012, Chapter 2, p. 84). Hofstede states that cultures with a high uncertainty avoidance have a high anxiety, which can make communication difficult and awkward. Besides, he confirms that this feeling is expressed through nervousness, stress and a need for predictability and rules (Hofstede, 2012). Hofstede classified Turkey as a culture with a high uncertainty avoidance and states that there is a huge need for laws and rules (Geert Hofstede, n.d. para. 9). His study also shows that people make use of a lot of rituals in order to minimize anxiety. Due to the fact of new campaigns, Turkish people are more receptive towards risks and trying new products (Sigri & Tigli, 2006). This is mainly because of a young population that quickly adapts to new technologies and products, which Turkey mostly consists of. Moreover, the Turkish culture is moving towards a lower uncertainty avoidance.

The fifth dimension of Hofstede is the long term orientation, which is about maintaining links of the past of the society while dealing with the challenges of the present and future.

Societies with a low score, prefer to maintain time-honoured traditions and norms, and tend to perceive societal change with suspicion. To the contrary, cultures with a high score have a more pragmatic approach which means that they encourage thrift and efforts in education in order to prepare for the future. According to Hofstede, Turkey has an intermediate score, which means that they are in the middle of the scale (Geert Hofstede, n.d., para.5).

The last cultural dimension of Hofstede is indulgence, which is the extent to which people try to control their desires and impulses. In particular, indulgence stands for weak control and strong control is also called “Restraint”. However, Turkey has an intermediate score which, therefore, cannot be determined for Turkey (Geert Hofstede, n.d.).

Besides, Turkey has a high context culture which implies that communication is derived from the physical, social and physiological context. Cultures with a high context culture tend to communicate indirectly and implicitly. When it comes to sense of self and space, high context cultures tend to have formal handshakes. Furthermore, time consciousness tends to be more elastic and relative. Relationships are an important factor of the society. The group has importance over the individual and the society is hierarchically based. For instance, in Turkey the society tends to be polychronic when it comes to time, which means that people tend to be flexible with time and not punctual (Geert Hofstede, n.d.). Besides, the people tend to believe in fate, which is bounded to religion (Ergil, 2015).

### **East Turkey compared to West- Turkey**

In this part a short description about the social-cultural differences between East and West Turkey is given. Because there are many cultural differences within the country, the differences are not described per region or city.

Turkey consists of regional inequality when it comes to income divisions, employment, working hours and gender inequality. For instance, in the Eastern region of Turkey, the table below (table 1) shows the number of graduates and number of studying students, again, divided between the sexes in the four different regions, namely: Northeast Anatolia, East Anatolia, Southeastern Anatolia and Istanbul. This table shows that there is a distinct difference between the sexes in the two regions: East Anatolia and Southeastern Anatolia (Turkstat, 2015).

Year	Region	Studying men	Studying Women	Graduated men	Graduated women
2015	Northeastern Anatolia	119617	136161	18676	18638
2015	East Anatolia	76187	55745	13313	11698
2015	Southeastern Anatolia	86287	68769	14453	13095
2015	Istanbul	315048	311862	36240	42454

Table 1- the number of graduates and the differences of sexes in numbers (Turkstat, 2015)

The Eastern regions in Turkey are known to be the less developed regions. It can also be seen in the table that these regions mainly have value added share in agriculture and services, which can be seen in table 2 below. Therefore, these citizens own a less developed mentality and have a more eastern mindset compared to Istanbul, which is mostly western oriented (Turkstat, 2013).

Year	Region	Agriculture share (%)	Industry share (%)	Services share (%)
2011	Northeastern Anatolia (Erzurum, Erzincan, Bayburt)	17.4	20	62.7
2011	Northeastern Anatolia (Ağrı, Kars, Iğdır, Ardahan)	24.8	14	61.2
2011	Southeastern Anatolia (Van, Muş, Bitlis, Hakkari)	23	15.2	61.8
2011	Southeastern Anatolia (Gaziantep, Adiyaman, Kilis)	10.5	32	57.5
2011	Southeastern Anatolia Sanliurfa and Diyarbakir)	24	19	57
2011	Istanbul	0.2	27.4	72.4
2011	Southeastern Anatolia Hatay,Kahramanmaras, Osmaniye)	14.4	27.5	58.1

Table 2- Value added share per region (Turkstat, 2013)



The Northeastern Anatolia region is, with a 0.7% of regional added value, the region with less regional value added accounts in comparison to the rest of the country. The highest in the country is Istanbul with an added value of 27.2% (Turkstat, 2013). These Eastern regions are also the regions who have less development chances compared to the Western part of Turkey. This can also be seen in the map below. The darker a region is coloured, the more added value it has.



Turkey contains the extreme of the western and eastern culture. According to the research of TÜSIAD, these differences are because of political inequality (TÜSIAD, 2008, p.91). Because of the underdevelopment in the eastern regions, there is a more conservative mentality among the citizens. Therefore, the eastern citizens are less integrated into the western culture as the western parts of Turkey. Therefore, in the Eastern regions of Turkey it sometimes occurs that women tend to have less rights in comparison to men. Another difference is that less women in Eastern Turkey study and that they are more conservative when it comes to clothing. In contrary to the conservatism mentality of Eastern Turkey, Istanbul has a Western mentality, which is also known as a cosmopolitan culture. It can be said that Istanbul and western Turkey has, together with the developments and economic improvements in the country, developed their own mentality and developed themselves together with the technological developments. However, Istanbul is a metropolis with many ethnicities and has a heterogeneous culture because of urbanisation.

Since the city is located in Asia and Europe and in the economic center of Turkey, it resulted in migration from all around Turkey (TÜSIAD, 2008). Moreover, Istanbul is a diverse city because of urbanisation (Turkije Instituut, 2013) and is therefore a city with different mentalities (Invest in Turkey, 2016).

## **5.2 Which products compete with flowers and plants in Turkey?**

Consumer spending on flowers and plants in Turkey is low. In order to understand what people buy instead of flowers and plants, different days in Turkey were analysed. This analysis will show opportunities to introduce the flowers and plants and the sociocultural aspects of the country.

Flowers are often perceived as gifts in the Netherlands, because the creation of atmosphere, colour and cosiness for men and women. Flowers are seen as one of the most sympathetic and kindest ways in which to pay tribute, or express gratitude or joy (Have, 2008). Moreover, a bouquet of flowers symbolises a personal message when it serves as a gift in order to make a point and convey feelings (Fleurop, 2016). Flowers can be connected to situations and intended for everyone: a partner, colleague, mother, father, friend, family, or anyone else. For instance, marriage, get-well-soon wishes, congratulations, love and romance, apologies, funerals, gratitude, birthdays, visits to friends, or other (Bloemetiquette, n.d). Moreover, the purchase of flowers can often be connected to special occasions (50%), gift-giving, Women's Day, Mother's Day, or personal use. These occasions mainly concern arranged flowers and bouquets. Plants are often seen as gifts and as interior decoration (I. van Orden, personal communication, October 12, 2016). It is important to understand how Turkish consumers perceive flowers and plants and understand why they do not buy them. Therefore, it is essential to analyse what they buy instead of flowers. Furthermore, this analysis will highlight socio-cultural aspects of Turkish culture by indicating national holidays and other special occasions. Besides the gifting culture, the use of flowers and plants as decoration will be analysed.

In Turkey, flowers can be given as a present for different reasons and are arranged with different intentions. They may be given as a gift on occasions such as birthdays, love and romance, a new job, a new born, New Year's Day, anniversaries, apologies, get-well-soon wishes, National Teacher's Day, opening ceremonies, celebrations, or weddings (Çiçekvemeyve, n.d) (Çiçeksepeti, n.d) (Gülmira Çiçekçilik, n.d) (Flora Çiçek, n.d).

Flowers and plants are not a common gift in Turkey. Below follows an analysis of competing products.

Birth celebration is a traditional celebration in Turkey, which is mainly celebrated with family, friends, relatives and neighbours. Every visitor brings a gift. The most common gift is gold. The size or weight of the gold varies and most common is a 'quarter of gold'. Currently the value of a quarter of gold is 215.71 Turkish Lira, which equals 56.31 euros (Wisselkoersen, n.d.). The younger population has added another rare kind of celebration to birth occasions, which is only common in wealthier communities. The hospital room is decorated by the husband and the mother receives flowers from visitors (Orhan Selçuk Sabuncu, 2012). Nowadays, comparatively, people in Turkey are eager to celebrate birthdays with cakes and presents. Generally, birthdays are celebrated at home with friends and family. People between the ages of 20-35 may prefer to celebrate out or organise a birthday party. Birthday gifts are usually not expensive. Common gifts are clothes, books, music CDs, inexpensive jewelry, birthday cakes or other presents the person likes. Normally, flowers are not considered to be a birthday gift (Orhan Selçuk Sabuncu, 2012). However, it is starting to become more common to give flowers as a birthday gift.

Big occasions in Turkey are weddings. A wedding is an occasion in Turkish culture during which huge amounts of gifts are gathered. Weddings are celebrated with family, relatives, friends, friends of friends, neighbours and neighbours of neighbours. When it comes to wedding gifts, the most common gift is gold (as it is for births). However, the amount of money spent is much higher than with birth occasions. It varies between a 'quarter' and 'half' gold, or even gold bracelets. The family of the groom brings gold, which is worth approximately 5000. However, this depends on the wealth of the family. Other gifts include home supplies and kitchen supplies. Also, flowers are brought to weddings by wealthy families as an additional gift. These flowers are in the shape of wreaths with the name of the family written on it (Orhan Selçuk Sabuncu, 2012). Although flowers are not seen as a wedding gift, it is popular as decoration.

According to Bol.com, flowers and bonbons are the most chosen presents in the Netherlands. In addition, research has indicated a consumer spending between 10-20 euros (Bol, 2012., para.1). However, Turkey has an approximate consumer spending of 127 Turkish Lira (33.40 euros). Flowers are bought as a Mother's Day present (Milliyet, 2016). Respondents of the conducted survey answered that they generally buy flowers and accessories for this day. When it comes to Father's Day, flowers and plants are not seen as a present because of the masculine culture that still exists. Usually other gifts which suit the taste of the father are bought.

New Year's is the period during which most presents are bought (Hürriyet Haber, 2010). There is even a New Year's present market (Fooduristik, 2016).

A popular gift is chocolate, which is a new trend amongst consumers aged 21-35 in Istanbul. However, it differs per region in Istanbul which presents are bought exactly (SeyirIstanbul, 2010).

In 2015, International Women's Day was celebrated in Turkey, with protests over violence against women across the country. Women's Day is not seen as a day to give presents. Although the respondents answered they usually do not buy gifts, there might be some people who do (Hürriyet Daily News, 2015). Also, online florist websites are promoting flowers as a Women's Day gift.

Teacher's Day is a day in Turkey on which people appreciate teachers. During this day it is common to buy gifts for teachers. The most common gifts are flowers. In particular, the less wealthy consumers buy carnations.

The two religious holidays are Ramadan *Bairam* and Sacrifice *Bairam*, also known as *Eid*. During these celebrations all family members come together. Another tradition is that the elderly give children money. Young people celebrate this occasion less traditionally nowadays, since they are working and see these holidays as an escape from their busy lives. Therefore, they go on vacation (Orhan Selçuk Sabuncu, 2012). Besides *Bairam*, there is *Mevlid Kandil*, which is the birthday of the Prophet. Red roses tend to be connected to the Prophet as a symbol. However, they are not considered a gift or memorial (Islamiyet, n.d).

In Turkey, visiting friends and family is very important. Turkish people tend to be ashamed when visiting friends or family without bringing gifts. These gifts often include baklava, sweets, fruit juice, *kurabiye* (Turkish cookies), chocolate, cups, coffee sets, souvenirs and accessories (Budulgan, 2015). Respondents from the conducted questionnaire answered that they rarely buy flowers and plants for visitations. 25 respondents answered that they buy flowers for visitations and 21 respondents answered that they buy plants. Besides visitation, of which the purpose is to socialise, visitation can also have the purpose to wish people to get well. For instance, in hospitals or at home. During these visits it is more common to bring flowers as a gift. For example, the conducted questionnaires showed that people bring flowers as a gift. However, plants were only chosen by 4 respondents of 186.

Graduation is also celebrated in Turkey. However, there is no common gift for graduated students. It depends on the preferences of the student. In fact, respondents have said to give money, nothing, or a different gift which parents think suits their child.

Flowers and plants are popular when it comes to romantic purposes. An example is asking a girl's hand in marriage, which is a ritual steeped in tradition. Here a man and woman acquire the approval of their families for a lifetime. It is common that a man brings gifts for the woman (his future wife) and for the family. These gifts include flowers (usually roses), chocolate, food and cake (Evliligim, 2015). Furthermore, men buy flowers and chocolate for their girlfriends. Accessories are also a popular gift. Research has shown that during Valentine's Day, the most frequently bought presents are chocolate and flowers. Research has also indicated that during Valentine's Day, men prefer flowers, whereas women prefer clothing or accessories (CNN Türk, 2016). According to the statistics from Dünya, a Turkish statistic website, chocolate is becoming more popular (Dünya, 2012, para. 2). The Valentine's Day statistics indicate that chocolate and flowers are the most popular gifts. Flowers are mainly bought by men for women and thus seen as a gift product. In fact, when men are searching for a 'small present' they prefer flowers and women prefer sweets or cards. Also, expensive accessories are a popular gift during these days. In 2014, a record in the flower industry was expected during Valentine's Day. Valentine's Day is one of the days on which flowers are sent as a gift. Generally, consumers purchase roses, but other cut flowers are also popular. (Haberler, 2014)

Turkey also has five national memorial days. One of them is National Children's Day on the 23<sup>rd</sup> of April, which recalls the National Assembly of the Turkish Republic on the 23<sup>rd</sup> of April, 1923. During this day, children symbolically take their place in the mayor's office to remind politicians that the future is the next generation. The Youth and Sports Day is on the 19<sup>th</sup> of May (*Gençlik ve Spor Bayramı*), which recalls the landing of Atatürk, Turkey's hero, in Samsun in 1919. This day has been celebrated since 1938, by law, with major sporting events in stadiums. On the 30<sup>th</sup> of August is the Day of Victory (*Zafer bayramı*). This day recalls the day of victory over the Greeks at Dumlupınar in 1922. On the 29<sup>th</sup> of October it is Republic Day, which is the national holiday that commemorates the founding of the Turkish Republic in 1923. On the 10<sup>th</sup> of November is the remembrance of Mustafa Kemal Atatürk. On this day, it is a tradition to have a minute of silence at 9.05 am. Additionally, pedestrians silently stand on the streets and cars stop driving. Later that day, schoolchildren walk in a procession with flags. While in the Netherlands flowers are seen as a memorial symbol, in Turkey wreaths are seen as a memorial symbol (Bilgiuzmani, 2014) (Koninkrijk der Nederlanden, n.d). Since the latest attempted coup, on the 15<sup>th</sup> of July, 2016, a memorial day for soldiers and martyrs was announced. This is a new day, so there are no habits or traditions attached to it yet. This day is named "Democracy and National Solidarity Day". This day might be a chance to introduce flowers.



It is not common to bring flowers to cemeteries in Turkey. However, after the body is buried, the relatives of the buried person can plant flowers on top of the grave. The 'home' part of the funeral is attended by close friends and family of the deceased person and is held in the deceased person's home. It is not common to bring gift or flowers to the funeral. Instead of flowers, food is brought in order to help the family (Orhan Selçuk Sabuncu, 2012). It is important to note that there is no ceremony during funerals. However, there are funeral ceremonies when it comes to soldiers and then it is common to help the family through donations.

According to Hurriyet, buying presents is becoming more integrated into Turkish culture. During New Year's season, Valentine's Day, Mother's Day and Father's Day, consumers tend to buy presents more often compared to previous years. Nowadays, it is more common to buy presents during special occasions, especially during December due to campaigns and commercials. Most presents are bought by citizens in Istanbul (Hürriyet Haber, 2010, para.2). According to estimates made in Turkey, the gift market is worth about 1.5 billion Turkish Liras, while the densest period for gift-giving is New Year's (Hürriyet Haber, 2010, para.3). According to Doctor Nebi Özdemir, the habit of buying each other presents is created by media and marketing, since it was not common before (ÖZDEMİR, 2008, p.13).

### **Flowers and plants as an interior item in Turkey**

Although flowers and plants can be seen as gift items, these floricultural products can also be served as interior items. According to the European Home report, 44% of the Turkish consumers are likely to spend more on their homes. Especially, the younger generations improve their homes as a hobby (32%). In particular, women spend more on improvement of their house environment. Besides, women tend to be more influenced in their style decisions by television shows on home improvement and even more by blogs. Men are more receptive to what they see in their friends' homes (Kingfisher PLC, 2012). Furthermore, furniture items of national identity are a growing trend in Turkish interiors. Moreover, the younger generation is becoming more conscious of their heritage and exploring ways to reflect it in their ideas (ITEBUILD&INTERIORS, 2015).

To support the conducted desk research, interviews were held with Süsbir, Orta Anadolu Ihracatçı Birlikleri and a florist and a questionnaire was conducted in Istanbul. According to the three interviews, the spending on flowers and ornamental plants is increasing.

According to Orta Anadolu Ihracatçı Birlikleri (OAIB), the competitor products are chocolate, baklava, Turkish delight (lokum), decorative items, and jewelry accessories. These products are mainly bought as presents for openings of new businesses, engagements, marriages, asking the hand of marriage, birthdays, New Year's Day, Valentine's Day and Mother's Day. According to OAIB, flowers are intended for special occasions and ornamental plants are used as decoration. The florist has added that Teacher's Day is also a popular day to give flowers as a present. According to Süsbir, competitor products are also electronic goods. However, he stated that it depends on the social economy of the persons. He also said that it is common to buy it for patient visits and anniversary days. He concluded that it is usually perceived as a symbol between partners. Moreover, all interviewees agreed that artificial flowers and plants are popular, because it is permanent. The interviews can be read in the appendices (numbers 2- 4).

The analysed results of the conducted field research in Istanbul show that flowers are mainly bought for special occasions, such as opening of a new business, Mother's Day, and Valentine's Day. Flowers are also considered to be a product for hospital visitations, whereas plants are only preferred by 4 respondents. However, only 25 respondents of the 186 answered that they would buy flowers when visiting friends and family. In contrast, plants are more often perceived as home decoration and not as a gift item. However, 48 respondents answered that they would buy flowers and plants for home decoration purposes. The results show that plants are rarely bought for hospital visitations, visitations for friends and family and special occasions. It is striking that respondents answered that they would buy flowers for their partner or flowers and plants, but plants are not preferred. Furthermore, the respondents who have answered to not buy flowers or plants answered to buy other home decorations such as souvenirs, cups and candles. For further details, please read Appendix 1.

In conclusion, flowers and plants are not unknown in the Turkish culture. Flowers are sometimes given as a present, which means that they see the flower as a gift product and plants as home decoration. Furthermore, it can be concluded that flowers, mainly roses, are mostly bought by men for women and thus seen as a feminine and romantic product. Moreover, It can thus be said that chocolate and other sweets are the competitor products of the flowers and plants in Turkey.

### **5.3 What kinds of promotion and promotional tools are used in the flower industry in the Netherlands?**

This sub-question provides information regarding the promotional activities in the Netherlands. The promotional activities are important to analyse in order to compare it to the Turkish promotional activities in the same sector. The following activities might also be implemented into the Turkish sector.

In the Dutch flower and plant industry different promotion types and promotional tools are used. To find out about flower and plant promotion in the Netherlands, an interview with Bloembureau Holland has been conducted, because they are the partner of Royal FloraHolland. Bloemenbureau Holland is a business to consumer working organisation, which provides the consumer promotion of flowers and plants in Western Europe. Various growers wish for different promotions. Therefore, the product specific promotion is divided and implemented by different people. Bloemenbureau Holland is responsible for the general promotion of the Netherlands, which is a reason why Bloemenbureau Holland is not in the supply chain. However, they get paid by links in the supply chain.

Specifically, they have the task to inspire consumers to think about flowers and plants in order to convince them to buy flowers and plants. The interview that was conducted focused on the potential segment, the Cultivated Performer, according to the research that was conducted. To clarify, the horticulture sector has translated the global seven types of consumers to their own sector, namely: the Cultivated Performer, the Cosiness Seeker, Naturalistic, Individualistic Performer, Traditional Carer, Conventional Smartshopper, Disinterested 1 and Disinterested 2. All these seven types of consumers have their own character, interests and tastes in flowers and plants (see image 1). The type of consumer also indicates whether the person is materialistic or not (Royal FloraHolland, 2015). However, in the Netherlands all the promotions are targeted on the consumers which belong to the Cultivated Performer segment. Bloemenbureau Holland indicated that 20% of citizens in Western Europe are in the Disinterested Group, which is considered to be critical. An important factor to note is that the flower and plant industry is promoted per product and not as a brand. Besides this organisation, two other big flower retailers are explained, namely: Bloomon and Fleurop.

Established <b>Cultivated Performer</b>	Post materialists <b>Naturalistic Intellectual</b>	Modern performing <b>Individualistic performer</b>
Traditionals <b>Traditional carer</b>	Modern mainstream <b>Cosiness Seeker</b>	Experimentalists <b>Disinterested 1 Adventurers</b>
	Consumer materialists <b>Conventional Smart-shopper</b>	Hedonists <b>Disinterested 2 Dreamers</b>

Image 1- The consumer types (Royal FloraHolland, 2015, p. 32)

Various promotion styles and tools are used to attract the consumer. A used method is to work with two promotion themes, 'Mooi wat bloemen doen', 'Mooi wat planten doen' (beautiful what flowers are doing and beautiful what plants are doing). Promotion for flowers and plants are separated since they are perceived as different by consumers. Flowers are perceived as gifts or as an attention item, whereas plants are perceived as an interior item. Therefore, flowers and plants are separately promoted. These themes are translated in the language of the different countries, for example in Germany: 'Toll was Blumen machen' and 'Pflanzfreude'. On the basis of segmentation analysis, different promotion methods are used. It is striking that Electronic commerce (E-commerce) is mostly used. In particular, social media is a continuously used promotion tool. For instance, they own accounts on Facebook, Instagram, Pinterest and Twitter. On Facebook and Instagram it is common to use selective marketing by sponsoring advertisements and selecting the targeted segment or interest groups. This can be done by creating a profile from the current trends on Facebook and selecting every consumer with the same interests so that they get to see the advertisement. A tool that can be used for this is Google Adwords (Google, n.d). In contrast, Bloomon uses Facebook and Instagram to stay in contact with their consumer by posting a story about the flower that has been delivered the day before (Daalder, 2016).

Besides own social media profiles, other online inspiration platforms are used to communicate about flowers and plants. Furthermore, a year-round programme for flowers is another promotion strategy, 'The Flower Calendar', which is a Public Relations campaign. This is decisive for the issues that will encounter the social media channels. The Flower Calendar contains of different flower types per month which will be promoted during the whole month.

For plants a residential construction plant of the month is used, which is also a regular public relations campaign. Hereby, every month a different plant is set in the spotlights. These plants are also divided under specific categories.

Besides the public relations campaigns, a communication boost is provided through big media campaigns, such as ‘The Favorite Flower of the Month Campaign’. This contains online videos and outdoor commercials, such as posters in bus shelters, billboards and television commercials during the month. For plants small campaigns are set up, such as pop- up stores and a video about “men plants”. This video contains material that has been conducted by research that plants attract men when it can be related to a real story. Examples of this are: carnivorous plants, coffee plants and plants that remind men of their holiday. These videos contain interviews with men who explain why plants are attractive to them and are shared on social media.

Furthermore, online influencers (bloggers and vloggers) are used to spread communication about flowers and plants. These online influencers usually communicate rather other topics than floriculture. For instance, fashion, interior, food and more. This also counts for magazines, such as Linda and Harper’s Bazaar. Hereby it is important that the targeted segment is involved. Bloomon, for instance, of contacted a blogger named “Mijnhuisstijl enik” (Wiemerink, 2015) (Bloomon, 2016). Reader of this blog can get a subscription at Bloomon and get a vase for free. As a result, the blog readers are introduced to the retailer and attracted to subscribe to Bloomon. Also, fashion bloggers, such as Fashionlab (Laurien, 2015) write about the flower retailer. In 2015 Fashionlab, an online fashion blog, promoted Bloomon flowers and the free vase consumers would receive when subscribing during Easter as an Eastern gift.

Another commonly used promotional strategy is to advertise in newspapers, such as Volkskrant. In 2015 Volkskrant published an advertisement from Bloomon with a unique giveaway for the readers, which included a year flowers for free when ordering regularly from Bloomon (Os, 2015). Also the NRC wrote about Bloomon flowers in order to promote the retailer. The NRC worked with a discount code, which gave the reader the opportunity for a free vase and a flowers cutter (NRC, n.d). Below, in image 2, an example of an advertisement in the Volkskrant can be seen.

Another important factor is the momentum of the year. Because of this fact, promotional strategies are adjusted to the time of year. During spring, consumers are more receptive towards promotion, which leads to more positive reactions on Facebook. In contrary to success in spring, in autumn consumers are less receptive towards flower promotions.

Therefore, it is common to make use of bigger campaigns in autumn. Also, the more spectacular the advertisement, the more market share.



*Image 2- Bloomon promotion (Os, 2015)*

Besides the promotional advertisements of retailers and companies, flowers are promoted through other social media channels. For instance, since 10 October there has been a programme that promotes flowers and plants on SBS6. This is a daily one minute programme in collaboration with the winner from best flower stylist. In this programme Sarah Dikker, Holland's best flower stylist, brightens the day with a wonderful personal flower or a plant arrangement or a festive jubilee, performed heroism or an extraordinary event (Floranews, 2016). Another television programme is: 'Holland's beste bloemstylist', which means 'Holland's Best Flower Stylist' in English. In this programme 12 people with a passion for flowers compete against each other in order to become the best flower stylist from the Netherlands (SBS6, n.d). Besides these two programmes, there is a programme about gardening in which it is all about a garden makeover. In this television show, someone registers a friend which needs a garden or living room makeover (SBS6, n.d). For more examples of programmes, please read Appendix 6.

To conclude, E-commerce is a commonly used method in order to promote and achieve a close relationship with the consumer. In order to get the attention of the consumer and start a

relationship, social media such as Facebook, Twitter, Instagram and Pinterest are used in different ways. Examples include Adworks, promoting on their own account, selecting target groups for promotion on social media, online videos and sharing stories about a delivered flower or plant. A crucial new promotional strategy is partnerships with online influencers. Besides E-commerce, traditional promotion tools are fundamental. In particular, billboards, posters, television commercials and advertising in newspapers.

A list of promotional examples and other television programmes can be found in the appendices (appendix number 5 and 6).

#### **5.4 What kinds of promotion and promotional tools are used in the flower and plant industry in Turkey?**

This sub-question is designed to find out if the low demand of flowers and plants in Turkey is caused because of the lack of promotional activities and to understand the differences in promotional activities in the flower and plant sector.

The flower and plant industry in Turkey has a traditional supply chain. The supply chain from Royal FloraHolland to Turkey is as follows: Grower → Royal FloraHolland → Exporter in the Netherlands → Importer in Turkey → Wholesaler/florist/supermarket/online flower website → Consumer. Although there is no publicity agency in the Turkish flower and plant sector, there are promotions which are used. There are many online flower and plant selling points, which are operating in the whole country. This means that many of the selling points in Turkey are online. An example of such an online website is “Markaçiçek”. Markaçiçek has a promotion for employees from Vakıfbank, one of the biggest banks of Turkey, which gives a 20% discount (image 3) (Markaçiçek, n.d). The other promotions are done through social media, such as Facebook, Instagram, Twitter, Pinterest and Google Plus. Furthermore, “Çiçekfilosofu” is another online selling point which promotes their products. This website promotes itself as a brand through different strategies. Çiçekfilosofu has made a video commercial for Valentine’s Day in which it says translated to English: “Flowers for everyone in Turkey” on Youtube. Furthermore, the florist promotes itself with an advertisement on a bus (Image 4). Also, this brands promotes via social media (Çiçekfilosofu, 2015). Besides this, there is an advertising agency “Anthea”, which advertises for several florists or flower and plant organisations. However, they do not advertise the flowers and plants as a product. Instead, they take care of the promotion for brands who are assigned to their agency. For instance, they help in creating the website and help the brands and

organisations with their advertising. However, this is not only for the floriculture or horticulture sector, as they are promoting these organisations on their own website (Anthea, 2014). Besides Çiçekfilosofu, Anthea and Markaçiçek, Çiçeksepeti is also an organisation which advertises and makes campaigns. Çiçeksepeti does this by online videos which are broadcasted on Youtube (Çiçeksepeti, 2014). Besides promoting flowers and plants as consumption, Turkey organizes flower exhibitions.

To gain more in-depth information about promotional activities in Turkey, three interviews were held with Orta Anadolu Süs Bitkiliri İhracatçıları Birliği (OAİB), Süsbir and Lale Çiçek Evi a florist. According to chief Mrs. Bay from Orta Anadolu Süs Bitkileri ve Mamulleri İhracatçı Birliği (OAİB), a flower and plant trading organisation, florist shops and big online selling websites promote flowers and plants in Turkey. She said that Interflora is an organisation which sometimes promotes for florists. Mrs. Bay added that aesthetics and the purpose of the product are important for promotion (G. Bay, personal communication, December 12, 2016). Furthermore, the florist, Lale Çiçek Evi, added that in the past he has promoted his own flowers and plants on local television. However, this is not the case anymore. He also stated that there would be a higher spending on flowers and plants if there would have been more promotion (Lale Çiçek Evi, personal communication, November 29, 2016). Mr. Yilmaz from Süsbir, the biggest ornamental plant organisation in Turkey, said that he has never seen flower and plant promotions on television or anywhere else. He also indicated that there are magazines which are related to the sector. However, these are not public magazines (M. Yilmaz, personal communication, November 18, 2016). Besides the conducted interviews, the conducted questionnaires show that 79% has never seen any promotional campaigns of flowers and plants.

Moreover, it can be concluded that there is no agency involved in the flower and plant industry in Turkey, as it is in the Netherlands. Promotional campaigns are up to the florist itself. Florists may subscribe to organisations such as Interflora, which then promotes for the subscribed florists. Furthermore, the flower and plant industry is not promoted as a whole sector. Organisations and florists promote their own flowers and plants, which also can be seen in the pictures below.



*Image 4- Çiçekfilosofu (Çiçekfilosofu, 2015)*



*Image 3- Markaçiçek (Markaçiçek, n.d)*



### **5.5 What are the needs, behaviour and buying patterns of the Turkish customer and what influences their needs and behaviour?**

The world is rapidly changing and together with this change, consumers are changing as well. Nowadays, consumers have unprecedented power to compare prices, find the best deals and make complaints (Edelman & Singer, 2015, para.1). Consumers seek other things in products than before, such as: social and mobile omnipresence, everything being distributed, and a close relationship with the brand or company. Below, the needs of the Turkish consumers are described (Consulting, 2013). What people expect from brands today is, from co-creation to structural collaboration, shaping your business through consumers, making global trends locally relevant, shaping the future together (Consulting, 2013 p. 16-17). Therefore, it is relevant to understand the Turkish consumer in order to adapt the strategy as close to the Turkish consumers. First of all, general information about consumer behaviour is provided, because the company has no Turkish consumer information yet.



#### **The Turkish consumer**

Ipsos KMG, a research and consulting company, has researched Turkish consumer behaviour and stated that Turkish consumers are fed up with political tensions. The research has showed that the political environment does not reflect the dynamics in Turkey. In fact, traditional values are shown to be the most important factor and with 66% it is stated that religion gives direction to the lives of the Turks. However, the ratio has shown a 6 point decrease in comparison to previous results. Furthermore, it has been researched that television serials are ultimately popular in the country, which is followed by news. Although there is a high television serial interest (84%) (Hurriyetdailynews, 2015) in the country, there is a contrary decrease in the effect which television ads have on purchasing behaviour. In fact, research has shown that the most effective strategy to effect the purchasing behaviour is through newspapers and magazines. However, Ipsos states that ads are important, because Turkish citizens are more likely to buy products from brands with a good advertising. Moreover, there is a decrease in brand and store loyalty (Ipsos KMG, 2010, para. 1-8). Besides television soaps, television contests and news are popular.

In addition, women tend to be more influenced in their style decisions by television shows on homeimprovement and even more by blogs. Men are more receptive to what they see in their friends' homes (Kingfisher PLC, 2012).

The most targeted group are the new conservatives, which are the most dominant social group in Turkey. On average their purchasing power is higher compared to the other groups. Generally, this group has a positive attitude towards the current political and economic situation. Moreover, this group tends to be more inclined to the latest technology use, such as smartphones and smart televisions. An important factor to know is that they are sensitive when it comes to religion (Ergürel, 2014). These citizens are mostly in Istanbul. The results of the elections on 7 June 2015, showed that most of the citizens in Istanbul have voted for the Justice and Development Party, also known as AKP (Turkstat, 2015).

Digital advertising is a growing way to position the brand or product into the mind of the Turkish consumer. In fact, digital marketing has increased by 19 percent in 2015 and, in particular, mobile advertising (Demirel, 2015). According to Internetworldstatic, Turkey has 46,196,720 users online and 46.000.000 users in 2016 (Internetworldstats, 2016, p.1). According to Turkstat, 62.1 percent uses Internet in Istanbul (Turkstat, 2013, para. 1-2). These users in Istanbul are mostly between 16-34 years old. As a result, the Turkish consumer is adaptive towards trends. The most developing online markets trends are mobile and social media, the E-commerce market and the online gaming market, with Facebook as the dominant social media market (Joinville, 2014) (Dogramaci & Radcliffe, 2015).

Turkish consumers highly value quality and therefore, they take into account the labels. Turkey has a “CE label”, which accompanies directions for use or certificates of guarantee. This label helps the consumer and informs about conditions of payment. Furthermore, young people are aware of advertising and are interested in products which suit western tastes. Since Turkey its prosperity is increasing, there is a higher interest and demand for luxurious, modern connotation Western products (Globaltradenet, 2015). This, again, indicates that there is a chance for a higher consumer spending in flowers and plants.

### **Consumers needs when it comes to flowers and plants**

Since there was nowhere any consumer data available in Turkey, field research has been conducted through questionnaires with 186 respondents in Istanbul in the week of 19 December 2016. The conducted questionnaires were held with 85 men and 101 women, which were mostly between 21 and 30 years old (45.2%). Most of the respondents, 45.2%, were married. Followed by single respondents which were 37.6% of the questionnaire and 17.2% in a relationship. Most of the respondents are working.

4.Çalışıyor musunuz? / Are you employed? (186 responses)

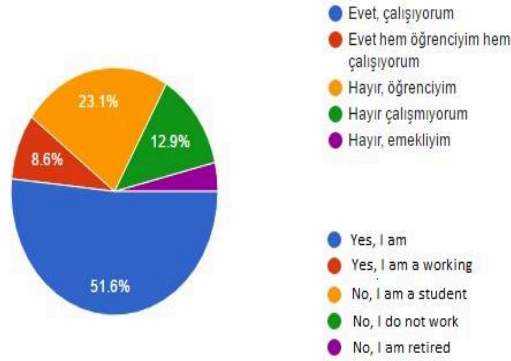


Figure 1

One of the main observations from the questionnaires was that Turkish consumers perceive flowers and plants as gift products, house decoration and as a product to express emotions. Plants and flowers are both perceived as gift products and decoration. However, flowers are also more perceived as a product to show emotions than plants. Most of the respondents prefer flowers over plants, because they are of the opinion that flowers look more lively and romantic. It can be said that flowers and plants are already perceived as a gift by the Turkish consumers. However, the buying frequency is on average between the 1-2 times and between the 3-5 times a year for flowers and plants, which can be seen in the figure below (figure2). The vast majority answered that they do not buy it more often for the reason that they perceive it as unnecessary since they buy it for special occasions.

8.Neden daha sık satın almıyorsunuz? / Why do you not buy them more often?

(186 responses)

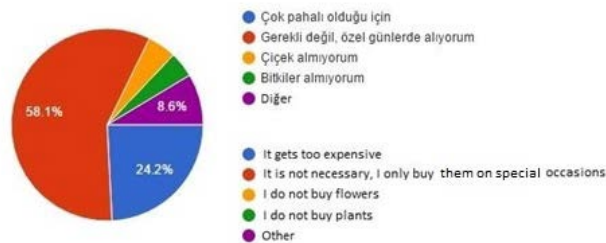


Figure 2

Furthermore, it is indicated that flowers and plants are mostly purchased to make someone happy and as second reason to make themselves happy, followed by because it is an easy

present. Furthermore, 35 respondents have said that they buy flowers and plants for daily life and 29 respondents have said that they buy them to increase the quality of life. In addition, 63.7% have said that they buy flowers and plants which are outstanding, striking and not classic. Most of the respondents indicated that aesthetics are the most important. Followed by quality, assortment, a low price, and accessibility from the stores. For more detailed information on decision making, please see the figure 3 below.

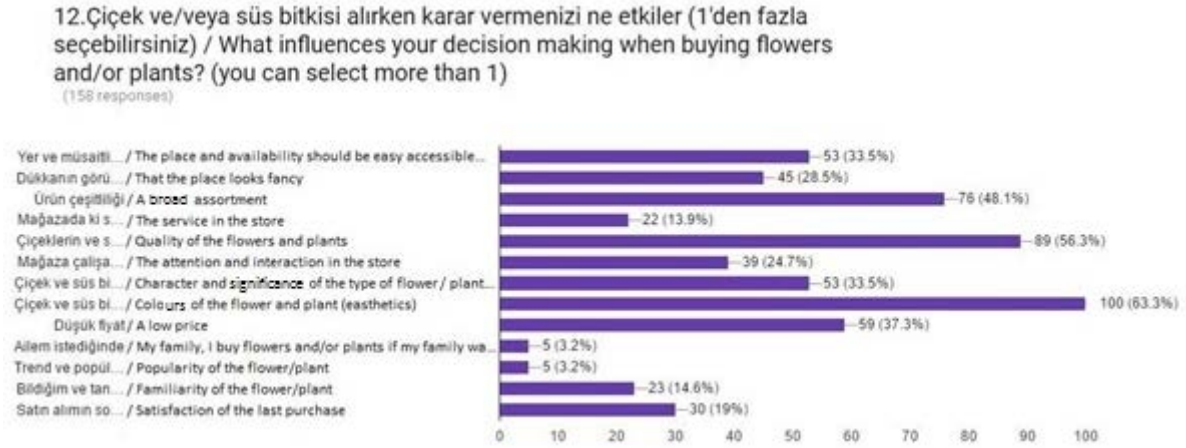


Figure 3

In addition, consumers prefer to buy their flowers and plants at a florist because of the higher quality, in particular flowers. It is striking that consumers said that they buy flowers at florists or flowers and plants. A low percentage of respondents said that they only buy plants at florists.



Figure 4

In addition, most of the respondents answered that they do not buy flowers and plants often. Despite the low buying frequency, they do spend high amounts of money on bouquets of flowers and plants. For instance, most of the respondents answered to spend more than 50 Turkish Liras, which is equal to 13.37 euros, on one bouquet of flower or plants. Although this is perceived as a low amount of spending, it is relatively high for the Turkish consumer because of the exchange rate. Striking is that the second most given answer, with 24.7%, is 11-20 Turkish Liras for one bouquet of flowers or a plant. Despite the low amount of spending, 55.9% of the respondents have indicated happiness when receiving flowers as a gift.

11. Bir buket çiçek veya süs bitkisi için ne kadar harcarsınız? / How much would you spend on a bouquet of flowers or plants?  
(158 responses)

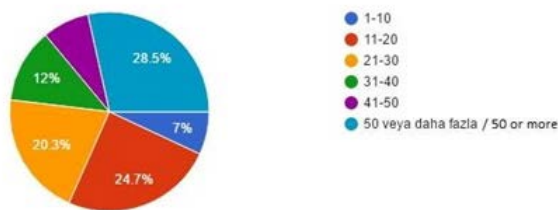


Figure 5

In contrast to consumers who are purchasing flowers and plants, there are consumers who do not purchase these products. Thirty seven consumers said that they do not purchase flowers and plants. Forty-eight per cent of these respondents indicated that they do not consume, because of the perception of an unnecessary product. Furthermore, 32.4% indicated that they do not buy flowers and plants, because they are not triggered to buy it and therefore, do not think about these products. Respondents also answered that flowers have a short vase life and therefore do not want to spend high amounts of money on these product. Most of these respondents have indicated that they do not buy it whatsoever, followed 17 respondents who are willing to buy flowers and plants if prices would be lowered and if they would have a longer vase life.

19. Ancak şu durumda çiçek ve süs bitkisi alırım: (1'den fazla seçebilirsiniz) / I do not buy flowers and/or plants, but I will buy flowers and/or plants if: (you can select more than 1 )  
(41 responses)

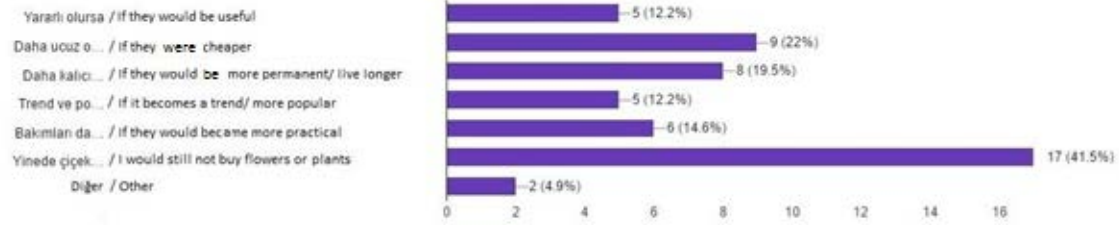


Figure 6

## 5.6 What is the decision-making process for buying products of the Turkish consumer?

The decision making process is a method to identify the decision making process of the consumer from start to finish in 5 steps; Problem recognition – information gathering – evaluation of alternatives – purchase of products – post purchase evaluation (Flekel, 2013). To understand the decision making process of buying flowers and plants in Istanbul, a questionnaire was designed based on this research question because there was no consumer data available.

When it comes to the purchasing of flowers and plants, the Turkish consumer mostly decides on aesthetics of the product followed by the quality, assortment and the accessibility of the product in stores. Additionally, most of the consumers enter the shops without gathering information about flowers or plants, and thus decide in the store. Furthermore, since quality is highly valued, the consumer prefers to buy at florist shops.

13. Çiçek ve süs bitkileri almadan önce dükkanlarda veya internette araştırıyor musunuz? / Do you first consider different shops, or browse the internet, before deciding which flower or plant you would like to buy?  
(157 responses)

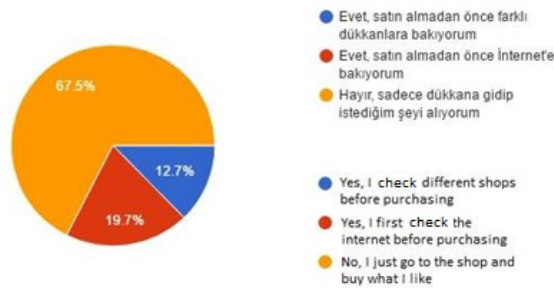


Figure 7

## **5.7 Why are flowers and plants not popular in Turkey?**

To answer this question, different interviews were held. In the next section it is described how consumer spending on Dutch flowers and plants in Istanbul can be increased.

Consumer spending on flowers and plants in Turkey is extremely low in comparison to the Netherlands and other European countries. According to Umit Demir from Dogaka, an agency which has launched a report on flowers and plants in Turkey, there is more need to focus on marketing campaigns. He reports that the biggest problem in Turkey is that consumers perceive the flower as a luxurious product and therefore, an unnecessary product. For instance, many consumers think that bringing flowers to a funeral is unnecessary and prefer helping people by donating money and bringing food to the house of the person who has lost someone. Furthermore, the price is an issue which needs to be combated (Demir, 2015, p.31). Besides, consumers perceive it as an unnecessary product, since flowers and plants die quickly.

To support this sub-question, field research is conducted through three interviews. These interviews are conducted with Süsbir, Orta Anadolu Ihracatçı Birliği and Lale Çiçek Evi. The field research supports the same arguments as the desk research. For instance, the local florist has said that the culture of flowers and plants is not integrated into Turkish culture. It is also because of the high prices of the flowers and plants, thus makes these products luxury products, in contrast to a low wage. The minimum wage in Turkey is 1300 Turkish Lira and flowers and plants are expensive. However, Turkey is still a developing country and therefore the citizens have not made space for flowers and plants in their minds. Consumers mainly buy flowers when it is necessary.

For instance, during special occasions such as Mother's Day, New Year's Day, Teachers' Day, engagements and for asking the woman's father for her hand of marriage. Obviously, flowers are chosen as a gift product and seen as a feminine product and are only bought if it is seen as necessary. Furthermore, artificial flowers and plants are chosen over 'real' flowers and plants, because of a longer life cycle. Because flowers might die quickly, they perceive it as a waste of money. Furthermore, because the habit of flowers is not integrated into the culture, people do not think about purchasing it. Also, Turkish consumers prefer a product to have a moral value and they prefer that it be necessary. Therefore, products such as sweets or chocolate are preferred over flowers since they are seen as more useful.

In fact, in order to integrate flowers and plants into the culture, people must see these products as a necessary and moral product. Also, there should be more promotional campaigns besides lowering the prices. According to Mr Yilmaz from Süsbir, it is not integrated into the culture because people in big cities do not have the time to think about flowers and plants because of the rush in these cities. He states that it is because of the socioeconomic structure in the culture. In fact, he states that many men feel ashamed when buying it because of the masculine culture. However, it is getting more popular. He has also indicated that it is all about the priorities of different people. Educated people whose financial situation is slightly better and whose social and economic situation is slightly better, can spend more time on this. The social and the lower class might maybe not buy it directly from the florist, but might prefer to buy the seeds and plant it by themselves.

Furthermore, in Istanbul people do not get in touch with floriculture. For instance, in the Netherlands it is possible to see flowers and plants in the supermarket, florists, the bazaar and greenhouses along the roads. Due to this fact, Turkish citizens see this as a rare product. Besides, many people perceive the flower as a symbol and not as a product to consume. For instance, the tulip has been known as a Turkish product since the Ottoman Empire. Furthermore, flowers are also used as sayings, such as phrases as: “you are just like a flower”. According to Mr. Yılmaz from Süsbir, the ornamental plant industry is a rapidly developing sector in Turkey and especially Istanbul. He states that the demand in the whole sector cannot be seen as low. In fact, urbanisation and the acceleration of urban transformation activities in big cities, such as Istanbul affects the density of the city. People are living close to each other in apartments without gardens. The population is growing in Istanbul which affects the density and infrastructure of the city and therefore, human life is getting smaller. For example, water problems, lack of sewers, lack of roads, and congestion on the grounds. To accommodate the growing population in Istanbul, more houses are being built.

However, the emotions of humans about this fact is not taking into account. Therefore, the municipality is taking this into account and is working on projects such as more green lives and is therefore planting more flowers and plants outside. Therefore, the main focus is on consumption from the municipality in the environment. For this reason, domestic demand for indoor plants and cut flowers is low compared to other European countries. This is the effect of inadequacy of raising awareness, advertising activities, the socioeconomic structure of the people. Consumers also need to accept giving flowers in all segments of society .



Also the questionnaires supported the interviews and desk research. The main observation of the questionnaires was that most of the consumers do buy flowers and plants and buy it for a high price. However, the buying frequency is low. Answers of buying frequency were divided between 1-2 times a year and 3-5 times a year.

Most of the respondents answered that it is not needed to buy more, because it is unnecessary since it are products for special occasions. The persons that do not buy flowers and plants responded that it is unnecessary, that they do not think about it and that they are not used to buying flowers and plants.

Furthermore, the field research conducted in Istanbul on 21 December 2016 has showed other sides of the flower and plant sector in Turkey which greatly affects the low consumer spending. During the conducted field research different supermarkets and florist from low to high segments were visited. The visited supermarkets were the A101, Bim, Shock, Migros, and Makro.

It is remarkable that flowers and plants receive less attention when it comes to the organisation of Category Management, quality and pricing. For instance, the Category Management was unorganised in all supermarkets and do-it-yourself stores. The range of flowers and plants were very limited compared to other products. Also, the presentation of the products was unorganised. The sold flowers and plants were dead, not priced and a very small assortment. The florist possessed a better quality of flowers and plants. However, the florist represented the 'wrong' flowers outside their store. For instance, the florist represented gerberas outside his shop, while it was raining and cold outside whereas, gerberas are grown in 24 degree heat. Also, the respondents answered that they do not buy flowers and plants often, because of a short life of flowers and plants, because they are too expensive, that they are not necessary and that they do not think about it. However, the Turkish florists are of the opinion that they need a high margin to earn enough money.

As a result, it creates a low rotation in the florists and other flower and plant selling retailers, so the products are older and therefore less long lasting. This can also be called self fulfilling prophecy. To combat these 'problems' different strategies have been set up.

Moreover, it can be said that flowers and plants are not integrated into Turkish culture. One reason for this is the problem of not pushing it through media channels (marketing) and the unorganised category management in retail stores.

Currently, florist do their promotions by themselves and only for themselves. Meanwhile, in the Netherlands, flowers and plants are promoted for the sector. However, flowers are starting to become more popular and especially during Valentine's Day, which has achieved a purchasing record. In order to integrate the flowers and plants into the Turkish culture and increase consumer spending, a marketing plan has been written which can be read after this chapter.



## Marketing plan

### Chapter 6. What is the current marketing situation of Royal FloraHolland?

#### 6.1 Internal analysis

##### 6.1.1 Mission and vision

The mission of Royal FloraHolland is concerned with the core of the company, the reach, and the way in which they realise their dream. The company states that their co-operative is all about 'Flowering and Planting'. The core values of Royal FloraHolland are all about service provision, clarity, sustainability and togetherness. The company aims to make the world healthier with flowers and plants. To achieve their goal, the company has set a plan for 2020 to make floriculture even better than it currently is. Flowers and plants will be the way for customers to express emotions. According to Royal FloraHolland, flowers are expressions of feeling and beauty and therefore they make sure that these high quality and responsibly produced flowers and plants find their way to their customer. Moreover, Royal FloraHolland provides a dynamic marketplace where trade, knowledge of consumer behaviour, knowledge of floriculture supply chain and innovation in floriculture come together (Royal FloraHolland, n.d, para 1).

##### 6.1.2 Organisational structure

In figure 8 an overview of the organisational structure of Royal FloraHolland is presented. Royal FloraHolland consists of six main departments, which are divided into sub departments (listed below the main departments). The department "SM&BD" stands for Strategy, Marketing and Business Development. IA & AO indicates Information Analysis and Application Development. IDP stands for Information Management Services and Projects.

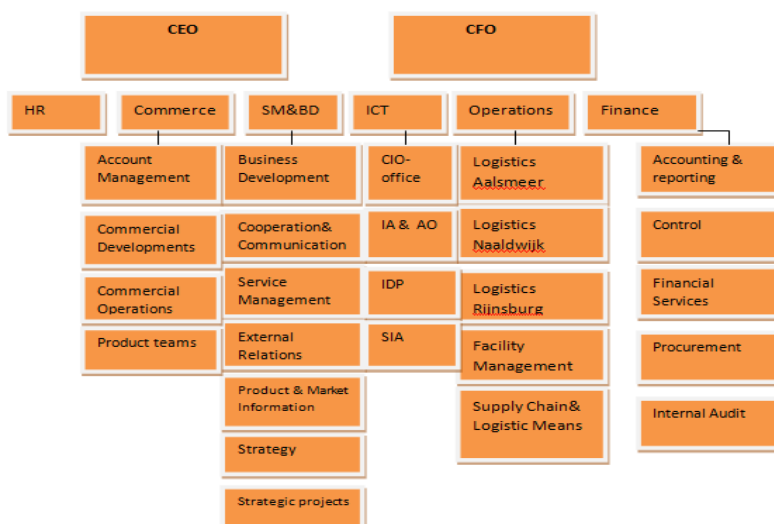


Figure 8 (Royal FloraHolland, 2016)

### **6.1.3 Business development team Turkey**

The Business development team is currently working on developing the horticulture sector in the Turkish market. Due to the fact that this research will be based on development of the Turkish market, information about the current situation of Royal FloraHolland in Turkey will be given.

### **6.1.4 Current market situation of Royal FloraHolland in Turkey**

Royal FloraHolland has been operating in Turkey for two years. However, flowers and plants are not yet integrated into Turkish culture. Due to this fact, not much money is spent on flowers and plants in Turkey.

### **6.1.5 Objective**

According to Royal FloraHolland, Turkey can be seen as a practice for the company to internationalize and expand their platform internationally, the Royal FloraHolland strategy 2020 being the starting point. The main cities they are focusing on are Istanbul, Ankara and Izmir. However, to develop the market, Istanbul will be the first target market.

### **6.1.6 Offerings**

Royal FloraHolland is a marketplace and a service providing company and has no product offerings. The company was set up by Dutch growers and provides services and market advice.

### **6.1.7 Business relations**

Royal FloraHolland has business relationships all over the world. Countries with the highest export value are, Germany, the United Kingdom and France. Royal FloraHolland also has business relationships in the supply chain in the Netherlands.

### **6.1.8 Previous results**

There are no previous results available since Royal FloraHolland is not a market share aiming company.

### **6.1.9 Organisational structure**

The business development team belongs to the SM&BD department. It develops new markets and provides the growth of these new markets. Furthermore, it searches for new customers. Business development works together with other departments as can be seen in figure 9.

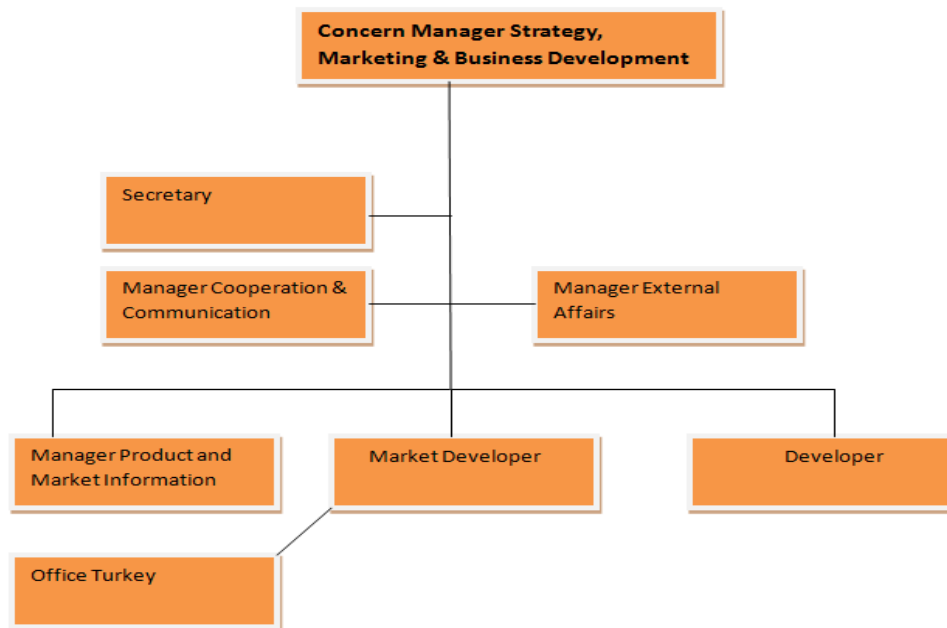


Figure 9- Organisational structure of the Business Development department

## **6.2 External situation**

### **6.2.1 DESTEP**

DESTEP is a marketing tool to used determine the trends and developments in the country. The tool is used for the Meso-and Macro analysis of the organisation. DESTEP is an acronym that stands for: Demographics, Economic, Social Cultural, Technological, Ecological and Political elements. This analysis will clarify how Royal FloraHolland can deal with external factors and adjust their marketing strategy accordingly.

#### **Demographics**

Istanbul is a transcontinental city which connects Europe and Asia via the Bosphorus Bridge. In 2015 Istanbul consisted out of 14.657.434 inhabitants with 7.360.499 men and 7.296.935 woman (Turkstat, 2016). For 2016, it is estimated that there are 14.840.652 inhabitants in Istanbul. The city is very dense with a population density of 2759 per km<sup>2</sup> (Nufusu, 2016). In fact, there are 2759 people per square kilometer in the province of Istanbul with an area of 5,313 km<sup>2</sup>. Because of this fact, most people live in apartments without gardens. On average, men get married at the age of 29.8 and women at the age of 26.5, which means that most of the targeted segment will be married. Most people live with family and not alone (Turkstat, 2016).

Furthermore, the horticulture sector is one of the most promising sectors in Turkey. Because consumer spending is increasing in Turkey, there is a growing demand, but there are not many selling points (Guillet & Meenink, 2014). For instance, in the Netherlands there are florists in each district of a town. In Istanbul there are 3000 (Interflora, 2016).

### Economy

Istanbul is the pre-destined financial capital of Turkey. Istanbul has a central importance in domestic and international trade (Koksal, 2010). Thirty-eight per cent of Turkey's total industrial output originates in Istanbul, as do 40% of the collected taxes. Furthermore, approximately 56% of national export and 60% of national import are created in Istanbul (Sansal, 2016). Many important companies and financial institutions, such as the Turkish Central Bank moved to Istanbul. Due to this decision it is expected that the city will become an important financial center in the world (Koksal, 2010). Moreover, Turkey has increased its minimum wage to 1300 Turkish Lira net per month, without scale divisions (MuhasebeTR, 2016). In 2013, Istanbul had an average employment rate of 46.4%. In fact, In 2015 inhabitants between 25 and 64 years were economically active and had a poverty rate of 17.8 % (see figure below). It is striking that men are more economically active than women. Furthermore, 50% of people aged between 15 to 64 years have a paid job, which ensures that the middle class is growing (Turkstat, 2016).

Year	Region	60% of the median income  / Poverty threshold (TL)	60% of the median income/number of poor (thousand)	60% of the median income/ poverty rate (5)
2015	Istanbul	9504	2560	17.8

*Number of the poor and poverty rate by equivalised household disposable income (Turkstat, 2016)*

This also counts for the horticulture sector. The small growers belong to the poor part of the Turkish population. Therefore, flowers and plants are currently an expensive luxury item, which influences consumption and investments in production. However, Turkey has set ambitions for the horticulture sector in 2023. Considering the ambition of Turkey to increase their export volume, there is an opportunity to increase the share of the Netherlands. Although the youth in Istanbul has a low spending per capita, they have more money to spend for luxury products such as flowers and plants (Euromonitor, 2014).

In the table below total export of Turkey in flowers and plants in 2014 and 2015 is presented.

Product group	2014	2015
Flower bulbs	1938	1.576
Living plants	42.537	40.924
Cut flowers	32.018	28.301
Plant leaves and branches	6.476	6.628
Total	82.969	77.429

*Total exports of Turkey in flowers and plants in 2014 and 2015 (Süsbir, 2016)*

In order to approach Turkey's export target in 2023, the target determined by the industry on its own account is 500 million dollars. Furthermore, import of ornamental plants in 2014 was about 93 million dollars, with the highest imports in 'real' plants. Below, import amounts of different plants and flowers can be seen.

Product group	2014	2015
Flower bulbs	7.381	9.995
Living plants	78.448	65.804
Cut flowers	6.342	4.883
Plant leaves and branches	719	704
Total	92.890	81.386

*Table imports of flowers and plants. Unit: dollars (Süsbir, 2016)*

### **Social cultural**

Combining Europe and Asia, Istanbul has a Western mindset with Islam as the main religion. Therefore, Turkey is in between an Arabic culture with a Western and Asian mindset with more than 70 ethnic groups. In addition, Istanbul has a young population, it mostly consists of people between the ages of 25-54, who are highly educated. The average age of people in Istanbul is estimated at 30.

Istanbul is a city which contains a high social inequality when it comes to living standards and income. Istanbul consists out of the very rich and the very poor with low standard living conditions, an inequality created due to the taxing system. Despite low salaries, there is an increasing demand for flowers and plants and especially for quality flowers. Furthermore, the demand for a wider range increases. In fact, the consumption per capita is 800 million euros, which is 10 euros per person per year. The consumption of houseplants is 200 million euros per capita, which is 2.50 euros per person per year and for the garden plants it is 800 million euros per capita, which equals 10 euros per person per year.

#### **Technological**

According to the ING Economic Bureau, Turkish production rapidly modernized (ING, 2012, para.3). An important trend in Turkey, and in particular in Istanbul, is the use of Internet, also known as E-commerce and Information and Communications Technology (ICT). In fact, since 2012 Turkey has a new trade law in which firms are required to make use of the internet.

#### **Ecological**

Turkey has a pleasant climate for production with the main production areas Antalya (cut flowers), Izmir and Yalova (with the government as land owner). Due to the fact that Turkey is centrally located, it is a turntable between Europe and Asia, which makes sourcing possible from local growers and Royal Floraholland areas. However, Istanbul is in possession of 53 hectometer production area of plants (Turkstat, 2016). Turkey has huge production areas (1000 ha production area). The production areas contain plastic green houses and old greenhouses and grow traditional products, such as: Roses, Lilium, Freesia, Gerbera, Chrysanthemum. Production is mainly focused on export and not on local consumption (especially carnations). In contrast, plants are in possession of large outside production areas with the government as an important buyer.

#### **Political**

Turkey is a politically unstable country, which leads to problems for foreign investors in the country. For instance, during political discord, the assets of businessmen were frozen (Szablowski, 2014). Furthermore, on 15 July 2016 there was a coup in Turkey. Political instability is a serious matter which has to be taken into account. In fact, Turkey is ranked a corrupt country with acts of terror, millions of migration, a tense relation with the European Union and the failed coup on 15 July 2016. However, according to Robert Schuddeboom, the Dutch Consul General in Istanbul, the country is underestimated because of its quick adaptation and recovery. Robert Schuddeboom claims that he has never seen a quick recovery such as in Turkey.



Moreover, considering the issues in the country and the swift recovery, Turkey would be an opportunity to invest in (Schuddeboom, 2016, para.6). The threat for Royal FloraHolland is the high tax revenues of 48.6% set by the Turkish government to protect local growers. However, the Turkish government has set 4 goals for the horticulture sector to be reached in 2023. The following goals are set for 2023 (StratejiCo, 2014):

1. Attracting foreign direct investments.
2. Increasing horticulture export from the current \$77 million to \$500 million.
3. Improving product quality and diversifying product scale.
4. Protecting local producers and creating more jobs in the sector.

### **6.3 Competitive situation**

#### **6.3.1 Competitors**

The Netherlands is the most dominant market when it comes to flowers and plants exports in the world. In fact, the biggest flower co-operation is Royal FloraHolland with 4700 growers as members (Floraldaily, 2015). In this chapter the competitors in the Turkish flower and plants industry will be analysed separately by looking at the import volume for these two products. Flowers and plants will be analysed separately since they are perceived as different products in the sector and by consumers.

When it comes to the competitive situation for the plant sector in Turkey, the Netherlands remains the biggest importer of the country followed by Italy and Germany.

These two countries can be seen as competitors in the future when they decide to invest and export more to Turkey. For now, Turkey has no direct competitors since the flower and plant market is not developed yet.

Country	Total plant imports in 2015	Strategy
1. The Netherlands  Royal FloraHolland	35.379.369	The biggest flower co-operation in the Netherlands with growers as members. Royal FloraHolland is a service provider which helps the growers in order to increase their market share.

2. Italy	24.507.801	The florists have to do the research by their selves.
3. Germany	3.539.662	The florists have to do the research by their selves.

*Total plant imports in Turkey (Süsbir, 2016)*

It can be seen that Royal FloraHolland has a competitive advantage in comparison to the top 3 other importers in Turkey. However, Italy and Germany might become competitors of the company in the future.

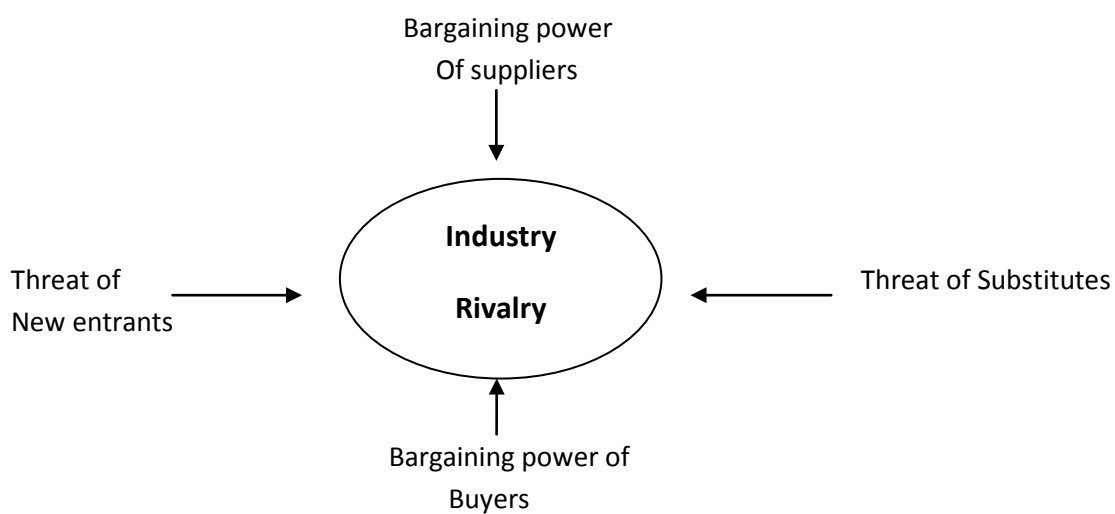
Country	Total cut flower imports in Turkey 2013	Strategy
1. The Netherlands  Royal FloraHolland	Over 500 tons	The biggest flower co-operation in the Netherlands with growers as members. Royal FloraHolland is a service provider which helps the growers in order to increase their market share.
2. Kenya	91 tons	Kenya has a competitive advantage because of its climate to grow cut flowers, which increases quality of the flowers. Besides, Kenya has excellent transport to Europe and the rest of the world through Nairobi airport, which is in possession of a flower terminal (Veselinovic, 2015).
3. Ecuador	45 tons	Ecuador is the world third-largest exporter, also in Turkey. The success comes from the climate, because they can grow flowers throughout the year without artificial illumination (Insider, 2015).

*Total flower imports (Heemskerk, 2015)*

It can be seen that the Turkey imports the most from the Netherlands. There is a change that Kenya and Ecuador might become competitors. However, currently the imports are much lower.

### **6.3.2 Five Forces of Porter**

The Fives Forces of Porter is a tool which helps a business understanding the strength of their current competitive position and the strength that the business is considering moving into. It identifies the five competitive forces that shapes every business.



#### **The Bargaining power of suppliers**

The exported flowers and plants are usually sold to a service provider or wholesaler who in turn sells it to supermarkets and florists. Also, there is a service provider which only sells plants to do-it-yourself stores and garden centres, such as Ikea. The Dutch growers are dependent on Royal FloraHolland and Royal FloraHolland is dependent on the suppliers. There might be a chance that the suppliers will trade with other foreign growers. However, Royal FloraHolland is the biggest with many growers in its network, which will be an advantage for the suppliers. There might be a risk when the Dutch growers decide to export by themselves or choose direct export. However, this is not realistic for the coming years. A threat in the long term might be that Turkish growers decide to grow by themselves and sell in Turkey instead of exporting. However, for now the Turkish growers use their products mainly as an export product and not as a local product.

Moreover, the Netherlands has a strong flower and plant industry, with the right techniques to grow the flowers and plants. Turkey is not yet in the possession of this. Dutch Royal FloraHolland growers work together with Dutch exporters, which sells it to the service provider.

#### **The bargaining power of buyers**

The customers of Royal FloraHolland are the exporters who are responsible for the exportation of the flowers and plants to Turkey. However, this plan is written in order gain market research to help growers in the Netherlands. Therefore, for the purpose of this paper the citizens in Istanbul are seen as the consumers. For now, the educated citizens in Istanbul at an average of 21-30 years are seen as the consumer. At the moment the amount of money spent on flowers and plants in Istanbul is 15 euros per person per year, which means that there is not a big consumer database. Since buyers of Royal FloraHolland are wholesalers, florists, supermarkets, garden centers and online websites, the company is in possession of a variety of buyers which strengthens the position of the company as the biggest flower co-operation in the world. However, the import duties of cut flowers are extremely high and therefore the Dutch flowers and plants are higher priced than the domestic flowers and plants. The threat might be that the buyers will choose the domestic flowers and plants over the Dutch flowers and plants when Turkey decides to sell their own flowers and plants on the domestic market. However, the Dutch growers from Royal FloraHolland have a strong position because of its competitive advantage in techniques and varieties.

#### **Threat of substitutes**

The power of threat of substitutes is low in the flower and plant market. Flowers and plants are products which cannot be substituted. There might be a chance that artificial flowers and plants will be used as a substitute and bought more by consumers since they are longer tenable. Currently, there are many artificial flowers sold on the Turkish (Istanbul) market. Although flowers and plants are not considered as substitute products, it might be an idea to take into account the other gift products in Turkey, such as chocolate and other sweets. When it comes to plants, there might be another substitute, such as artificial plants and other popular decoration products, such as: photo frames. Since flowers and plants are not promoted as brands, it is necessary to push these products into the culture by promotion.

### **Threat of new entrants**

Royal FloraHolland is an independent marketplace and service provider. In Turkey the horticulture sector is a traditional sector with many poor family owned firms with 17 auction clocks, which are based on fraud activities and a low solvability. Royal FloraHolland can utilize the Turkish market potential by establishing the Dutch know-how in co-operation with Turkish partners, which have experience with entrepreneurship and big scale projects. Besides, the flowers and plants industry is a 'new growing sector' in Turkey overall. However, Turkey itself is a potential threat since it has the climate to grow flowers and plants. Therefore, the threat might be a low market share for the Dutch growers. Because of the high imports duties, consumers might choose local flowers and plants since they will be sold cheaper. Furthermore, the horticulture sector in Turkey is seen as a market opportunity by foreign companies, such as pullposition. Also, the business guide Turkey informs their readers as a market potential. Many businesses prefer to start in Istanbul.

### **Industry rivalry**

The Netherlands has the biggest flower industry in the world and Royal FloraHolland is the biggest operating co-operation. Turkey is not yet developed enough when it comes to growing flowers and plants to compete against the techniques of the Netherlands. Many farmers who own greenhouses are poor, which is one of the reasons of ineffectiveness. Current floriculture products lack quality due to insufficient knowledge and shortcomings in their supply chain. Also, their current vase life is very short.

The cooling is weak and the logistics need to be improved. Moreover, the diversification in local production is little, with the main production item being the carnation. This means that the Netherlands, with their floriculture knowledge, has a competitive advantage. Furthermore, there is no domestic flower co-operation in the Turkish market (Rabobank, 2015).

### **6.3.3 Industry Analysis**

The flower and plant industry in the world is led by the Netherlands, and in particular, Royal FloraHolland. Royal Floraholland is one of the economic mainports with a 20% contribution to the Dutch economy together with 4700 members and 700 foreign members. In contrast, Istanbul is not in possession of a big floriculture market. The cut flower production has started in Istanbul and has spread to other provinces. Almost 80% is meant for export purposes and not for domestic consumption.

However, Istanbul is no longer a production area, but a consumption area (Baris & Uslu, 2009). The floriculture market in Turkey as a whole is relatively small. The average expenditure on flowers and plants in Istanbul is approximately 15 euros per year. In contrast, in the Northern and Western European countries there is an average spending of 50 to 100 euros per person per year.

## **6.4 Market situation**

### **6.4.1 Customer groups**

Royal FloraHolland targets consumers that are young and educated. The average consumer age is 30 years. Consumers are interested in the Western world and are curious about the rest of the world. Royal FloraHolland has no specific group in this segment yet. The new segment will be described in the chapter "Target market and segmentation". However, potential customer groups are: the Cultivated Performer, Cosiness Seeker, Naturalistic, Individualistic Performer, Traditional Carer, Conventional Smartshopper, Disinterested 1 (Adventurers) and the Disinterested 2 (Dreamers) group. These consumer types will also be described in the chapter "Target market and segmentation".

### **6.4.2 Customer needs and behavior**

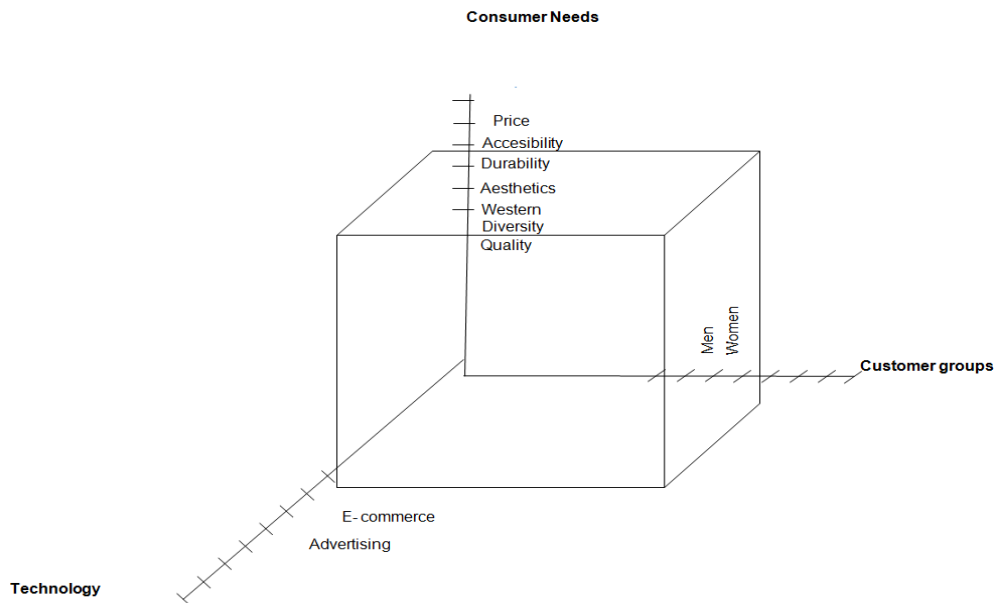
The customers of Royal FloraHolland are all Turkish consumers of flowers and plants, because there is no specific brand for flowers and plants. The current Turkish consumers are in Istanbul and need flowers and plants which are easy accessible, because of the rush and little spare time in Istanbul. Furthermore, the Turkish consumer prefers quality flowers and plants with a low price. Besides, aesthetics are important in order to attract the consumer. The consumer buys flowers for special occasions and celebrations, such as New Year's Day, Valentine's Day, Mother's Day and Teachers' Day. Flowers are also perceived as a symbol between lovers. The consumer also buys flowers as ornamentation for their homes. On the contrary, the consumer buys plants mostly as home decoration. Generally, flowers are seen as products for women and only bought when they are seen as necessary for an occasion. In fact, some men might feel ashamed because of the masculine culture. In addition, the customer is interested in Western luxury products. Moreover, the consumer is in need of durability because they are of the opinion that it is a waste of money when the flower or plant dies quickly.

### **6.4.3 Technologies**

The Turkish consumer is online very often. Therefore, there are many online flower and plant selling points (websites). Furthermore, consumers watch television regularly, but is rational towards advertisements during programs.

However, the consumer values advertising. Furthermore, the consumer is receptive towards trends because of their online presence. In fact, women are most receptive to advertising during television series and men when they see a product at the home of their friends. Royal FloraHolland can use this knowledge to broaden their business scope by mobile or digital marketing.

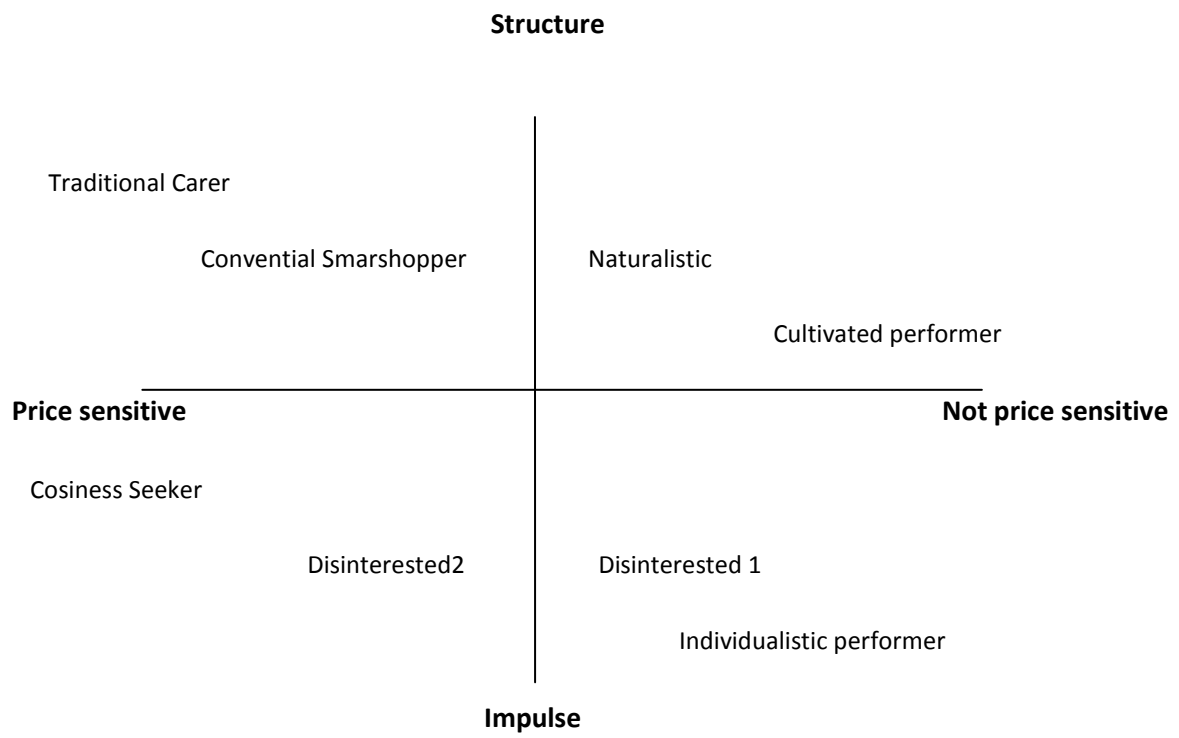
### **ABELL Model**



As can be seen in the ABELL model above, the consumer wishes for a low price, easy access, durability, quality, and aesthetics of the flowers and plants. Royal FloraHolland has to improve the accessibility and price, by developing the Turkish flower and plant selling retailers and stores and negotiating the price. Mobile marketing, E-commerce, is a much needed technology since consumers are often online. The consumer needs to be reminded of flowers and plants. Since Royal FloraHolland is not focusing on a specific type of consumer, it is intended for everyone. Therefore, no distinction in consumer types and ages was made.

#### **6.4.4 Positioning map**

Royal FloraHolland is not a brand, but a marketplace which provides services for the growers and other members. This means that Royal FloraHolland does not set prices for their products. Different products from different growers are exported to Turkey and therefore it cannot be compared with other growers from other countries. For this reason, a positioning map of the consumer types has been made.



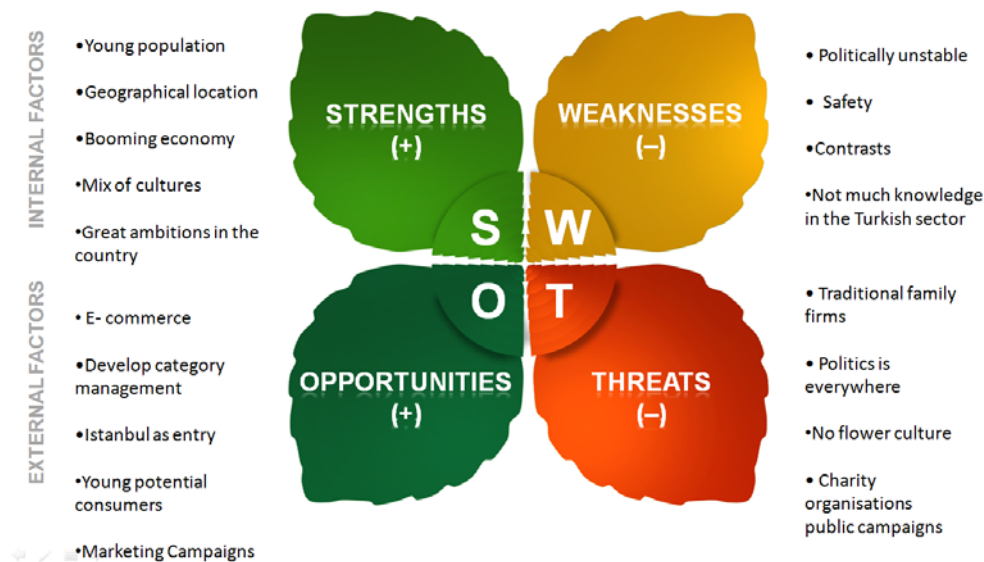


#### 6.4.5 Market share

Royal FloraHolland aims no market share. It is unknown which other companies or growers from other countries export to Turkey. Therefore, it is not possible to determine the different market shares.

#### 6.5.1 SWOT analysis

This SWOT analysis is slightly different from others. Royal FloraHolland advises their clients and members in order to increase their market share. Therefore, for this research it was not essential to analyse the internal situation of Royal FloraHolland itself, but the average internal strengths and weaknesses of members who are trading with Turkey are analysed.



#### Strengths

- **Young population**

Turkey has a young population, which is a strength because of the receptiveness towards new technologies and western products.

- **Geographical location**

Being located between Asia and Europe makes Turkey a transit centre of trade. This also ensures different mentalities.

- **Booming economy**

Turkey has a booming economy, which ensures that consumers have more money to spend.

- **Mix of cultures**

Turkey has a mix of cultures and different mentalities because of its geographical location. This ensures that there is a chance to try to focus on different people when one is not interested.

- **Great ambitions in the country**

Turkey has great ambitions. For instance, the horticultural ambitions that the government has set. This will allow more import and lower prices and thus more revenue for the traders.

### **Weaknesses**

- **Politically unstable**

Turkey has an unstable political environment, which leads to a low reliability on investment and trading.

- **Safety**

Due to political instability it is unsafe to do business in Istanbul. Many people do not want to trade because they are afraid.

- **Contrasts**

Turkey has many different contrasts and imbalances. For instance, the country has a strong protective legislation with regard to local entrepreneurs (import duties) and no opportunities for starting a business. However, the opportunities are endless when confidence and partnership in trading is gained.

- **Little knowledge in the Turkish flower and plant sector**

The Turkish flower and plant sector needs more information on organisation and presentation of the products. If the sector remains underdeveloped, consumer spending will barely increase.

### **Opportunities**

- **E- commerce**

The young Turkish consumer spends a lot of time online. Mobile marketing will be the perfect opportunity to remind consumers of flowers and plants. Through such media, marketing will work effectively and target the correct segment. The flower and plant culture is not yet integrated into the Turkish culture as it is in the Netherlands. It might be difficult to start this habit and to integrate it into the country's culture. There is a chance to push it into the culture by help of promotion. For example by using a day which already exists and promote that flowers (and plants) are the ultimate products as a gift. Such days can be pushed through social media.

- **Develop Category Management**

The category management needs to be developed in Turkey. When the category management will be developed by the business development team, the consumer will have more choice, a better overview of choices and more added value. This will lead to more consumer spending.

- **Istanbul as entry**

Turkey is a big country with many differences in its culture. In fact, Istanbul is the financial capital of the country and many firms first invest in Istanbul before they spread in the country. Because of the fact that trends start in Istanbul and flow over to the rest of Turkey, it is strategic to invest in Istanbul. Besides, most of the consumers in Istanbul have a western mentality.

- **Young potential consumers**

Since flowers and plants are seen as luxury products and not integrated into the culture, it might be difficult to let them integrate into the culture when older people are targeted. In contrast, the young and educated consumers might be more attracted to try new products and integrate it as a habit. They are also more open minded and will accept flowers and plants faster than the elderly people. Furthermore, research shows that the young Turkish consumers are becoming more interested in decorating their houses.

- **Marketing campaigns**

The Turkish flower and plant sector has not executed many marketing campaigns, despite low consumer spending. However, marketing campaigns will ensure that people get in touch with the products and will give the opportunity to experience giving moment of flowers and receiving flowers and plants. Besides, marketing campaigns will ensure more media attention from the consumer.

## **Threats**

- **Traditional family firms**

The Turkish horticulture sector is a traditional sector with family firms and poverty. This causes a very poor solvency and tamper activities.

- **Politics**

Turkey is a politically unstable country, which might lead to huge impacts in Istanbul as the financial capital. The political tensions might lead to frozen business assets and in less foreign direct investments, which could have impact on the supply.

- **Flowers are not integrated into the culture**

As of yet there is no flower and plant culture in the country. The introduction of the flower and plant culture will need a lot of investment, which might be expensive. Chances exist that this investment will be for nothing.

- **Charity organisations public campaigns**

Charity organisations are able to advertise on television and promote other products and convince people to buy other products instead of flowers and plants.

### 6.5.2 Confrontation matrix

Although the SWOT is not a 'regular' one, there are factors which can be combined. Therefore, a confrontation matrix was designed.

		Opportunities					Threats			
		O1 E-commerce	O2 Develop category management	O3 Istanbul as entry	O4 Young potential consumers	O5 Marketing Campaigns	T1 Traditional family firms	T2 Politics is everywhere	T3 No flower culture	T4 Charity organisations
<b>S</b>	S1 Young population	+++		++					- -	
	S2 Geographical location			++						
	S3 Booming economy									
	S4 Mix of cultures									
	S5 Great ambitions in the country							-		
<b>W</b>	W1 Politically unstable									
	W2 Safety									
	W3 Contrasts									
	W4 Little knowledge		+++							

Since the young population is online often, it is an opportunity to use this as strategy to reach the right target group. Also, because in general trends start in Istanbul and it is a market on itself, Istanbul provides a great starting point for a business. Furthermore, the Turkish flower and plant sector is in possession of little knowledge of the products and organisation. Therefore, the category management knowledge of Royal FloraHolland could be used. Although there are great ambitions in the country, politics remains unsafe and unstable which might affect the businesses. Furthermore, the flower and plant culture needs to be integrated, which might need a lot of investment.

## **Chapter 7. What are the segmentations and what is the target market?**

In this chapter possible consumer groups will be identified through consumer segmentation based upon the segmentation criteria from Royal FloraHolland. First, the consumer segments will be selected. Next, variables will be applied to possible consumer markets. Thereafter, possible consumer segmentations will be targeted. Consumer information is gathered through the conducted questionnaires in Istanbul.

### **7.1 Segmentation**

Consumers have been segmented into the Cultivated Performer, Cosiness Seeker, Naturalistic Intellectual, Individualistic Performer, Traditional Carer, Conventional Smart Shopper, and Disinterested. For all the consumer types the criteria is that the consumer lives in Istanbul and is between 21-30 years old. This age-group was chosen, because this segment tends to buy flowers and plants most often according to the questionnaires.

#### **1. Cultivated Performer**

**Behavioural and attitudinal:** The Cultivated Performer is someone who thoroughly considers style when shopping. This type of consumer highly values the shopping experience for exclusivity, and focuses on the quality of the product. Furthermore, the assortment and service in-store is perceived as a highly important factor when shopping. The Cultivated Performer pays little attention to price, is well prepared and focuses on their own goals. Moreover, this type of consumer is an organised shopper. This person is very sensitive to personal attention and perception. The Cultivated Performer has a high purchase frequency and a high spending habit.

**Psychographic:** This type of consumer has a high standard of living, is status conscious, has a high income and asks for exclusivity. Moreover, this consumer has a Western mindset.

#### **2. Cosiness Seeker**

**Behavioural and attitudinal:** This type of consumer is a passionate sales shopper, who attaches most value to quality. After quality, the Cosiness Seeker values accessibility of the store, the shopping experience, and price. The Cosiness Seeker pays less attention to in-store service and least attention to variety in the assortment. Moreover, this person is impulsive, focusing on sales, inspiration and fun. This type of consumer is demanding, and easily inspired by a special offer.

**Psychographic:** The Cosiness Seeker values family and entertainment, and is a conformist who avoids risks. Furthermore, this person is materialistic, status-sensitive, and consumption-oriented.

### **3. Naturalistic Individual**

**Behavioural and attitudinal:** The Naturalistic individual is a person who attaches most value to access, quality and assortment. This person pays less attention to experience, price and service. In addition, the Naturalistic Individual is a 'passive-responsible' shopper, who only shops when it is necessary. This consumer values certainty and assurance, service, accessibility and local shopping. Moreover, the Naturalistic Individual is a convenience shopper, who is willing to pay for sustainable and natural products.

**Psychographic:** Naturalistic Individuals are highly educated, have a middle to low income, and they are cosmopolitan individuals who value sustainability and nature. Furthermore, these persons want to be socially useful, develop themselves and keep their lives in balance.

### **4. Individualistic Performer**

**Behavioural and attitudinal:** This type of consumer pays most attention to accessibility and quality, followed by innovation, the possibility to gain information, the range of the assortment, and service in-store. This person is considered a fun shopper and highly values service and quality. Shopping may cost time, but it can be perceived as fun. Moreover, this type of consumer wants to be surprised by new and special products and the latest trends.

**Psychographic:** This person is highly educated and earns more than the population does on average. Individualistic Performers focus on their careers, and they are impulsive and adventurous. Their consumption is centred on fun. Furthermore, this person is materialistic and sensitive towards status.

### **5. Traditional Carer**

**Behavioural and attitudinal:** this person pays attention to price and quality and is neutral towards accessibility, shopping experience, the range of the assortment and in-store service. This consumer is a traditional, organised and calculated social shopper. Moreover, this person is a frugal shopper, mainly considering the prices of the products. The Traditional Carer is sensitive to friendly and personal attention.

**Psychographic:** The Traditional Carer has a low level of education, and has a low to middle income. This person has a peaceful life, a modest character, and saves money. Moreover, this person is harmonious and values material security.

## **6. Conventional Smart shopper**

**Behavioural and attitudinal:** This person primarily values price during shopping. The Conventional Smart Shopper also values accessibility, and the range of products on offer. This person is neutral towards quality and does not care about shopping experience or in-store service. Furthermore, this person is a calculating impulse shopper, with a 'no nonsense' mindset. This person is an impulsive planner, a budget shopper, and conformist.

**Psychographic:** The Conventional Smart Shopper has a low to moderate education with a low to average income. This person has success in business and has found a balance between family and society. This person is consumption-focused and sensitive when it comes to status, as well as realistic and flexible

## **7. The Disinterested**

**Behavioural and attitudinal:** The Disinterested person pays attention to accessibility, shopping experience, price, quality and service. This person pays no attention to the range of the assortment. This person is convenience oriented, prepared, and responsible, and looks for fixed, low prices. Furthermore, this person is a smart shopper, who is comparatively less receptive to sales. However, this person is sensitive to socially responsible and innovative concepts. Moreover, the service in the store must be quick and professional.

**Psychographic:** The primary Disinterested group can be divided into two sub-groups: 'Disinterested 1' and 'Disinterested 2'. The Disinterested 1 group are consumers who are always in the mood for an adventure, they have a modest education, and an average income. This person values freedom and wants to explore and experience life. Furthermore, this person is individualistic and has networks. Fun and convenience is important. In contrast, the consumers from the Disinterested 2 group are dreamers with a low education and low to average income. These consumers can be considered narcissistic. They are creative and ambitious, they have a youthful lifestyle, they are individualists, and they are service-oriented.



## **7.2 Targeting**

### **Main targeting groups:**

- Cosiness Seeker
- Individualistic Performer

### **Extra:**

- The Cultivated Performer

Ten per cent of the respondents are Cultivated Performers. However, the Cultivated Performer is already a consumer which has a high buying frequency, and a high spending frequency with regard to flowers and plants. Because of low consumer spending in Turkey, the Cultivated Performer will not be the targeted group. Nonetheless, it is important to still trigger this consumer type in order to not lose the market share. The surveys have revealed that Istanbul has the potential for higher consumer spending. Therefore, respondents with a low spending frequency who are interested in flowers and plants will be the main targeted segment (67%). Furthermore, 14% has answered that they would not buy flowers and plants at the moment, but that they will buy flowers and plants if the prices are lowered and if these products had a longer shelf-life. Therefore, this group will also be targeted. This means that when triggering these two types of consumers, the consumer spending could increase.

## **7.3 Positioning**

The average Turkish consumer perceives flowers and plants as a gift item or as a home decoration item. Additionally, the Turkish consumer perceives flowers as a product which can reveal emotions in order to make people happy. Therefore, flowers and plants do not need to be 're-branded' and will remain in the people's minds as they are. Additionally, flowers and plants can be promoted by saying that they are Western products. This will attract consumers who are curious about the Western world.

## **7.4 Consumer profile**

In Turkey, the Cosiness Seeker and Individualistic Performer are young men and women between 21-30 years in age. They are mostly married and working with a high income. Consumers perceive flowers and plants as gift items and as home decoration items.

However, these consumers only perceive flowers as products through which to express emotions. The consumer has some feelings for flowers and plants, but prefers flowers to be as prominent as possible. The consumer has a high spending budget for flowers and plants, but does not buy these products very often because there are no media incentives. The person adores flowers, but mainly buys them for special occasions, such as Mother's Day, Valentine's Day, or the opening of a new business. The consumer buys flowers to make someone happy and as a result, causes him or herself to be happy too. In addition, the consumer is modern and curious about the Western world, and therefore interested in Western products. The consumer is often online on social media, such as Facebook, Instagram, and Twitter. Women are influenced by national social media role models, such as bloggers and vloggers, while men are influenced by their friends and family. The Cosiness Seeker has ambition, works hard, and admires power and status. When it comes to flowers the Cosiness Seeker prefers exuberant colours and authenticity, and has a preference for shorter flower species. This consumer prefers creative and romantic plants. The Individualistic Performer focuses on his or her career, is impulsive and adventurous, materialistic and status sensitive. This person is ambitious and curious. When it comes to flowers the Individualistic Performer prefers chic, tasteful and long flowers. Plants on the other hand are hip and trendy.

## **Chapter 8. What are the objectives and Issues?**

### **8.1 Financial objectives**

To achieve the same export value as Denmark or Italy, Royal FloraHolland must increase its export value to Turkey to 5% in the coming 3 years.

### **8.2 Marketing objectives**

Royal FloraHolland will increase consumer spending in Istanbul of the 'Cultivated Performer' from 15 euro to 20 euro in 3 years. Furthermore, the 'Cosiness Seeker' and 'Individualistic Performer' should buy flowers and plants two times a year in the next 3 years.

### **8.3 Societal objectives**

Royal FloraHolland will work with at least one charity every 5 years.

## **Chapter 9. What will the new marketing strategy be?**

The Turkish flower and plant sector is in need of development. The present research has shown that low consumer spending on flowers and plants can be attributed to the short shelf-life of fresh flowers and plants, the fact that they are expensive, that they are not necessary, and that people do not often think about them. However, Turkish florists set these high prices in order to earn enough money. As a result, florists and other flower and plant selling retailers have a low rotation, in turn causing the products to be old and less long-lasting. This can be considered a vicious cycle, or a self-fulfilling prophecy. To combat this problem, different strategies have been set up. The strategies are based on management, because this is a part of the business development team of Royal FloraHolland.

1. Import duty and Value Added Tax (VAT) must be lowered through lobbying, and the Ministry of Economic Affairs and Ministry of Agriculture must accept this.
2. Florists will be encouraged to buy high-quality products and sell them at competitive prices, possibly supported by one or more advertising campaigns. This way, the products become cheaper, and, because they remain fresh through high rotation, flowers will also have a longer vase life. This will fulfil the need of the dissatisfied group of Turkish consumers. In addition, the packaging used by florists and supermarkets must become more distinguishable.
3. Category Management must be organised in-store. Currently, supermarkets are adding flowers and plants without organising the products and without applying effective marketing. The products are purchased and calculated with a decent margin in mind. Furthermore, supermarkets sell very few flowers and plants, which can come across as looking disorganised to customers. Therefore, Category Management needs to change in order to make it easier for consumers to distinguish products more clearly. This will cause flower and plant selling retailers, such as supermarkets, to become more successful. Furthermore, all flowers and plants in stores, even IKEA, need to be priced (because at the moment this is not always the case). The A101 should work on traffic building, and Migros on image enhancing. Moreover, the right products must be presented in the right places.

4. Mobile marketing should create extra 'giving opportunities' on, for example, New Year's Day and during graduation ceremonies by collaborating with Interflora. Flowers and plants are not 'pushed' into the culture yet. The Turkish consumer is already familiar with flowers and plants. However, these products never received any media attention, which would trigger the consumer. Without this media push, consumers do not usually think about flowers and plants, and flowers and plants are not integrated into the culture. The consumer needs to constantly be reminded of flowers and plants. Flowers and plants need to be positioned in the minds of consumers according to the concept: "express your feelings by giving a flower and making another person happy" (translated into Turkish). The special occasions which usually prompt Turkish consumers to give presents will be the days on which social media promotion will be focussed. These days will be: Mother's Day, Valentine's Day, New Year's Day, International Women's Day, and graduation ceremonies. In this respect it is significant that flowers and plants are promoted as a product and not as a brand, because it is important that customers become accustomed to generally buying flowers and plants more often than they have previously done. However, a larger consumer database is needed in order to target the 'right' segment of society. It is important to know which websites consumers use. As a result, the right segment will see sponsored advertisements. A collaboration with Interflora would make this process easier.

#### Online influencers

Online influencers (bloggers and vloggers) play an important role in the promotion of flowers and plants. Bloggers can promote flowers and plants they have received, and associated feelings, through writing. They can also write during special occasions and recommend that their readers buy flowers and plants as gifts. In addition, bloggers can create hashtag hypes on Instagram and Facebook. When bloggers write about flowers as decoration and gifts, and emphasise that these flowers are from Europe, it might become a trend. As a result, bloggers can ensure higher consumer spending.

*For possible online influencers to work with, please visit Appendix 6*

5. A marketing campaign will be set up to create a 'moment of happiness' for people. Flowers will be shared on the streets in order to allow people to experience the feeling of receiving flowers as a gift and making someone happy.

This may ensure that the consumer buys flowers sooner than they might previously have done, because they have experienced the feeling of happiness. During this campaign, people will be able to give each other flowers and take pictures. These pictures can be shared using hashtags on Instagram. Also, bloggers could write about the campaign and post pictures of (visiting) the event. Vloggers could announce the event before the campaign starts and invite their viewers to visit as well. Lastly, online influencers (bloggers and vloggers) can share their pictures online and write about the event afterwards.

6. A collaboration with Mehmetçik Vakfı on the 15<sup>th</sup> of July will ensure that consumers feel more involved with the purchase of flowers. Since Turkey is at war with the PKK and IS, there are many martyrs. This has a huge emotional impact on the citizens in Turkey. Because of the attempted coup on the 15<sup>th</sup> of July, 2016, a memorial day for soldiers and martyrs was announced. Raising money for this charity will allow consumers to be involved, and buy flowers. This will also bring flowers and consumers closer together. The plan is that consumers in Istanbul buy flowers, and 10% of the proceeds will go to the families of the martyrs. This can be advertised on television. Also, charitable organisations are allowed to advertise for free in magazines and on television. This will ensure a lower advertising price. This activity can also be executed in collaboration with other flower and plant organisations in Istanbul. The Democracy and National Solidarity Day is new, which means that it does not have many commercial activities associated with it yet.

**After a higher consumer spending has been achieved:**

7. It may be possible to set up bigger flower and plant campaigns per individual season. Existing fashion magazines can write about different flowers in order to reach out to the consumer and to remind the consumer to buy flowers. In this way, the fashion readership will be confronted with flowers on a regular basis. For instance, it might be possible to publish an article about artists and their flower and plant experiences.
8. Traditional promotions, such as outdoor advertisements (bus shelters and billboards during special occasions) and television advertisements (İzdivaç is a live dating show, which is the most-watched television program in Turkey) remain important. Flowers will

fit perfectly into this dating show and it would therefore serve as excellent advertisement.

9. Television programs, such as a Turkish version of “The Netherlands best flower stylist” could be proposed.
10. The Bloomon concept could be explored. Consumers who are in a rush can get a subscription on flowers and plants.

All these strategies involve all the stakeholders in the supply chain from beginning to end. Category Management will involve all the retailers with flowers and plants in stock, such as supermarkets (A101, Shok, Bim, Migros, Makro and Carrefour), florists, and do-it-yourself stores (Koçtaş and IKEA). This will automatically create more demand in the respective stores and thus affect consumer spending. The marketing campaigns will involve online influencers and their followers.

## **Chapter 10. What will the marketing programmes be?**

In this chapter the marketing mix, the P's of marketing, will be described. The marketing mix consists of: product, price, place, promotion, people, process and physical evidence. This marketing mix is essential, because it helps determine the marketing strategy.

### **10.1 Product**

The 'Cosiness Seeker' prefers exuberant colours, authenticity and has a preference for short flower species. This consumer prefers creative and romantic plants. The 'Individualistic Performer' prefers flowers with exuberant colours. However, other kinds of flowers and plants may still be sold to them as well. While composing a flower bouquet or promoting via advertisements, it is important to use exuberant and eye catching flowers.

### **10.2 Price**

The prices of the different flowers and plants cannot be determined. However, the Value Added Tax (VAT) and import duties must be lowered in order to increase more consumer spending. The florist and flower and plant selling retailers will have to work with discounts. As a result, the products will become cheaper and the products will remain fresh for a high rotation and will live longer.

### **10.3 Place**

Supermarkets, do-it-yourself stores and florists in Istanbul will remain the primary selling points for flowers and plants. However, supermarkets will need a broader assortment to attract more consumers. These supermarkets will remain the same, namely: A101, Shok, Migros, Carrefour, Bim, and Makro. Of course, florists will continue selling flowers and plants as well. Since Royal FloraHolland has no retail store of its own and these other stores already exist, there is no need to change locations. These stores are also already in central areas. In addition, E-commerce will continue.

### **10.4 Promotion**

Promotions will primarily be executed through E-commerce and social media. The consumer is often found online, which ensures that the consumer may easily be confronted with flower and plant promotions and advertisements.



The consumer will be selected through accurate targeting, including places the consumer visits online and any hobbies the consumer may have. In addition, online influencers can help to start a trend, by giving flowers and plants as a gift and thereby expressing their emotions.

### **10.5 People**

All these strategies involve all the stakeholders in the supply chain, from beginning to end. The category 'management' will involve all retailers with flowers and plants in stock, such as supermarkets (A101, Shok, Bim, Migros, and Makro), florists and do-it-yourself stores (Koçtaş and IKEA). Staff at these stores are also all involved. When it comes to management, organising and pricing, the managers and the managing directors of the stores are responsible. Furthermore, for customer service, employees in the stores are responsible. The florist is responsible for informing consumers about flower and plant care. For online marketing, marketers and public relations companies will be involved. The marketing campaigns will involve online influencers and their followers (the consumers for the sector).

### **10.6 Process**

Supermarkets need to price every product, improve management of the products and present the right flowers and plants in the right place. Therefore, for supermarkets such as A101, Bim and Shok traffic building is needed. Migros, for instance, needs image enhancing.

### **10.7 Physical Evidence**

The experience a consumer has in-store is very important. Stores need to increase their assortment, and improve their organisation as well as pricing on all products. Furthermore, stores need to sell fresh flowers for customer satisfaction. Besides, consumers have to be confronted with more mobile marketing to keep being reminded of flowers and plants. By implementing marketing campaigns, the consumer will be more involved and will experience the 'feeling' of receiving flowers and plants. It is important to make consumers think about flowers and plants as often as possible.

## Chapter 11. What are the financial and operational plans?

The questionnaire was completed by 186 people (from now on 100%). The financial plan presented here is based on the 14 million people currently residing in Istanbul (Review, 2016). This is an estimation, because there were no specific financial data available.

- 10% Cultivated Performers = 14 million x €5,- extra consumer spending (from €15,- to €20,-) = 7 million revenue.
- The primary target group = 67% = 9.3 million citizens, who will buy flowers and plants 2 x extra per year. This results in: 9.3 million citizens x €20 = 18.6 million.
- 14% of people indicated that they do not buy flowers and / or plants, but would buy these if they were cheaper and lived longer. 14% of 14 million = 1.9 million citizens which will buy flowers and plants for €10 per year = 19 million.

### Revenue

Cultivated Performer (10%)	7 million
Main targeting group	18.6 million
The disinterested group, which might become interested	19 million
<b>Total</b>	<b>€ 44.6 million</b>

A social media budget starts from €60.000 (Veldwijk, 2011)

44.6 million – 60.000= €44.540.000 revenue

## **Chapter 12. Conclusions**

The conclusions presented here were reached following the analysis of desk research and field research conducted in Istanbul. In this section it will be described why flowers and plants have a low consumer spending in Turkey.

The habit of buying flowers and plants is not yet integrated into Turkish culture. However, the Turkish consumer is familiar with flowers and plants as a gift product for special occasions and for home decoration purposes, which holds potential for the flower and plant sector. Turkey has a masculine culture in which men feel ashamed when buying flowers and plants. However, this masculine culture is moving towards a more neutral culture in which men buy flowers more often. Nevertheless, at the moment flowers and plant are still perceived as a feminine and romantic product. Instead of buying flowers and plants on a daily basis, the Turkish consumer prefers to buy flowers only for special occasions and, especially in the case of women, on days such as Mother's Day, Teacher's Day and Valentine's Day. Either way, flowers are generally not the first gift product which comes to mind. The average Turkish consumer prefers chocolate, Turkish delight (*lokum*) or other sweets over flowers and plants as a gift. In contrast, plants are perceived as home decoration. Yet, plants are not bought regularly. People instead prefer to buy souvenirs, home accessories, candles and paintings.

The low consumer spending on flowers and plants is mainly caused because of the fact of no media push. In comparison to the flower and plant sector in the Netherlands, this sector in Turkey barely promotes flowers and plants. There is no to little knowledge about the consumer and there is nowhere any consumer data available. The promotional activities and advertising are up to the florist itself or to Interflora, which promotes for the subscribed florist who have to pay a high commission. Many florists are not able to afford this. As a result, flowers and plants are not promoted through any sort of marketing activity, but are promoted by the bigger florist or retailers for personal purposes. Therefore, it can be said that many consumers do not think about flowers and plants, because of the fact of no promotion that helps people to be reminded to buy these products.

Besides the use of push marketing, in order to gain consumer attention, the sector also needs development before the consumer can change. The field research in Istanbul has showed that retail stores, do-it-yourself stores and supermarkets had a poor Category Management.

For instance, the flower and plant section was unorganised, many product were not priced, the retailers were in possession of a very low stock and the quality of the products were very low. In fact, these factors are perceived as the most important of the decision making of the Turkish consumers. Moreover, it can be said that the sector needs development because of self fulfilling prophecy, more advertising and much more marketing campaigns before the consumption can be increased.

## **Chapter 13. Recommendations**

This report was written in order to answer the following research question: “How can Royal FloraHolland increase the consumer spending on Dutch flowers and plants in Turkey?”

The investigation has revealed that Turkey certainly has great potential to increase its consumer spending on flowers and plants. However, the Turkish sector needs to be developed further before this can be achieved, and will therefore require more investments. Firstly, import taxes and Value Added Tax (VAT) must be lowered. Otherwise consumer spending will remain low because the prices of flowers and plants are too high for many people. Additionally, florists will have to be encouraged to sell their products at competitive prices, supported by advertising campaigns. This should create more demand, which also means that flowers and plants will stay fresh, rather than wither away without being sold. Also, florists should be encouraged to differentiate their packaging from other retailers in order to emphasise the added value of their products for their customers. Furthermore, management in retail stores must be re-organised and improved, and stores must sell a higher amount of flowers and plants. In addition, every flower and plant selling store or retailer must price their flowers and plants accurately, and the right product must be presented in the right place, to prevent loss of customers. It is recommended that retailers consider the way in which they build traffic and enhance their image.

Besides the development of florists, do-it-yourself stores and retailers, the consumer must be triggered to buy flowers and plants through ‘push strategies’. Therefore, it is recommended to make use of mobile marketing and marketing campaigns. Flowers will be presented as a product to share emotions through and to make people happy with, which will create an added value for consumers. This is one of the strategies which can be supported with marketing campaigns and mobile marketing. This so-called push strategy will be implemented on all days which Turkish consumers associate with gifts. For instance, Mother’s Day, Teacher’s Day, Valentine’s Day, New Year’s Day and graduations. Currently Turkey is going through a difficult time due to the loss of many soldiers and police officers. This is why it is recommended to start a yearly fund on “Democracy and National Solidarity Day”, on the 15<sup>th</sup> of July, in collaboration with the charity Mehmetçik Vakfi. Ten per cent of the collected money will be donated to the families and relatives of victims. This will ensure a higher consumer spending and a closer relationship with consumers, sharing emotions towards family and love for the fatherland. All these strategies can be implemented by collaborating with Interflora.

Istanbul is a suitable first target. Hereafter, other big cities in Turkey can be targeted. It is recommended to focus on the 'Cosiness Seeker' and the 'Individualistic Performer' in Istanbul. However, broader consumer-based research is necessary in order to provide effective marketing.

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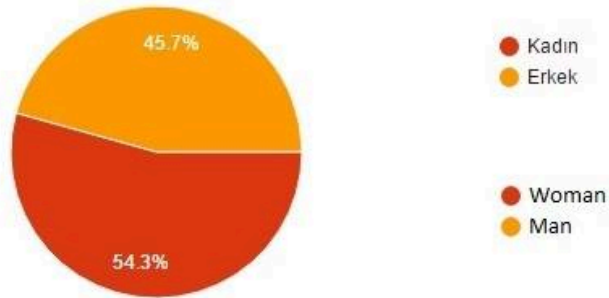
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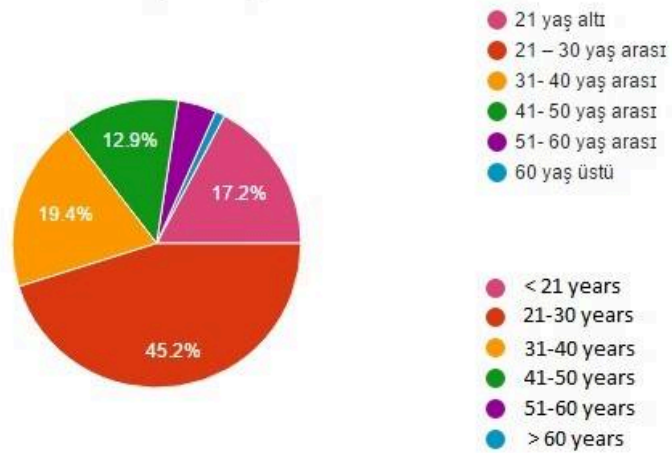
## Appendices

### Appendix1 The Questionnaires

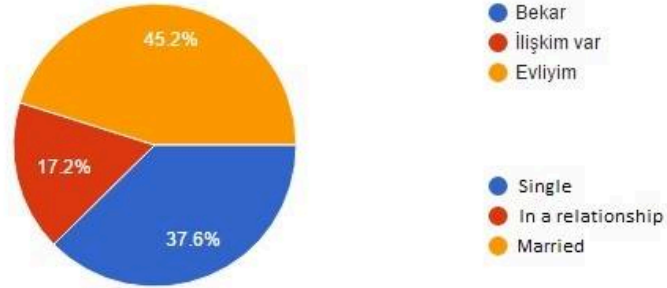
1. Cinsiyetiniz nedir? / What is your gender? (186 responses)



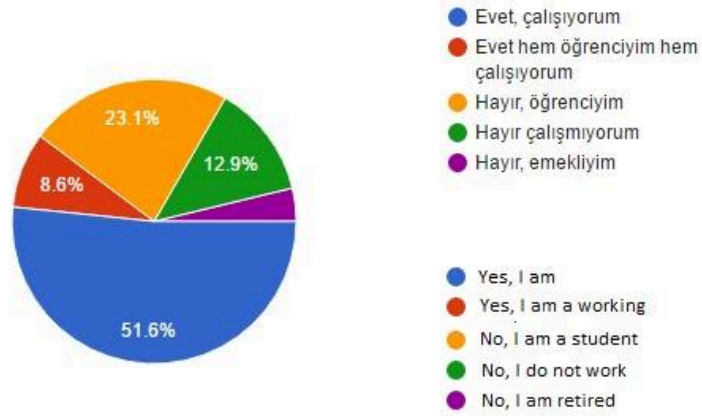
2. Yaşınız kaçtır? / What is your age? (186 responses)



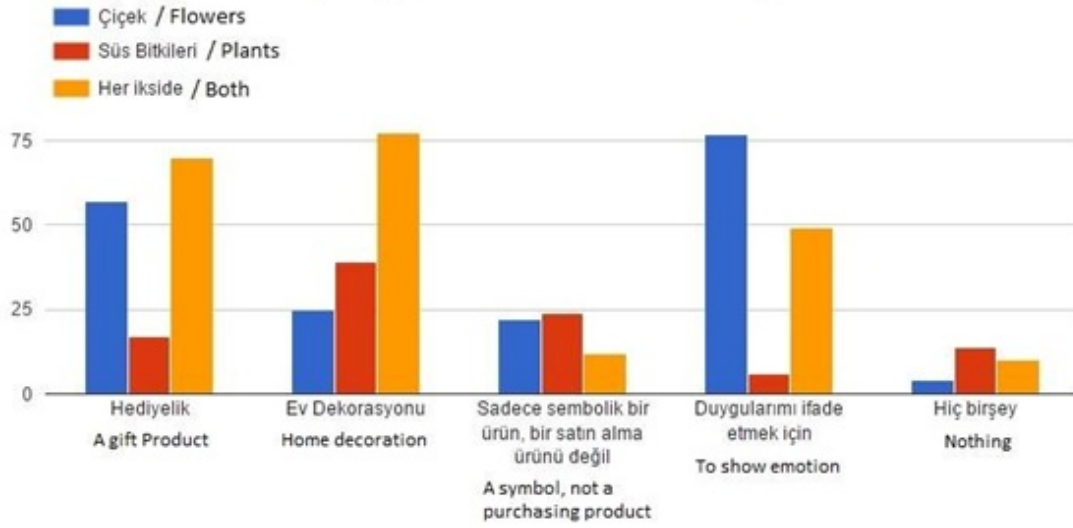
3. Medeni durumunuz nedir? / What is your marital status? (186 responses)



4. Çalışıyor musunuz? / Are you employed? (186 responses)

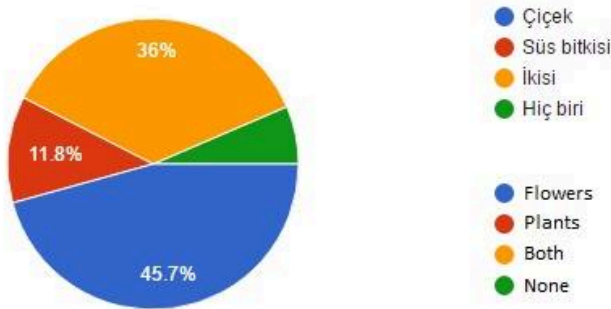


5.Sizin için çiçek ve süs bitkileri nedir? (1'den fazla seçebilirsiniz) / What are flowers and plants to you? (you can select more than 1)

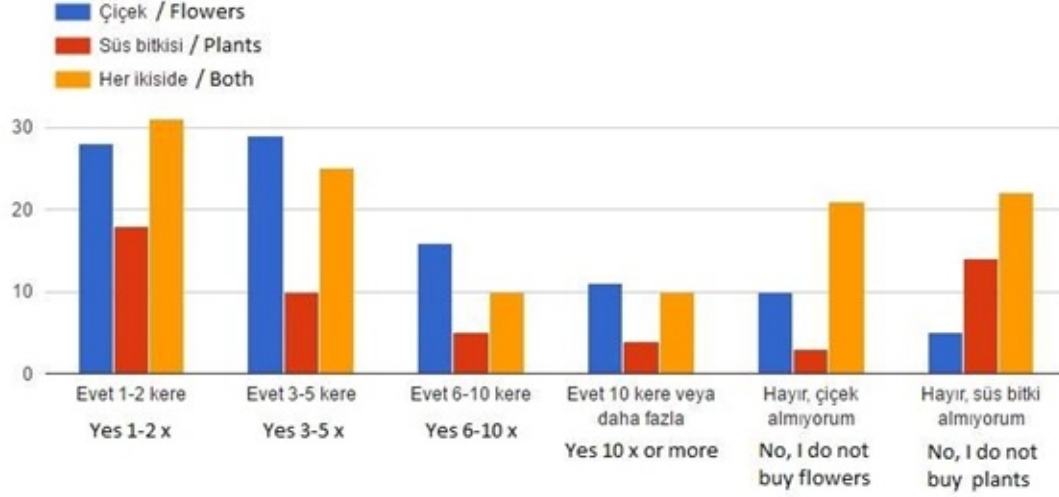


6.Çiçeği mi? Yoksa, süs bitkilerini mi tercih ediyorsunuz? Nedeni nedir? / Do you prefer flowers or plants?

(186 responses)

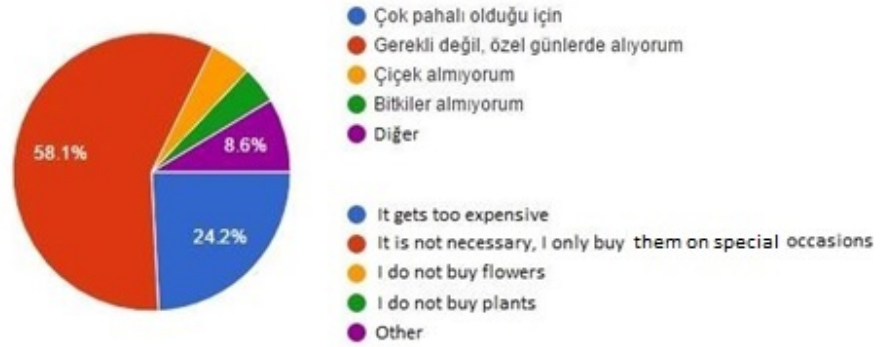


7.Siz hiç çiçek ve/veya süs bitkisi satın aldınız mı? Aldıysanız, lütfen yılda kaç kez işaretleyiniz. / Do you ever buy flowers and/or plants. If yes, please select how many times per year.

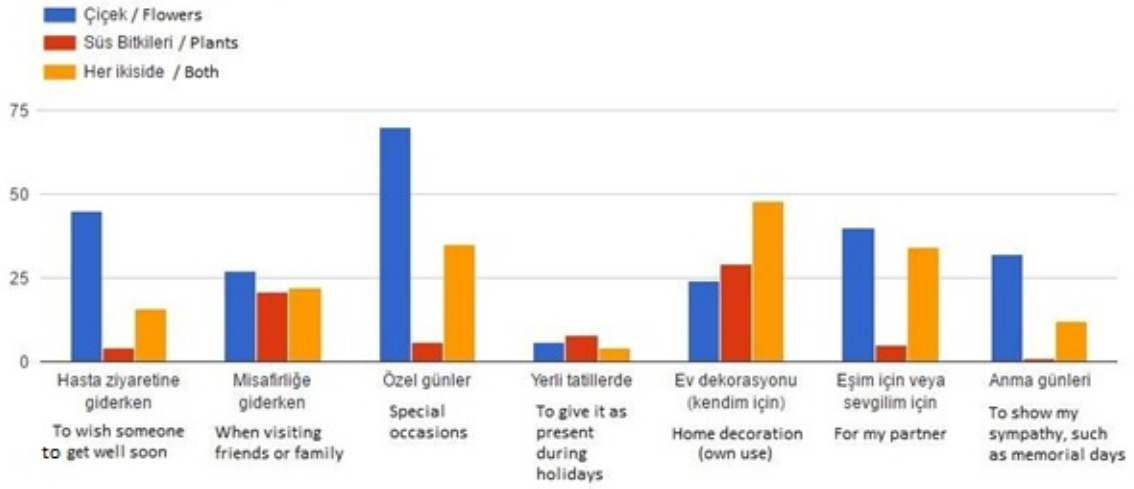


8.Neden daha sık satın almıyorsunuz? / Why do you not buy them more often?

(186 responses)

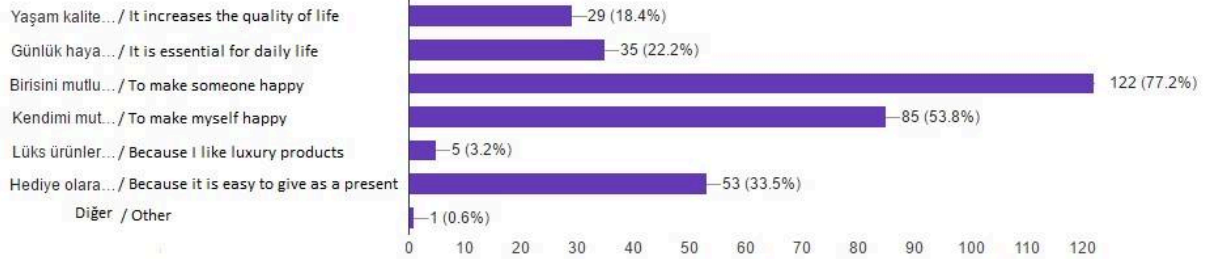


9. Ne zaman çiçek ve/veya süs bitkisi satın alıyorsunuz? / When do you buy flowers and/or plants?



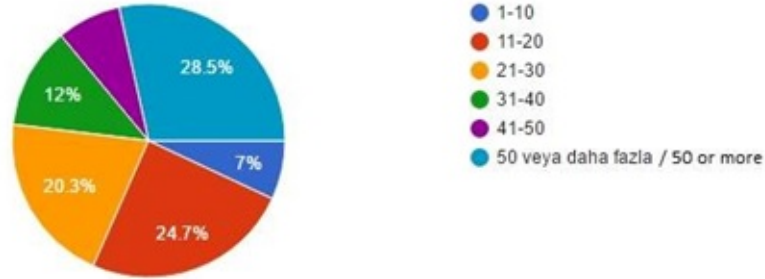
10. Neden çiçek veya süs bitkisi satın alıyorsunuz? (1'den fazla seçebilirsiniz)  
/ Why do you buy flowers or plants? (you can select more than 1 )

(158 responses)



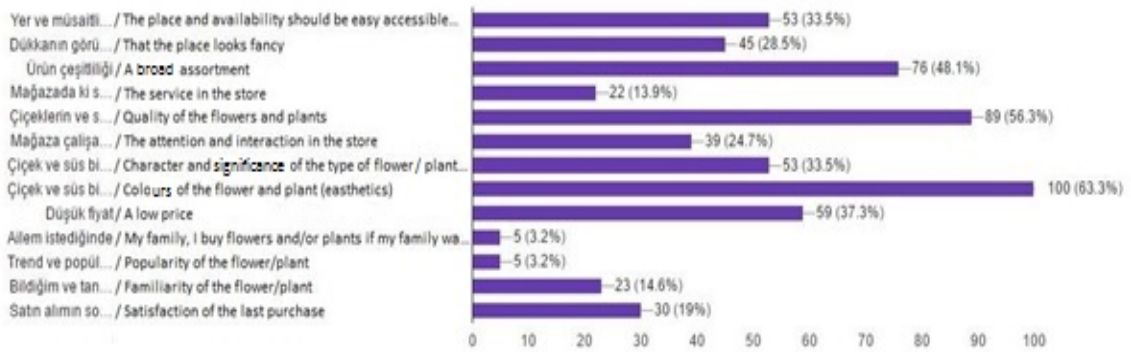
11. Bir buket çiçek veya süs bitkisi için ne kadar harcarsınız? / How much would you spend on a bouquet of flowers or plants?

(158 responses)



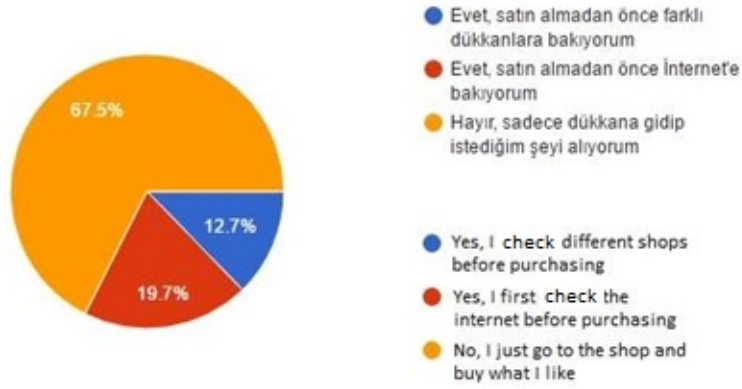
12. Çiçek ve/veya süs bitkisi alırken karar vermenizi ne etkiler (1'den fazla seçebilirsiniz) / What influences your decision making when buying flowers and/or plants? (you can select more than 1)

(158 responses)



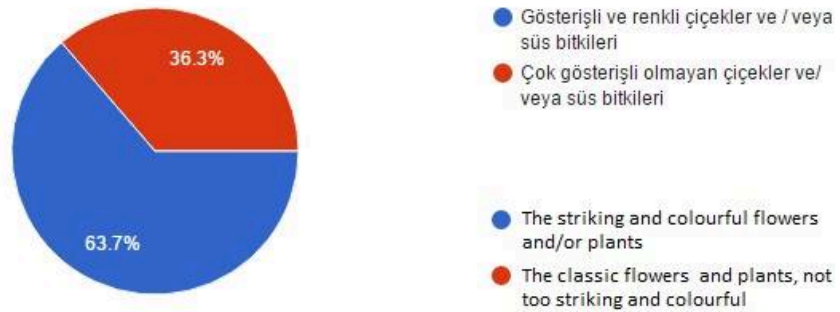
13.Çiçek ve süs bitkileri almadan önce dükkanlarda veya internette araştırıyor musunuz? / Do you first consider different shops, or browse the internet, before deciding which flower or plant you would like to buy?

(157 responses)



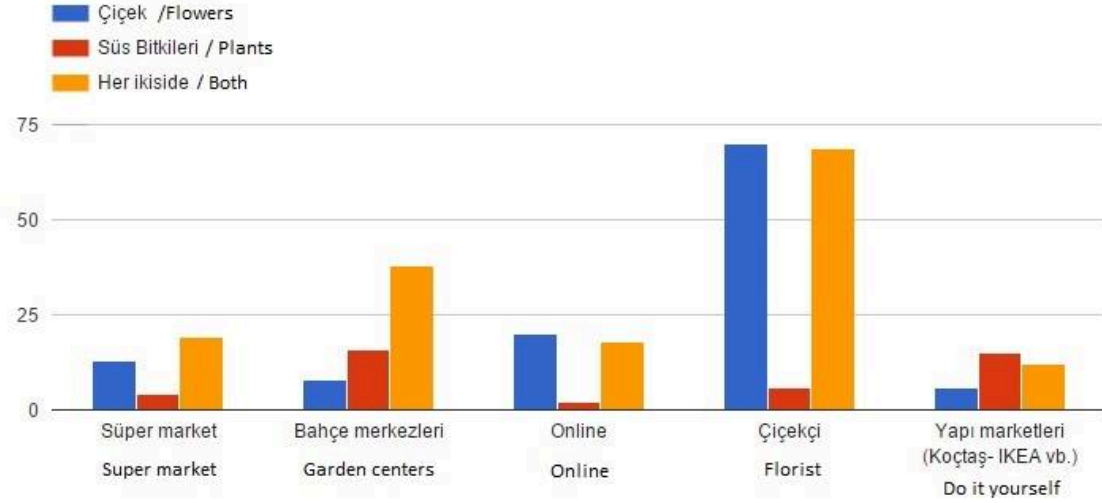
14.Ne tür çiçek ve/veya süs bitkileri satın alıyorsunuz? / If you buy flowers and/or plants. Which one do you buy?

(157 responses)



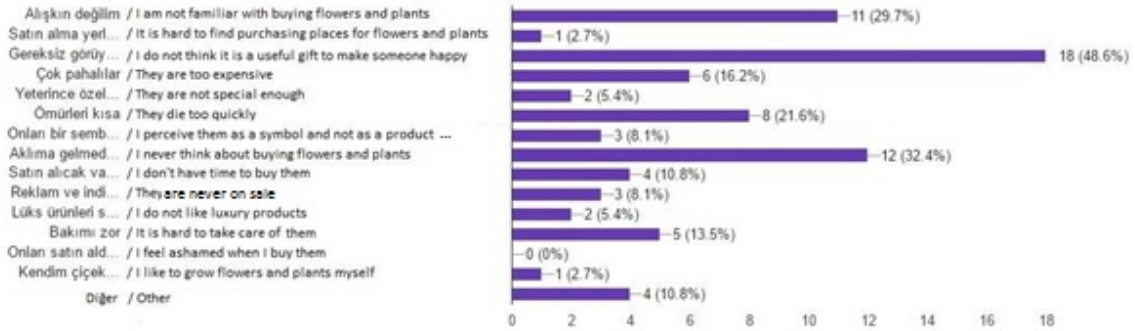


15.Çiçek ve/veya süs bitkileri nereden satın alıyorsunuz? (1'den fazla seçebilirsiniz) / Where do you buy flowers and/or plants ? (you can select more than 1)



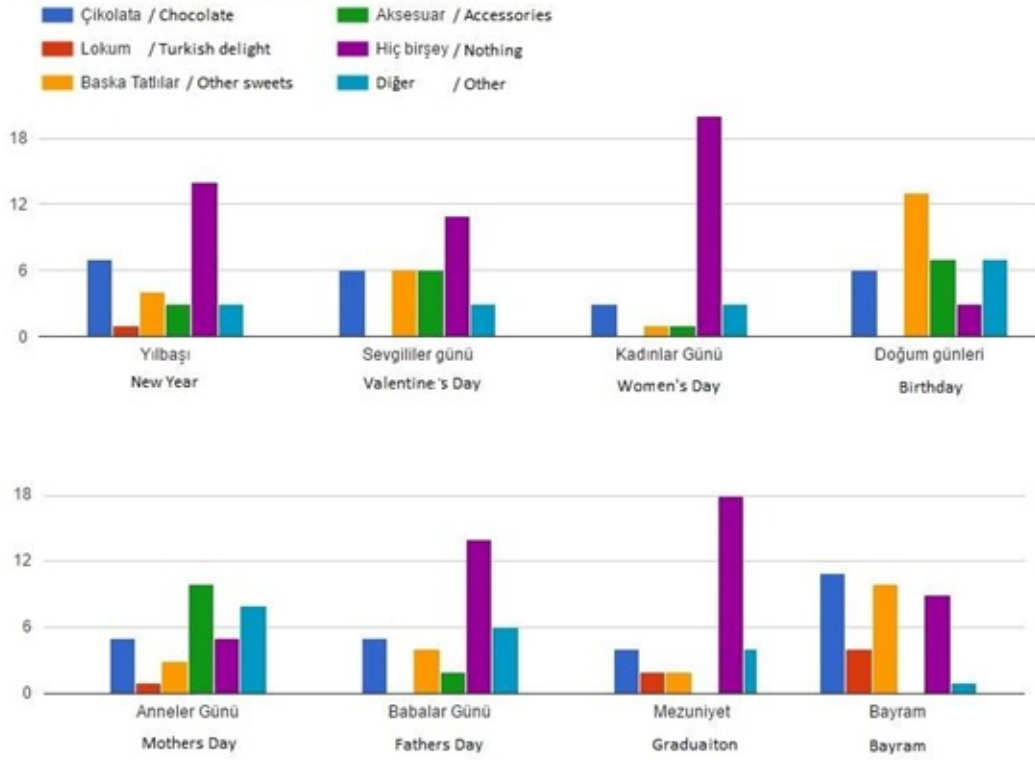
16.Neden çiçek veya süs bitkisi alıyorsunuz? (1'den fazla seçebilirsiniz) / Why do you not buy flowers or plants? (you can select more than 1)

(37 responses)



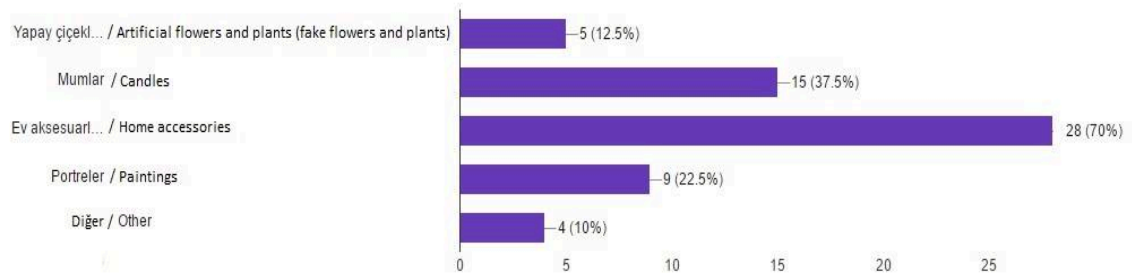


17.Çiçek veya süs bitkileri yerine hangi özel günlerde ne satın alıyorsunuz?  
Şıklarda bulunan özel günlerin tümü dahildir. / What do you buy during special occasions instead of flowers or plants?



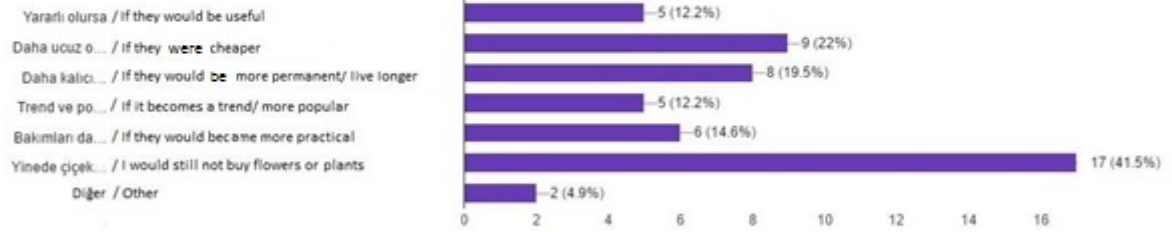
18.Çiçekler veya süs bitkiler yerine ev dekorasyonu olarak ne satın almayı tercih edersiniz? (1'den fazla seçebilirsiniz) / What do you prefer to buy as home decoration instead of flowers or plants? (you can select more than 1)

(40 responses)



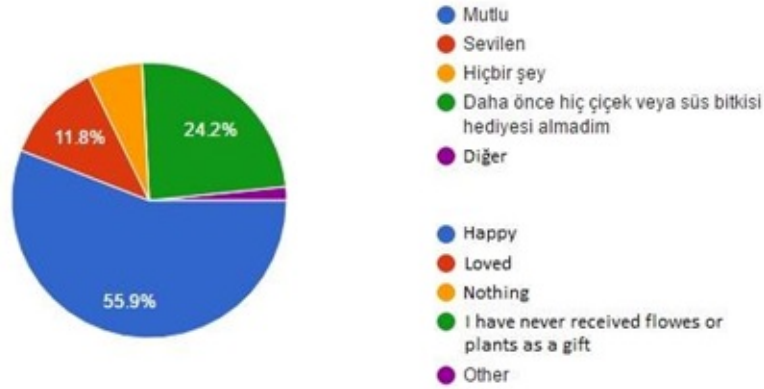
19. Ancak şu durumda çiçek ve süs bitkisi alırım: (1'den fazla seçebilirsiniz) / I do not buy flowers and/or plants, but I will buy flowers and/or plants if: (you can select more than 1 )

(41 responses)



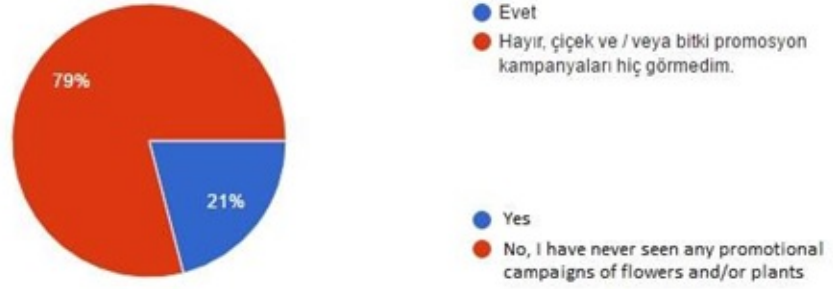
20. Çiçek veya süs bitkileri size hediye olarak verildiğinde ne hissediyorsunuz? / How do you feel when you receive flowers or plants as a gift?

(186 responses)



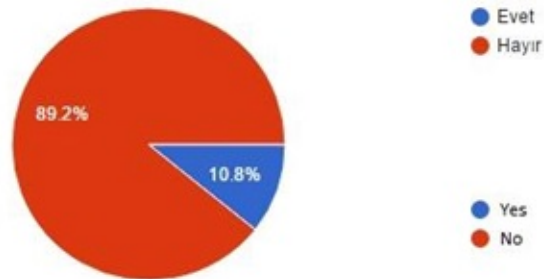
21. Hiç çiçek veya süs bitkisi promosyon kampanyaları gördünüz mü? Evet ise, nerede? / Have you ever seen promotional campaigns of flowers or plants? If yes, where?

(186 responses)

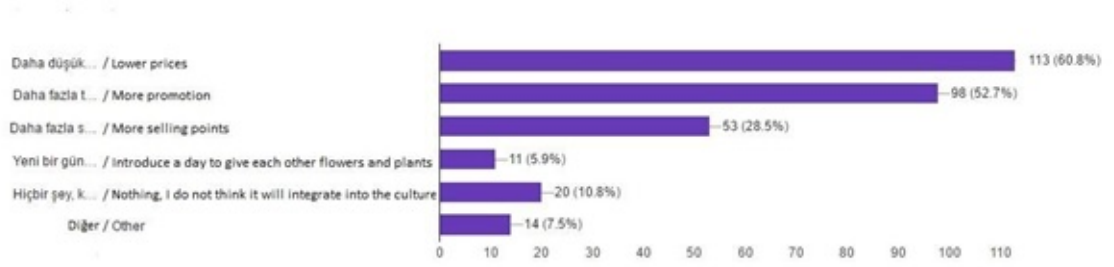


22. Promosyon kampanyaları nedeniyle hiç çiçek ve süs bitkisi aldınız mı? / Have you ever bought flowers and/or plants because of promotional campaigns?

(186 responses)



23.Çiçek ve süs bitkisi satışlarını arttırmak için ne yapılması gerektiğini düşünüyorsunuz (1'den fazla seçebilirsiniz)  
/ What do you think should be done to increase consumer spending on flowers and plants?  
(you can select more than 1) (186 responses)



## Questionnaires English

### Interview Istanbul English

**1. What is your gender?**

- ☐ Male
- ☐ Female

**2. What is your age?**

- ☐ < 21 years
- ☐ 21-30 years
- ☐ 31-40 years
- ☐ 41-50 years
- ☐ 51-60 years
- ☐ < 60 years

**3. What is your marital status?**

- ☐ Single
- ☐ In a relationship
- ☐ Married

**4. Are you employed?**

- ☐ Yes, I am
- ☐ Yes, I am a working student
- ☐ No, I am a student
- ☐ No, I do not work
- ☐ No, I am retired

**5. What are flowers and plants to you? (You can select more than one answer.)**

- |  |                                |
|--|--------------------------------|
| <input type="radio"/> A gift product                     | <i>flowers- plants - both</i>  |
| <input type="radio"/> Home decoration                    | <i>flowers- plants - both</i>  |
| <input type="radio"/> A symbol, not a purchasing product |                                |
| <input type="radio"/> Purchasing product                 | <i>flowers – plants - both</i> |
| <input type="radio"/> To show emotion                    | <i>flowers- plants - both</i>  |
| <input type="radio"/> Nothing                            | <i>flowers- plants - both</i>  |
| <input type="radio"/> Other, namely: .....               |                                |

**6. Do you prefer flowers or plants, and why?**

- ☐ Flowers, because...
- ☐ Plants, because.....
- ☐ Both, because

- None, because

**7. Do you ever buy flowers and / or plants. If yes, please select how many times per year.**

- Yes 1-2 x *flowers - plants - both*
- Yes 3-5 x *flowers - plants - both*
- Yes 6-10 x *flowers - plants - both*
- Yes 10 x or more *flowers - plants - both*
- No, I do not buy flowers
- No, I do not buy plants

**8. Why do you not buy them more often?**

- It gets too expensive
- It is not necessary, I only buy them on special occasions
- I do not buy flowers
- I do not buy plants
- Other, namely.....

**If you have selected NO at the questions above, please continue at question 16.**

**9. When do you buy flowers and /or plants?**

- To wish someone to get well soon *flowers - plants - both*
- When visiting friends or family *flowers - plants - both*
- Special occasions, namely..... *flowers - plants - both*
- To give them as present during holidays, namely: ..... *flowers - plants - both*
- Home decoration (own use) *flowers - plants - both*
- For my partner *flowers - plants - both*
- To show my sympathy, such as memorial days *flowers - plants - both*
- Other, namely: ..... *flowers - plants - both*

**10. Why do you buy flowers or plants? (You can select more than one answer.)**

- It increases my quality of life
- It is essential for my daily life
- To make someone happy
- To make myself happy
- Because I like luxury products
- Because it is easy to give them as a present
- Other, namely: .....

**11. How much would you spend on a bouquet of flowers or plants?**

- 1-10
- 11-20
- 21-30

- 31-40
- 41-50
- 50 or more

**12. What influences your decision making when buying flowers and /or plants? (You can select more than one answer.)**

- The location and availability should be convenient, for example when I buy groceries
- That the place looks fancy
- A broad assortment
- The service in the store
- Quality of the flowers and plants
- The attention and interaction with staff in the store
- Character and significance of the type of flower or plant (the story behind it)
- Colours of the flower or plant (aesthetics)
- A low price
- My family (I buy flowers and / or plants when my family wants them)
- Popularity of the flower / plant
- Familiarity of the flower / plant
- Satisfaction of the last purchase

**13. Do you first consider different shops, or browse the internet, before deciding which flower or plant you would like to buy?**

- Yes, I look at different shops before purchasing
- Yes, I first check the internet before purchasing
- No, I just go to the shop and buy what I like

**14. If you buy flowers and / or plants, which ones do you buy?**

- Striking and colourful flowers and / or plants
- Classic flowers and plants, not too striking and colourful

**15. Where do you buy flowers and / or plants? (You can select more than one answer)**

- |                                     |                                |
|-------------------------------------|--------------------------------|
| ○ Supermarket                       | <i>flowers - plants - both</i> |
| ○ Garden centers                    | <i>flowers - plants - both</i> |
| ○ Online                            | <i>flowers - plants - both</i> |
| ○ Florist                           | <i>flowers - plants - both</i> |
| ○ Do-it-yourself stores (e.g. Ikea) | <i>flowers - plants - both</i> |
| ○ Other, namely:.....               | <i>flowers - plants - both</i> |

**Please continue at question 20**

**If you answered that you do not buy flowers and / or plants, please continue with these questions**

**16. Why do you not buy flowers or plants? (You can select more than one answer)**

- ☐ I am not familiar with buying flowers and plants
- ☐ It is difficult to find places where flowers and plants are sold
- ☐ I do not think they are a useful gift to make someone happy
- ☐ They are too expensive
- ☐ They are not special enough
- ☐ They die too quickly
- ☐ I perceive them as a symbol and not as a product I would purchase
- ☐ I never think about buying flowers and plants
- ☐ I do not have time to buy them
- ☐ They are never on sale
- ☐ I do not like luxury products
- ☐ It is hard to take care of them
- ☐ I feel ashamed when I buy them
- ☐ I like to grow flowers and plants by myself
- ☐ Other, namely: .....

**17. What do you buy during special occasions instead of flowers or plants?**

New Year	Chocolate - Turkish delight (Lokum) - Other sweets - Accessories - Nothing - other, namely
Valentine's Day	Chocolate - Turkish delight (Lokum) - Other sweets - Accessories - Nothing - other, namely
Women's Day	Chocolate - Turkish delight (Lokum) - Other sweets - Accessories - Nothing - other, namely
Birthday	Chocolate - Turkish delight (Lokum) - Other sweets - Accessories - Nothing - other, namely
Mother's day	Chocolate - Turkish delight (Lokum) - Other sweets - Accessories - Nothing - other, namely
Graduation	Chocolate - Turkish delight (Lokum) - Other sweets - Accessories - Nothing - other, namely
Father's Day	Chocolate - Turkish delight (Lokum) - Other sweets - Accessories - Nothing - other, namely
Bayram	Chocolate - Turkish delight (Lokum) - Other sweets - Accessories - Nothing - other, namely

**18. What do you prefer to buy as home decoration instead of flowers or plants? (You can select more than one answer)**

- ☐ Artificial flowers and plants (fake flowers and plants)
- ☐ Candles
- ☐ Home accessories
- ☐ Paintings



- Other, namely .....

**19. I do not buy flowers and / or plants, but I will buy flowers and / or plants if: (you can select more than one answer)**

- ... they would be useful
- ... they were cheaper
- ... they would be more permanent / live longer
- ... if they became a trend / more popular
- ... if they became more practical
- I would not buy flowers or plants
- Other, namely.....

**20. How do you feel when you receive flowers or plants as a gift?**

- Happy
- Loved
- Nothing
- I have never received flowers or plants as a gift
- Other, namely.....

**21. Have you ever seen promotional campaigns for flowers or plants? If yes, where?**

- Yes, namely: .....
- No, I have never seen any promotional campaigns for flowers and / or plants.....

**22. Have you ever bought flowers and / or plants because of promotional campaigns?**

- Yes
- No

**23. What do you think should be done to increase consumer spending on flowers and plants? (You can select more than one answer)**

- Lower prices
- More promotions
- More selling points (stores)
- Introduce a day to give each other flowers and plants
- Nothing, I do not think flowers and plants will integrate into the culture
- Other, I think that .....

## Questionnaires Turkish

### Istanbul röportaj

**1. Cinsiyetiniz nedir?**

- ☐ Kadın
- ☐ Erkek

**2. Yasiniz kactir?**

- ☐ 21 yaş altı
- ☐ 21 – 30 yaş arası
- ☐ 31- 40 yaş arası
- ☐ 41- 50 yaş arası
- ☐ 51- 60 yaş arası
- ☐ 60 yaş ustı

**3. Medeni durumunuz nedir?**

- ☐ Bekar
- ☐ İlişkim var
- ☐ Evliyim

**4. Calisiyormusunuz?**

- ☐ Evet, çalışıyorum
- ☐ Evet hem öğrenciyim hem çalışıyorum
- ☐ Hayır, öğrenciyim
- ☐ Hayır çalışmıyorum
- ☐ Hayır, emekliyim

**5. Sizin için çiçek ve süs bitkileri nelerdir? (1'den fazla seçebilirsiniz)**

- |   |  |
|---|--|
| <input type="radio"/> Hediyelik   | çiçek - süs bitkileri - her ikisi de   |
| <input type="radio"/> Ev dekorasyonu  | çiçek - süs bitkileri - her ikisi de   |
| <input type="radio"/> Sadece sembolik bir ürün , bir satın alma ürünü değil | çiçekler –süs bitkiler - her ikisi de  |
| <input type="radio"/> Duygularımı ifade etmek için                          | çiçekler – süs bitkiler - her ikisi de |
| <input type="radio"/> Hiç birsey  | çiçekler – süs bitkiler - her ikisi de |
| <input type="radio"/> Diğer, yani: ..... ..                                 |  |

**6. Çiçeği mi? Yoksa, süs bitkilerini mi tercih ediyorsunuz ? Nedeni nedir ?**

- ☐ Çiçek, çünkü..
- ☐ Süs bitkisi, çünkü.....
- ☐ İkisi, çünkü
- ☐ Hiç biri, çünkü

**7. Siz hiç çiçek ve / veya süs bitki satın aldınız mı? Aldıysanız, lütfen yılda kaç kez isaretleyiniz.**

- |  |                                      |
|--|--------------------------------------|
| <input type="radio"/> Evet 1- 2 kere               | çiçek - süs bitkileri - her ikisi de |
| <input type="radio"/> Evet 3-5 kere                | çiçek - süs bitkileri - her ikisi de |
| <input type="radio"/> Evet 6 - 10 kere             | çiçek - süs bitkileri - her ikisi de |
| <input type="radio"/> Evet 10 kere veya daha fazla | çiçek - süs bitkileri - her ikisi de |
| <input type="radio"/> Hayır, çiçek almıyorum       |                                      |

- Hayır, süs bitki almıyorum

**8. Neden daha sık satın almıyorsunuz?**

- Çok pahalı olduğu için
- Gerekli değil, özel günlerde alıyorum
- Çiçek almıyorum
- Bitkiler almıyorum
- Diğer, yani .....

**8. soruya "HAYIR" cevabı verdiyseniz, lütfen soru 16'dan devam ediniz.**

**9. Ne zaman çiçek ve / veya süs bitkileri satın alıyorsunuz?**

- |                                |                                      |
|--------------------------------|--------------------------------------|
| ○ Hasta ziyaretine giderken    | çiçek - süs bitkileri - her ikisi de |
| ○ Misafirlige giderken         | çiçek - süs bitkileri - her ikisi de |
| ○ Özel günler, yani .....      | çiçek - süs bitkileri - her ikisi de |
| ○ Yerli tatillerde             | çiçek - süs bitkileri - her ikisi de |
| ○ Ev dekorasyonu (kendim için) | çiçek - süs bitkileri - her ikisi de |
| ○ Eşim için veya sevgilim için | çiçek - süs bitkileri - her ikisi de |
| ○ Anma günleri                 | çiçek - süs bitkileri - her ikisi de |
| ○ Diğer, yani: .....           |                                      |

**10. Neden çiçekler veya süs bitkileri satın alıyorsunuz? (1'den fazla seçebilirsiniz)**

- Yaşam kalitesini arttırmak için
- Günlük hayat için
- Birisini mutlu etmek için
- Kendimi mutlu etmek için
- Lüks ürünleri sevdiğim için
- Hediye olarak vermek kolay olduğu için
- Diğer, yani: .....

**11. Bir buket çiçek veya süs bitki için ne kadar harcarsınız?**

- 1-10
- 11-20
- 21-30
- 31-40
- 41-50
- 50 veya daha fazla

**12. Çiçek ve / veya bitkiler alırken karar vermenizi ne etkiler (1'den fazla seçebilirsiniz)**

- Yer ve müsaitlik kolay erişilebilir olmalı, mesela alisveris yaptığımızda
- Dükkanın görüntüsü, dizayn
- ürün çeşitliliği
- Mağazadaki servis
- Çiçeklerin ve süs bitkilerin kalitesi
- Mağaza çalışanların yaklaşımları
- Çiçek ve süs bitkilerin karakter ve anlamları (arkasındaki hikaye)
- Çiçek ve süs bitki renkleri (estetik)
- Düşük fiyat

- Ailem istediğinde
- Trend ve popüler olan çiçek ve süs bitkileri
- Bildiğim ve tanıdığım çiçek ve süs bitkileri
- Satın alimin sonrasındaki memnuniyet

**13. Çiçek ve süs bitkileri almadan önce dükkanlara veya internette araştırıyormusunuz?**

- Evet, satın almadan önce farklı dükkanlara bakıyorum
- Evet, satın almadan önce İnternet'e bakıyorum
- Hayır, sadece dükkana gidip istediğim şeyi alıyorum

**14. Ne tür çiçek ve/veya süs bitkileri satın alıyorsunuz?**

- Gösterisli ve renkli çiçekler ve / veya süs bitkiler
- Çok gösterisli olmayan çiçekler ve/veya süs bitkiler

**15. Çiçek ve / veya süs bitkileri nereden satın alıyorsunuz? (1'den fazla seçebilirsiniz)**

- |                      |                                      |
|----------------------|--------------------------------------|
| ○ Süper market       | çiçek - süs bitkileri - her ikisi de |
| ○ Bahçe merkezleri   | çiçek - süs bitkileri - her ikisi de |
| ○ Online             | çiçek - süs bitkileri - her ikisi de |
| ○ Çiçekçi            | çiçek - süs bitkileri - her ikisi de |
| ○ Kendin yap         | çiçek - süs bitkileri - her ikisi de |
| ○ Diğer, yani: ..... | çiçek - süs bitkileri - her ikisi de |

**Lütfen soru 20'den devam ediniz.**

**Çiçekler ve / veya bitkiler satın almadığınızı söylediyse, lütfen bu sorularla devam ediniz.**

**16. Neden çiçekler veya bitkiler almıyorsunuz? (1'den fazla seçebilirsiniz)**

- Alishkın deęilim
- Satın alma yerlerini bulmak zor
- Gereksiz goruyorum
- Çok pahalılar
- yeterince özel deęiller
- Ömurleri kısa
- Onları bir sembol olarak algılıyorum ve satın alma ürün olarak görmüyorum
- Aklima gelmedigimden
- Satın alıcak vaktim yok
- Reklam ve indirimler olmadigindan
- lüks ürünleri sevmiyorum
- Bakımı zor
- Onları satın aldıgımda utaniyorum
- Kendim çiçek ve bitki yetiştirmeyi severim
- Diğer, yani: .....

**17. Çiçek veya süs bitkileri yerine hangi özel günlerde ne satın alıyorsunuz? şıklarda bulunan özel günlerin tümü dahildir.**

- Yıl basi                      çikolata - lokum - baska tatlılar – aksesuar – hic birsey – baska, yani: .....

- ☐ Sevgililer Günü çikolata - lokum - baska tatlılar – aksesuar – hic birsey – baska, yani: .....
- ☐ Kadınlar Günü çikolata - lokum - baska tatlılar – aksesuar – hic birsey – baska, yani: .....
- ☐ Dogum günleri çikolata - lokum - baska tatlılar – aksesuar – hic birsey – baska, yani: .....
- ☐ Anneler Günü çikolata - lokum - baska tatlılar – aksesuar – hic birsey – baska, yani: .....
- ☐ Babalar Günü çikolata - lokum - baska tatlılar – aksesuar – hic birsey – baska, yani: .....
- ☐ Mezuniyet çikolata - lokum - baska tatlılar – aksesuar – hic birsey – baska, yani: .....
- ☐ Bayram çikolata - lokum - baska tatlılar – aksesuar – hic birsey – baska, yani: .....

**18. Çiçekler veya süs bitkiler yerine ev dekorasyonu olarak ne satın almayı tercih edersiniz? (1'den fazla seçebilirsiniz)**

- ☐ Yapay çiçekler ve sus bitkileri
- ☐ Mumlar
- ☐ Ev aksesuarları
- ☐ Portreler
- ☐ Diğer, yani .....

**19. Ancak şu durumda çiçekler ve süs bitkileri alırım: (1'den fazla seçebilirsiniz)**

- ☐ yararlı olurlarsa
- ☐ Daha ucuz olma durumunda
- ☐ Daha kalıcı daha uzun yasarlarsa
- ☐ Trend ve popüler hale gelirse
- ☐ Bakımları daha kolay olursa
- ☐ Yinede çiçekler ve süs bitkileri satın almayı düşünmüyorum
- ☐ Diğer, yani .....

**20. Çiçek veya süs bitkileri size hediye olarak verildiğinde ne hissediyorsunuz?**

- ☐ Mutlu
- ☐ Sevilen
- ☐ Hiçbir şey
- ☐ Daha önce hiç çiçek veya süs bitkisi hediyesi almadım
- ☐ Diğer, yani .....

**21. Hiç çiçek veya bitki promosyon kampanyaları gördünüz mü? Evet ise, nerede?**

- ☐ Evet, yani: .....
- ☐ Hayır, çiçek ve / veya bitki promosyon kampanyaları hiç görmedim .....

**22. Promosyon kampanyaları nedeniyle hiç çiçek ve süs bitki aldınız mı?**

- ☐ Evet
- ☐ Hayır

**23. Çiçek ve Süs bitkilerinin satışlarını arttırmak için ne yapılması gerektiğini düşünüyorsunuz (1'den fazla seçebilirsiniz)**

- ☐ Daha düşük fiyat
- ☐ Daha fazla tanıtım
- ☐ Daha fazla satış noktası
- ☐ Yeni bir günün veya mevcut bir günün özel kılınması
- ☐ Hiçbir şey, kültürün içine yerleştirilemez
- ☐ Diğer, bence .....

## **Appendix 2. Interview Florist Lale Çiçek Evi (English)**

- 1. The demand for flowers and ornamental plants in Turkey is rather low compared to European countries. What are the reasons for this?**

This is because of our culture. In addition, flowers and plants are expensive, and the minimum wage in Turkey is low. Therefore, the (low) consumption of flowers is directly related to the economic situation of the consumers. Turkey is still a developing country.

- 1. A few days ago Turkey celebrated Teacher's Day. Were there any consumers who bought flowers or plants from you on this occasion (and if so, how many)?**

There were not many people this year, because of the national KPSS exams. KPSS is a national exam, which can be taken by graduated citizens in order to find a job. However, normally there is a high demand for flowers during this day.

- 2. What is the main purpose of consumers who want to buy flowers? (A gift for a special occasion, home decoration etc.)**

Birthday, asking a woman's father for her hand in marriage, engagements in general, marriage. Normally people only buy flowers when it is needed; they really buy them with a purpose.

- 3. Why are flowers and ornamental plants not perceived as gift products?**

Flowers are not permanent, they die quickly. Also, people do not think about flowers. Flowers have no moral or other value to people. People prefer to give someone a kilo of baklava (a Turkish sweet) in order to eat it together, instead of flowers. Flowers are only visual, they have no additional purpose.

- 3. When are flowers and ornamental plants usually purchased as gifts in Turkey?**

Mother's Day, Teacher's Day, Valentine's Day, New Year's Day. These days are the days on which flowers are bought most often.

- 4. How are ornamental plants and flowers perceived? (Think about decorations, or gift products.)**

Artificial flowers are mostly bought to decorate the space in front of windows, or alternatively they are placed on tables. Pot flowers are more permanent compared to cut flowers.

- 5. Why are flowers and plants not yet integrated into the Turkish culture, and what should be done to integrate them?**

Besides the economy, people do not see flowers and plants as necessary, or as products which have any additional value.

- 6. In what ways are flowers and ornamental plants advertised in Turkey, and are there specific periods during which advertising is most effective? Are there organisations which are responsible for advertising? (Agency, media groups, people, and so on.)**

Specific times during the year, such as special events: Mother's day, Valentine's Day, New Year's Day, and Teachers' Day.

**7. Do you have any consumers who buy flowers or ornamental plants as decoration?**

This is actually uncommon. Many people buy artificial flowers or artificial plants for their homes.

**8. Why are these artificial flowers and plants more commonly consumed?**

Because they are more permanent. The prices are at the same level, differing from 30 Turkish Lira to 250 Turkish Lira (depending on the item). For instance, when a boy asks a girl's hand in marriage, many men prefer to buy artificial plants because they can be preserved as a memory. It is considered more sensible and logical.

**9. Are you promoting your flowers and ornamental plants by yourself, or do you ask other agencies and organisations to promote them for you?**

In the past, we promoted our products on local television channels. However, we stopped doing this 7-8 years ago. Previously, we promoted ourselves because there were not many florists to begin with. However, nowadays there are more florists. If we promoted ourselves more, we would probably sell more.

**10. Do you have any consumer behaviour information?**

Many people try to lower the prices of products through negotiating (haggling). Nowadays, consumers want to buy flowers and plants for a low price, but with the highest possible quality. Furthermore, people now often conduct research before buying anything.

**11. What do your consumers think about before buying a product? (Price, accessibility, research, brand)**

Mostly the price. Furthermore, they consider the aesthetics of the store and the delivery method. We, for example, also deliver our products. Not only in or outside the city, but also abroad. However, we do not have any connection with Interflora, because they ask for commission, which is too expensive for us. Other florists do work with Interflora though.

**12. What does the consumer decision making process of your customers look like? Do they, for example, just buy flowers, or do they conduct research, or ask you about specific characteristics of the flower or plant? (Do they, for example, ask which flower would best suit their teacher?)**

Yes, most of our consumers visit our store before buying. If they decide to buy a product, they might return a few days later to make the actual purchase. Many people prefer a delivery from us.

**13. Do you have any information about the type of consumers which visit your store? Do they have any specific age, characteristics, hobbies, education, or economic situation?**

Yes, the economic situation of our customers is usually good. They usually only buy products when this is necessary for a special occasion. The age group varies between 15-45 years in age. However, I can say that the average age is between 25-30 years old.

### **Interview florist Lale Çiçek Evi (Turkish)**

- 1. Avrupa ülkelerine kıyasla Türkiye’de çiçek ve süs bitkilerine talep oldukça düşük. Bunun nedenleri nedir ?**  
Kültürümüzde yok , asgari ücret düşük (1300 Turkish Lira) , çoğu insanın geçim derdi var, çiçek lüks olarak görülüyor ve hala gelişen olan ülke olduğumuz için pek çiçeğe önem verilmiyor.
- 2. Geçen öğretmenler günüydü. Bu gün için size öğretmene çiçek almak için müşterileriniz geldi mi ve ne kadar?**  
Bu sefer zayıfı, sınavlardan dolayı. Ama normalde talep yüksek oluyor.
- 3. Çiçek almak isteyenler en fazla hangi amaçla geliyor? ( hediye belirli bir gün mesela doğum günü, yılbaşı, ev esyası için v.b)**  
Doğum günü, kız isteme, nisan, düğün. Çiçekler sadece insanların ihtiyacı olduğunda alınıyor ama oylesine alınmıyor.
- 4. Çiçek ve süs bitkileri neden hediyelik olarak fazla tüketilmiyor?**  
Yakalacı olmadığından, kalıcı olmadığından çabuk bozuluyor. Akıllarına gelmiyor. Manevi değil. Genelde bir kilo tatlı daha manevi olarak görülüyor. Çiçek sadece görsel.
- 5. Türkiye’de ne zaman çiçekler ve süs bitkileri en fazla hediye olarak alınır ?**  
Anneler günü, Öğretmen, Yılbaşı, Sevgililer Günü. En çok talep olan günler o günler.
- 6. Çiçekler ve süs bitkilerini ne olarak görüyorlar ? (hediyelik,dekor vb.)**  
Yapay çiçekleri genelde kalıcı olarak vitrine, masaya koyar ama saksı çiçekleri daha biraz daha kalıcı ama diğer kesme çiçekleri biraz solanıldığı için.
- 7. Çiçek ve süs bitkileri neden Türk kültürüne yerleşmemiş ve yerleşmesi için ne yapılmalıdır?**  
Kötü düzen yükselmesi gerekir. Yani bunu manevi olarak görmesi lazım.
- 8. Türkiye’de çiçekler ve süs bitkilerinin reklamları hangi yol ile yapılmaktadır ve genellikle reklam için seçilen dönemler var mıdır ? reklamları yapan kuruluşlar hangileridir? (ajans, medya grupları, şahıs ve benzeri).**  
Dönemler: Öğretmenler, anneler, sevgililer, yılbaşı . Reklamlar çok az neredeyse yok. Potansiyel çok düşük olduğu için pek reklam yapılmıyor. Reklamları supermarketler ve çiçekçiler kendileri yapıyorlar. Çiçek noktaları siteleri yapıyorlar.
- 9. Sizde çiçek ve süs bitkilerini ev esyası olarak alınıyor mu?**  
Çok nadir. Yapay çiçek alırlar.
- 10. Yapay çiçekler neden daha fazla satılıyor?**  
Kalıcı , bozulmadığı için. Fiyat olarak 30, 40 , 50 . daha lüksleri de var 200 gecen de var. Kız istemede ya da çiçekler geliyor daha mantıklı oluyor.



- 11. Siz kendiniz reklam yapıyormusunuz veya bir organizasyon reklam yapıyor mu sizin için?**  
Eskiden yapıyorduk (7/8 sene önce) ama artık yapmıyoruz. Eskiden kendi ilcemizde olan televizyon kurumlarına veriyordum ama şimdi artık yapmıyoruz. Pek yapılmıyor artık. Ozaman cicek azdi , ozaman yapiliyordu ama simdi cicekci cogalidigi icin yapmıyoruz.
- 12. Çiçek ve sus bitkisi alan insanlardan tüketici davranislari hakkında bilginiz var midir? (once bunu sorabilirisin. Kisi cevaplayamadiginda bunlari sorabilirsin veya ekstra olarak sorabilirsin)**  
Pazarlik yapiliyor, indirim istiyor. Hem dusuk fiyat hem yuksek kalite istiyor. Piyasa arastirmasi yapiliyor.
- 13. Sizde musteriler bi ürün aldıklarında en fazla nelere dikkat ederler? (fiyat, ulasim, arastirma, marka, v.b)**  
Fiyat, guzellik, dukkanin guzelligine, cicegin teslimatina bakiyordur. Disariya da teslimat ediyoruz. Nereye istiyorsa gonderiyoruz. Interflorayla baglantimiz yok. Interflora araci yapinca daha pahali oluyor.
- 14. tüketici karar verme süreci nasıl görünür (consumer decision making process)? Mesela begendiklerini alip giderler mi veya önce size çiçek karakter hakkında sorular sorarlar mi? (mesela öğretmenime çiçek almak istiyorum hangi çiçek uygundur gibi sorular)**  
Benim musterilerim genelde bir kac gun onceden geliyor ve begendiginde geri geliyor Sonra bize teslimati sorar. Cicekci olarak bizde teslimat yapiyoruz.
- 15. Türkiye’de çiçek ve süs bitkisi alan insanların genel özellikleri nelerdir. Ne tur insanlardir yas grubu, karakter, hobi, egitim, durumu iyi olan insanlar v.b?**  
Yuksek olarak, maddi durumu iyi olan insanlar, ihtiyaci varsa gerekliyse ozaman alir. Yas grubu genellikle 15- 45 . agirlikli 25-30 arasi.

**Appendix 3. Interview Orta Anadolu Süs bitkileri and Mamulleri ihracatçıları Birliği (OAİB) (English)**

- 1. The demand for flowers and ornamental plants in Turkey is rather low compared to European countries. What are the reasons for this?**  
The fact that 'flower culture' has not become widespread yet means that people see flowers as luxury items.
- 2. Flowers and ornamental plants in the Netherlands are usually given as gifts. What are the most common gifts given in Turkey?**  
Chocolate, baklava, Turkish delight, souvenirs, decorative items, and (jewelry) accessories.
- 3. Why are flowers and plants not usually perceived as gifts in Turkey?**  
Because flowers perish quickly. People prefer long-lasting gifts.
- 4. When are flowers and ornamental plants usually purchased as gifts in Turkey?**  
When someone starts a new job, gets engaged, gets married, or has a birthday. Flowers and plants are used as gifts for special occasions.
- 5. How are ornamental plants and flowers perceived? (Think about decorations, or gift products.)**  
For decoration and ornamentation.
- 6. Why are flowers and plants not yet integrated into the Turkish culture, and what should be done to integrate them?**  
Accessibility to flowers should be easy, and prices should be low(er).
- 7. In what ways are flowers and ornamental plants advertised in Turkey, and are there specific periods during which advertising is most effective? Are there organisations which are responsible for advertising? (Agency, media groups, people, and so on.)**  
Generally, flowers and plants are advertised through florists or organisations such as InterFlora. Also, by selling them online (such as Çiçeksepeti.com, which offers flowers and plants through their website).
- 8. What kind of advertising is being created, and what kind of advertising is most successful with the audience? (Aesthetic sense of the product, usefulness of the product, useful information of the product.)**  
Mostly aesthetics and purpose (e.g. emphasis on love).
- 9. What sort of advertisements attract most attention in Turkey?**  
Price, special campaigns (discounts, etc.) and famous actors.
- 10. Do people in Turkey view flowers and ornamental plants as household products? Do you have information about the amount spent per person?**  
Yes they are. No spending information.
- 11. Why are fake flowers more popular than fresh flowers?**  
Because they are more permanent.

**12. Do you have information about consumer behavior from people who buy flowers and plants?**

-

**13. Do people in Turkey who are educated generally spend more money on flowers and plants?**

It is not fair to comment on this because everyone has different priorities.

**14. What do educated people (around the age of 30) pay attention to, when they purchase a product? (Price, transportation, research, brand, etc.)**

Brand, price, quality.

**15. In Turkey, do people who spend money on flowers and ornamental plants as gifts pay attention to the reaction of the recipient?**

They mainly pay attention to aesthetic and price.

**16. What does the consumer decision making process of this target group (people around the age of 30) look like?**

They consider whether the price and quality are is reasonable.

**17. What are the general characteristics of people who receive flowers and ornamental plants in Turkey? (Specific character, hobbies, education or training, etc.)**

They are educated.

**Appendix 3. Interview Orta Anadolu Ss bitkileri and Mamulleri ihracatıları Birlięi (OAIB) (Turkish)**

**1.Avrupa lkelerine kıyasla Trkiye’de iek ve ss bitkilerine talep olduka dşk. Bunun nedenleri nedir ?** iek kltrnn henz yaygınlařmamıř olması, insanların ieęi lks bir madde olarak grmesi .

**2.Hollanda’da iekler ve ss bitkileri genelde hediye olarak alınır. Trkiye’de en fazla hediye olarak neler verilmektedir ?**ikolata, baklava, lokum , hediyelik dekoratif eřyalar. Takı aksesuar.

**3.iek ve ss bitkileri neden hediyelik olarak gzkmyor?** iek Uzun mrl olmadıęı iin, srekli kalacak bir hediye tercih edebiliyorlar.

**4.Trkiye’de ne zaman iekler ve ss bitkileri en fazla hediye olarak alınır?** rneęin iřyeri hayırlısı, niřan, nikah, doęumgn, bayram vb. zel gnlerde iek ve bitki hediye olarak kullanılmakta

**5.iekler ve ss bitkilerini ne olarak gryorlar ? (hediyelik,dekor vb.)**

Genelde dekor ve ss olarak

**6.iek ve ss bitkileri neden Trk kltrne yerleřmemiř ve yerleřmesi iin ne yapılmalıdır?**

ieęin kolay eriřilebilir olması, fiyatlarının uygun oloması

**7.Trkiye’de iekler ve ss bitkilerinin reklamları hangi yol ile yapılmaktadır ve genellikle reklam iin seilen dnemler var mıdır ? reklamları yapan kuruluslar hangileridir? (ajans, medya grupları, sahis ve benzeri).**

Genelde ieki dkkanları veya st kuruluřu olan interflora gibi kuurmlar reklam yapıyor. Ayrıca web sitesi zerinden satıř yapan iek satıř siteleri ( rn. ieksepeti.com) gibi tarafından

**8.Ne tr reklamlar yapılmakta ve izleyicinin dikkatini en ok neler ekiyor ? (runun estetik grntusu, rne espirili yaklayis, rne ait faydalı bilgiler)** estetik ve ama ( rn sevgililer gn amcıyla vurgu)

**9.Trkiye’de reklam izleyicilerin en ok neler dikkatini ekmektedir?**Fiyat, zel kampanya (indirim vb) + grsel anlamda meřhur oyuncular

**10.Türkiye’de ki insanlar çiçek ve süs bitkilerini ev esyaşı olarak alıyor mu? Kişi başı harcanan miktarla ilgili bilginiz var mıdır?**Evet alıyorlar. Harcama bilgisi yok

**11.Sahte çiçekler neden daha fazla satılıyor?** Daha kalıcı olduğu için

**12.Çiçek ve sus bitkisi alan insanlardan tüketici davranislari hakkında bilginiz var midir?**  
-

**13.Türkiye’de ki eğitimli olan ve farkli yas grubunda olan insanlar genellikle en fazla neye para harcar?**

Buna kişisel yorum yapmak doğru değil, herkesin önceliği farklıdır.

**14.Yas grubu 30 olan eğitimli insanlar bi ürün aldıklarında neye dikkat eder? (fiyat, ulaşım, araştırma, marka, v.b)**

Marka, fiyat, kalite

**15.Türkiye’de çiçek ve süs bitkilerine para harcayan insanlar çiçekleri ve süs bitkilerini aldıklarında neye dikkat ederler? (fiyat, ulaşım, estetik, araştırma, marka)**

Estetik, fiyat

**16.Bu hedef grubun (ortalama 30 yas) tüketici karar verme süreci nasıl görünür (consumer decision making process)?** Uygun fiyat iyi kalite

**17.Türkiye’de çiçek ve süs bitkisi alan insanların genel özellikleri nelerdir? (Belirli karakter, hobi, eğitim v.b)**

Tek bildigimiz eğitimli olduklari

#### **Appendix 4. Interview Süsbir (English)**

- 1. Can you introduce yourself and your work? What sort of areas do you work in, and what has been done so far?**

My name is Murat Yilmaz and I am working for Süsbir, which is an organisation for producers of seed plants. Süsbir is one of the biggest organisations working for the public agriculture ministry. This is the only occupational organisation in the sector.

- 2. The demand for flowers and ornamental plants in Turkey is rather low compared to European countries. What are the reasons for this?**

The main reason is culture: the way in which people look at life, considering the legal and economic situation. In Europe special occasions often result in the consumption of many flowers, especially cut flowers. Think of events such as New Year and Valentine's Day. In Turkey, we have not yet reached this stage due to our social-economic structure.

- 3. Flowers and ornamental plants in the Netherlands are usually given as gifts. What are the most common gifts given in Turkey?**

All we know is that flowers are not very popular.

- 4. What are the competing products of flowers and plants?**

It depends on the budget of the person. However, the most common gifts are chocolate, Turkish delight, sweets, and electronic goods.

- 5. Why are flowers and plants not perceived as gifts in Turkey?**

Because of the social economic structure. Flowers are perceived as a luxury product. Besides, somehow many men feel ashamed when buying flowers. However, people do buy flowers when visiting a patient in the hospital or at home.

- 6. When are flowers and ornamental plants usually purchased as gifts in Turkey?**

Anniversary day, a gift for the partner, the visit of a patient, celebration, the opening of a business... Many times flowers are a symbol between lovers and thus seen as a symbol. In this regard the aesthetic of the flower is very important.

- 7. How are ornamental plants and flowers perceived? (Think about decorations, or gift products.)**

We do not have an answer for this. However, sometimes we see flowers as spiritual. They are a sort of psychological support, or a form of therapy. Other than that, the appeal of flowers is usually simply aesthetic.

- 8. Why are flowers and plants not yet integrated into the Turkish culture, and what should be done to integrate them?**

It depends on the priorities of the persons involved. The citizens of big cities, such as Istanbul, have other priorities because of their rushed and stressful lives. In addition, flowers and plants are considered luxury products, so people rarely stop to think about them.

- 9. In what ways are flowers and ornamental plants advertised in Turkey, and are there specific periods during which advertising is most effective? Are there organisations which are responsible for advertising? (Agency, media groups, people, and so on.)**

I have personally never seen campaigns or promotions on television. People who have links to the industry in general create these advertisements. I did not see advertisements in print. Of course there are magazines in this sector, which include advertisements. However, these are usually subject-specific, not general public magazines.

- 10. What kind of advertising is being created, and what kind of advertising is most successful with the audience? (Aesthetic sense of the product, usefulness of the product, useful information of the product.)**

For the consumer it must be aesthetic, it should appeal to the eye.

- 11. Do people in Turkey view flowers and ornamental plants as household products? Do you have information about the amount spent per person?**

I do not know what the average amount of money spent is. These products are becoming increasingly popular. Different people have different priorities. Educated people, whose financial situation is slightly better, and whose social and economic situation is slightly better, can spend more time on these things. The lower class might not buy flowers or plants directly from the florist, but instead prefer to buy the seeds and plant them. Nowadays, (cut) flowers are preferred by higher class consumers. However, the middle class and the lower class keep plants at home as well. Houseplants are very common here. It does not matter what the economic situation of the persons is: everybody has plants in their homes. Furthermore, women like flowers and plants more than men.

- 12. Which type of flowers are consumed most commonly?**

Cut flowers, such as roses and carnations.

- 13. Which ornamental plants are consumed most commonly?**

-

- 14. Do you have information about consumer behaviour regarding people who buy flowers and plants?**

-

- 15. Do people in Turkey who are educated generally spend more money on flowers and plants?**

-

- 16. What do educated people (around the age of 30) pay attention to, when they purchase a product? (Price, transportation, research, brand, etc.)**

-

- 17. In Turkey, do people who spend money on flowers and ornamental plants as gifts pay attention to the reaction of the recipient?**

-

- 18. What does the consumer decision making process of this target group (people around the age of 30) look like?**

-

**19. What are the general characteristics of people who receive flowers and ornamental plants in Turkey? (Specific character, hobbies, education or training, etc.)**

With ornamental plants people prefer to look at prices and select the cheapest option. It depends on the purpose for which the product is bought. If the purpose is gift-giving, the consumer will research the product before going shopping. However, if the product is intended for their own home or garden, the consumer will research the price.

*Summary*

According to Mr. Mustafa Yılmaz, the ornamental plant industry is a rapidly developing sector in Turkey, and especially in Istanbul. He states that demand in the whole sector cannot be seen as low. Urbanisation and the acceleration of urban transformation activities in big cities, such as Istanbul, affects the population-density of the city. People are living on top of each other in apartments without gardens. Because the population of Istanbul is growing, and because this is affecting the population-density and infrastructure, human living space is decreasing. This causes, for example, water problems, lack of sewage, lack of roads, and congestion. To accommodate the growing population in Istanbul, more houses are being built. People's feelings about this situation are rarely taken into account, but nevertheless the municipality is working on projects to make the city greener, and it is planting more flowers and plants. Therefore, the flower and plant industry is focussing on the environmental needs of the municipality. At the same time, domestic demand for indoor plants and cut flowers is low compared to other European countries. This is caused by inadequacy when it comes to raising awareness for flowers and plants and the ways in which they are advertised, not to mention to the socio-economic structure of the country. The industry struggles to promote and spread the use of flowers and plants for special (holiday) days in all segments of society, and accordingly the acceptance of flowers as gifts during *bairam* and special occasions.



### Interview Süsbir (Turkish)

1. **Öncelikle kendinizi tanıtip işinizden bahseder misiniz? Organizasyonun çalışma alanları ve bu zamana kadar yapılmış olan faaliyetler nedir?**  
Murat Yılmaz. sus bitkileri üreticilerine yöneticeleri için bir organizasyon. Kamu tarım bakanlığı . bu sektörde tek meslek örgütü. yarı kamuna ait.
2. **Avrupa ülkelerine kıyasla Türkiye’de çiçek ve süs bitkilerine talep oldukça düşük. Bunun nedenleri nedir ?**  
Kultur. Hayata bakis, yasama bakis kulturun icinde. Ekonomik durum. Avrupa birliğinde özellikle özel günler (yılbaşı sevgililer günü etc) özellikle kesme çiçeği büyük bir oranda çiçek tüketimi oluyor. bizde bu henüz yaygınlanmadı. Sosyal ekonomik yapı
3. **Hollanda’da çiçekler ve süs bitkileri genelde hediye olarak alınır. Türkiye’de en fazla hediye olarak neler verilmektedir ?**  
tek bildiğimiz çiçekler çok yaygın değil.
4. **Çiçek ve süs bitkilerin rakip ürünleri nelerdir?**  
sosyal ekonomide değişiyor. Çikolata, lokum, tatlı, elektronik eşya .
5. **Çiçek ve süs bitkileri neden hediyelik olarak gözükmüyor?**  
sosyo ekonomik yapı. Lüks olarak görülüyor. Many men feel ashamed when buying it. it has to do with other people. hasta ziyaretlerinde alınıyor.
6. **Türkiye’de ne zaman çiçekler ve süs bitkileri en fazla hediye olarak alınır ?**  
Anneler günü, sevgililer günü, yılbaşı, hasta ziyaretlerinde, kutlama tebrik, acil organizasyon, iş yeri  
çiçek seçimi: sevgili arası genelde internetten anlamına symbolize, Estetik önemlidir
7. **Çiçekler ve süs bitkilerini ne olarak görüyorlar ? (hediyelik,dekor vb.)**  
Bilmiyoruz destekleyici psikolojik durumu desteklemen. psikolojik terapi için. Genelde estetik amacı olur
8. **Çiçek ve süs bitkileri neden Türk kültürüne yerleşmemiş ve yerleşmesi için ne yapılmalıdır?**  
İnsanların öncelikleriyle günümüzün insanı büyük seyahatlerde başka öncelikleri oluyor çok kosturmaya stress oluyor. lüks olarak görülüyor . het komt door tempo, atlanıyor
9. **Türkiye’de çiçekler ve süs bitkilerinin reklamları hangi yol ile yapılmaktadır ve genellikle reklam için seçilen dönemler var mıdır ?**  
Televiziyonda hiç görmedim. genelde sektör ile alakası insanlar bu reklamları yaptırıyor. yazılı basında hiç reklam görmedim. Ama dergilerde basın diyelim. direkt sektörle alakalı olan yayınlarda oluyor.
10. **Ne tür reklamlar yapılmakta ve izleyicinin dikkatini en çok neler çekiyor ?**  
Estetik olması., göze itap etmeli

**11. Türkiye’de çiçekçilik zinciri var mı ?**

Evet bazem hemen son kullanıcıya gönderiliyor bazen önce kooperatiflere. mezar veya pazarlama kooperatifleri iletişimi yapabiliyor. özellikle dış mekaninkilerinden mutait firmaların özel firmaları belediyeler direk alıcı olabiliyor. Böyle bir zincir var

**12. Türkiye’de ki insanlar çiçek ve süs bitkilerini ev esyaşı olarak alıyor mu? Kişi başı harcanan miktarla ilgili bilginiz var mıdır?**

Kisi başı harcanan miktarı bilmiyorum. Gittikçe yaygınlaşıyor. İnsanların öncelikleriyle alakalı. Maddi durumu biraz daha iyi olan, sosyal ekonomik durumu biraz daha iyi olan, eğitilmiş insanlar biraz daha bu şeyler için vakit ayırabiliyor. Middenklasse / lagere klasse hemen üreticiden almasa bile evlenirinde var yada kendileri köklerini alıp büyütüyor. bunun yaşla alakası yok . bugün kesme çiçekler biraz ekonomik durumu biraz daha iyi olan insanlardan tercih ediliyorsa, salon bitkileri .... bu tür bitkiler çok yaygın. Bu insanların sosyal ekonomik durumları iyi olsun veya olmasın. Butun evlerde var. Ve kadınlarımız daha fazla seviyor

**13. Hangi çiçekler en fazla tüketiliyor?**

Kesme çiçeklerden: gül, karanfil.

**14. Hangi süs bitkileri en fazla tüketiliyor?**

-

**15. Hedef grubumuz 30-39 yaş eğitilmiş insanlardır. Bu insanlar en fazla neye para harcar ve neyi severler?**

-

**16. Bu insanlar genel olarak bir ürün aldıklarında neye dikkat eder?**

-

**17. Bu hedef grubun tüketici karar verme süreci nasıl görünür (consumer decision making process)?**

-

**18. Türkiye’de çiçek ve süs bitkisi alan insanların genel özellikleri nelerdir? (Belirli karakter, hobi v.b)**

böyle bir araştırma bizim elimizde mevcut değildir, süs bitkilerinden fiyata bakıyorlar ucuz olanı seçiyorlar. kullanıcıya yere bağlı. hediye olunca araştırılmaz. ama evinde veya bahçesinde ise araştırır ve yine fiyatı araştırırlar.

## **Appendix 5. Interview Bloemenbureau Holland (English)**

### **1. Can you explain what Bloemenbureau Holland is exactly?**

On behalf of the flower and plant sector we conduct marketing and communications. Specifically, we are tasked with inspiring consumers to spend more time thinking about flowers and plants, and encouraging consumers to consider purchasing flowers and plants. We are working business to consumer (B2C) and the 'business to business' part of this is conducted primarily by Royal FloraHolland (in close consultation of course). We are an independent organisation which is mostly funded by the members and clients of Royal FloraHolland. Our locations beside one another, which aids our co-operation. We mainly focus on Germany, France, the United Kingdom and the Netherlands. These are also the biggest markets for Royal FloraHolland. The Netherlands, our home country, is the fourth biggest market. I think that approximately 10% of all flowers and plants which are traded through Royal FloraHolland are destined for the Dutch market. This is quite specific: we are not trying to reach all consumers. Of course we would like to do this, but it would be too time-consuming. We consider how the budget and resources we have can help us to focus on the most relevant segments of society or groups of people. These groups are the result of a study from the Sinus market research organisation in Germany, which specialises in indicating consumer behaviour. This organisation also collaborates with Royal FloraHolland and the association of wholesalers, the VGB. They have both invested in the translation of the floriculture sector (flowers and plants). We asked Sinus if it would be possible to analyse consumer behaviour towards flowers and plants. The resulting analysis showed where people buy their flowers and plants, how often, and for what purpose (for example, as a gift or for personal use). A media analysis was applied to identify which types of media the consumers are using, and which they are not. The analysis indicated whether people were online, on their mobile phone, watching television, listening to radio, or reading magazines or newspapers. We have subsequently divided our consumers into six groups, although the sizes of the groups differ per country. We then selected the two most promising groups out of these six groups, which are the groups with a positive attitude towards flowers and plants. These are understandably the groups we believe have the potential to buy flowers and plants most often. These consumers are relatively easy to attract and they are able to spend money. The group which holds our main focus is the 'Cultivated Performer'. The 'Cultivated Performer' is a group which consists 60% of women between the age of 25 and 60, who are highly educated, and earn a middle to high income.

This research primarily concentrates on Western Europe, which means that we have a Western European perspective. If we were to transpose it onto Southern Europe, the composition or components might differ. As mentioned, it varies per country how big the groups are. For instance, the group in Germany is (percentually) bigger than the group from the Netherlands. Critical is that almost 20% is in the disinterested group, which means that these people do not have any interest in buying flowers and plants and are not in a position to be convinced to buy them. Because of this fact, we do not focus on them: it consumes too much effort and time. However, Germany is an important player, with 45% of flowers and plants originating in the Netherlands. This is in contrast with the Netherlands, which does not reach the 10% mark. Furthermore, France and the United Kingdom together make up approximately 17-18% of the market. For all of these four countries we have selected the same focus group, since the communication channels are relatively easy to compare. For our communication we are concentrating on the average Western European 'Cultivated Performer'.

## **2. What is your role within the organisation?**

I am the marketing manager.

## **3. Who does the Bloemenbureau Holland promote for?**

*Bloemenbureau Holland* promotes for the Netherlands, France, and Germany. Germany is already 45% and the United Kingdom 17-18% of the market.

## **4. How long has the Bloemenbureau Holland been promoting for the Netherlands and for Royal FloraHolland?**

BloemenBureau Holland started in the 1980s but has had many predecessors. We are working closely with Royal FloraHolland, which means that we have been collaborating since the very beginning.

## **5. What sort of promotions do you create for Royal FloraHolland?**

We do not work for Royal FloraHolland. However, we make sure that the products are sold via Royal FloraHolland eventually. We take care of the promotions for these brands: "Mooi wat bloemen doen" and "Mooi wat planten doen". Plants and flowers are separated, because flowers and plants perceived differently in the minds of the consumers. Plants are usually perceived as

interior items while flowers are perceived as gifts or attention. For this reason we have chosen to separate these two.

In these four countries (the Netherlands, Germany, the United Kingdom and France) we have translated our brand. For example in Germany we are known as: “Toll was Blumen machen” and “Planzfreude”. Each country has its own variant. On the basis of our segmentation we research the most effective strategy to use for our communication tools. We ensure that there is a continuous online flow, via inspiration platforms. Through these platforms we ensure communication about flowers and plants. We have different channels, such as social media channels (Facebook, Twitter, Instagram, Pinterest). These channels are used constantly.

Furthermore, we have a year-round programme for flowers: the flower calendar. This is a public relations campaign, which also determines the topics we promote on our social media channels. For instance, if there are tulips on the flower calendar, we communicate this on our social media channels.

When it comes to plants, we have a ‘residential construct’ ‘plant of the month’. Every month we select a different plant. We do the same for garden plants. However, we do this separately because it forms a specific (sub-)category. In addition, during the year, we ensure communication boosts through big media campaigns. At the moment we are implementing our “Favourite Flower Campaign”. This is a large-scale campaign which is carried out in the Netherlands and the United Kingdom. Last month this campaign was also implemented in Germany and France. During this campaign we use:

- online videos,
- outdoor advertising (such as billboards along the highway, ads in bus shelters, and posters)
- and television.

This big campaign lasted a whole month and ended on the 31<sup>st</sup> of October, 2016.

For plants we do have smaller campaigns. For instance, we have recently opened a pop-up store for plants. We also created a video (online), which is targeted at a male audience in order to promote that plants can be relevant to men too. Generally, flowers and plants are perceived as feminine products. However, they are obviously relevant to men too. For men it is important that plants are big and ‘cool’. The most important factor in this regard is the ‘story’, such as the appeal

of carnivorous plants. The story behind this plant is that you can watch the plant catching insect. The coffee plant is another example. Men can relate it to a journey they made, or they can say that their coffee beans are produced by this plant. A man can, for instance, say that he once noticed this plant in South America and the plant will therefore appear less 'soft'. We have added these stories to our online video, in which men tell each other why they are interested in different plants. These online videos have had a high rating and are shared on social media. We are concentrating on the group of men who are aged between 25-60 years (especially the younger side of this group, aged 25-40 years). These men are reachable via social media. Because of this, we are involved with online influencers who are not normally active in the flower and plants sector (such as those who work in fashion, interior, and food).

#### **6. So, other people also advertise for you?**

Yes, they do. This is actually how our Public Relations campaign works. We would like, for example, to see the editors of 'Linda' or 'Harpers Bazaar' write about flowers or plants for us. These magazines normally do not write about flowers and plants. In contrast, 'De Libelle' and 'Margriet' are always full of flowers and plants. However, we keep pushing the subject anyway. Furthermore, we are focusing on the quality of magazines which our target group read online and in print. This is improving.

#### **7. How do you promote on Facebook? Do people have to like your Facebook page first?**

Yes, people often have to like the page first. However, we also sponsor. You can sponsor an advertisement and select target profiles. We make use of selective marketing by following trends on Facebook, thereby determining the interests of our target group and ensuring that people with similar interests see the same advertisements. We do not work with mass-marketing, because that would be too expensive. On the other hand, we *do* work with Adworks. These are all strategies to reach big groups.

#### **8. Have you also done this for Royal FloraHolland?**

It is always in collaboration with Royal FloraHolland. For example, flowers and plants which are on the flower calendar, or the 'living plant of the month', which are the plants used for the for the men's commercial, are selected together with Royal FloraHolland. This means that there is always a consultation, to decide which plant is relevant at the moment and whether the plant is available. Royal FloraHolland divides the campaigns between its members and clients in order to

allow garden centers and florist to employ the same campaigns. Our communication is always about flowers and plants in general and as a result there is a wonderful platform with beautiful flowers and plants. You do not tell consumers that these flowers or plants are from Royal FloraHolland. It is not clear where the flowers and plants come from. It is like telling consumers to drink more milk, without saying it is milk from Campina (the brand). Adding the brand could make it stronger. However, you already need to have a strong brand for flowers and plants in order to do this. This is not yet the case in the floriculture sector. This means that you promote more generally and say: “Drink more milk”, “Buy more bread”, or in our case “Buy more flowers and plants”.

### **9. When and how did the flower integration start in the Netherlands?**

Integration of flowers and plants can actually complicate their sale, because it becomes more difficult to increase their desirability and their value. The average Dutch consumer has a low spending budget for flowers and plants, and people generally assume that they can buy flowers and plants anywhere. Therefore, there is a lot of choice and competition on the market. Sometimes you can buy flowers and plants cheaply in the market (or bazaar). This is also the case for Germany. Because of this, people are unlikely to spend large sums of money on flowers and plants. In the Netherlands, it is challenging to enhance the appeal of flowers and plants. In contrast, in France flowers and plants are rare as well as expensive. As a consequence, people are actually more willing to buy them. Nowadays, a grower would rather sell flowers and plants in Germany than in the Netherlands, because flowers and plants are so cheap in the Netherlands.

The flower and plant industry became integrated in Dutch culture during the Golden Age, when trade was an important element of the Dutch East India Company (VOC). This is actually where flower trade as a whole has its origins. Tulips first came from the Ottoman Empire, which was unique. Dutch traders brought these flowers to the Netherlands and started to grow them at home due to the ideal flat landscape. Over the years other flowers slowly began to make their way into the Netherlands as well. The trading position which the Dutch created during the 17<sup>th</sup> Century ensured that the Netherlands is still a country which trades in flowers today. The trading culture, combined with the landscape, made the Netherlands a flower country. People are confronted with this in the form of greenhouses along the streets, and domestically flowers remain cheap products.

Turkish people likewise see tulips as their national flower. However, they perceive the tulip as a symbol and not as a consumer product. In fact, in this regard, one of the most challenging problems in Turkey is the climate. We have discovered that people usually do not like to buy flowers when it is hot outside, because they want to spend time outside. People do not want to spend money on flowers if they are not at home. Furthermore, in the Netherlands the sale of flowers is strengthened by their role as a gift: think of Mother's Day and Valentine's Day, introduced by the Americans after the Second World War. The predecessor of *Bloemenbureau Holland* struggles to introduce flowers as a product which you give to people on specific days. They have been trying to relate these days, and flowers, to happiness. In contrast, flowers are also used on occasions of disaster and for memorials. It can therefore be said that flowers are concerned with emotions. Is this also the case in Turkey? Turkey does have a relationship with flowers. As mentioned, the tulip originated in Turkey. The name 'tulip' comes from the Ottomans who were used to wearing turbans. 'Tulip' is derived from *tuliban* → *tulipan* → *tulipa*. This means that Turkey has a historic connection with flowers. Therefore, the flower market should have some potential in Turkey.

**10. What sort of promotions would you advise for countries such as Turkey, in which flowers and plants are not yet integrated into the culture?**

First of all, I would focus on a group. I would personally recommend the European side. There, identify consumer behaviour and use of social media, and whether people live alone or with family. For instance, when people do still live with their family, they are less likely to buy a vase for flowers. Furthermore, identify which media they use and try to use existing national holidays to introduce new plants. I will not recommend setting up a new event, because this will cost too much time. Maybe it can be identified whether, for example, men watch soccer/football in order to advertise flowers during sports broadcasts. However, it should be analysed whether these men are receptive towards advertising during broadcasts. In addition, identify the location of the consumer. For instance, look at mobile data. Turkey is reasonably Western-minded, which means that people purchase many things online. Moreover, I would recommend to use media as your strategy, and target 25-40 year olds at specific times during the day. Also, identify if there is a flower supply chain. This all differs per market of course. There are many other organisations with competing promotions. An example is *Fleurop*, which is a floral chain franchise. They likewise take care of flower promotions. Besides this, there is *bloomon.nl* which promotes flowers by selling



flower subscriptions. They deliver flowers to consumers who do not want to buy them, or do not have time to buy them.

## **Interview Bloemenbureau Holland in Dutch**

### **1.Kunt u uitleggen wat bloemenbureau Holland inhoudt?**

Namens de sector doen wij de marketing en communicatie. Wij hebben de taak om consumenten te inspireren om meer over bloemen en planten te gaan nadenken, zodat zij het eerder gaan overwegen te kopen. Wij hebben hier een echte specifieke consumentenfocus in. Wij werken bijna alleen maar business to consumer. Business to business gebeurt grotendeels door Royal FloraHolland, uiteraard in nauwe samenspraak. Wij zijn wel een onafhankelijke organisatie dat deels wordt betaald door leden en klanten van Royal FloraHolland. Onze kantoren zitten ook naast elkaar, wat wel heel erg helpt voor onze samenwerking. Wij hebben puur de consumenten focus in vier landen: Duitsland, Frankrijk, Nederland en het Verenigd Koninkrijk. Dit zijn de vier grootste markten van Royal FloraHolland. Nederland is er hier één van. Nederland is er hier in orde van grootte de vierde markt in. Ik denk dat ongeveer tien procent van alle bloemen en planten die via Royal FloraHolland verhandeld worden ook voor de Nederlandse markt bestemd zijn. Het is vrij specifiek, want wij proberen niet alle consumenten te bereiken. Natuurlijk zouden wij dit wel willen. Wij bekijken hoe wij zo effectief mogelijk consumenten communicatie kunnen bedrijven. Op basis van onderzoek hebben wij ervoor gekozen om ons te richten op de twee meest relevante segmenten. Die segmenten komen uit een onderzoek van onderzoeksbureau Sinus. Dit is een onderzoeksbureau in Duitsland die de consumentengedrag in kaart brengt. Zij bedrijven samen met Royal FloraHolland en de Vereniging van Groothandelsbedrijven (de VGB) geïnvesteerd in een vertaling voor de sierteelt sector; bloemen en planten. Wij hebben gevraagd of het mogelijk was om het gedrag van mensen ten opzichte van bloemen en planten in kaart te brengen. Hier hoort ook bij waar mensen het kopen en voor welk doel. Ook komt er hier een media analyse bij kijken, zodat wij weten welke media zij gebruiken (online, mobile, televisie, radio of tijdschriften). Deze zes consumentengroepen hebben wij ingedeeld in de grootte van die groepen. Deze verschillen wel per land. De twee meest kansrijke groepen zijn hier uitgehaald: The Cultivated Performer. Deze twee groepen zijn eigenlijk al groepen die al een positieve houding voor bloemen en planten hebben, waarvan wij ook verwachten dat zij de potentie hebben om meer en vaker bloemen en planten te kopen. Deze groep mensen zijn relatief makkelijk te verleiden en hebben ook voldoende te besteden. The Cultivated Performer houdt in dat zestig procent van de groep vrouwen tussen de 25 en 60 jaar zijn met een midden tot hoge opleiding en een midden tot hoog inkomen.

Dit onderzoek focust zich op West- Europa en betekent dat de samenstelling van de groepen in Zuid- Europa anders zullen zijn. In Duitsland is een bepaalde groep bijvoorbeeld net iets groter qua percentage van de bevolking dan in Nederland. Gemiddeld kun je zeggen dat zeventien procent van de West- Europese bevolking onder deze groep valt. Zorgwekkend lijkt dat bijna twintig procent in al deze landen in de “Desinterested Group” zitten. Dit zijn mensen die absoluut geen interesse in het product hebben en ook niet te overtuigen zijn. Hierdoor richten wij ons ook niet op deze groep, omdat het teveel tijd en moeite kost.

Duitsland is al wel goed voor bijna 45% van de bloemen en planten die uit Nederland komen. Nederland is net geen tien procent. Frankrijk en het Verenigd Koninkrijk zijn beiden ongeveer rond de zeventien en achttien procent van de markt.

Verder richten wij ons op dezelfde type consumenten, zodat de media kanalen en communicatie goed te vergelijken zijn.

## **2.Wat is uw taak binnen de organisatie?**

Marketing manager.

## **3.Voor wie promoot bloemenbureau Holland?**

Wij richten ons op de volgende landen: het Verenigd Koninkrijk, Nederland, Frankrijk en Duitsland.

## **4.Hoelang verzorgt de bloemenbureau promoties voor Nederland en Royal FloraHolland?**

Bloemenbureau Holland bestaat sinds begin de jaren 80, maar heeft veel voorgangers gehad. Bloemenbureau Holland is voor en door de leden van Royal FloraHolland opgericht, dus wij werken al sinds dag één samen.

## **5.Wat voor soorten promoties voeren jullie uit voor Royal FloraHolland?**

Wij werken niet voor Royal FloraHolland, maar we zorgen er wel voor dat die producten uiteindelijk via hen verkocht worden. Wij maken onze reclames onder de merken: “Mooi wat bloemen doen” en “Mooi wat planten doen”. Wij scheiden bloemen en planten, omdat bloemen en planten voor consumenten anders beleefd worden. Zo zijn planten meer een interieur item en bloemen meer een cadeau item. Vandaar dat wij dit bewust hebben gescheiden.

Onze marketing campagnes vertalen wij in de vier landen. In Duitsland heten wij: “Toll was Blumen machen” en “Planzenfreude”. Elk land heeft hier zijn eigen variant van.

Op basis van de segmentatie onderzoeken kijken wij naar waar die consumenten zich bevinden en hoe wij onze middelen het meest effectief in kunnen zetten. Wij zorgen constant voor een *social media* stroom. Wij noemen dit inspiratieplatformen.

Wij zorgen ervoor dat daar continu over bloemen en planten gecommuniceerd wordt. Daarvoor hebben wij voor al die varianten ook eigen *social media* kanalen. Deze kanalen zijn: Facebook, Twitter, Instagram en Pinterest.

Daarnaast hebben wij een jaarrond programma voor bloemen, namelijk: De Bloemenagenda. Dit dient zowel als een publieke relatie (PR) campagne als een content programma. Dit is dus ook bepalend voor de onderwerpen die de consument op de kanalen tegen zal komen. Als daar bijvoorbeeld tulpen op de Bloemenagenda staan, communiceren wij ook op onze *social media* kanalen met name over tulpen, maar dat wil niet zeggen dat het geen andere producten kunnen zijn. Dit is in ieder geval het lijndraad.

Voor planten hebben wij de constructie woonplant van de maand. Iedere maand geven wij extra aandacht aan een plant of planten groep. Dit doen wij ook voor tuinplanten, want dit is weer een specifieke categorie binnen de planten. Daarom hebben wij ook een tuinplant van de maand. Dit zijn reguliere publieke relatie (PR) campagnes. Daarnaast willen we gedurende het jaar zorgen voor een grote media campagne. Daar voeren wij op dit moment (afgelopen dinsdag gestart) “de Liefelingsbloem Campagne”. Dit is een grootschalige campagne dat nu in Nederland en het Verenigd Koninkrijk gevoerd wordt. Deze is ook afgelopen maand in Duitsland en Frankrijk uitgevoerd. Voor bloemen maken wij gebruik van:

- Online videos
- Outdoor reclames: bushokjes, posters, langs de snelweg.
- In Nederland zelfs op televisie
- Die campagne duurt tot 31 oktober (dus de hele maand) dit is een grote campagne

Voor planten voeren wij kleinere campagnes uit, namelijk:

Een pop- up store die wij voor planten hebben geopend en een aparte online video over mannenplanten. De video over mannenplanten hebben wij gedaan om aan te geven dat planten een relevante rol voor mannen kunnen hebben. Over het algemeen worden bloemen en planten

als vrouwelijk product getypeerd. Uitstraling is belangrijk bij de typische mannenplanten. Mannenplanten moeten er namelijk groot en stoer uitzien.

Het allerbelangrijkst is dat er een sterk verhaal achter moet zitten, bijvoorbeeld dat vleesetende planten jagersplanten zijn. Hier kun je naar staren om te kijken hoe het fruitvliegjes vangt. Het verhaal achter de koffieplant is bijvoorbeeld: “dit is de plant waarmee mijn koffiebonen vandaan komen”. Mannen hebben dan een stoerder verhaal. Een ander voorbeeld is een plant die je tijdens een verre reis ben tegengekomen. Een man kan bijvoorbeeld zeggen dat hij deze plant is tegengekomen in Zuid-Amerika en maakt het voor hem minder soft. Al deze verhalen hebben wij in een film verpakt, waarbij wij mannen interviewen om aan te tonen waarom planten ook interessant voor mannen kunnen zijn. Tevens heeft dit in veel landen goed gescoord. Ook worden deze gedeeld op *social media* kanalen.

In de basis richten wij op de groep tussen de 25 en de 60 jaar met de focus op de jongerenstuk (de 25-40 jaar groep). Deze zijn met name goed te bereiken met online communicatie. Hierbij betrekken wij veel online influencers, dus *bloggers* en *vloggers* waarvan wij weten dat zij ook over hele andere onderwerpen, zoals: mode, interieur, en eten schrijven. Dit brengen wij in relatie met bloemen en planten en dit lukt tot nu toe aardig goed.

#### **6. Dus andere mensen maken ook reclame voor jullie?**

Ja, zo werkt het publieke relatie campagne eigenlijk ook. Wij willen bijvoorbeeld dat de redacties van de “Linda” of de “Harpers Bazaar” schrijven over bloemen of planten. Zij zullen het van nature minder snel doen. Tijdschriften zoals “de Libelle” of “Margriet” staan er altijd vol mee. Alhoewel, je er wel contact mee moet blijven houden. Kortom willen wij dat de wat meer hoogwaardige titels die onze doelgroepen lezen over bloemen of planten schrijven en dit lukt telkens beter. Het is belangrijk dat niet alleen wij telkens schrijven en zenden, want dat is heel erg kostbaar.

#### **7. Hoe doet u het op Facebook moeten mensen u eerst ‘leuk vinden’?**

Dat is mogelijk, maar wij sponsoren het zelf ook. Je kunt ook gewoon *ad sponsoren* en zorgen dat je doelgroepen profiel selecties maakt. Wij zorgen ervoor dat er een profiel gemaakt wordt van de consumenten met dezelfde interesses en de huidige trends op Facebook. Daarmee zorgen wij ervoor dat de mensen met dezelfde interesse groep ons reclame te zien krijgt. Dit betekent dus

dat dit heel selectief is, want massamarketing is te duur. Daarnaast werken wij ook veel met “Google Adworks”. Dit zijn manieren om op een slimme wijze grotere groepen te bereiken.

#### **8.Heeft u dit ook voor Royal FloraHolland gedaan?**

Het is altijd in samenspraak met FloraHolland. De bloemen en planten die bijvoorbeeld gebruikt worden in “de Bloemenagenda” of in “de Woonplant van de Maand” worden samengesteld in samenwerking met Royal FloraHolland. Dit geldt dus ook voor de mannen *commercial*. Er wordt altijd overlegd over welke bloemenplanten op het moment relevant zijn, of zij verkrijgbaar zijn en welke nieuwe of huidige planten verkrijgbaar zijn. Royal FloraHolland verdeelt deze campagnes onder hun leden en klanten, zodat hun verkooppunten (bijvoorbeeld een tuincentrum of bloemist) die campagnes gaan uitvoeren. In onze communicatie gaat het altijd over bloemen en planten in het algemeen, dus eigenlijk is er een categorie “communicatie”. Wij zorgen voor een mooie bloemen en planten platform en wij promoten geen merk. Wij vertellen bijvoorbeeld niet dat de bloemen van Royal FloraHolland komen en zo blijft het dus onduidelijk voor de consument waar het vandaan komt. Om een voorbeeld te geven: je zegt “Drink meer melk” en zegt dus niet dat het van Campina is. Het koppelen van een merk zou het sterker maken, mits je een bekend merk hebt. Dit is echter nog niet geldig in de bloemen en planten sector. Je zegt dus: “Drink meer melk, “Koop meer brood”, “Koop meer bloemen en plante”.

#### **9.Wanneer en hoe begon de bloemen integratie in NL?**

De integratie kan het lastig maken, want het vermindert de waarde van bloemen en planten gemakkelijk. De gemiddelde Nederlander heeft een laag bedrag over om uit te geven aan bloemen en planten. Zij zijn van mening dat het overal gekocht kan worden, zoals op de markt. Er is dus erg veel concurrentie en verkrijgbaarheid. Dit geldt ook in Duitsland. Het is in Nederland mogelijk om twee bossen bloemen voor 5 euro te kopen en hierdoor zijn mensen minder bereid om veel uit te geven aan bloemen en planten. In Frankrijk is het duurder en schaars en daardoor is de consument bereid meer uit te geven. Hierdoor heeft verkoopt een Nederlandse kweker zijn bloemen en planten liever in Duitsland dan in Nederland. In Nederland is de uitdaging daardoor om de bloemen en platen bijzonderder te maken, zodat het de Nederlandse kwekers meer winst oplevert.

De bloemen en planten cultuur is in Nederland tijdens de Gouden Eeuw geïntegreerd. In de tijd van de VOC was handel erg belangrijk voor Nederland. Destijd ging Nederland de hele wereld over om handel te drijven. Op deze manier is het ook begonnen met de bloemen en planten.

In het voormalig Ottomaanse Rijk (nu Turkije) was het uniek. De slimme Nederlandse handelaren namen het mee naar Nederland en hebben het verbouwd en geteeld in Nederland. Dit was makkelijk, omdat Nederland nat en plat is en dus gunstig is om bloemen en planten te verbouwen en telen. Destijds hebben ze uit het voormalige Ottomaanse Rijk de tulpen meegenomen en langzaam kwamen daar rozen en andere soorten bloemen bij. Kortom heeft de handelspositie van Nederland in de 17<sup>e</sup> eeuw ervoor gezorgd dat het verder werd verspreid. Als Nederland die handelscultuur en het landschap niet had, was Nederland geen bloemenland geweest. Handelscultuur en landschap betekent namelijk een goed bloemenland. Ook worden mensen er hier meer mee geconfronteerd. Mensen zien hier kassen langs de weg, komt hier vandaan dus het is goedkoop.

Verder zien Turken de tulpen wel als de nationale bloem van Turkije. In Turkije wordt het meer gezien als een symbool en minder als product. Daarnaast heeft Turkije een klimaatuitdaging. In het binnenland van Turkije zullen bloemen het minst verkocht worden als het warm is, op vakantie gaan en dus bloemen en planten als nutteloos zien als zij toch niet thuis zijn. In Nederland heeft het geholpen om de bloemen te onthouden door geefdagen te introduceren, zoals Moederdag en Valentijnsdag. De voorgangers van Bloemenbureau Holland hebben hier heel veel moeite voor gedaan om dit soort dagen te koppelen aan bloemen. Valentijnsdag is na de Tweede Wereldoorlog hier gebracht door de Amerikanen en Bloemenbureau Holland heeft er veel aan gedaan om er een bloemen geef dag van te maken. De investering helpt het in relatie te brengen met een vreugde moment. Als er bijvoorbeeld een ramp is, worden bloemen als eerbetoon gebruikt om emotie te uiten. Dit wordt veel in Zuid- Europa gedaan. Het is een idee om te kijken of dit in Turkije ook zo is. Qua geschiedenis heeft Turkije wel iets met bloemen, zoals de tulp. De tulp heeft zijn naam ook te danken aan de Ottomanen die vroeger nog tulbanden droegen. Het is afgeleid uit: tuliban → tulipan → tulipa. Hierdoor heeft Turkije dankzij zijn geschiedenis wel wat met bloemen.

**10. Wat voor soort acties zou u adviseren voor landen als Turkije, waarin bloemen en planten nog niet in de cultuur zijn geïntegreerd?**

Allereerst moet je een doelgroep hebben om op te richten. Ik zou persoonlijk de Europese kant adviseren. Identificeer het gedrag en het gebruik van *social media* van de consument en vraag of de mensen alleen of met familie wonen. Wanneer mensen met hun familie wonen, zijn ze minder geneigd om een vaas te kopen voor de bloemen. Je zou kunnen bepalen op welke media je doelgroep zit en dan proberen te koppelen aan nationale feestdagen om nieuwe bloemen of

planten te introduceren. Ik zal niet een nieuwe nationale dag verzinnen, want dat zal teveel tijd kosten. Misschien kijken de mannen van jouw doelgroep wel veel voetbal en zou je bloemen tijdens voetbalwedstrijden kunnen adverteren. Echter, moet er wel onderzocht worden of zij wel ontvankelijk zijn ten opzichte van reclame tijdens de uitzending. Bekijk ook of mensen veel *online* zijn op hun mobiel. Turkije is redelijk westers, wat betekent dat veel mensen online inkopen doen. Bovendien zou ik als doelgroep de 25-40 jarigen adviseren. Ook adviseer ik om vast te stellen of er een bloemen keten is.

In Nederland zijn er verschillende ketens en reclame soorten. Een voorbeeld hiervan is Fleurop, dat is een bloemen keten franchise. Zij nemen ook de zorg voor de bloemen promoties. Daarnaast is er ook bloomon.nl die bloemen abonnementen verkoopt. Zij leveren bloemen aan consumenten die geen tijd hebben om bloemen te kopen.



## **Appendix 6. Examples of television programmes and online influencers**

One episode as an example from the television series 'Fleur je leven'.

<http://www.sbs6.nl/programmas/fleur-je-leven/blog/post/dinsdag-25-oktober>

<http://www.medyaradar.com/rejting-sonuclari-08-Kas%C4%B1m-2016> → list of TV programmes  
and TV shows.

### **Promotions in Turkey:**

- <https://www.youtube.com/watch?v=Md02LvrC0Gk>
- <http://www.dijitalajanslar.com/cicek-sepeti-reklam-kampanyasi-hediyemgelinceben/>

### **Online influencers in Turkey**

#### **Women**

Buse Terim <https://www.youtube.com/user/buserimcomtr/featured>  
Billur Saatçi <https://www.youtube.com/channel/UCVUJq33RfLoJv6GQbXngiOg>  
Gökçe Yildirim [https://www.youtube.com/channel/UCSQdAhwaDS8IOG00IzPon\\_A](https://www.youtube.com/channel/UCSQdAhwaDS8IOG00IzPon_A)  
Duygu Özaslan [https://www.youtube.com/channel/UCYUY1iZP9t6LFbBMg\\_QOPAA](https://www.youtube.com/channel/UCYUY1iZP9t6LFbBMg_QOPAA)

#### **Men**

Can Direkli [https://www.youtube.com/channel/UCUa7e\\_BTQPbymQGYWvivcFg](https://www.youtube.com/channel/UCUa7e_BTQPbymQGYWvivcFg)  
Göze Şener <https://www.youtube.com/user/TheGozesener>  
Kubilay Sakarya <https://www.youtube.com/user/kubilaysakarya/featured>

For more online influencers, please visit this website: <http://talks.boyner.com.tr/30-turk-moda-bloggeri/>

### Appendix 6.3 – Student Ethics Form

#### European Studies Student Ethics Form

Your name:

Supervisor:

##### Instructions/checklist

Before completing this form you should read the APA Ethics Code (<http://www.apa.org/ethics/code/index.aspx>). If you are planning research with human subjects you should also look at the sample consent form available in the Final Project and Dissertation Guide.

- a. ☐ Read section 3 that your supervisor will have to sign. Make sure that you cover all these issues in section 1.
- b. ☐ Complete sections 1 and, if you are using human subjects, section 2, of this form, and sign it.
- c. ☐ Ask your project supervisor to read these sections (and the draft consent form if you have one) and sign the form.
- d. ☐ Append this signed form as an appendix to your dissertation.

##### Section 1. Project Outline (to be completed by student)

- (i) Title of Project: *How can Royal FloraHolland increase the consumer spending of Dutch flowers and plants to Turkey?*
- (ii) Aims of project: *final project for European studies and for Royal FloraHolland in order to research how Royal FloraHolland can increase the consumer spending to Turkey and what the causes are for such a low spending.*
- (iii) Will you involve other people in your project – e.g. via formal or informal interviews, group discussions, questionnaires, internet surveys etc. (Note: if you are using data that has already been collected by another researcher – e.g. recordings or transcripts of conversations given to you by your supervisor, you should answer 'NO' to this question.)

☒ YES / ☐ NO

If no: you should now sign the statement below and return the form to your supervisor. You have completed this form.

This project is not designed to include research with human subjects. I understand that I do not have ethical clearance to interview people (formally or informally) about the topic of my research, to carry out internet research (e.g. on chat rooms or discussion boards) or in any other way to use people as subjects in my research.

Student's signature \_\_\_\_\_ - date \_\_\_\_\_

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If yes: you should complete the rest of this form.

Section 2 Complete this section only if you answered YES to question (III) above.


(i) What will the participants have to do? (v. brief outline of procedure):  
Bloembureau Holland will help with explaining how the marketing and communication in the Netherlands works. The organisers in Turkey will help explaining the low spending and will explain the activities in Turkey + consumers


(ii) What sort of people will the participants be and how will they be recruited?  
Bloembureau Holland, Suspi, OAFB, owner florist

(iii) What sort stimuli or materials will your participants be exposed to, tick the appropriate boxes and then state what they are in the space below?  
Questionnaires [V] Pictures [ ] Sounds [V] Words [V] Other [ ]  
Consumers in Istanbul will answer questionnaires and the other participants, interviews

(iv) Consent: Informed consent must be obtained for all participants before they take part in your project. Either verbally or by means of an informed consent form you should state what participants will be doing, drawing attention to anything they could conceivably object to subsequently. You should also state how they can withdraw from the study at any time and the measures you are taking to ensure the confidentiality of data. A standard informed consent form is available in the Dissertation Manual.

(vi) What procedures will you follow in order to guarantee the confidentiality of participants' data? Personal data (name, addresses etc.) should not be stored in such a way that they can be associated with the participant's data.  
I will ask the participants whether they want to remain anonymous. Only the organisation will be mentioned.

Student's signature:  date: 5.10.17

Supervisor's signature (if satisfied with the proposed procedures):  date: 06-01-2017  
W.v. Leeuwen

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