




ay yıldız

aangesloten bij  **kpn**

Communications plan for AY YILDIZ the Netherlands

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Date: June 29 2007

PREFACE

This thesis forms a part of my graduation in Communication Management at the Institute of Higher European Studies. The aim of the research conducted is to explore the possibilities for AY YILDIZ in becoming the leading company in offering low-price mobile services for the Turkish society living in the Netherlands.

I would like to thank the staff of AY YILDIZ for providing the information required for conducting this research and of course Ms. Nieuweboer for her guidance and feedback in all stages of my research.

Furthermore, special thanks to my friends and family for their support, and above all their patience.

The Hague, June 2007

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1. INTRODUCTION

This report is written for AY YILDIZ the Netherlands, hereafter to be referred to as AY YILDIZ.

AY YILDIZ is a young Dutch provider of mobile telephone services aiming on the Turkish society living in the Netherlands.

AY YILDIZ is a division of KPN and has been launched on the 25th of September 2006. Prior to the Dutch introduction it has been launched in Germany (2005) and Belgium (2003). AY YILDIZ is a MVNO, a Mobile Virtual Network Operator, which is a company that does not own a licensed frequency spectrum, but resells wireless services under their own brand name, using the network of another mobile phone operator. In the case of AY YILDIZ, this mobile phone operator is KPN.

AY YILDIZ, which means MOON and STAR (as the Turkish flag) delivers Prepaid mobile services for its target audience. This group consists of 364.000 people, 1st, 2nd, and 3rd generation Dutch-Turkish citizens. AY YILDIZ is offering very low prices for its Prepaid customers (M. Basalan, personal conversation, December 18, 2007).

The aim of this thesis is to explore the possibilities for the future of AY YILDIZ in the Netherlands: how to enhance the offered services and to establish a strong marketing position within the Dutch market. Thus, to find out whether AY YILDIZ is able to achieve the goal of becoming the market leader in Prepaid mobile services for the Turkish society in the Netherlands as a trustful, valuable, and strong brand by applying the right communication mix methods.

Even though it has been only a few months since the introduction of AY YILDIZ and the number of sales are rising slowly, it has been brought to the understanding of AY YILDIZ that changes will have to be made in order to achieve higher sales numbers, but also to gain a secure market share in the mobile market with satisfied and loyal customers now and in the future.

Higher sales number, positive name recognition and high client-product satisfaction are key elements for becoming the market leader.

The Central Question can be stated as follows:

How can AY YILDIZ become the leading company in offering low-price mobile services for the Dutch-Turkish market in the Netherlands by means of marketing communication mix?

This report will cover the following sub questions:

- What is the position of AY YILDIZ?
- What are the difficulties AY YILDIZ is facing as a new product on the market?
 - What are the cause(s)?
 - How can these difficulties be overcome?
- What are the services and products offered by AY YILDIZ Germany and Belgium?
 - What can be learned from these countries?

- Who are AY YILDIZ's competitors, and how do they operate?
 - What can be learned from the competition?
- How can AY YILDIZ optimise and expand its range of services according to the wishes and demands of AY YILDIZ customers?
 - What reason(s) do/would people have to prefer AY YILDIZ above other mobile providers?
 - What is/are the USP('s) of AY YILDIZ?
 - What does the target group expect from AY YILDIZ?

In order to answer these questions the following research methods will be used:

desk research to gain background information; a **survey** will be conducted amongst clients of AY YILDIZ, in order to find out what their opinions, wishes and demands are; **conversations** will be held with the AY YILDIZ staff to gain more in-depth information about the company and the daily running of the business.

2 AY YILDIZ – A DETAILED VIEW

This first chapter will discuss the organisation of KPN and especially the department AY YILDIZ in more detail together with the mission and objectives. Furthermore information will be given on the current situation of AY YILDIZ, together with the problems it is coping with.

2.1 KPN IN A NUTSHELL

Royal KPN NV, incorporated in 1989 when the decision was taken to privatize the state-owned company in order to be able to compete in an approaching single European market, is a multimedia company in the Netherlands. While the core business of KPN is mobile and fixed-line telephony it also has a significant role to play in other divisions. To business customers, the company delivers voice, Internet and data services, as well as fully managed outsourced ICT solutions. Both nationally and internationally, KPN provides wholesale network services to third parties, including operators and service providers. In Germany and Belgium, KPN has mobile operations, and serves multiple customer segments in consumer, as well as business markets.

As of December 31, 2006, KPN served 6.3 million wire line voice subscribers, 8.6 million mobile customers, 2.1 million Internet customers and 0.3 million television customers in the Netherlands, as well as 15 million mobile customers in Germany and Belgium, while employing 29,286 individuals ("Company profile for KPN", 2006, pp.1).

AY YILDIZ is a part of the Wholesale and Operations division, which is responsible for KPN's operational activities, its Fixed and Mobile network in the Netherlands, and its Wholesale customers and portfolio in the Netherlands.

The three core countries where KPN provides telecommunication services are the Netherlands, Belgium, and Germany. As of 2004, KPN is active in the mobile telecommunication markets of these countries. KPN has a multi brand strategy, with different brands focused on different target groups.

With the introduction of AY YILDIZ, KPN gives further meaning to its multi brand – and segmentation strategy, KPN wishes to develop more tailor-made offers for specific market segments in order to care for the needs of specific target groups. ("AY YILDIZ van KPN voor Turkse gemeenschap", 2006, pp.4). The brands KPN has for mobile communications are Hi, Simyo, Sympac, Telfort, KPN, and, since 2006 AY YILDIZ. In the Netherlands KPN is the undisputed market leader in mobile telecommunications, with the brands KPN Mobile, Telfort, and Hi.

In Germany KPN is, with daughter company E-Plus, the third player on the mobile telephony market with a market share of 12, 8% (revenue 2006 was €683 million), and operates under the brands E-Plus, Simyo, AY YILDIZ Germany, and recently launched a brand for the youth under the name Vybemobiel. In Belgium, the KPN subsidiary BASE is the third supplier of mobile telephony with the brands BASE, Simyo, and AY YILDIZ Belgium. KPN's international service provider, Sympac, supplies mobile communication services for companies with offices in several countries. In addition to its own brands and services, Mobile International also partners with other companies, supplying them with

network resources to enable them to offer retail mobile services under their own label. These partner brands include Medion Mobile (Aldi Talk) in Germany, Debitel (Germany and the Netherlands), AH Mobiel (the Netherlands), Carrefour (Belgium) and Ortel (Belgium and the Netherlands) (Financiële Telegraaf, 2006, "KPN wil geografische expansie voor mobiele merken" section, pp.12-13).

When AY YILDIZ has proven to be a big success, KPN wishes to introduce other brands for specific groups, such as Suriname and the Dutch Antilles.

2.2 AY YILDIZ

Vision

AY YILDIZ states to understand as no other the importance of the strong relationship with the home country and ones need to keep in contact with friends and family in Turkey (and Germany and Belgium), but also with people within the borders of the Netherlands itself.

AY YILDIZ believes that mobile phone calls and text messages do not have to be expensive, not within the Netherlands, nor to Turkey.

Mobile phone contact is a part of day-to-day life of most people these days and therefore of vital importance. It is a fact that this day-to-day life, for many people, is partly in the Netherlands, partly in Turkey. For this reason AY YILDIZ offers its target group a new mobile brand.

AY YILDIZ wishes to make mobile phone traffic to Turkey something that is self-evident.

AY YILDIZ is not expensive, this by not giving away expensive mobile phones or any other services which are not essential for the core business of mobile phone traffic, like WAP, MMS or Internet.

With an AY YILDIZ SIM card one can only make phone calls and send text messages, but with very low costs, for calling to Turkey, and in the Netherlands from AY YILDIZ-to-AY YILDIZ.

Mission statement

AY YILDIZ wants to make mobile telephony for Turkish people *simpler, well-organized and affordable*. When making calls to Turkey, Germany, Belgium, and Dutch AY YILDIZ customers, AY YILDIZ states to provide the best solution.

"AY YILDIZ offers *quality* on the base elements of mobile telephony, a reasonable low price for the Netherlands and a very low price for Turkey for mobile phone calls and text messages.

AY YILDIZ is specially designed for the Turkish target group; by Turkish people, in Turkish with the understanding of the Turkish norms and values. AY YILDIZ *understands* the proud feeling of the Dutch-Turkish population towards the home country and the uniqueness of AY YILDIZ (as mentioned derived from the Turkish flag with moon and star) is very important. AY YILDIZ's mission is also the tightening of the ties with the home county, even is far away from here (MCA Communicatie (August 2006). "*De missie van AY YILDIZ*", p.2)

Strategy

In the communication sphere there are different types of strategies, generic and specific.

AY YILDIZ makes use of the generic strategy, which means that its strategies influence the image that the public has of AY YILDIZ.

Examples of generic strategies are open-door strategy, closed-door strategy, and PR-marketing strategy. The strategy used by AY YILDIZ is the PR-marketing strategy. This strategy implies that an organization identifies the wishes and needs in their environment, to be able to achieve the best possible effect it adjust its communication (Vos & Schoemaker 2005, p. 205).

By means the following elements AY YILDIZ wishes to influence its perceived image:

<i>Product:</i>	Simple, low-cost mobile telephony for both the Netherlands as well as Turkey.
<i>Message:</i>	The simple way to make mobile phone calls to Turkey.
<i>Communication:</i>	Consideration of the emotions and needs of the Turkish population.
<i>Communication goals:</i>	Reach approximately 2/3 of the Turkish population within a 3-year period. Become the market leader within a 3-year timeframe. Create a trustful, valuable and strong brand.

Brand Strategy of AY YILDIZ

The term brand strategy is a very broad term with many meanings. Here the elements differentiation and added value will be referred to. Brand strategies are based on differentiation and added value. Differentiation is accentuating the differences with competing brands. Added value refers to the meaning of the brand for the consumer. This can be based on functional values of the product or on symbolic values that are meaningful for the consumer (Vos & Schoemaker 2005, p. 121).

In this context the brand values of AY YILDIZ can be implemented as follows.

Turkish

All of AY YILDIZ's communication towards its target group is in Dutch as well as in Turkish. AY YILDIZ is developed by Turkish people, who understand the Turkish habits, norms and values. In this way a product comes to life meeting all wants and demands of the Turkish consumer, and recognizes the Turkish pride and solidarity.

Cheap

AY YILDIZ offers a low price-level (for calling rates see appendix 1). Very low for phone calls and text messages to Turkey and among Dutch AY YILDIZ customers, and reasonably low prices for phone calls and text messages within the in the Netherlands to other providers than AY YILDIZ.

Reliable

AY YILDIZ is endorsed by KPN. The well-known quality, reliability, and of the breadth coverage of KPN, provides an excellent signal-strength in the entire country.

Visual recognition of AY YILDIZ

- AY YILDIZ logo & KPN logo
- AYLA logo (MCA Communicatie (August 2006). "De missie van AY YILDIZ", p.3).



2.2.1 TARGET GROUP

AY YILDIZ is for all Turkish people in the Netherlands who want to keep in contact with Turkey.

The focus target group is the 2nd and 3rd generation, aged 18-35 years, mainly men (nevertheless women are taken into consideration).

The profile of the AY YILDIZ customers is:

He is modern, well-integrated, and thinks of himself as Turkish as well as Dutch.

He uses all modern telecommunication sources, and regularly watches Turkish programmes on satellite dish. He is frequently on the Internet for many purposes, like MSN, surfing, or e-mail. He thinks highly of the Turkish traditions, norms and values, and generally avoids conflict with the older generation.

Calls to Turkey are frequently made, especially on religious days, birthdays, weddings, or other family matters. It is expected of the Dutch-Turkish people to keep close contact with relatives living in Turkey, so mobile telephony is a set part of life. Now, there is a perception that calls made to Turkey are costly, so people tend to be cautious when calling.

In the world of gadgets they are not the trend setters, but the trend followers. They do not feel the need to have the newest and most modern mobile telephones; a 1-year old well-functioning mobile telephone will do just fine. All that matters is that it is of high quality.

AY YILDIZ's target group is;

- High or middle-class educated
- Reasonably conservative
- In search of the practical functionality of a product
- Cost-aware (J. van de Plas personal conversation, January 12, 2007)

2.2.2 FIELD OF FORCES OF AY YILDIZ

Organizations operate in a complex Field of Forces, which are companies, institutions, and persons that are very important to the organization. Many developments play a role within the Field of Forces in which an organization functions, among other things, economic, technological, and political developments (Vos & Schoemaker 2005, p.21-22). In order to find out AY YILDIZ's methods of business it is important to know its sources. This chapter will discuss the parties involved with AY YILDIZ, and therefore play a role in the methods and results of AY YILDIZ.

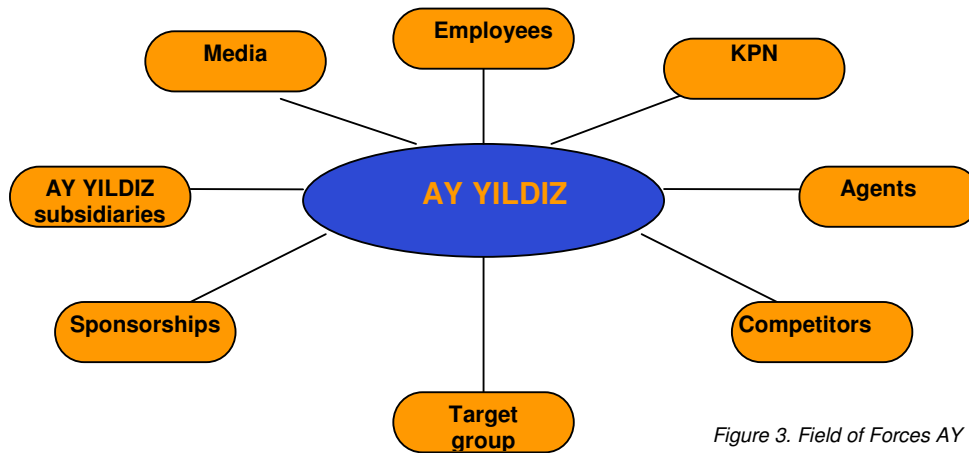


Figure 3. Field of Forces AY YILDIZ

As shown in figure 3, the most important Field of Forces of AY YILDIZ are:

Target group

AY YILDIZ is a profitable organization. Therefore it is very important to appeal to the target market, in order to keep its turnover as high as possible. The opinion of the consumers is very important for AY YILDIZ. More information about the target group is to be found in paragraph 2.2.2.

Media

The various mass media that can be employed to carry advertising messages to potential audiences or target markets for products, services, organizations, or ideas. These media include newspapers, magazines, direct mail advertising, Yellow Pages, radio, broadcast television, cable television, outdoor advertising, transit advertising, and specialty advertising. (Marketingpower, 2007, "Dictionary of Marketing terms" section, pp.1)

The media play a very important role in making or breaking an image. Eventually leading the company to success with high turnover or, when negative publicity is all a company gets, leading it to its downfall. For this reason, it is very important to gain positive media attention. In order to reach this, AY YILDIZ must be transparent, and keep the media updated about its programs that influence the Turkish society. Besides paid advertisements, this can be done by means of *Public Relations* by generating *free publicity* and the *sponsoring* of events. Free publicity has been generated at the launch of AY. YILDIZ, when a press meeting was organised by inviting various organizations.

In Chapter 5 the communications elements PR and sponsorships used by AY YILDIZ will be further discussed.

Employees

Since AY YILDIZ has been launched fairly recently it is very dependant on its employees. Since its employees are a reflection of the target audience of AY YILDIZ itself, they have to be bi-lingual (Turkish and Dutch) in order to give information to its customers. In this respect, AY YILDIZ has to invest in its employees, and recruit personnel who are familiar with both the Turkish and Dutch society. Currently AY YILDIZ has two (bilingual) *customer care employees*, one (bilingual) *channel manager*, one *communication expert*, and *two marketers*.

Besides to the office staff, there are seven *agents* hired for the tasks of distribution and monitoring sales, throughout the country in retail shops. Each has his own region in the Netherlands, like Zuid-Holland or Noord-Brabant.

Competitors

AY YILDIZ has to deal with two very serious competitors in the Netherlands. These are Lebara and Ortel. Both are experienced and specialized in mobile telephony to abroad for very low rates and are still growing. In this sense, they are making the Dutch telecommunication market extremely competitive for AY YILDIZ.

It is very important for AY YILDIZ to monitor its competitors, so it is able to anticipate on their strategies. This will allow AY YILDIZ to maintain its position in the market, and when handled well enlarge its market share.

The competition will be discussed in more detail in Chapter 3.

KPN

AY YILDIZ is endorsed by KPN and offers mobile telephony through the network of KPN. KPN has positive name recognition within the boundaries of the Netherlands as well as outside. In the minds of most people KPN stands for reliability, trustworthiness, and know-how. More information on KPN can be found in paragraph 2.1.

AY YILDIZ subsidiaries

In 2003 AY YILDIZ has firstly been introduced in Belgium. *AY YILDIZ Belgium*, endorsed by KPN subsidiary BASE, has approximately 44.000 customers. Target group are the Turkish immigrants living in Belgium. The product range consists of post paid and Prepaid contracts. Information can be gained about AY YILDIZ Belgium through its website, but the offered products can only be obtained in retail stores. Promotional activities primarily exist in the form of ads in Turkish printed media, radio, and posters.

Another by KPN endorsed subsidiary E-Plus, *AY YILDIZ Germany* has been launched in 2004.

AY YILDIZ Germany's product range consists of Prepaid SIM cards, post paid contracts, Internet, and mobile phones with and without a contract, which can be all obtained through the Internet on [the](#)

website, and in the various retail stores. The company has a target audience of 2.7 million Turks living in Germany. Currently AY YILDIZ has approximately 70.000 customers. Its main promotional activities are radio and television (with spokesperson Beyaz), printed Turkish media, and the sponsoring of Turkish events, such as concerts and sporting events.

AY YILDIZ Germany is Field of Force of much importance. Since it is very successful in Germany it has a strong influence on the Dutch target audience. This by means of word-of-mouth promotion, as many Turkish people have friends and relatives living in Germany. Furthermore, AY YILDIZ Germany television commercial are broadcasted on channels received by trough satellite dish, and most Turkish households are frequently, if not, daily viewers of the AY YILDIZ Germany television commercials broadcasted by these channels. All this has a big impact on the Dutch target group and its perception of AY YILDIZ. This is shown in the fact that people believe that the rates and other campaigns promoted on television are applicable in the Netherlands. Many calls to the AY YILDIZ customer care are made with questions concerning these. People call to ask how they can top up their calling balance with a top-up card purchased in Belgium, how to apply for a post-paid contract, and how they can purchase a mobile phone or why the rates charged are higher than what is being adverted on television, not knowing that the commercials on television are only for German AY YILDIZ customers (S.Sahin-Cosar, personal conversation, March 8, 2007).

2.2.3. SITUATION ANALYSIS

AY YILDIZ is doing fairly well as a newcomer to the telecommunications market. Nevertheless, difficulties have risen on operational aspects. Even though sales numbers are reasonably high, caution is needed in order to secure future success in the fairly crowded competitive Dutch market.

The high sales numbers are largely a consequence of the successful promotion of the Starter Package. One pays €10,- and receives a calling credit of €25,-. Caution is needed here, for more and more people are taking their advantage by buying several Starter Packages. This is resulting in high sales numbers but not in more top-ups of the calling balance, since buying a Starter Package is more advantageous than buying a top-up card.

Competitors on the market are Lebara, Ortel, Hürriyet Mobile, and Chippie, yet most competition comes from Lebara and Ortel, on which more information will be given in Chapter 3.

Since AY YILDIZ is a division of KPN, and KPN's shares are listed on Euronext Amsterdam and the stock exchanges of New York, London and Frankfurt, detailed exact numbers of sales are not to be made public. For this reason the following indication in percentages is given in figure 2 (M. Hersman, personal e-mail, March 15 2007).

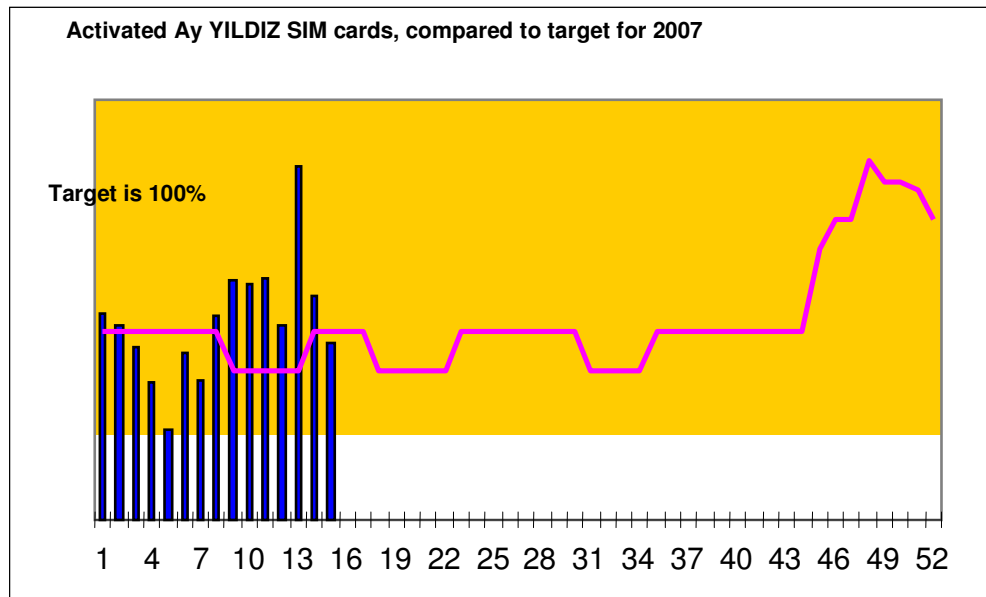


Figure 2 activated SIM cards

Offered services

AY YILDIZ Starter Packages are for sale for €10,-. When purchasing a Starter Package, a calling credit of €25, - is included, since December 2006.

AY YILDIZ Starter Packages and top-up cards can be obtained at the following sales outlets:

All 97 Primafoon shops, all 125 BelCompany shops, various Turkish shops, and mosques all around the country. Easy access to AY YILDIZ is a key reason for making the product available in every city in the Netherlands.

Another AY YILDIZ sales outlet is the Internet: on the website of AY YILDIZ one can order an AY YILDIZ SIM card which will be delivered cost-free (M. Basalan, personal conversation, December 18, 2007).

Procedure for topping up:

For topping up calling credit there are 2 possibilities:

- Online on www.ayyildiz.nl by means of IDEAL (Internet banking), credit card, or bank authorization.
- Top-up cards which can be obtained at one the many outlet stores.

AY YILDIZ is not a pure Prepaid product; it is possible for the customer to have a negative calling balance. This is different from the procedure at other mobile providers, where this possibility does not exist. For more information on the procedure of AY YILDIZ see appendix 2.1.

When using **top-up cards** to upgrade ones calling balance, one has to call the 0800-number. When calling this number one gets two options: topping up and or gaining information about the calling balance. In both cases the customer will receive a text message with information on the calling credit. When the credit balance has reached zero or further, and has been blocked for outgoing calls, one can not call the service number for topping up of the call credit. In this case one has to call the 0800-number with another mobile or fixed phone. See appendix 2.2 for more information.

Internet top-ups are simply done by logging on to one's personal page in the website of AY YILDIZ and by clicking on the desired amount for the top-up. No major difficulties have arisen in the use of this method. One does have to have easy access to a computer and Internet and make use of Internet banking of course, in order to use this method.

Top-ups can also be performed by calling the service number 1244. When calling from one's mobile phone the amount of money will be directly deducted from the bank account.

This method can not be used when the calling balance is negative though. (M. Basalan, personal conversation, December 18, 2007).

Activation of SIM cards

Even though AY YILDIZ is promoted as a Prepaid product, the process of activation differs from other Prepaid SIM cards which can be used immediately after the purchase.

For after purchasing an AY YILDIZ Starter Package, one first needs to activate the SIM card before being able to make use of the SIM card. This is done by calling the 0800-number for activation.

The maximum number of activated SIM cards per address, was originally set on 5 SIM cards. This number is brought back to 3 SIM cards, since February 2007. Several difficulties have arisen in relation to the activation line. More information on the activation procedure and its difficulties are to be found in appendix 2.3. (M. Basalan, personal conversation, December 18, 2007).

Promotional activities

Various promotional activities are undertaken, like sponsorships, radio, mosques, and ads in selected magazines aiming at the target audience of AY YILDIZ. In Chapter 5 the promotional activities will be further discussed. The effects on the sales numbers will be researched and recommendations will be given on how to make them rise further in this research thesis.

Conclusion

As mentioned above there are several operational systems that are different from other Prepaid mobile providers. These are:

- the 0800-number for topping up;
- calling data are not deducted in real-time from the calling credit, creating the possibility for a negative calling balance;
- the 0800-number for activation of the SIM card in order to receive the PIN-code on the home address before being able to use an AY YILDIZ SIM card.

Even though there are some elements that are of some concern to the target group, AY YILDIZ is still appealing to them. It is recognizable for it is Turkish (Turkish brand name), it is economic for it has low calling rates to the home country, it is accessible for it is sold both on the Internet as in outlets stores, plus the campaign where one receives a calling credit of €25,- when purchasing a Starter Package for €10,- is very attractive.

3. COMPETITORS IN THE DUTCH MARKET

The two major competitors of AY YILDIZ in the mobile communication branch are Lebara and Ortel. Both companies have launched their businesses in the Netherlands prior to AY YILDIZ, and so are in the advantage of having an already existing market share, name recognition, and experience as well as know-how.

As AY YILDIZ still needs to gain the largest part of its desired market share on the Dutch market, it is important to know the competitive representation.

Both brands can be considered as a threat for AY YILDIZ as both are specialised in mobile telephony with very low rates for abroad. The distinction with AY YILDIZ is that AY YILDIZ's target audience is only the Turkish population, with low calling rates to Turkey, Germany, and Belgium whereas Ortel and Lebara are competing with each other with low calling rates to all around the world, with a result that the target group does not feel a personal affiliation to the product. Whereas in AY YILDIZ the target audience recognizes the Turkish flag and the home country, making the experience with AY YILDIZ more personal.

This makes AY YILDIZ different than all other mobile telephony companies on the Dutch market.

Its Unique Selling Point is that is aiming at, and specialized on the Turkish population only, with a Turkish brand name, promotional activities on religious days and Turkish activities like concerts and sporting activities in Turkish media. This makes it a very recognizable brand for its target audience. When the satisfactory rate is high, higher customer fidelity will be ensured.

After AY YILDIZ, another provider aiming solely on the Turkish market has been introduced, by the name of Hürriyet Mobil. Nevertheless, since this provider is very young and has not made any remarkable impact (yet) in the mobile branch, it is not to be considered as serious competition, and therefore no further mention will be made regarding this company.



3.1 LEBARA MOBILE

The British Lebara has been introduced on the Dutch Market in 2004. Besides in the Netherlands Lebara is represented in: Denmark, Belgium, Norway, Spain, Sweden, and Switzerland. Lebara is targeting on the Turkish, Antillean, Moroccan, Surinam and the Polish segment of the mobile Prepaid telephony market, resulting in a target audience of around 3 million people. Lebara is a MVNO, like AY YILDIZ and Ortel. In the Netherlands Lebara makes use of the same telecom operator as AY YILDIZ, KPN. Lebara has a clientele of approximately 130.000 people. (Beursonline, 2007, "Belservice KPN krijgt het zwaar section", pp.8)

Offered services

The offered services by Lebara are Prepaid contract and since November 2006, post-paid SIM-only subscriptions. They do not sell mobile phones. Since the post-paid subscription are a relatively new offered service, and this segment of the business is no competition for AY YILDIZ, more research will be conducted on the Prepaid product of Lebara.

A Prepaid Lebara Starter Package can be obtained for €7,50; this includes a calling credit of €7.50. Currently Lebara has a campaign where an extra calling credit of €5, - is promoted. So when buying a Starter Package of €7,50, one obtains a calling credit of €12,50. When one has a zero credit balance, one can no longer make outgoing calls, but can still use emergency service numbers and call the service number 1244 for topping up the calling balance. The website is offered in the languages English, Dutch, Turkish, Polish, Papiamentu, Arab, Romanian, and Bulgarian.

There are three possibilities for topping up the calling balance: by calling 1244 from one's mobile phones, the amount of money will be directly deducted from the bank account; online on www.lebara-mobile.nl through IDEAL, Internet banking; by calling 1244 with top-up cards and vouchers which can be obtained at one of the 5000 sales outlets.

Lebara Starter Packages and call credit can be obtained at the following sales outlets:

BelCompany, TforTelecom, Debitel Shop, Telfort, Belhuizen, GSM Shop, Shell, Kijkshop, GWK, Travelex, Postkantoor, Dixons.

Sales outlets where only top-up cards can be obtained:

V&D, Free Record Shop, Super de Boer, Kruidvat, Texaco, BP, Total, Totaalgemak, Konmar, Music Store, Trekpleister, van Leest, Plus Supermarkten. (Lebara, 2007, "Verkooppunten SIM-kaart en beltegoed" section)

Promotional activities of Lebara

Promotional activities exist of radio commercials on FUNX, a radio station aiming on the young multi-cultural Dutch population, multi-cultural festivals, billboards and pamphlets, promotions in mosques, advertisements in Turkish newspapers, and the sponsoring of events like Kwakoe festival and Roots festival in Amsterdam. Furthermore, future commercials on Turkish television channels are in development.



3.2 ORTEL MOBILE

Ortel Mobile BV has been launched on the Dutch market in 1997. Since then, it has proven to have found a formula for success. The annual turnover (2005) has grown to €21 million.

Ortel is also MVNO and thus, makes use of the network of mobile phone operator KPN. Ortel Telecom Holding does not exist of Ortel Telecom Int. only, besides this division and the 11 Ortel Telecom Telecenters, there is also the real-estate division Orland BV.

Currently Ortel Mobile has about 50 employees working within the organization for its 115.000 customers.

The target audience is the Dutch ethnic citizens and other foreigners, to whom they offer mobile services to abroad for low rates with a qualitative high product.

Offered services

This company offers Ortel Prepaid Starter Packages, mobile phones and top-up cards, and “Bel en Bespaar”, which can be obtained at one of the outlet stores or online on the website. There are no possibilities for post-paid subscriptions.

“Bel en Bespaar” is a service offered apart from its own services; by buying an international calling card one can call from any Dutch mobile or fixed phone to abroad for low rates by calling an 0900-service number.

The costs of Ortel Starter Package are €9,95, this includes a calling credit €7,50.

When one has a zero credit balance, one can no longer make outgoing calls, but can still use emergency service numbers, and call the service number 1244 for topping up the call credit.

Topping up can be done with top-up cards and vouchers or/and through the website by means of Internet banking. The website is offered in the following languages: Dutch, English, French, Spanish, Greek, Turkish, Chinese, and Arab.

Ortel Starter Packages and top-up cards can be obtained at the following sales outlets:

Postkantoor, Goffin bank, Nettomarkt, Music Store, Ortel Telecom Centers, V&D, Primera, Kijkshop, Shell, Kruidvat, BelCompany, Trekpleister, Free Record Shop, C1000, Dixons, Totaalgemak, BP, Bruna, Debitel, Esso, Alphyra, Jumbo Supermarkten, Paybase, Total, Belwinkels, Gulf, GWK Travelex, Q8, van Leest, Plusmarkt, Texaco, Avia, Super de Boer, Konmar, Lekkerland.(Ortel, 2007, “Verkrijgbaarheid Ortel mobile” section).

Promotional activities

Most promotion activities are performed by means of sponsorship like the sponsorship of Dünya Festival in Rotterdam, Zomercarnaval in Rotterdam, Nelson Mandela Festival in Rotterdam.

Besides by means of sponsorship, Ortel is promoted through pamphlets and billboards and of course their own stores, which are very recognizable by its flags and posters.

In the following table an overview is given of the competition and AY YILDIZ for a brief insight.

Table 1: Overview competition

Lebara	Ortel	AY YILDIZ
<u>General</u> -Introduced in 2004 -Represented in 7 countries -MVNO KPN	<u>General</u> -Introduced in 1997 -Represented only in NL -MVNO KPN	<u>General</u> -Introduced in 1997 -Represented in 3 countries -MVNO KPN
<u>Target audience</u> -Turkish, Antillean, Moroccan, Surinam, Polish segment	<u>Target audience:</u> -Dutch ethnic citizens	<u>Target audience</u> -Dutch-Turkish citizens
<u>Offered services</u> -Prepaid & post-paid contracts -Starter Packages €7,50 with €12,50 calling credit -Website in 8 languages -Sales outlets: retail and website	<u>Offered services</u> -Prepaid SIM cards & mobile phones -Starter Packages €9,95 with €7,50 calling credit -"Bel en Bespaar" -Website in 9 languages -Sales outlets: retail	<u>Offered services</u> -Prepaid contract -Starter Packages €10,- with €25,- calling credit -Website in Dutch and Turkish -Sales outlets: retail and website
<u>Topping up</u> -Internet banking through website -Top-up cards -By phone, directly deducted from bank account -Zero calling balance -Ready for use when purchased -Topping up through service number or shortcut #100#	<u>Topping up</u> -Internet banking through web site -Top-up cards -Zero calling balance -Ready for use when purchased -Topping up through service number or shortcut #101#	<u>Topping up</u> -Internet banking through web site -Top-up cards -By phone, directly deducted from bank account -Negative calling balance -Activation service number -Topping up through service number
<u>Promotional activities</u> -Billboards and pamphlets -Radio - Lebara -Multi-cultural festivals & mosques -Turkish printed media - Sponsorships	<u>Promotional activities</u> -Billboards and pamphlets -Ortel stores - Turkish printed media - Sponsorships	<u>Promotional activities</u> -Billboards and pamphlets -Radio -Multi-cultural festivals & mosques -Turkish printed media -Sponsorships

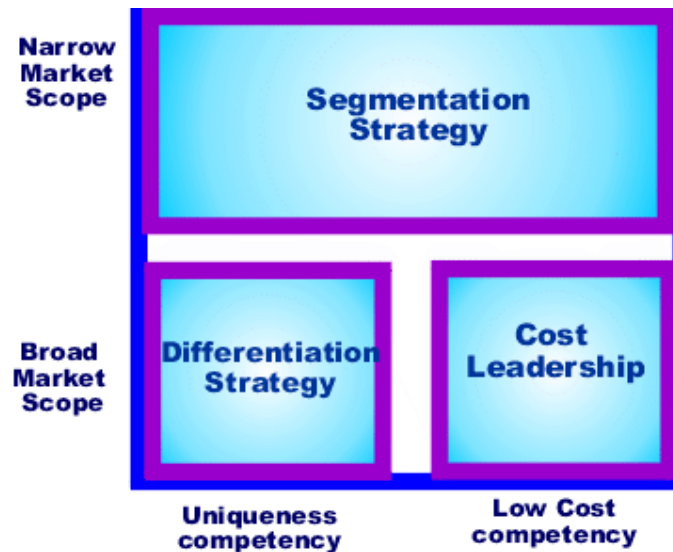
3.3 AY YILDIZ'S COMPETITIVE STRUCTURE

The competition mentioned above are not targeting one single ethnic group, they focus on all people who are frequent callers to abroad. AY YILDIZ, on the other hand, focuses itself on one specific group: the Turkish population living in the Netherlands. All campaigns and promotions are focused on them. AY YILDIZ trusts in the fact that it is a strong brand with a strong partner KPN. AY YILDIZ partly has to thank its positive name recognition to AY YILDIZ Germany. In this country the product is already a big success, with many television campaigns on the Turkish television channels on satellite dish. Because of this fact the Dutch Turkish population was long familiar with the product of AY YILDIZ, and was in a sense waiting for AY YILDIZ to be finally available in the Netherlands.

Porter uses three competition strategies (Porter 1998, p.47):

- ❑ cost leadership strategy
- ❑ differentiation strategy
- ❑ segmentation strategy

Figure 5: Strategies (Wikipedia, 2007, "Porter generic strategies", fig.1)



To differentiate itself from the competition AY YILDIZ clearly makes use of the segmentation strategy, also known as focus or niche strategy. Porter gives the following meaning to the segmentation strategy: By focussing the marketing efforts on one or two narrow market segments and tailoring the marketing mix to these specialized markets, it is hoped that one can better meet the demands of that target market. The company typically looks to gain a competitive advantage through effectiveness rather than efficiency. This strategy is most suitable for relatively small firms but can be used by any company.

According to the segmentation strategy the used marketing mix can be implemented as follows:

Product

Positioning strategies build around benefits designed to create product attractiveness and preferences (Best 2004, p.74).

The visible product of AY YILDIZ is of course the Starters Package with the SIM card and the cards for top-ups. These all carry the logo and colours of AY YILDIZ and Turkey: red and white. The broad sense of the meaning of a product includes the offered service. Also to be referred to as the post-sales relation with the company. These include the customer service, the 0800-number for top-ups, the retail stores where AY YILDIZ is sold.

Price

Strategies that are designed to enhance intentions to buy based on a price that creates an attractive customer value (Best 2004, p.74).

The price of a Starters Package in retail as when purchased on the Internet, is €10,-. This includes a calling credit of €25,-. The calling credit can be seen as a means of promotion (for calling rates see appendix 1).

Place

Strategies ensure that there is adequate availability and service to facilitate purchase (Best 2004, p. 74).

The products of AY YILDIZ can be gained at the place that is most convenient for its target audience; like at Turkish shops, mosques, Primafoon, BelCompany, on the Internet.

The choice of the sales representatives has certainly not been a random choice. With this choice, the product is very accessible for the target audience.

Promotion

Promotion is a set of strategies intended to create awareness of a product and its benefits (Best 2004, p. 74). This segment of the marketing mix will be discussed in further detail in Chapter 5.

Service

Strategies intended to enhance customer satisfaction and retain customers (Best 2004, p.74).

The offered service by the customer service of AY YILDIZ is in Turkish and Dutch. Sales outlets are outlets where the Turkish segment is familiar with, where mostly Turkish and Dutch are spoken (except for the outlet stores Primafoon and BelCompany). All written information on the products and promotional activities are in Dutch and Turkish.

The destinations with attractive low rates are those where the target audience makes frequent phone calls to.

3.4 Conclusion

After defining the competition and its activities, and having a better view on AY YILDIZ's competitive structure, one can state that all three of companies are doing their best to stay as close to their target audience as possible. Further comparisons will be given in more detail in Chapter 6, where the SWOT-analysis will be applied.

4. PROMOTION STRATEGY

This chapter will take a closer look at the communication objectives and communication tools used by AY YILDIZ.

Promotion is a very broad term. Promotion decisions are those related to communicating and selling to potential consumers. The promotional mix, as shown in figure 4, consists of five main elements (Brassington & Pettitt 2000, figure 14.1, p.560).

The choice of a strategy is made, among other things, on the development of a stage which the product is in. These stages are: the introduction of a new product, the growth stage of a product; the maturity into a fully-grown product; a product in its declining stage (Vos & Schoemaker 2005, p128). AY YILDIZ is close to the growth stage, but officially still in the introduction stage, in which stage much emphasis is put on making the target audience familiar with AY YILDIZ and its characteristics. The promotional activities are intensively carried out. As AY YILDIZ's target audience is the Turkish society living in the Netherlands, all promotional activities are focussed on reaching this group. This is done by channels that are close to this group, like for example Turkish events, Turkish magazines and newspapers, and Turkish stores. (J. van de Plas, personal conversation January 12 2007).

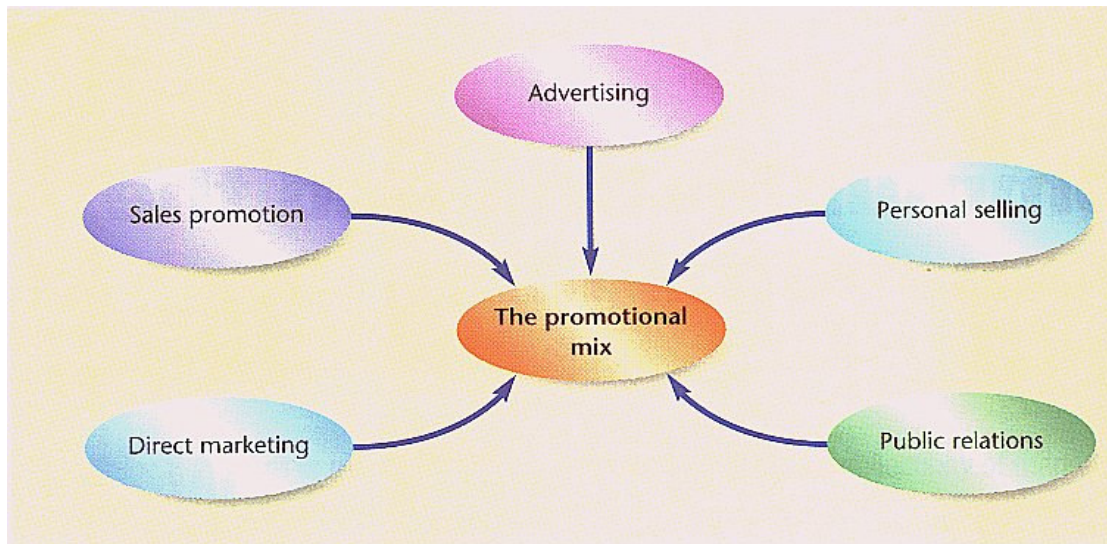


Figure 4. Promotional mix

Types of Tools used by AY YILDIZ

Personal selling

Personal selling by the firm's sales force for the purpose of making sales and building customer relationship. An effective way to manage personal customer relationships (Kotler & Armstrong 1997, p. 428). The sales person acts on behalf of the organization.

AY YILDIZ has engaged seven so-called "personal sellers", who act on behalf of AY YILDIZ. They are native Turkish speakers and familiar with the Turkish culture and business mentality, which make it

easier to access the Turkish market in the Netherlands. They are engaged with daily activities, like supplying AY YILDIZ top-up cards and Starter Packages to the sales outlets, but also with the recruitment of new AY YILDIZ sales outlets, by using their sales tactics and knowledge on AY YILDIZ and the mobile market. They act as representatives of AY YILDIZ.

Other sales representatives are the sales

Sales promotion

This element of the promotional mix tends to be thought of as being all promotions apart from advertising, personal selling, and public relations. Examples are the BOGOF promotion (Buy One Get One Free); couponing, money-off promotions, and free accessories (Marketingteacher 2007, "Promotion" section, pp.5).

A segment of the *Sales promotion* of the promotional mix is **Specialty advertising**, which is used by AY YILDIZ. According to the institute of Sales Promotion, it means: "...a range of tactical marketing techniques designed within a strategic marketing framework to add value to a product or service in order to achieve specific sales and marketing objectives (Brassington & Pettitt 2000, p.643).

Originally the price for an AY YILDIZ Starter package was €10,-, including €10, - calling credit.

In December the "December promotion" was introduced. This meant that if you would buy an AY YILDIZ Starter Package in the period from the 1st of December 2006 until the 3rd of January 2007, the received calling credit would be €25,-. Due to the remarkable success of this promotion in comparison to the first two months of the existence of AY YILDIZ, this promotion has been extended and is still applied today.

Public Relations

The deliberate, planned and sustained effort to establish, and maintain mutual understanding between an organization and its publics. PR is proactive and future orientated, and has the goal of building and maintaining a positive perception of an organisation in the mind of its publics. This is often referred to as goodwill (Marketingteacher, 2007, "Promotion" section, pp.6).

To establish and strengthen relationships AY YILDIZ invites its relations, like its suppliers to events like the concert of Tarkan.

Customers of AY YILDIZ could win tickets for the concert Tarkan held in December. To apply for tickets they had to send a text message with their AY YILDIZ-SIM card.

Furthermore, they have key chains, body warmers, ballpoints, gadgets as luggage tags and stationary cases. There is also a summer campaign planned. Further detail on this will be given when discussing "Direct Marketing" as an element of the promotional mix, since this campaign will be introduced by means of Direct Mail to the customers of AY YILDIZ.

Another means of communication of PR is *free publicity*, which contributes to the visibility of the product. When this is positive it promotes the credibility of the product. Free publicity is important for the introduction of products.

For the launch of AY YILDIZ in September a *press information day* was organized at Sultan Lounge in Rotterdam, invited were speakers like M. Visser (commercial director KPN Mobile) and M. Basalan

(Channel manager AY YILDIZ). Present were representatives from various media like “Algemeen Dagblad”, “Hürriyet”, “Dogus”, “DenizTV”, and “Platform”. Furthermore *press releases* were sent out the various media, present or not present at the press information day.

Other press releases are occasionally send out by AY YILDIZ, for example after the concert of Tarkan, of which AY YILDIZ was the main sponsor.

Direct Marketing

Direct marketing, also referred to as Direct Mail, is very highly focussed upon targeting the (potential) consumers upon a database. The (potential) consumer is ‘defined’ based upon a series of attributes and similarities. The mail is sent out to the (potential) consumers and responses are carefully monitored. Direct-mail advertising has several advantages, including detail of information, personalization, selectivity, and speed (Marketingteacher, 2007, “Promotion” section, pp.8).

€50, - = €75,-,

In the month June a direct mail is to be send out to all current customers of AY YILDIZ.

When topping up the calling with €50, - in the period June 15 - August 15, an extra calling credit of €25, - will be added to the calling credit.

The direct mail will include:

- a two-sided personalised letter (front Dutch, back Turkish)
- a flyer, with a summary of the summer promotion with more in depth-information;
- a luggage tag with the logo of AY YILDIZ on it and the text €50, - = €75,-, which is the name of the summer campaign. This will be the first time that AY YILDIZ is using this means of promotion (J. van de Plas, personal conversation, January 12 2007).

Advertising

Advertising is any paid form of non-personal presentation and promotion of ideas, goods, or services by any paid form of promotion. It is used to develop attitudes, create awareness, and transmit information in order to gain a response from the target market. Advertising directs a message at large numbers of people with a single communication, in other words it is a mass medium. Examples of advertising are media, television, radio, outdoor advertising like billboards, and printed media like newspapers and magazines. (Marketingteacher, 2007, “Promotion” section, pp.10).

The following advertising methods are to be applied to AY YILDIZ as a means to create more awareness and name recognition on AY YILDIZ and raise sales numbers:

- Radio

During the period December 5-December 18 2006 a radio campaign was introduced. The radio advert, with a length of 25 seconds, was spoken in Turkish and in Dutch and broadcasted by the radio stations FunX and Juize FM. This was to promote the “December promotion”. The radio advert was broadcasted 152 times on FunX and 140 times on Juize FM.

Fun X is a radio station for young people from different ethnic backgrounds; it plays a mixture of music kinds, like mainstream pop music, Arab Raï, and Turkish pop music. Its target audience is aged between 15-35 years, with the emphasis on 15-25 years. More than a quarter of this group

has a non Dutch background. *Juize FM* plays Hip Hop and R&B. The target audience is aged 13-34 years. It has a listeners audience of approximately 300.000 people, 50% of this group is from different ethnic backgrounds (MCA Communicatie (December 2006) "Promotie", p.2

- Television

A television commercial was broadcasted on Turkish channels (to be received by satellite dish) from September until December 2006. The advert was showing Beyaz (a famous Turkish talk show host), a well-known figure by almost the entire Turkish community, promoting the introduction of AY YILDIZ in the Netherlands.

In February 2007 again adverts of AY YILDIZ were broadcasted, this time to promote the concert of Tarkan in March 2007. AY YILDIZ was the main sponsor of this event (J. van de Plas, personal conversation, January 12 2007).

- Billboards

In this same period billboards were to be seen in cities like The Hague, Rotterdam, and Amsterdam (cities with large Turkish populations). These billboards showed Beyaz as the spokesperson of AY YILDIZ (J. van de Plas, personal conversations, January 12 2007).

- Printed media

Especially in the month December this medium was used in various magazines and newspapers in order to promote the "December promotion" and later February and March, the concert of Tarkan (sponsored by AY YILDIZ). Turkish newspapers *Milliyet* and *Hürriyet* showed ads of AY YILDIZ, as did the magazines *Merhaba*, *Platform*, *Dogus*, and *Ekin* (J. van de Plas, personal conversation, January 12 2007).

Sponsorships

Sponsoring is a tool which especially offers opportunities for awareness, a stronger stressing of distinctive features and the building up of goodwill in society. Sponsoring distinguishes itself from giving donations because something in return is required, usually promotion of the name of the sponsor by linking it to activities of the sponsored party, like sports and culture (Vos & Schoemaker 2005, p.68)

On the 3rd of March 2007 Tarkan gave a concert in AHOY Amsterdam, sponsored by AY YILDIZ.

Tarkan is a well-known Turkish singer worldwide, who enjoys Ricky Martin-style popularity in Turkey since 1994. Another event sponsored by AY YILDIZ was the stand up comedy show in April 2007 in De Doelen in Rotterdam by Ata Demirer, a successful Turkish performer.

Furthermore, AY YILDIZ has been the main sponsor during a soccer tournament in December 2006 for Avni Spor, a Turkish soccer team from Enschede. (J. van de Plas, personal conversation, January 12 2007).

Internet marketing

Internet marketing means providing information and/or promoting a company, service or product through the World Wide Web.

The Internet is another important medium for AY YILDIZ. The AY YILDIZ website is an attractive site where information on AY YILDIZ is provided and where can order a Starter Package and topping up the calling balance. For the concert of Tarkan tickets were to be won by participation in a match.

There are banners of AY YILDIZ to be found on the website of "Sahmeran", a well-known party organization in Turkish circle for Turkish parties and concerts in Rotterdam.

Celebrity marketing

This is a type of advertising in which a well-known figure, a celebrity, uses his or her status in society to promote a product or a service.

As Slecht quoted in her 2003 research paper "a celebrity endorser is an individual who is known by the public (...) for his or her achievements in areas other than that of the product class endorsed." (Slecht C. (2003). p. 63).

This type of advertisement was implemented by AY YILDIZ at its launch in September 2006. This by using Beyaz (famous Turkish talk show host) as its spokesperson in the television commercials and on its posters and pamphlets. Even though officially this endorsement campaign ended at the end of December 2006, the pamphlets are still in running and in the minds of the public Beyaz is linked to AY YILDIZ. Of influence is also the fact Beyaz still is the spokesperson of AY YILDIZ Germany, where still active campaign is run by means of commercials on channels, to be received by satellite dish in Germany, but also in the Netherlands.

5. CONCLUSION AND RECOMMENDATIONS

This final chapter will give conclusions and recommendations for AY YILDIZ, which they could implement for improvement of the current offered services and product. These conclusions and recommendations are based on the conducted primary and secondary research methods. In other words, this chapter will give answers to the Central Question of this investigation.

In the introduction the definition of the problem for the report has been stated as follows:

How can AY YILDIZ become the leading company in offering low-price mobile services for the Dutch-Turkish market in the Netherlands by means of marketing communication mix?

5.1 CONCLUSION

AY YILDIZ is doing well as a newcomer on the mobile telecommunications market. It has set a clear goal for itself for becoming the market leader. After all the information gained during the process of investigation, I believe these goals can be reached, but only if the right marketing communication mix is applied in accordance with the concerns and desires of the target audience for improving the offered products and services of AY YILDIZ.

I hope this paper will be useful for AY YILDIZ, and putting (some of) my recommendations into action will help them to achieve the goal of becoming the market leader.

When analysing the results of the survey it is understood that the customers find some aspects of AY YILDIZ very positive, yet others very negative.

These negative elements of AY YILDIZ can be categorized as operational matters within the company, which are;

- *The activation system*
One has to give his/her personal information, for receiving a letter with the PIN-code a few days after the activation.
- *The possibility for a negative calling balance.*
The survey shows clearly that a zero calling balance is preferred, as people do not wish to be in debt with their Prepaid mobile provider.
- *A maximum of 3 SIM cards per address.*
Since most people were not informed on this subject, this should be categorized as a negative aspect. Another reason for perceiving this as a negative aspect, is the fact that many households exist of more than 3 people, and by implementing this maximum, certain people of the target audience are automatically left out.
- *The system for topping up.*
One has to call a 0800-number for topping up. Yet, when there is no calling credit left, this number can not be reached. One has to call with another phone number for topping up ones AY YILDIZ calling credit.

5.2. SWOT. ANALYSIS OF AY YILDIZ

This section will first look at the SWOT analysis and the confrontation matrix of AY YILDIZ. In my opinion it is very important to look at the strengths and weaknesses and the opportunities and threats of AY YILDIZ before giving any specific recommendations. When forming the SWOT-Analysis the findings of the *Survey Results* (see appendix 4) are taken into consideration.

Table 2. SWOT analysis AY YILDIZ

INTERNAL ANALYSIS		EXTERNAL ANALYSIS	
STRENGTHS		OPPORTUNITIES	
S1	Strong product	O1	Expanding product range
S2	High name/logo recognition	O2	Market growth
S3	Qualified sales personnel	O3	Broaden target audience
S4	Recognizable for target audience	O4	Learn from competitors and
S5	Good reputation	O5	Learn from AY YILDIZ subsidiaries
WEAKNESSES		THREATS	
W1	Poor operational system	T1	Competitors
W2	Unsatisfactory use of communication tools	T2	Growing substitutes
W3	Start up phase		
W4	Narrow product range		

Confrontation Matrix

Table 3. Confrontation Matrix

INTERNAL ANALYSIS	EXTERNAL ANALYSIS	
	Strengths	Weaknesses
Opportunities	S-O - Growth - Maintain high position in market	W-O - Improve / change into strengths
	S-T - Defend / Compete with strengths - Differ from competitors	W-T - Improve the knowledge of the market
Threats		

5.3 RECOMMENDATIONS

Taking these matters into consideration together with the other survey results, the following recommendations are given:

The activation process should be eliminated. This is a roundabout way of doing business for a Prepaid system. When purchasing a Prepaid SIM card one should be activated already, and be able to make calls immediately after purchasing. This should be done after the possibility for gaining a **negative calling balance** has been eliminated. A zero calling balance is desired by the customers. This way, the customer will have no debts at AY YILDIZ, and will be able to top-up his/her calling balance, even if there is no calling credit left, without the requirement of a second phone number. When applying these changes, the problem with losses of income will automatically be eliminated as well. With the current system AY YILDIZ has no means for checking the credibility of the given addresses during the current activation system, thus not able to retrieve the money from the people who have a negative calling balance, but have given a false address.

After both this processes have been changed, there is no more need for the **maximum set on SIM cards per address**. As this maximum is set to limit the damages from the negative balances of people who have given a false address.

I do believe that these problems should be resolved before making further changes (as will be recommended below), since these are key issues for AY YILDIZ in meeting the wishes of the target audience.

Further recommendations concern the marketing communicating strategy as implemented by AY YILDIZ. Even though the company has a good strategy I do believe there are some gaps within it, and the following recommendations (with consideration of the survey results) are therefore in order:

- *Broaden range of target audience*

The current target audience of AY YILDIZ is mainly Turkish men in the ages of 18-35 years old.

Even though women are taken into consideration, I believe the promotional activities should include **specific promotional campaigns aimed at women**, since this group can be a good source of income, thus broaden the target audience of AY YILDIZ. This can be done by promotional activities targeted at women where gifts are given when purchasing an AY YILDIZ Starters Packages. These **gifts** could be jewellery for your mobile phone or a key chain of AY YILDIZ, with this last one targeting on Turkish women as well on the men.

- *Broaden product range*

Mobile phones could be offered, in combination with the current Prepaid Starters Package or by offering **Post-paid contracts** with mobile phones. I also recommend AY YILDIZ to offer **SMS-bundles** in combination with a Post-paid contract. Customers could choose for example for a SMS-bundle for Turkey, which would be economic for the customer, and be an extra source of income for AY YILDIZ, since customers would be more readily to send text messages.

Furthermore, I recommend including **France** into group of countries with low calling rates (Belgium, Germany, and Turkey), since in the survey it is made clear that frequent phone calls are made by using the services of another mobile provider. The competitors offer lower rates to France than AY YILDIZ currently does.

Finally, offering **€20,- top-up cards** is recommended, since currently only €10,- top-up cards are offered, while many people top-up several times a week.

By broadening its product range AY YILDIZ will be able to better compete with its competitors, since the recommendations made below, are mostly offered already by its competitors.

- *Create more awareness*
 - A promotional campaign should be launched for promoting **low calling rates for calling among AY YILDIZ customers**. This would attract more people to buy AY YILDIZ for calling within the Netherlands.
 - Since initial acquaintance through the Internet is very low, I recommend creating **more brand awareness through the Internet**. This can be achieved through links and more banners on websites frequently visited by Turkish people.
 - The rate of **purchases and top-ups on Internet**, at the website of AY YILDIZ is far less than the purchases and top-ups in retail. Internet purchases and top-ups could be stimulated by promotional campaigns, like a bonus calling credit when purchasing or topping up through the website of AY YILDIZ.
 - **Advertise on Dutch television** on Turkish regional programmes.

In order to clarify the points mentioned above the following control system table illustrates the most important recommendations, how they should be executed, by whom and with what frequency. (Smith & Taylor, 2004, p.50)

Table 4. Control system

WHAT	HOW	WHO	FREQUENCY
Optimize operational system by changing the current possibility for a negative calling balance	Change the system into a zero calling balance	Operations department AY YILDIZ	Should be carried out within 3 months. Thereafter to be checked every 2 months.
Optimize operational system by eliminating process for activation.	After the zero calling balance is implemented, there will be no more need for the activation process, and the SIM cards can be ready for use immediately after purchase	Operations department AY YILDIZ	Should be carried out within 3 months. Thereafter to be checked every 2 months.
Optimize operational system by changing the system for top-ups	Enabling top-ups with AY YILDIZ SIM card when there is no calling credit left	Operations department AY YILDIZ	Should be carried out within 3 months. Thereafter to be checked every 2 months.

Broaden product range	By offering mobile phones, post-paid contracts, SMS-bundles, low calling rates to France, and €20,- top-up cards	AY YILDIZ Sales department	Start-up: Once Thereafter, update assortment of mobile phones every 6 months
Create more awareness for calling rates from AY YILDIZ to AY YILDIZ	Announcements of the attractive calling rates on the website and printed media	Webmaster and communications department	Start-up: Once Thereafter, update website every 6 months
Create more brand awareness through the Internet	Links and more banners on other websites which are frequently visited by Turkish people	Webmaster	Update banners every 3 months
Stimulate more sales and top-ups on the website	By offering bonus calling credit when purchasing or topping up on the website of AY YILDIZ	Webmaster	Start-up: once Thereafter, update website every 6 months
Create more brand awareness through television	By broadcasting television commercials during Turkish programmes on Dutch television, like "Omroep Brabant" and "TV West"	Communications department	10 broadcasts in total every month nationwide for a year long.

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List of appendices

1. Rates
2. Situation analysis
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APPENDIX 1 **RATES AY YILDIZ- LEBARA- ORTEL**

Below a table is given with the rates of AY YILDIZ and its competition as a means of comparison.

Table 1: Rates

Rates for calling within the Netherlands			
	AY YILDIZ *	LEBARA*	ORTEL*
Initial rate	€ 0.08 p. call	€ 0.10 p. call	€ 0.07 p. call
On-net rates, to the same provider	€ 0.07 p.m. € 0.07 per SMS	N.V.T.	N.V.T.
Rates to all (other) providers	€ 0.28 p.m. € 0.15 per SMS	€ 0.18 p.m. € 0.09 per SMS	€ 0.25 / € 0.20 p.m.** € 0.15 per SMS
Voicemail	€ 0.28 p.m.	€ 0.18	
Top-up	Free	Free	
Customer Service	€ 0.07	€ 0.20	

* paying is per second

* paying p. sec. in the 1st min.,
thereafter p. min.

* paying is p. sec
** = during off-peak hours

Rates for calling from the Netherlands internationally to...			
	AY YILDIZ *	LEBARA*	ORTEL*
Initial rate	€ 0.08 p. call	€ 0.10 p. call	€ 0.07 p. call
Turkey	Fixed: € 0.17 p.m. Mobile: € 0.25 p.m. SMS: € 0.15 per SMS	Fixed: € 0.14 p.m. Mobile: € 0.26 p.m. SMS: € 0.09 per SMS	Fixed: € 0.18 p.m. Mobile: € 0.28 p.m. SMS: € 0.15 per SMS
Belgium	Fixed: € 0.17 p.m. Mobile: € 0.25 p.m. SMS: € 0.15 per SMS	Fixed: € 0.12 p.m. Mobile: € 0.35 p.m. SMS: € 0.09 per SMS	Fixed: € 0.12 p.m. Mobile: € 0.35 p.m. SMS: € 0.15 per SMS
Germany	Fixed: € 0.17 p.m. Mobile: € 0.25 p.m. SMS: € 0.15 per SMS	Fixed: € 0.12 p.m. Mobile: € 0.35 p.m. SMS: € 0.09 per SMS	Fixed: € 0.12 p.m. Mobile: € 0.35 p.m. SMS: € 0.15 per SMS
France	Fixed: € 1.25 p.m. Mobile: € 1.25 p.m. SMS: € 0.50 per SMS	Fixed: € 0.12 p.m. Mobile: € 0.35 p.m. SMS: € 0.09 per SMS	Fixed: € 0.12 p.m. Mobile: € 0.35 p.m. SMS: € 0.15 per SMS
Other countries in Europe	Fixed: € 1.25 p.m. Mobile: € 1.25 p.m. SMS: € 0.50 per SMS	Depends on the country	Depends on the country
Countries outside Europe	Fixed: € 2.50 p.m. Mobile: € 2.50 p.m. SMS: € 0.75 per SMS	Depends on the country	Depends on the country
Voicemail	€ 0.28 p.m./ € 1.25 from other countries then TR, BE, or GE.	€ 0.18 p.m.	
Top-up	Free	Free	Free
Customer Service	€ 0.07	€ 0.20	

* paying is per second

* paying p. sec. in the 1st min.,
thereafter p. min.

* paying is p. sec
** =

APPENDIX 2

APPENDIX SITUATION ANALYSIS

Appendix 2.1

As mentioned, AY YILDIZ is not a pure pre-paid product; it is possible for the customer to have a negative calling balance. All data are collected a few times a day and then deducted from the calling credit. This enabling customers to make outgoing phone calls until the moment that all data are updated and deducted from the calling credit. This is the moment that the SIM card is blocked for outgoing calls, if the customer has reached a negative calling balance. Prepaid SIM cards of other providers are usually blocked on the moment that a zero balance has been reached.

Appendix 2.2

On the initial top-up cards, the number *101# was communicated towards the public as a short code to perform the topping up with a top-up card. Due to operational matters, this number could not be applied to AY YILDIZ. As a temporary solution, top-ups were performed by the customer service employees, only during office hours and work days. This obviously not being the ideal solution a 0800-number has been set to life, in order to make 24-hours topping up possible.

The top-up cards have been provided with a sticker with the new 0800-number for topping up. As there is a large supply of these top-up cards, they still run in circulation, still causing for some occasional confusion for the new customers who do not know how to top-up one's calling balance.

Appendix 2.3

After having given the necessary details (first and last name, address, date of birth) the customer will receive a letter at the home address, with the PIN and PUK code together with a password for entering their personal page on www.ayyildiz.nl. Once this is received, the customer has given and received all the information that is needed, and the SIM card is ready for use.

As AY YILDIZ has no means for an address check for the Starter Packages purchased, this is a point of concern.

In relation to this, another problem is that since is no effective way to do an address check on the activated SIM cards, customers are free to apply for activation with any willing address. Since there is a possibility to have a negative calling balance, to amounts of even mounting up to € 100 when data processing is very slow, there is no way of knowing whether it is possible to collect this amount, and so absolutely a point of concern.

APPENDIX 3

MEDIAPLAN AY YILDIZ

Mediaplan eindejaarscampagne 2006 AY YILDIZ

060681.vh, versie 4 december 2006

AY YILDIZ komt in december met een super feestmaand aanbieding: een startpakket (inclusief 25 euro beltegoed) voor slechts 10 euro en gratis sms-en tijdens Offerfeest en Oud & Nieuw. AY YILDIZ heeft MCA Communicatie gevraagd een voorstel mbt de media & middelen uit te werken voor deze eindejaarscampagne. Gezien de krappe tijdplanning stelt MCA Communicatie voor een A5 actieflyer, een topkaart en een sticker als point-of-sale materialen te ontwikkelen, een radiocommercial in te zetten en de actieflyer via promotieteams en het MeerInfo netwerk te verspreiden in concentratiesteden.

Alle genoemde kosten zijn exclusief 19 % btw, vertaalkosten en eventuele transportkosten.

1. Point-of-sale materiaal

Op korte termijn kunnen de volgende materialen ontwikkeld worden:

- A5 flyer, vier versies (normale winkelversie, primafoon winkelversie, belcompany winkelversie en uitdeelversie met URL)
- Topkaart voor toonbankdisplay
- Ronde sticker, twee versies (voor op de posters en op de startpakketten)

Creatieve uitwerking: 1 opvallende steunkleur toevoegen, om actiemateriaal eruit te laten springen tussen de bestaande materialen van de introductiecampagne.

Planning (afgesteld met Cendris)

Woe 22 nov	Start ontwerp en opmaak
Woe 22 nov	Copy akkoord, oplages bepaald
Do 23 nov	Eerste proeven, correcties eerste proeven verwerken
Vrij 24 nov	Tweede proeven, correcties tweede proeven verwerken, drukklaar maken, def proeven naar Cendris
Di 28 nov	Drukwerk klaar
Woe 29 nov	Distributie naar winkels
Vrij 1 dec	Materiaal in winkels, start campagne

Kosten:

Artwork materialen (inclusief opmaak en verzending advertentie),

ontwerp plus DTP, drukklaar maken, materialen (proeven, pdf-jes)

€ XXXXXXXXXX

Drukwerk sticker diameter 15 cm, oplage 5000 stuks

€ XXXXXXXXXX

Drukwerk sticker diameter 3,5 cm, oplage 5000

€ [REDACTED]

Drukwerk flyer, gebundeld per 50

€ [REDACTED]

Normale winkelversie, oplage 12.500

Primafoon winkelversie, oplage 10.000

Belcompany winkelversie, oplage 12.500

URL uitdeelversie, oplage 22.500

Drukwerk verwisselbare topkaart, 750 stuks

€ [REDACTED]

2. Radio

Om Turkse jongeren te bereiken adviseert MCA Communicatie een spot van 25 seconden uit te zenden via de populaire stations FunX en JuizeFM. Campagneperiode: 5 december tot en met 18 december. Zie bijlage C voor de uitzendschema's.

FunX

FunX is dé radiozender voor en door jongeren. De unieke muziekmix van mainstream muziek en muziekstijlen die alleen bij FunX te horen zijn zoals Arabische Raï, Turkse popmuziek, Asian underground, latin en veel reggae/dancehall heeft reeds een zeer breed luisterpubliek weten te binden aan FunX. FunX richt zich op jongeren en jongvolwassenen in de leeftijd van 15 tot 35 jaar, met de nadruk op 15 tot 25 jaar. Ruim een kwart van deze groep heeft een niet-Nederlandse achtergrond.

Naast de muziekmix kent de programmering liveprogramma's met veel aandacht voor lifestyle. De straatreporters(per stad dagelijks aanwezig op scholen, in drukke winkelstraten en in de clubscene) staan direct in contact met de luisteraars. FunX heeft vier etherfrequenties in de vier grote steden Amsterdam, Rotterdam, Den Haag en Utrecht. Vanaf 6 september 2005 is FunX onder licentie van BNN ook in heel Nederland via de kabel en de schotel te ontvangen. Deze unieke distributie brengt de mogelijkheid met zich mee om zowel landelijk als regionaal te adverteren.

Juize.FM

Juize.FM is in juli 2004 opgericht als spin-off van het populaire Radio 538 programma Juize.

Op het station is 24 uur per dag 7 dagen per week Hiphop en R&B from A to Z te horen. Juize.FM is horizontaal geprogrammeerd met programma's van o.a. Ali B & Yes-R, Niels Hoogland, DJ Jeff, Negativ, 2Tall en E-life. Veertig procent van de 13-34 jarigen kent inmiddels hét Hiphop en R&B station van Nederland. Dit zijn maar liefst 1.800.000 mensen. Deze mensen zijn ook nog eens goed gestemd over Juize.FM; men waardeert het station met een mooie 7. Ruim 800.000 mensen van 13-34 jaar hebben al eens geluisterd naar Juize.FM. Van de groep tot 25 jaar is dit zelfs een derde. Wekelijks luisteren er zo'n 300.000 mensen naar Juize.FM. Gemiddeld wordt er 81 minuten naar Juize.FM geluisterd. De man-vrouw verhouding binnen de Juize.FM luisteraars is 58-42. De verhouding autochtone/allochtone is 50-50.

Planning

Vrij 24 nov

Tekst akkoord

Ma 27 nov t/m 1 dec

Productie commercial

Ma 4 dec

Aanleveren commercial bij FunX

Kosten:

Ontwikkeling radiospot 25 sec (uitgaande van 4 uur studiohuur & audiomontage) € [REDACTED]

Inkoop voice-over voor 1 versies inspreken (incl afkoop rechten, reiskosten etc) € 300,00

Buma Stemra, prijs volgt na selectie radiostations

*Inkoop FunX (regionaal, 4 grote steden)), 2 weken adverteren met 152 uitzendingen
(doordeweeks 3 keer per dag en weekend 1 keer per dag)*

€ [REDACTED]

Inkoop JuizeFM (landelijk)

**pakketprijs voor spot 25 seconden 2 weken adverteren met 140 uitzendingen*

€ [REDACTED]

3. MeerInfo locaties & winkeldistributie

Verspreiding van actieflyer begin december op 160 MeerInfo locaties en een selectie van 200 Turkse winkels en horeca in de vier grote steden. Benodigd aantal flyers (gebaseerd op 50 per locatie): 18.000.

Kosten: verspreiding op 360 locaties incl. standaard display, 360 maal € [REDACTED] **€** [REDACTED]

4. Printadvertentie

Drie 1/4 full colour plaatsingen in Hurriyet en Milliyet begin december. Inkoop via E-plus Duitsland. Daarnaast zijn de advertentie voor de decembernummers van Merhaba, Platform en Dogus vervangen door de nieuwe advertentie.

Kosten: artwork (zie kosten materialen)

*Overige kosten: ontwikkeling en coördinatie Eindejaarsactie,
50 uur à € 115, stelpost*

€ [REDACTED]

APPENDIX 4

DRAAIBOEK PERSEVENT

Draaiboek persevent AY

060.RvD, 24 september 2006

Locatie

Sultan Lounge, Zuidplein 109, Rotterdam)zie volg. pag. voor routebeschrijving)

Draaiboek

- 16.00 uur Van MCA Communicatie aanwezig *Vanessa en Rik*
Technicus aanwezig gedurende gehele officiële gedeelte van de avond
- 16.30 uur Van KPN aanwezig: *Sema, Jacqueline en ?*
- 16.00 uur 18.00 uur
- Opbouw en check apparatuur *
 - Final check met restauranthouder overloop en Iftar maaltijd, *Rik en Jacqueline?*
 - Aankleding **zaal, *Vanessa en Sema?*
 - Klaarzetten tafel voor aanmelding en klaarleggen persmappen, *Sema en ?*
(registratieformulier, persmappen*. Opvragen visitekaartjes)
- 18.00 uur Sprekers aanwezig, apparatuur gereed
- 18.30 uur Ontvangst en registratie pers (*door Sema en ?*)
Muzikale omlijsting
- 18.45 uur Welkom heten door *Bram Oudshoorn*
Presentatie *Marco Visser*
Presentatie *Mehmet Basalan*
Vertoning videoboodschap
Uitdelen persmappen, onthullen diverse campagnemiddelen
Vragen en interviews
Mensen uitnodigen plaats te nemen voor Iftar maaltijd *Bram Oudshoorn?*
- 19.34 uur Aanvang Iftar maaltijd, mogelijkheid tot gebed in aparte ruimte
Muzikale omlijsting

***Gehuurdde apparatuur door MCA Communicatie**

- LCD projector (beamer)
- Projectiescherm
- Dvd speler
- Audioset (microfoon, versterker, speakers)
- Plasma televisie
- 3 laptops waarvan 1 met Power Point

Door KPN geregeld:

- Laptop met UMTS internetverbinding

****Aankleding ruimte**

- Beyaz Standee met folders en display
- Banieren
- Abris
- Binnenposters, diverse formaten

****Inhoud persmap**

Door KPN

- Persbericht Nederlands en Turks
- Presentaties Nederlands en Turks
- Flyer AY YILDIZ
- Flyer AY YILDIZ
- Print AY YILDIZ advertentie?
- Pen AY YILDIZ
- 'Oog of tegeltje'

Routebeschrijving

<http://www.sultanlounge.nl/route/route.htm>

Openbaar vervoer

Metro: vanaf Rotterdam CS (met de Erasmuslijn) richting Slinge of Spijkernisse. Uitstappen bij station Zuidplein.

Bus: vanuit de stad en de regio Rijnmond e.o. zijn er diverse busverbindingen van en naar Zuidplein.

Voor vertrektijden en –punten belt u 0900-92 92 (€0.50 per minuut). Een zogeheten lijnennetplattegrond is verkrijgbaar bij RET-informatiepunten.

Eigen vervoer:

Vanaf centrum Rotterdam: via de Maastunnel (zie plattegrond) of via de Erasmusbrug de borden richting Zuidplein volgen.

Vanaf Amsterdam, Den Haag (A13,A20): volg de borden 'centrum' en 'Maastunnel'. Door de Maastunnel rechtdoor, richting Zuidplein.

Vanaf Utrecht (A20, A16): via de Van Brienenoordbrug, Strevelsweg richting Zuidplein.

Vanaf Vlissingen, Dordrecht, Breda (A16, A15, A29): via de Drechtunnel, vanaf Rijksweg afslag Vaanweg. Volg de borden richting Zuidplein.

Vanaf Brielle: aankomst via de Zuiderparkweg, afslag bij Ahoy' richting Zuidplein.

APPENDIX 5
SURVEY AY YILDIZ

1. Age

- ☐ Between 15 – 20 years
- ☐ Between 21 – 30 years
- ☐ Between 31 – 40 years
- ☐ Between 41 – 50 years
- ☐ Between 51– 60 years
- ☐ Between 61 – 70 years

2. Gender

- ☐ Male
- ☐ Female

3 . How do you know AY YILDIZ?

- ☐ The Internet
- ☐ Billboards
- ☐ Friends/ relatives
- ☐ Pamphlets of AY YILDIZ
- ☐ Turkish events
- ☐ Television
- ☐ Radio
- ☐ Otherwise,....

4. Mainly you use AY YILDIZ's services for...

- ☐ Calls to Turkey
- ☐ Calls to Belgium
- ☐ Calls to Germany
- ☐ Calls to the Netherlands
- ☐ Other countries
- ☐ Text messages

5. Why did you choose for AY YILDIZ?

- ☐ Low rates to Turkey/Belgium/Germany
- ☐ Low rates AY YILDIZ-AY YILDIZ
- ☐ Name/logo AY YILDIZ
- ☐ Because it is Turkish
- ☐ No contract
- ☐ Reliable network operator
- ☐ Recommended by other AY YILDIZ users
- ☐ Other,.....

6. Of which method for topping-up do you make use of?

- ☐ By Internet, www.ayyildiz.nl
- ☐ Topping-up cards
- ☐ None of these methods, I have never topped up my calling balance (go to question 9).

7. How often do you top-up your calling credit?

- ☐ Daily
- ☐ 4-6 times a week
- ☐ 2-3 times a week
- ☐ Once a week
- ☐ Less than once a week

8. What is approximately the amount you spend monthly on your calling credit?

- ☐ € 10,-
- ☐ between € 11,- and € 30,-
- ☐ between € 31,- and € 50,-
- ☐ more than € 50,- per month

9. To which countries do you make frequent phone calls (with AY YILDIZ or another provider)

- ☐ France
- ☐ Belgium
- ☐ Germany
- ☐ Spain
- ☐ Turkey
- ☐ Other

10 For which purpose(s) do you visit the website? (multiple answers possible)

- ☐ To check my calling credit
- ☐ For topping-up
- ☐ To gain information
- ☐ I never visit the web site (go to question 14)
- ☐ Other.....

11. What grade of satisfaction would you consider process of topping-up through the Internet?

- ☐ Completely satisfied
- ☐ Satisfied
- ☐ Unsatisfied
- ☐ Completely unsatisfied
- ☐ Not applicable

12. What grade of satisfaction would you consider for the process of purchase of an AY YILDIZ Starter Package on the Internet?

- ☐ Completely satisfied
- ☐ Satisfied
- ☐ Unsatisfied
- ☐ Completely unsatisfied
- ☐ Not applicable

13. What do you think of the website in general?

- ☐ Attractive
- ☐ Easy to navigate
- ☐ Informative
- ☐ Chaotic
- ☐ Could not find the answers I needed
- ☐ Other

14. What grade of satisfaction would you consider for the price/ quality relation?
- ☐ Completely satisfied
 - ☐ Satisfied
 - ☐ Unsatisfied
 - ☐ Completely unsatisfied
 - ☐ Not applicable
15. What grade of satisfaction would you consider for the process of activation?
- ☐ Completely satisfied
 - ☐ Satisfied
 - ☐ Unsatisfied
 - ☐ Completely unsatisfied
 - ☐ Not applicable
16. What grade of satisfaction would you consider process of topping up with top-up cards?
- ☐ Completely satisfied
 - ☐ Satisfied
 - ☐ Unsatisfied
 - ☐ Completely unsatisfied
 - ☐ Not applicable
17. Would you rather have a zero calling credit, instead of the current possibility of a negative calling credit at AY YILDIZ?
- ☐ Yes
 - ☐ No
 - ☐ No opinion
18. In comparison to other mobile providers the best thing about AY YILDIZ is...
- ☐ Price
 - ☐ Services
 - ☐ Customer service
 - ☐ Expertise
 - ☐ Name/ logo AY YILDIZ
 - ☐ The fact that it is Turkish
 - ☐ Other,.....
19. Which of the following services would you like to see offered by AY YILDIZ?
- ☐ Post-paid contracts
 - ☐ Mobile phones
 - ☐ WAP/ MMS/ mobile Internet
 - ☐ A savings system, where you can exchange your saved credits for discounts or gadgets
 - ☐ Lower rates for countries like.....
 - ☐ SMS bundles
 - ☐ Other,.....
20. If AY YILDIZ were to offer mobile post-paid contracts would you consider leaving your current provider and switching to AY YILDIZ?
- ☐ Yes
 - ☐ Maybe
 - ☐ I do not think so
 - ☐ Absolutely no

21. Did you know that there is a maximum number of 3 sim cards per address?

- ☐ Yes, I received a letter of rejection
- ☐ Yes, I was informed at purchase
- ☐ Yes, I heard it from friends/family
- ☐ Yes, I read it on the web site of AY YILDIZ
- ☐ No

22. In the last few weeks all customers of AY YILDIZ have received a letter informing them of the current promotion where you receive an extra calling credit of €25, - if you top-up €50, - in the period May 15-June 15 2007. Will you participate to this promotion?

- ☐ Yes
- ☐ Maybe
- ☐ No

23. Would you recommend AY YILDIZ to your friends and relatives?

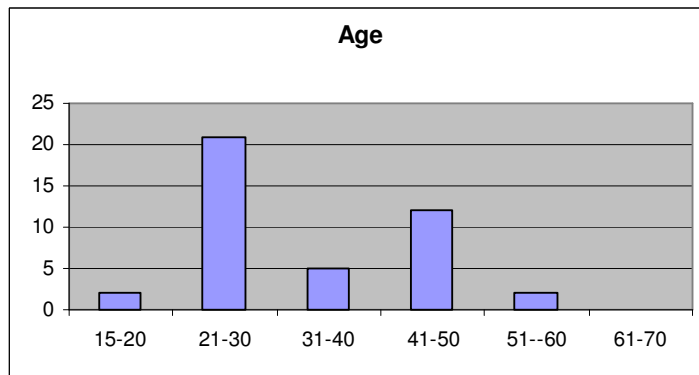
- ☐ Yes
- ☐ No

APPENDIX 6 SURVEY RESULTS

It is important to thoroughly understand the current situation of AY YILDIZ. For this reason information is gained by means of a survey. The choice has been made to submit this survey to only the current customers as they are familiar with all aspects of the products and services offered. 52 current customers of AY YILDIZ have answered this survey.

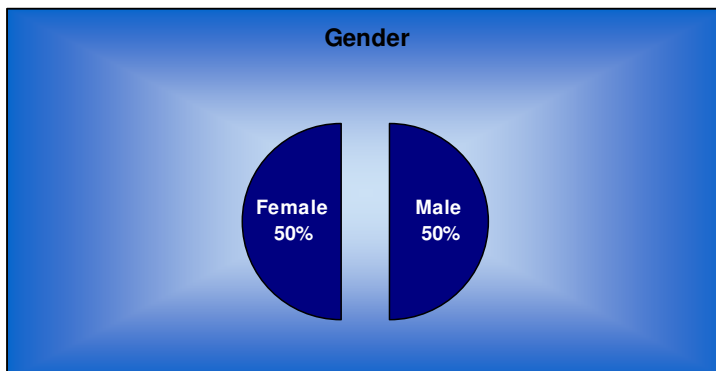
1. The people interviewed were in the age group 18-35, as that is the age of the target group as ...specified by AY YILDIZ, and therefore their points of view are the most relevant for this research.

- 15 – 20 2
- 21 – 30 21
- 31 – 40 5
- 41 – 50 12
- 51– 60 2
- 61 – 70 0



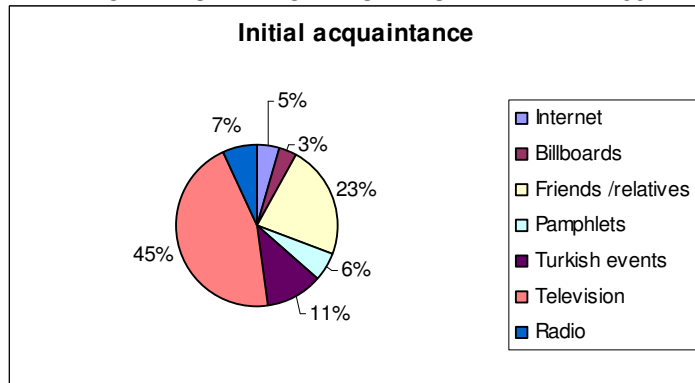
2. The target group specified by AY YILDIZ is mostly male. Nevertheless, women have been included to this survey, for they are also customers of AY YILDIZ. If targeted well, this group could have much potential.

- Male 26
- Female 26



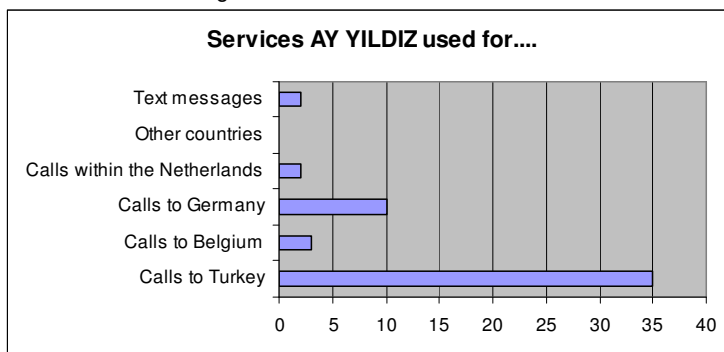
3. This question is aimed to find out which has been the most effective way of initial acquaintance, in order to see if methods can be improved or implemented by AY YILDIZ in order to reach its potential target group. 45% have first known of the existence of AY YILDIZ from television and 23% by means of word- of -mouth promotion and another 11% of the questioned people's initial acquaintance with AY YILDIZ was at Turkish events where AY YILDIZ was represented.

• Internet	4
• Billboards	3
• Friends / relatives	20
• Pamphlets	5
• Turkish events	10
• Television	40
• Radio	6
• Otherwise	0
• TOTAL NUMBER OF ANSWERS	88



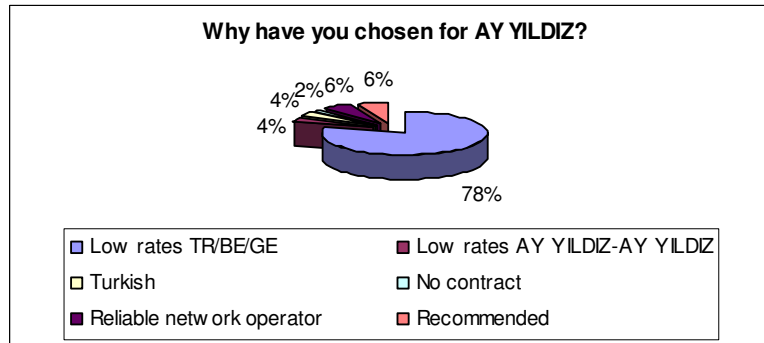
4. The low rates of AY YILDIZ are to Germany, Belgium, and Turkey. These answers below show that this is in accordance with usage of the customers, it demonstrates that people mostly make use of AY YILDIZ for the cheaper rates offered.

- Calls to Turkey	35
• Calls to Belgium	3
• Calls to Germany	10
• Calls to the Netherlands	2
• Other countries	0
• Text messages	2



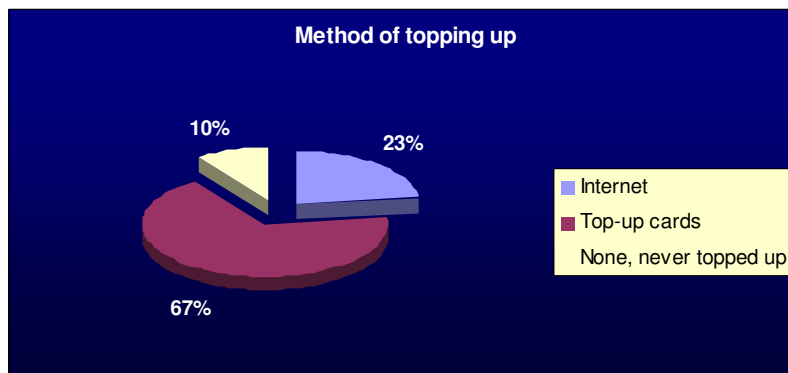
5. These answers show that the reason why people have chosen AY YILDIZ, is very clearly the cheap calling costs.

- Low calling costs to Turkey/Belgium/Germany 41
- Low calling costs AY YILDIZ-AY YILDIZ 2
- Name/ logo AY YILDIZ 0
- Because it is Turkish 2
- No contract 1
- Reliable network operator 3
- Recommended by other AY YILDIZ users 3
- Other 0



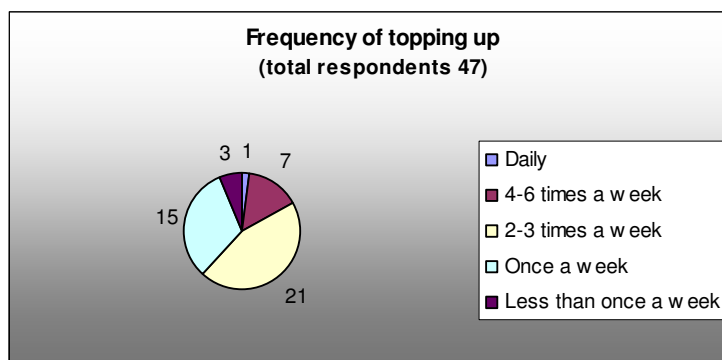
6. This question has asked in order to find out if all possibilities for topping up are used to its potential. As we can see from the results, most people use topping-up cards.

- Via Internet, www.ayyildiz.nl 12
- Topping-up cards 35
- None, I never topped up my calling credit 5



7. Currently top-up cards are only available for € 10,-. These results indicate that most people top-up several times a week, and therefore have to buy several top-up cards every week.

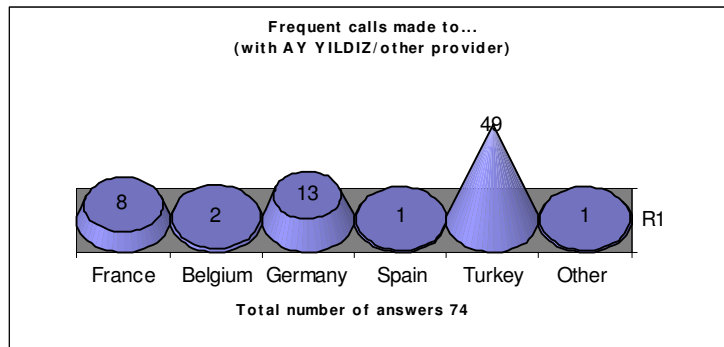
- Daily 1
- 4-6 times a week 7
- 2-3 times a week 21
- Once a week 15
- Less than once a week 3



9. The answers given here indicate that France is a also a destination frequently called, after Turkey and Germany.

- France 8
- Belgium 2
- Germany 13
- Spain 1
- Turkey 49
- Other....Switzerland 1

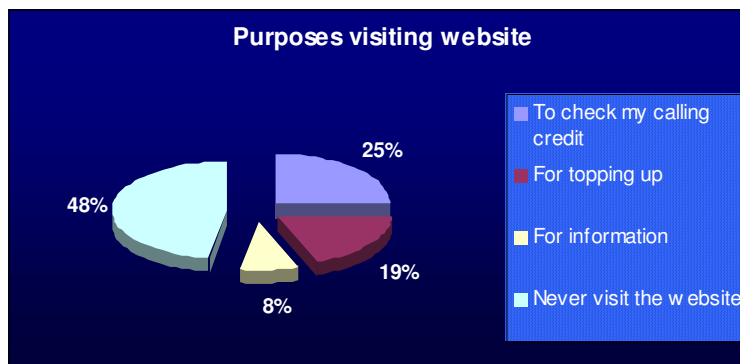
TOTAL NUMBER OF ANSWERS 74



10. The answers given below indicate the reasons for people to visit the website, and whether AY YILDIZ could/should promote some elements of Internet usage. The answers indicate that close half of the people questioned never visit the website and only 12 use it to top-up.

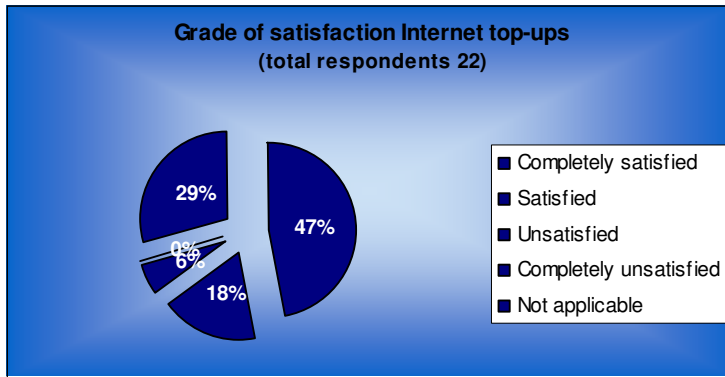
- To check my calling credit 16
- For topping up 12
- For information 5
- I never visit the website 30
- Other..... 0

TOTAL ANSWERS: 63



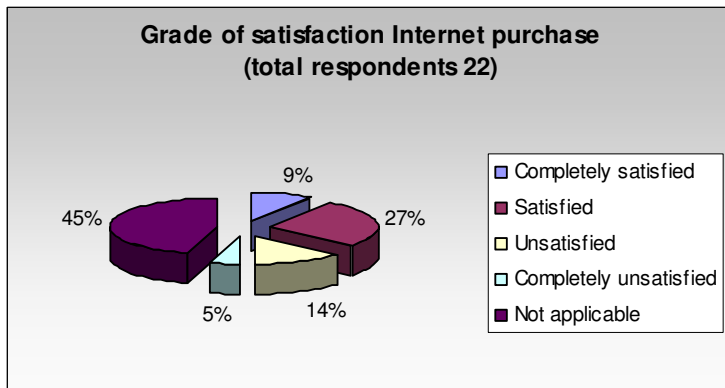
11. This question has been asked to find out if there is need for improvements for this method of topping up. As to been seen in the graph, the overall experience with Internet top-ups is positive.

- Completely satisfied 8
- Satisfied 3
- Unsatisfied 1
- Completely unsatisfied 0
- Not applicable 5



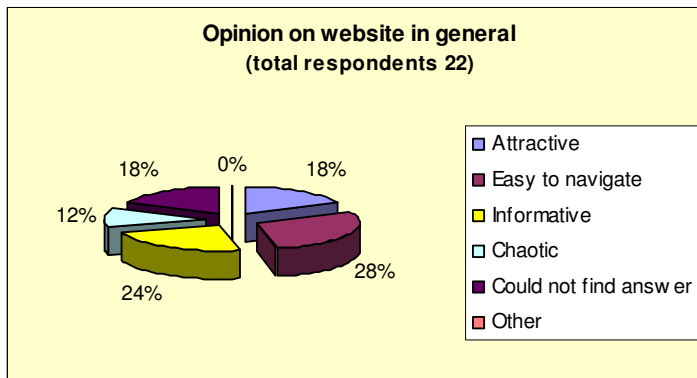
12. This question has been asked to find out if there is need for improvements for the method of ordering a Starter Package on the website of AY YILDIZ. The conclusion to be drawn is that a clear majority to whom this question applies have experienced this as a positive method of purchase.

• Completely satisfied	2
• Satisfied	6
• Unsatisfied	3
• Completely unsatisfied	1
• Not applicable	10



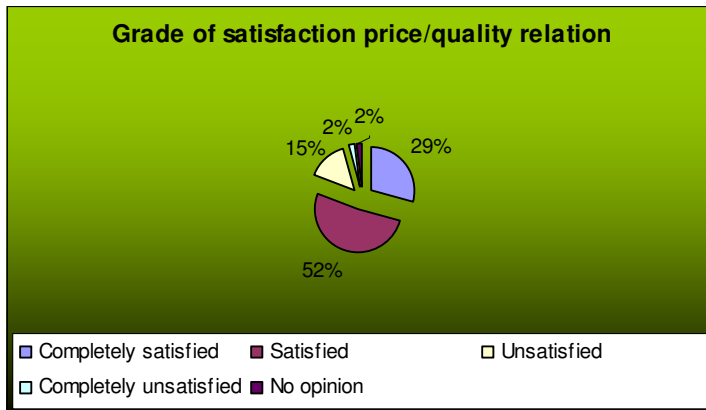
13. To find out if improvements are required to the website, this question has been included to the survey.

• Attractive	3
• Easy to navigate	5
• Informative	4
• Chaotic	2
• Could not find the answers I needed	3
• Other	0



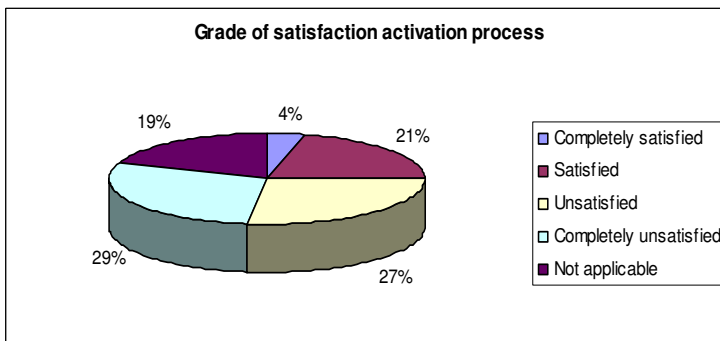
14. Even though there are some points of concern for the customers, their overall value for their money spend is still considered to be positive.

• Completely satisfied	15
• Satisfied	27
• Unsatisfied	8
• Completely unsatisfied	1
• No opinion	1



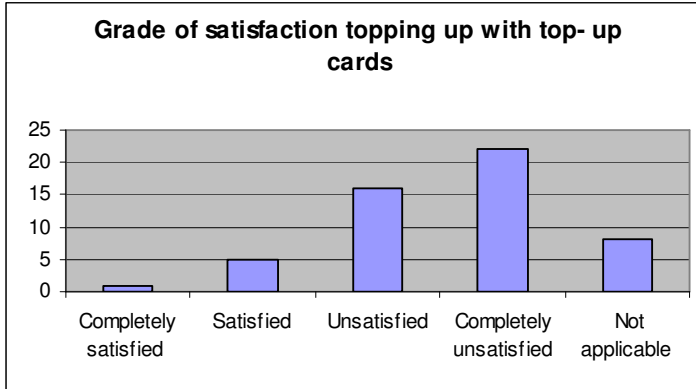
15. These answers clearly show that major improvements in the process of activation is desired by the customers.

• Completely satisfied	2
• Satisfied	11
• Unsatisfied	14
• Completely unsatisfied	15
• Not applicable	10



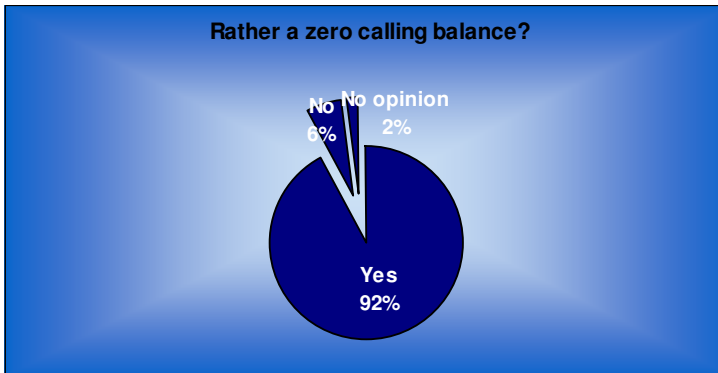
16. Also changes in the system of topping are needed, as shown in the results of the graph below.

- Completely satisfied 1
- Satisfied 5
- Unsatisfied 16
- Completely unsatisfied 22
- Not applicable 8



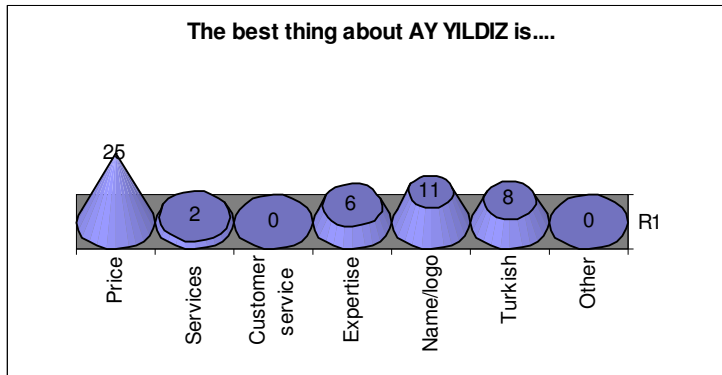
17. The results of this question show that the current system of obtaining a negative calling is absolutely not desired by the current customers of AY YILDIZ.

- Yes 48
- No 2
- No opinion 2



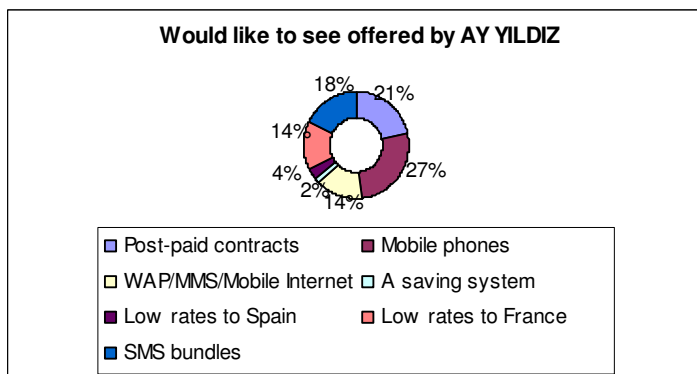
18. These result show the element(s) of customer satisfaction and what could be considered as the USP's of AY YILDIZ; Price and Name/Logo.

- Price 25
- Services 2
- Customer service 0
- Expertise 6
- Name/ logo AY YILDIZ 11
- The fact that it is Turkish 8
- Other,..... 0



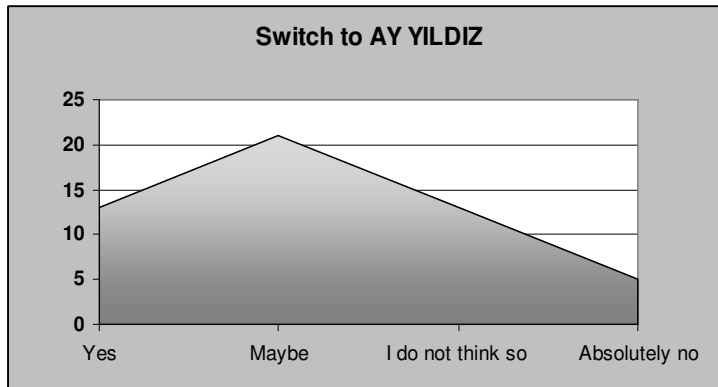
19. According to the wishes and demands of its customers AY YILDIZ could implement new services where possible. Post-paid contracts, mobile phones, SMS-bundles, low calling rates to France, and WAP/MMS/Mobile Internet, future services that the current customers would like to see offered by AY YILDIZ.

- | | |
|---------------------------------------|----|
| • Post-paid contracts | 12 |
| • Mobile phones | 15 |
| • WAP/MMS/Mobile Internet | 8 |
| • A saving system | 1 |
| • Low rates for other countries like; | |
| ○ Spain | 2 |
| ○ France | 8 |
| • SMS bundles | 10 |
| • Other | 0 |



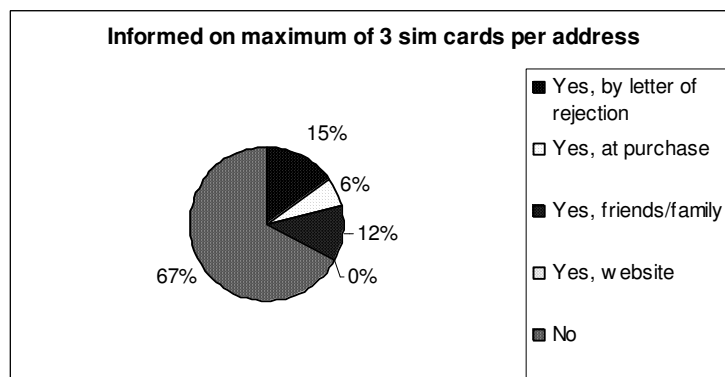
20. This graph below shows that if AY YILDIZ would offer post-paid contracts, it has a fairly good chance in succeeding, if approached with the right marketing communication methods.

- | | |
|-------------------------|----|
| • Yes | 13 |
| • Maybe | 21 |
| • No, I do not think so | 13 |
| • Absolutely no | 5 |



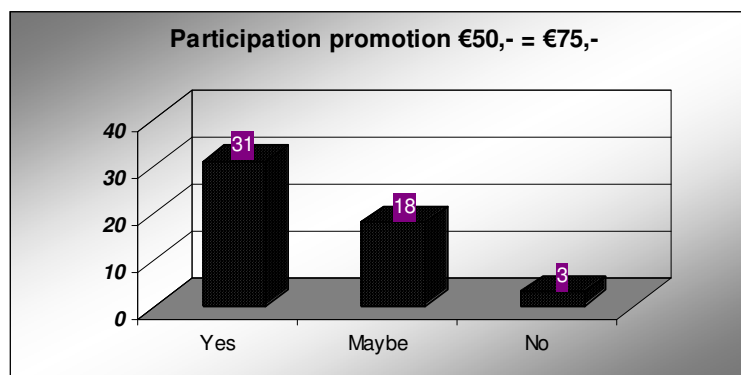
21. These answers show that AY YILDIZ lacks in communication the maximum of 3 sim cards per address towards its audience.

- Yes, I received a letter of rejection 8
- Yes, I was informed at purchase 3
- Yes, I heard it from friends/family 6
- Yes, I read it on the website of AY YILDIZ 0
- No



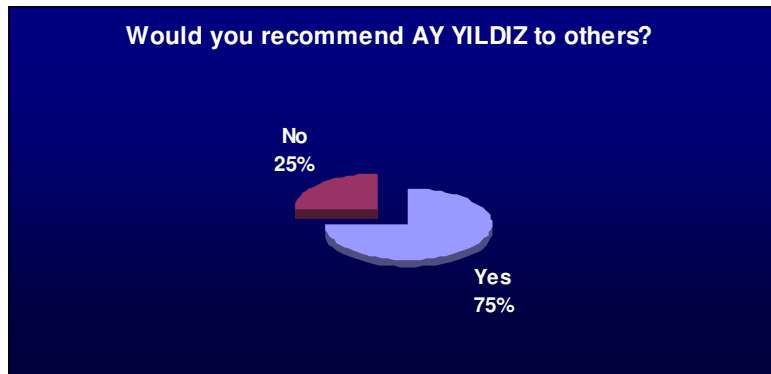
22. The table below gives a good indication of the success of the recent Direct Mail to its customers.

- Yes 31
- Maybe 18
- No 3



23. Since word-of-mouth promotion is a very strong method of promotion, this last question has been included as the final survey question.

- Yes 39
- No 13



Conclusion

This survey has been very useful for giving an insight in aspects like their calling behaviour, the strong points of AY YILDIZ, and aspects of AY YILDIZ that could be improved to better suit their wishes and demands. There are some elements of AY YILDIZ that need attention, as the satisfaction rate for these elements is very low. Nevertheless, most people would like to see these improved, and would recommend AY YILDIZ to others, meaning that they would like to stay with AY YILDIZ in the future and see more people becoming an AY YILDIZ customer.