İSTANBUL TECHNICAL UNIVERSITY ★ INSTITUTE OF SCIENCE AND TECHNOLOGY

IKEA IN THE TURKISH FURNITURE INDUSTRY AND ITS INFLUENCES WITH REFERENCE TO DESIGN AND CUSTOMISATION

M.Sc. Thesis by

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Department : Industrial Product Design

Programme: Industrial Product Design

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TÜRK MOBİLYA SEKTÖRÜNDE IKEA: TASARIM VE KİŞİSELLEŞTİRME İLE İLGİLİ ETKENLER ÜZERİNE BİR ARAŞTIRMA

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ÖZET

Tüketicilerin farklı ihtiyaç ve istekleri, global markette pek çok şirketi kişiselleştirilebilen ürünler ve hizmetler üretmeye yönlendirmektedir. Bu ürün ve hizmetleri yüksek hacimde üretebilmek için oluşturulan farklı stratejiler, tasarım ve üretimde esnek çalışabilmeyi destekleyen yeni ve farklı bir dönemi işaret etmektedir: kişiselleştirilebilen seri üretim. Ürünlerde modülerlik, çeşitlilik ve düşük fiyat hedefi ile oluşturulan bu stratejiler, genellikle tüketiciye kişisel tercih ve ihtiyaçlarına uygun ürünler yaratabileceği tasarım örnekleri veya internet üzerinde çalışan programlar sunmaktadır. İsveç ev dekorasyon ürünleri perakendecisi IKEA, ürün gamında çeşitlilik ve düşük fiyata odaklanan benzer yöntemlerle çalışarak farklı tüketici istek ve ihtiyaçlarına cevap vermektedir. Özellikle ev dekorasyonunda farklı ölçülerde ürünler ve fonksiyonlara olan ihtiyaç arttığı için mobilya tasarımı ve üretiminde, modülerlik ve çeşitlilik önem kazanmaktadır.

IKEA ile yükselen rekabetin etkisinde olan Türk mobilya sektörü, esas olarak marangozhane ve küçük fabrika işletmelerinden oluşmaktadır. Bu işletmeler, daha çok yerel markete üretim yapan ve mobilya onarımı ile uğraşan küçük aile şirketleridir. İstikbal, Kelebek ve Çilek gibi büyük ölçekli işletmeler ise, tasarım anlayışı, üretim yöntemleri ve pazarlama stratejilerini geliştirerek yurtdışında da başarılı olmaya başlamışlardır.

Bu çalışma, IKEA konsepti ve ürün gamının Türk mobilya sektörü ve tüketicileri üzerindeki etkilerini ve sektördeki diğer perakendecilerden farklı kılan özelliklerini incelemektedir. Bu çalışma kapsamında, IKEA-Türkiye departman müdürleri ile yapılan görüşmeler ve Bayrampaşa (İstanbul) mağazasında müşteriler ile yapılan anketlerin amacı, Tüketicilerin IKEA ve ürün gamı hakkında görüşlerini öğrenmek ve Türk pazarında IKEA'nın güçlü bir rakip olmasında etkili olan nedenleri araştırmaktır.

Elde edilen verilere göre, IKEA ve ürün gamını Türk pazarında farklı kılarak tüketiciye cazip gelen özellikleri tasarım, çeşitlilik ve düşük fiyat özellikleridir. Kişiselleştirilebilen seri üretim döneminin tanımı ve stratejileri dikkate alındığında, bu özelliklerin Türk pazarında yeni olan kişiselleştirilebilen ürün ve hizmetler yaratabilmek için önemli elemanlar olduğu görülmektedir. Ürün gamı ve mağazalarında ilham verci ve fonksiyonel sunumlar yapan IKEA, pazarda farklılık ve rakabeti artırmaktadır.

IKEA IN THE TURKISH FURNITURE INDUSTRY AND ITS INFLUENCES WITH REFERENCE TO DESIGN AND CUSTOMISATION

SUMMARY

Different needs and demands of customers in the global market have led industrial products and/or services to be customisable. Some alternative strategies of the market for achieving these customisable goods and services in high volume have recently developed into a new period called mass customisation, which brings about flexibility in design and production. Modularity, variety and low price in products have been the goals for the strategies of mass customisation, and usually work with design templates or online tools enabling customers to create their own product combinations. IKEA, the Swedish home furnishing retailer, works with similar strategies focusing on variety and low price in its product range in order to satisfy different needs and requirements of customers worldwide. Especially in furniture design and manufacturing, modularity and variety are significant features, because home decoration requires different dimensions and functions for customers with different necessities.

The furniture industry in Turkey, affected by IKEA rising the competition in the market, is mainly based on small enterprises like ateliers, carpenters and small factories that are usually family businesses manufacturing for the local market and also for furniture repairs and restoration. The major enterprises of the industry like Istikbal, Kelebek and Çilek, improve their design approach, manufacturing methods and marketing strategies and have succeeded also in some other countries.

This study, concerning about influences of the IKEA concept and the product range on the Turkish furniture industry and the Turkish customers, has explored the comments of IKEA customers on IKEA, its product range in comparison with the other home furnishing retailers in Turkey. The survey including the interviews with the managers of IKEA-Turkey and a questionnaire carried out with IKEA customers in the Bayrampaşa store helped in gathering the data required to find out about the comments of customers and the main reasons that make IKEA a tough competitor in the market.

According to the findings of the survey, IKEA and its product range catch the attention of customers by its design, variety and low price features in the range. Considering the definition and strategies of mass customisation, these features are essential components of customisation, which is also new in the Turkish market. Moreover, inspiration and functionality are the characteristics of its product range and stores distinguishing IKEA from the other retailers in the market.

1. INTRODUCTION

Furniture industry in Turkey, essentially based on small and medium sized enterprises, is working with traditional production and lack of innovation besides using almost no technological tools in manufacturing **(Kayacıklı and Emil, 2003)**. On the other hand, the major enterprises are the ones manufacturing in larger quantities with a limited innovation in design and in an effort to succeed at exports. It is required to discover and develop the strengths and the opportunities of the furniture industry in Turkey, since the competition in the international markets is increasing with the effects of the globalisation. According to **Kayacıklı and Emil (2003)**, newly industrialised countries tend to be developing a greater market because of their sector characteristics and also due to the nature of their markets' demand, despite the fact that USA and EU countries seem to be the leading ones in manufacturing, importing and exporting furniture.

IKEA, the Swedish home furnishing retailer, offers a wide range of furniture and accessories for home and office use, in its large stores all around the world. Similar to the competition that IKEA affects in each furniture market of various countries, it is essential for Turkish furniture enterprises to realise the features of IKEA, its wide range of products and its strategies, which make the concept of the company succeed. **Er and Er (1997:117)** have defined the distinctive characteristics of the Swedish company and they have argued that these characteristics are the major reason that makes IKEA "a tough competitor for the companies of the markets it enters, but also a model these local companies should lose no time to emulate".

The reason for studying this particular subject with a thesis title of *IKEA in The Turkish Furniture Industry and Its Influences with reference to Design and Customisation* is that it is crucial to find out about influences of the IKEA concept and the product range on the Turkish furniture industry and the customers in Turkey. In addition, it is essential to explore the significant role of mass customisation in developing a wide range of products with low price, modularity and variety that increase customers' satisfaction.

1.1 Aims of the Study

Mass production has led the manufacturers to increase their production volume and also reducing costs, while the customers could purchase and consume more products and services with affordable prices. By the technological improvements in the processes of mass production and standardisation, customers tended to ask for product variety as well as the quality and the affordable prices that were also standardised. They have demanded products allowing self-expression and the opportunity to satisfy their personal needs. These changes in 1980s have introduced a new concept of design and production management, which is called mass customisation. This new concept combining variety and modularity in product design with low price and customisation in production has been improving the market in recent years.

IKEA, the Swedish home furnishing retailer, has developed the IKEA concept and its product range with a wide variety, innovative design and low price in the global market. Since its foundation in 1943, IKEA introduced its product range in the world with more than 235 stores in more than 35 countries. In 2005, its first store in Turkey was opened in Istanbul, and its unique concept and products have been introduced into the Turkish furniture market.

This study aims:

1) to gain an understanding of the IKEA concept and the development of its product range,
2) to point out the essential role of product design and customisation in the development of the IKEA concept and its product range,
3) to explore the reasons that make IKEA a tough competitor among the other home furnishing retailers in Turkey.

1.2 Structure of the Study

This study consists of six chapters, beginning with an introductory chapter in order to clarify the aims and the scope of the study.

The second chapter on design and customisation explores the relationship between customers, designers and customisation. First, an overview of the customers' need for customisation is given. Second, emerging attitudes in product design as a response to this need of customisation are explained to define the link between customisation and product design. Next, the concept of mass customisation is described and the formation of the concept by considering the features of mass production is given. Furthermore, discussions on mass customisation are given in order to show the variety in implementation of the strategies in the market. Next, the relationship between customers and mass customisation is explained by concerning the advantages and disadvantages of these strategies. Finally, some examples of mass customised products and services are given.

The third chapter begins with a brief description of the Swedish home furnishing retailer IKEA, offering a wide range of furniture and accessories for home and office use, and also explains about its history and the development of its concept. Second, IKEA product range and the essential role of product design and customisation in the development of the IKEA concept and its product range is described. Next, an overview of the Turkish furniture industry is given. Last, the relationship between IKEA and the other home furnishing retailers in Turkey is given in order to describe the adaptation of the IKEA concept and its product range into the Turkish market, and the potential influences of IKEA on the other retailers in the market.

The fourth chapter explains the methodology of the study using literature review, interview and questionnaire methods in order to achieve the objectives of this study. First, the aims and the main issues of literature review stage are given. Next, interviews held with the managers of IKEA-Turkey are explained and the major discussions of these interviews are defined. Last, the survey carried out with the IKEA customers is described and the nature of the questionnaire is explained.

The fifth chapter consists of the findings of the interviews and the questionnaire, besides discussions on the opinions of IKEA customers about IKEA and its product range in comparison to the other home furnishing retailers in Turkey.

The last chapter comprises the conclusion as a brief summary of the study and suggestions for further studies on the subject.

2. PRODUCT DESIGN AND CUSTOMISATION

This chapter, which explores about product design and customisation, explains the relationship between customers, designers and manufacturers considering the need for customisation. The development of mass customisation is described in order to point out the strategies that increase variety and modularity in product design and satisfy various requirements of customers.

2.1. Need for Customisation

Slater (1997) defines a consumer as the one who makes choices among goods and services by considering how to spend his/her own money to get these choices. On the other hand, **Miller (1995:16)** defines a "consumer" as "opposed to being a producer implies that we have only a secondary relationship to goods", and calls attention to this secondary relationship since it occurs "when people have to live with and through services and goods that they did not themselves create". Both definitions include an individual who makes own choices, whereas **Miller (1995)** emphasises some lack of personalisation. This need for personalisation has become a common issue of mass consumption, since "where mass production and distribution occur, some consumers feel forced to accept the preferences of the mass rather than pay a high price for individuality" **(Britannica, 1957:328)**. In order to avoid this forced purchasing of consumers, there must be some improvements for consumption. As it is described in the *Encyclopaedia Britannica*, the definition of "consumption" for any society in order to save this individuality and freedom of consumers must include these major issues:

> "…(1) the organization of the society for the purpose of sharing consumer goods; (2) the system of choice making which determines the kind and quantity of consumer goods to be produced; (3) the bearing of consumption on the level of productive activity; and (4) the actual volume and character of consumer goods purchased or used during a given period of time, how these are distributed among the population and the extent to which various consumer needs are met." **(Britannica, 1957:328)**

This definition recommends meeting the various needs and demands of consumers, since consumption depends on choice making among goods and services in order to match needs with own taste. **Slater (1997:28)** calls attention to the "consumer choice" as a private act: "We do not consume in order to build a better society, to be a good person and live the true life, but to increase private pleasures and comforts."

“Every consumption event involves an interaction between a subject and an object” **(Holbrook, 1999b cited in Addis and Holbrook, 2001:56)**, where the subject refers to a consumer or customer and the object refers to some good, service, event, person, place, or other kind of thing. This interaction is essential for the consumption event, as **Addis and Holbrook (2001:57)** explain:

> “The product embodies certain features or objective characteristics (such as colour, price, weight, shape, and so forth), while the consumer embodies a personality equipped for sensitivity to various sorts of subjective responses (where use of the term ‘responses’ refers to various facets of own psychology such as beliefs, feelings, or loyalty related habits).”

In order to match the features of the products with the personal requirements, customers need customisation as well as the interaction in each consumption process. Customers have begun to consider not only a product but also the services around it; therefore, “the consumption of the product becomes part of a holistic experience” **(Addis and Holbrook, 2001:54)**. As **Cagan and Vogel (2002:41)** explain about the facts that have generated entirely new types of consumers, they emphasise the influences of “civil rights, women’s rights, and environmentalism” on consumer behaviours. Consumers have expected more from the goods and services that they chose and bought in order to satisfy their particular demands and new range of interests that exceeded their own personal needs, wants, and desires.

> What every consumer is searching for is a sense of integrity and their own version of value and quality that can help them fulfil their lives. Today’s consumers have a much clearer sense of their own identity and who they want to connect with (market segment) and they are also well aware of the range products available. Customers are looking for products that are well made, safe, and match their lifestyle. Everyone has a number of product categories, where they expect a product to make a statement about who they are and how they want to live their lives. **(Cagan and Vogel, 2002:42)**

During the shopping experience, each customer is comparing goods and services, choosing among them, and if necessary, combining the features they prefer. **Davis (1996:169)** explains this process as “every buy is customised, every sale is standardised”. Finally, customers’ need of customisation matches with the notion defined as ‘consumer sovereignty’. It is “the tastes of consumers rather than the preferences of producers, which determine what goods are provided” **(Black, 2002:82)**.

2.2. Design and Customisation

Considering the customers’ need for customisation, designers and manufacturers need to change the traditional strategies of mass production. **Miller (2007)** explains about this change required in design and manufacturing, pointing designers need to accept their new role in creating ideas since most of the products are bought by considering the customer’s own intelligence and personal features, not according to the designer’s creativity and preference. Also, **Levien (1999)** has pointed out the significant role of design in humanising mass-produced products, similar to the understanding of customising them. Hence, as well as meeting functional needs, it is important to bring warmth, personality, sensuality in everyday products which are defined as human characteristics.

> “Designers of the future will no longer produce collections of specific product designs from which consumers select their favourite. Nor will they add a few superficially customisable features to such limited product ranges. Rather, designers will develop complex design vocabularies and grammars that consumers can explore, probably through interactive evolutionary software, to realise products that best express their personal ‘identities’ and ‘styles’...” **(Miller, 2007:93)**

Designers are expected to achieve variety and innovation in products that are the new tools of satisfying the customer rather than just being functional instruments. As well, designers need to review their applications of basic design in products, since “in a society of mass customisation, only the simple can become the ‘my’ **(Wallace, 2006:21)**”. The fact of becoming the “my” is also defined by **Schreier (2006:317)** as “the pride of authorship effect” considering the value of purchased goods. When customers “take pride in having created something on their own (instead of traditionally buying something created by somebody else)”, the product or service they bought tends to become “the my” more easily. This new concept of product design emphasises “a new challenge for retail and product designers” **(Amerongen et al, 2003:177-178)**:

> “Instead of focusing on narrowly defined product categories, the new perspective asks what product and services fit into what kind of consumption situation. We are moving away from thinking about an isolated product to arrive at a broader space of meaning for the customer.”

2.3. Mass Customisation

By the technological improvements in the processes of mass production and standardisation, customers tend to ask for more product variety rather than the quality and the affordable price. They have demanded products allowing them to express their identities and satisfying individual needs. These changes have led the manufacturing industries into a concept of new strategies defined as mass customisation that enables variety and modularity in product design with low price and customisation in order to satisfy various needs and demands of customers.

2.3.1. Definitions

Neither ‘mass’ nor ‘customisation’ is newly generated notions in the literature of industrial production and management; but the definition of ‘mass customisation’ has not been clarified yet. Emerged recently in the last decades, mass customisation has been mostly defined easier, when it is in comparison to the well-known concept of ‘mass production’. For instance, **Tseng and Jiao (2001:2)** describe mass customisation as "producing goods and services to meet individual customer's needs with near mass production efficiency.”

Davis (1987), who has first coined the term in his legendary book *Future Perfect*, describes mass customisation as the ability to provide individually designed products and services to every customer through high process agility, flexibility and integration. Moreover, it refers to achieve reaching the same large number of customers as in mass markets of the industrial economy, and simultaneously satisfying each customer individually as in the customised markets of pre-industrial economies. **Pine (1993)** defines mass customisation as providing tremendous variety and individual customisation, at prices comparable to standard goods and services to enable the production of products and service with enough variety and customisation that nearly everyone finds exactly what they want.

The hesitation in defining the term has been emphasised by **Davis (1996:15)**: "Mass customising is an oxymoron, the putting together of seemingly contradictory notions, like jumbo shrimp and artificial intelligence." Therefore, mass customisation tends to be defined by statements explaining what it is not rather than what it is. First of all, variety does not mean customisation, although mass customisation is based on providing product variants. For instance, "offering hundreds of bicycles with different colours and features does not mean being able to identify the exact bicycle need of the customer" **(Duray et al., 2000 cited in Atrek, 2004)**. Similarly, it is so common to bring handcrafts and mass production together in the definition of mass customisation. As handcraft is based on customisation, it seems as if handcrafts returned back into production process. **Teresko (1994:45)** explains this confusion of the term:

> "Mass customisation is more than some oxymoronic marriage of craft-based production to mass-production techniques. Instead, the term refers to a new way of conducting business to gain the ultimate competitive edge. Mass customisation reaches the goal of customer satisfaction by harnessing the latest business methods and technology."

Enabling successful mass customisation does not only represent modularity, but also some other strategies, processes and methodologies. For instance, supply chain management has a significant role in coordinating the resources, and developing an information network within suppliers **(Atrek, 2004)**.

Marketing strategies also play a significant role in exploring the needs and demands of customers in order to take action for each requirement, however classification of these strategies may result in misunderstanding the concept. For instance, direct marketing is not customisation, as customisation needs a sort of mutual relationship. If the differences between direct marketing and customisation are distinct, the gap with brand-based marketing is even wider **(Thackara, 1997)**. Since brands are based on values, not on the material quality of products or services, brand-based marketing has no use in mass customisation.

Finally, it is reminded by **Davis (1996)** that mass customising is not restricted to products and services. As it also includes the applications about customers, as well as market segmentation and distribution, mass customisation tends to offer a flexible concept rather than to limit the strategies.

2.3.2. Emergence of Mass Customisation

The confusion in defining the notion indicates the significance of examining the emergence of mass customisation in history. However, by various researchers, mass customisation is declared as a sort of transformation from mass production by new technologies, as well as a return of crafts production with all the facilities of improved technologies in manufacturing. **Addis and Holbrook (2001:51)** explain that mass customisation "increasingly allows customers to ask for new personalised products at a level of individualised tailoring that was never before possible". They point out that this new strategy with the potential to bring individualised products of craft production and some features of mass production together. According to **Pine (1993:9)**:

> "For centuries, economic production was based on the notion of craftsmen. Everything was crafted by the hands of someone who had the requisite materials, tools, and most important, skills. …The Industrial Revolution brought a general replacement of hand tools with machinery and mechanisation as the primary instruments of production."

Table 2.1: Evolution of production paradigms **(Boër and Dulio, 2007:6)**

Paradigm	**Craft production**	**Mass production**	**Flexible production**	**Mass customisation**	**Sustainable production**
Started	~1850	1913	~1980	2000	2020?
Society needs	Customised products	Low cost products	Variety of products	Customised products	Clean products
Market	Very small volume per product	Demand>supply Steady demand	Supply>demand Smaller volume per product	Globalisation Fluctuating demand	Environment
Business model	Pull *Sell-design-make-assemble*	Push *Design-make-assemble-sell*	Push-Pull *Design-make-sell-assemble*	Pull *Design-sell-make-assemble*	Pull *Design for environment-sell-make-assemble*
Technology enabler	Electricity	Interchangeable parts	Computers	Information technology	Nano/bio/material Technology
Process enabler	Machine tools	Moving assembly line	Flexible Manufacturing System robots	Reconfigurable Manufacturing System	Increasing manufacturing

Boër and Dulio (2007:5) define manufacturing as "the prime driver in the evolution of society from one that is agriculturally centred to one that is industrially centred" and outline the evolution of production through time as shown in Table 2.1.

By this replacement of crafts with mechanisation in production, reducing the cost of manufacturing goods has been achieved but this led to the need for developing standards in products in order to avoid difficulties in production process. **Lampel and Mintzberg (1996)** describe the standardisation era as a series of strategies: standardisation of choices leads to standardised design, then standardisation of design tolerates mechanised mass production, and finally standardisation of products allows for mass distribution. As a result, price has been affordable and quality of goods has been standardised in the mass market, but quite ignoring the various needs and demands of customers.

New technologies improving the manufacturing processes have also generated the opportunity to produce in various colours and sizes for standardised products. **Thackara (1997)** comments on this improvement by calling quality of products and services as the beginning, not the end. Since it has been systematised, quality no longer differentiates products from each other. Customers have become spoiled for alternatives among perfectly performing products.

Table 2.2: The old ways contrasted with the new **(Pine, 1993:162)**

The Old Ways of Mass Production	The New Ways of Mass Customisation
• Low-cost, consistent quality, standardised products	• Affordable, high quality, customised products
• Homogeneous markets	• Heterogeneous markets and segments of one
• Stable demand	• Demand fragmentation
• Long product life cycles	• Short product life cycles
• Long product development cycles	• Short product development cycles
• Official efficiency premier	• Total process efficiency premier
• Economies of scale	• Economies of scale and scope
• Long runs	• Lot sizes of one
• Inflexible production	• Flexible production
• High overhead necessary	• Low overhead
• High inventories: build to plan	• No inventories: make to order
• High cost of variety	• Low cost of variety
• Separation of thinking and doing	• Integration of thinking and doing
• Lack of investment in worker skills	• High utilization of and investment in worker skills
• Poor management/employee relations	• Sense of community
• Breakthrough innovations	• Breakthrough and incremental innovations
• Separation of innovation and production	• Integration of innovation and production
• Poor supplier relations	• Supplier interdependence
• Disregard for many customer needs and wants	• Quick response to changing customer desires
• Short-term managerial decisions	• Sound long- and short-term decisions by managers and workers

Mass production has been so efficient in manufacturing large volumes of goods in a short time, whereas it has failed in adapting the changing demands and needs in the market. **Pine (1993)** points out one of the primary reasons for mass production to develop that extensively in the United States as the more homogenous structure of the American market than of the industrialised countries of Europe. Therefore, the homogeneity of demand is interrelated with the standardization of output. Reversing the dependence of economies of volume on the standardisation and homogeneity of mass production, this new strategy of mass customisation has gained force from an increase in the flexibility of the productive cycle of modularity. This modularity, the central concept of post-Fordism, has been improved by the new technologies in order to offer a unique product to each customer according to the particular necessities and specifications, "including products that were traditionally considered undifferentiated commodities" **(Addis and Holbrook, 2001:52)**.

Comparing the strategies in transition from mass production to mass customisation makes the features of both concepts more comprehensible, as shown in the Table 2.2, listing the distinguishing ways of both concepts. It is also important to realise the similarities between mass production and mass customisation, as well as the differences between them.

Through the mass production model, "you could have either low-cost, standardised goods, and services or high quality and customised ones, but not both simultaneously" **(Davis, 1996:15)**. However, continuous improvement has changed the situation into getting low-cost and high quality at once, even while mass customising has proved that it is achievable to produce, distribute, and deliver customised goods and services.

Mass production and mass customisation are not distinct concepts, as **Mintzberg and Lampel (1996:21)** explain: "Customisation and standardisation do not define alternative models of strategic action but, rather, poles of a continuum of real-world strategies." Similar to its new structure and various strategies, the term itself is defined in a flexible way matching with its flexible implementations.

2.3.3. Discussions on Mass Customisation

Similar to the different statements for describing the term itself, there are various researches and studies that define some classifications about strategies of mass customisation. It is significant first to define the different requirements of individual customers, and there is no standardised method for applying mass customisation.

Lampel and Mintzberg (1996) call attention to the misunderstanding of the link between mass and individual, by claiming that production managers often see “aggregation” as the best way to increase efficiency, whereas sales managers often consider ‘individualisation’ as the surest approach to increase sales.

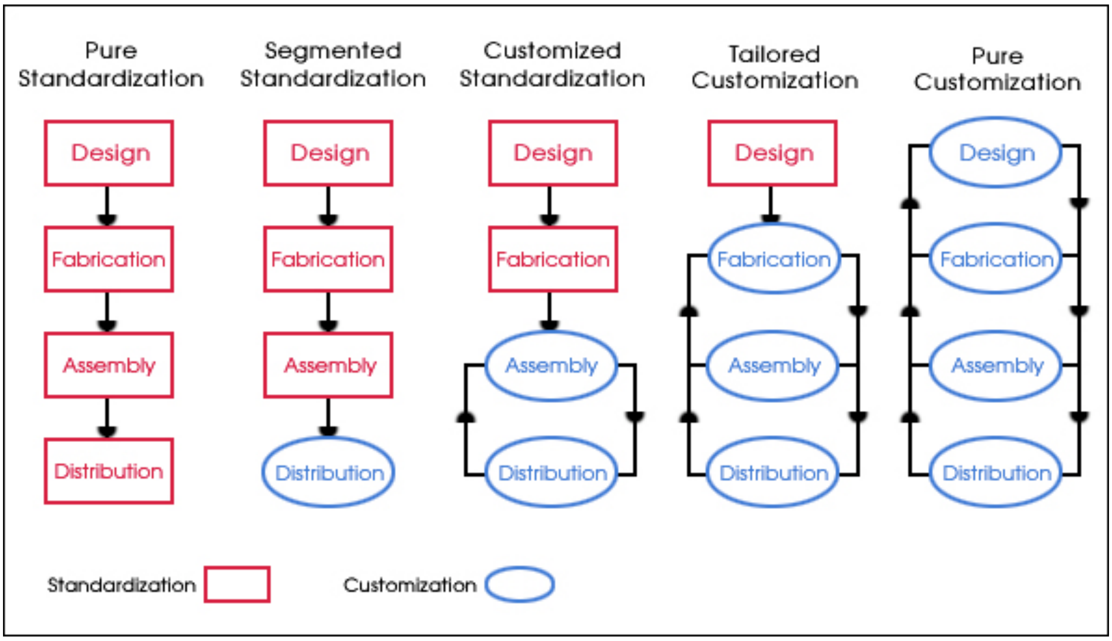


Figure 2.1: A continuum of strategies **(Lampel and Mintzberg, 1996:24)**

Lampel and Mintzberg (1996:25) have developed a continuum of strategies with four stages in its value chain: design, fabrication assembly, and distribution as shown in Figure 2.1. According to their study, “some firms tilt one way or the other because of the needs of the customers they serve”, whereas others prefer transitional positions. These five different strategies of customisation and standardisation that comprise the operating processes of manufacturing from design to delivery are described as follows **(Lampel and Mintzberg, 1996)**:

Pure standardisation is based on such a strategy having no distinction among different customers that has no external influence over the processes of design, production, or even distribution.

Segmented standardisation refers to a strategy keeping the standardisation of products within a narrow range of features, also modifying to generate variety, but not at the request of individual customers. However, depending on the large segmentations of customers, distribution stage has a greater tendency to be customised than variety of products.

Customized standardisation offers standardised components in addition to products usually designed as a central standard core, like an automobile body. Each customer has the chance to combine his/her own preferences among the range of available components. This strategy is mostly based on modularisation enabling customers to customise the assembly stage and to configure the product according to their necessities.

Tailored customisation is working with prototypes and/or design templates while presenting the standardised design of any product to a potential customer. Customising process starts in the fabrication stage by adapting the standardised design to the needs or demands of each customer individually.

Pure customisation allows the whole process for being customised, so the product or service is directly made to order. For instance, a jeweller or a residential architect designs in order to satisfy the exact needs and wishes of customers. As well, Apollo project of NASA or the Olympic Game are major examples of pure customisation.

These strategies confirm the possibilities in implementing customisation. The difficulties in satisfying each customer lead companies to try some alternatives. **Gilmore and Pine (2000:115)** draw attention to these difficulties:

> "...to become customer driven, many companies have resorted to inventing new programs and procedures to meet every customer's request. But as customers and their needs grow increasingly diverse, such an approach has become a sure-fire way to add unnecessary cost and complexity to operations."

There is no obligation in implementing mass customisation since each company has its own concept, vision, market segmentation, customer requirements, and so on. Therefore, it is significant to be aware of own features, strengths and weaknesses for each company intending to develop mass customisation strategies.

Table 2.3: Strategies of customisation defined in the literature **(Bardakçı, 2004:5)**

Terms preferred	**Terms used in the literature**
Collaborative customisation	- Pure customisation (Lampel & Mintzberg, 1996) - Cosmetic customisation (Gilmore & Pine, 1997)
Adaptive customisation	- Developing customisable products and services (Pine, 1993)
Modularisation	- Customised standardisation (Lampel & Mintzberg, 1996) - Tailored customisation (Lampel & Mintzberg, 1996) - Modular product design (Feitzenger & Lee, 1997) - Modular process design (Feitzenger & Lee, 1997) - Point of delivery customisation (Pine, 1993) - Providing customisable services around a standard product (Pine, 1993) - Modularised components (Pine, 1993)

Bardakçı (2004) also mentions that strategies of implementing mass customisation are defined as various terms despite of the very few differences among them. In his article, these various terms of strategies are categorised into three main groups: collaborative customisation, adaptive customisation and modularisation. These terms preferred as the main categories of customisation strategies (Table 2.3) are comprised of various terms defined in the literature by different researchers.

To begin with *collaborative customisation*, it is based on the communication between the customer and the firm, and offers no finished product before this communication is completed **(Bardakçı, 2004)**. The end product is produced by integrating some standardised ready-made modules or by designing a new one for each customer. Next, *adaptive customisation* depends on a standardised product satisfying various needs and demands of customers. This product requires adjustable components in order to be customised by the user and a well-developed design process rather than the choice of manufacturing methods.

On the other hand, *modularisation* is the most common method in manufacturing goods for variety and customisation **(Bardakçı, 2004)**. Modularity in design and manufacturing allows products to be combined according to the needs and demands of customers just before purchasing in the store or online as well as to be customised by adding or removing some modules according to the changing needs and demands of the customers whenever they want. This possibility, promising long-term usage and customisation of products, represents some sort of guarantee since the customers know that they can have additional or changeable pieces for their combinations if any problem or need occurs.

2.4. Modularity for Customisation

Baldwin and Clark (2000:63) define modularity through combining two ideas: the first one is "the idea of interdependence within and independence across modules" and the latter one is the idea summarised by "abstraction, information hiding, and interface". The first idea mentioned is more appropriate for the subject of this study, since modularity in furniture design is more related to modules and combinations rather than abstraction or interface.

> "Modules are units in a larger system that are structurally independent of one another, but work together. The system as a whole must therefore provide a framework –an architecture– that allows for both independence and integration of function." **(Baldwin and Clark, 2000:63)**

Stoll (1999:311) defines a module as "a self-contained component that is equipped with standard interfaces that allow it to be integrated into a larger system" and calls attention to the variety of different definitions for modules. Each individual part of a product is a module whereas the product itself can be defined as a module like light bulbs, batteries, etc. “Building blocks” of modules, illustrated in Figure 2.2, can be used interchangeable for different products and product variants.

Assorted combinations of building block modules, illustrated as Product A in the Figure 2.2, can be used to focus on a product in order to meet particular customer specifications. Next alternative, illustrated as Product A, B, and C, is using different modules interchangeably in several combinations to create different final products.

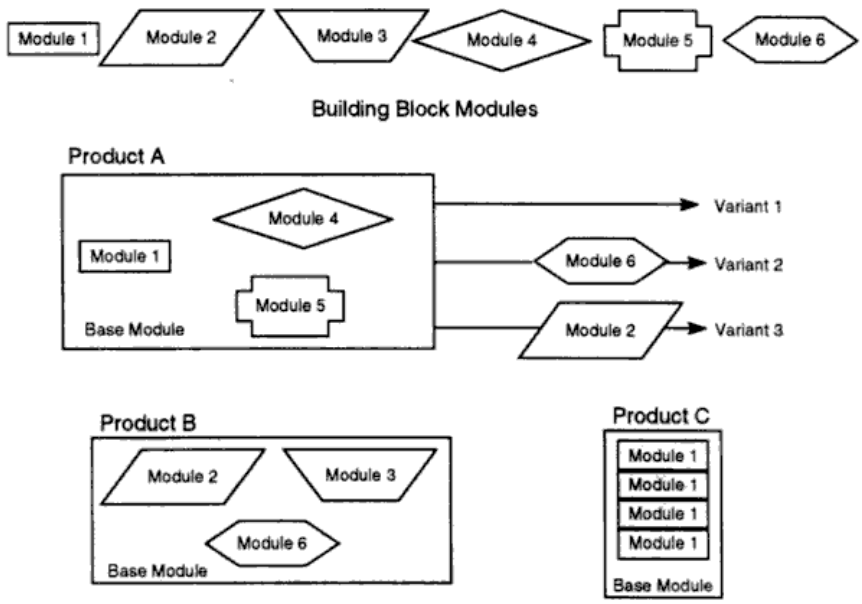


Figure 2.2: Examples of modular design **(Stoll, 1999:312)**

Another alternative process in modular design, illustrated as Product C in the Figure 2.2, is repeating the modules within a product “allowing a larger system to be built from repetitions of smaller components” like applied to modular furniture and cabinets **(Stoll, 1999:311)**. Modular kitchen units and cabinets (Figure 2.3) allow customers not only to create the choice for their specific needs but also to add more pieces whenever they call for changes.

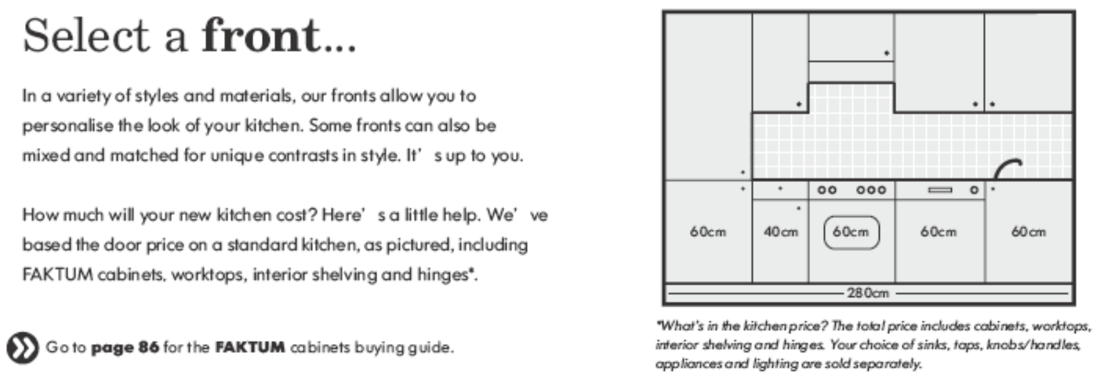


Figure 2.3: IKEA Kitchen units and cabinets **(IKEA Kitchens, 2008:60)**

Berman (2002) highlights the significant role of the flexibility in producing a customised good rapidly at a cost comparable to that of a mass-produced one. He argues that efficient production in mass customisation is typically based on two stages comprising modularisation. According to **Berman (2002:55)**:

> "In the first stage, the firm develops modular subassemblies composed of parts that are common to all mass-customised products. In the second stage, these modular assemblies are customised by including additional parts on the basis of a costumer's unique order. This second stage is referred to as postponement of product differentiation."

This second stage of modularisation leads the manufacturer to improve the product and add more possible components whenever needed, whereas leads the customer to find new modules or products whenever they need changes in their choice of combinations. **Berman (2002)** points out the importance of flexible manufacturing among the components of mass customisation by emphasising differences from mass production processes and explains that consumer is able to choose among a very large number of options through the former one, whereas he/she is able to choose one of the several alternatives through mass production. In other words, this is the statement that mass customisation creates variety for individual consumer and requires flexibility in manufacturing, while mass production's limited variety for market segment or average consumer is required due to fixed production set-ups.

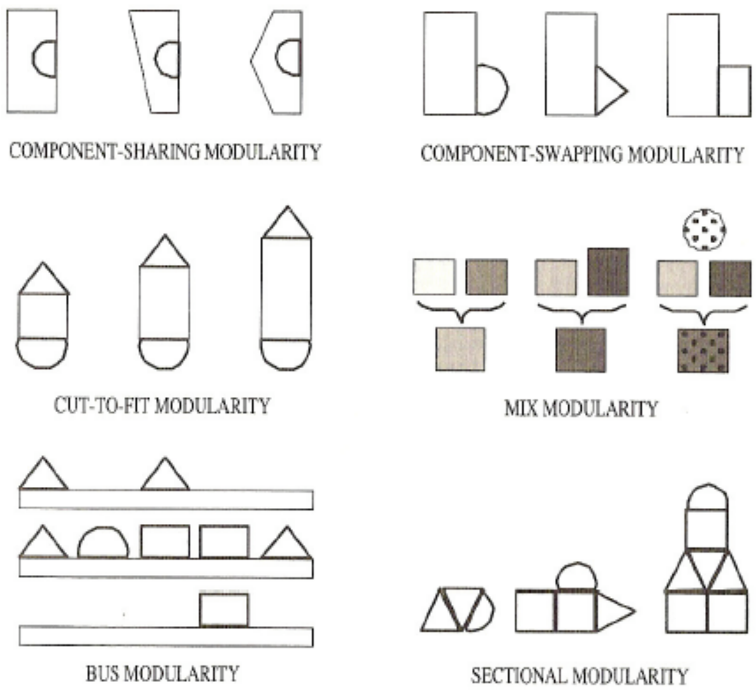


Figure 2.4: Modularity types for mass customisation **(Pine, 1993:201)**

Pine (1993) defines six types of modularity and explains that simple forms of modularity allow a wide range of variety without changing the nature of the end products (Figure 2.4). First, *component-sharing modularity* uses the same additional component across several products, whereas *component-swapping modularity* is defined to be the complement of the previous one and uses different modules to match with the same basic product. Third, *cut-to-fit modularity* is described as the most useful one for any product that has a specific component to be repeatedly varied and enables to match the needs of hard-to-fit individuals at the extremes. Then, *mix modularity* does not differentiate in the process but in the end product that the components are quite mixed together to become something else. Next, *bus modularity* uses a base component allowing a number of various components to be attached and variation in the type, number and/or location of its related modules that can plug into it. Last, *sectional modularity* has the advantage of standard interfaces matching any components together and is defined to be providing the greatest degree of variety and customisation since it provides the change in the structure of the product itself. According to **Pine (1993:212)**:

> "The greater the number of products, and particularly as that number approaches the number of individual customers, the greater the cost and performance advantage of modularity."

2.5 Customers and Customisation

It is essential that mass customisation has emerged in order to satisfy customers' need for personalisation, not to experiment some new concepts in manufacturing goods. **Blecker and Abdelkafi (2006:4)** define the customer as "the main driver for the implementation of mass customisation". If there is no customer need or demand for individualised goods and services, there will be no opportunity to enable success for this strategy. It is so evident that customer is the determinative element in mass customisation.

Requirements and wishes, leading the consumption of customised goods, define the value level of products perceived by the customer. **Schreier (2006:317)** points out this value of consumed goods as:

> "Customers may also be likely to value the output of self-design more highly if they take pride in having created something on their own (instead of traditionally buying something created by somebody else). This is referred to as the 'pride of authorship' effect."

In addition to this enthusiasm of customers about building their own products or services, they have gained a better understanding of products and market options. They have become better able to make informed preferences and more dominant in their discussions with various sellers **(Addis and Holbrook, 2001)**. Therefore, considering the goods and services before and after shopping is so common that the consumption becomes a holistic experience for the customers.

Customers are defined in various images according to their way of consuming such as "the dupe", "the rational hero", and "the post-modern identity-seeker" and "the craft consumer" **(Campbell, 2005:23-24)**. The first one is passive and easily manipulated by market forces, whereas the second one is active and careful about goods and services in order to increase the utility obtained. Third, the post-modern identity seeker is the one who manipulates the symbolic meanings attached to products and prefers the goods as the self-expression of an identity or lifestyle. Finally, the craft consumer refers to the one who buys mass produced goods, uses them as 'raw materials' for creating personalised, humanised or customised objects. This process may involve distorting, combining, painting, etc. in order to generate a new item allowing efficiency as well as self-expression.

The first type of customer, defined as the dupe, does not tend to have any requirements about the goods and services offered by the market, whereas the rational hero, the post-modern identity-seeker and the craft consumer insist on quality, value and variety in products in order to be able to find out the best choice, to personalise the good for self-expression, and to customise the necessary articles or materials for own purpose, respectively. Consequently, mass customisation seems to be a sort of essential strategy in the market that has the ability to satisfy any type of customer and has the potential even to wake the passive consumers.

However, variety in goods and services offered by mass customisation is suggested as a risk factor for some confusion in the study of **Huffman and Kahn (1998:491)**:

> "Large assortment strategies can backfire, however, if the complexity causes information overload such that a customer feels overwhelmed and dissatisfied, or chooses not to make a choice at all."

Although customisation is usually based on modularity and variety, presenting all the possible combinations has the potential to lead customers to confusion instead of satisfaction. It is significant to maintain the balance of offering proper amount of variations and pay attention to the ways of displaying these variations.

2.6 Firms and Customisation

Many companies considering customers' needs and demands have implemented mass customisation; therefore, there is a wide scope of examples including credit cards, food, electronics, automobiles and so on. Some examples are described here in order to give an explanation of strategies experienced in the markets abroad and in Turkey. Most of the examples rely on some web-based processes in order to offer customers a visual trial of customisation. According to **Franke and Schreier (2008)**:

> "The core idea of mass customisation is to provide a web-based user toolkit that allows the individual customer to design a product, which suits her individual preferences and is then produced exclusively for her. Many companies—including Dell, General Mills, Nestlé and Nike—have set up mass customisation systems."

Each example given in this chapter has online interaction tools available for the customers who are interested in customising the products offered especially on the websites. Each presents similar strategies of mass customisation in various markets of goods and services. For instance, the genius of Dell's use of mass customisation is defined to be realising the potential of the Net to make the customer an active partner in creating economic value **(Berman, 2002)**. The customisation of "open-source laptops" of Dell allows customers to find the proper components and features of the end product (Figure 2.5).

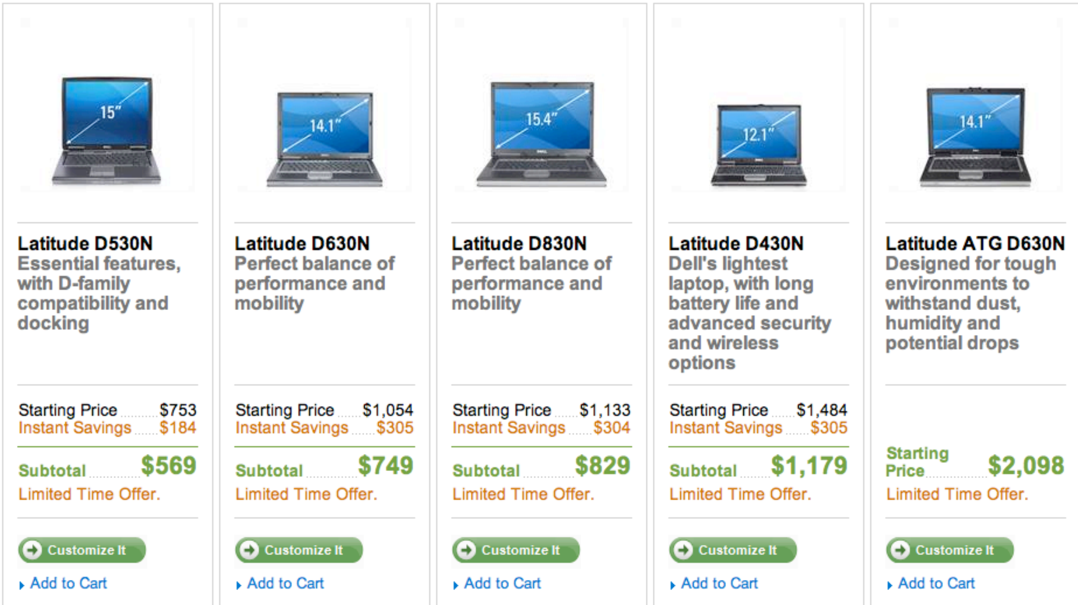


Figure 2.5: Open-source laptops **(Dell, 2008)**

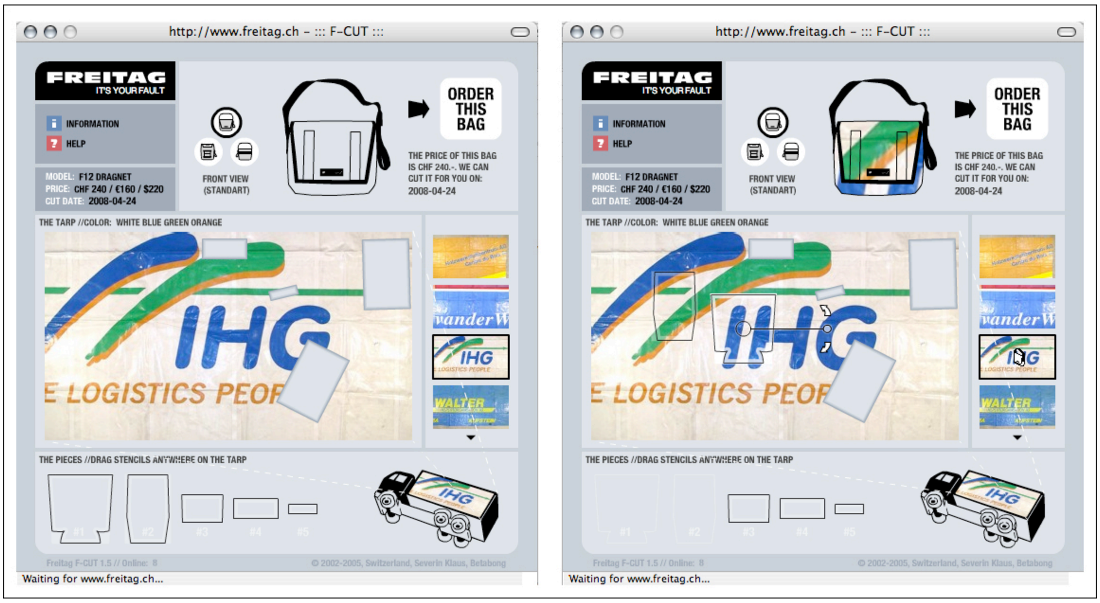


Figure 2.6: Design your bag **(Freitag, 2008)**

Freitag, which is owned by two Swiss brothers, produces bags from recycled materials like used truck tarpaulins, used car seat belts, used air bags and used bicycle inner tubes **(Freitag, 2008)**. The company, founded in 1993, has 3 own stores and over 350 point of sales worldwide. In addition to these stores selling the products of Freitag, there is an online shop that offers customers to design their own bag (Figure 2.6). Customers are allowed to choose among twelve different truck tarpaulins and create their own combination of cuts for their bag. Freitag encourages the customers for original bag designs but also reminds them that they are responsible for the design: “If it looks ugly, it is your own fault.” **(Freitag, 2008)**

Figure 2.7: Adicolor shoe box **(Adicolor, 2008)**

Adidas offering a box of shoes and tools for the customers courageous and creative to customise an original Adidas like an artist painting on these shoes (Figure 2.7). This range of customisable products, named as ‘Adicolor White Series’, consists of jackets, shoes, and caps. Besides these boxes, an online manual of hints and tips is available for the customers who need guidance (Figure 2.8).

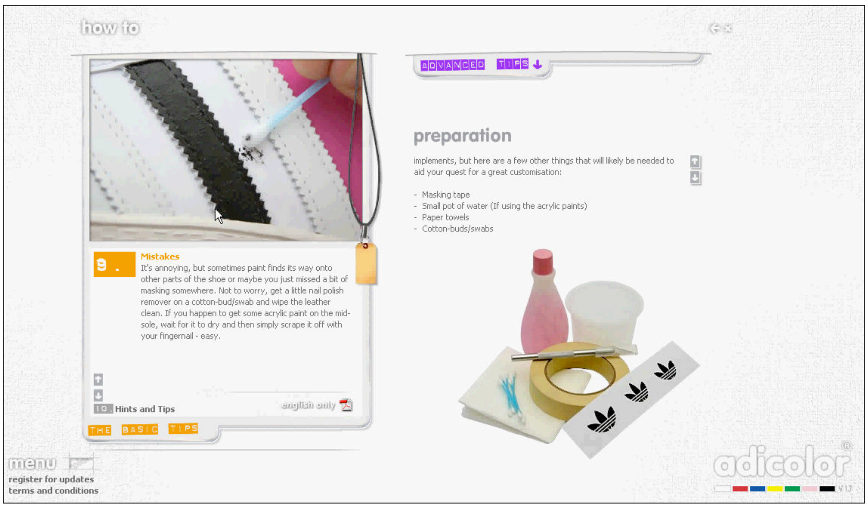


Figure 2.8: Adicolor manual **(Adidas, 2007)**

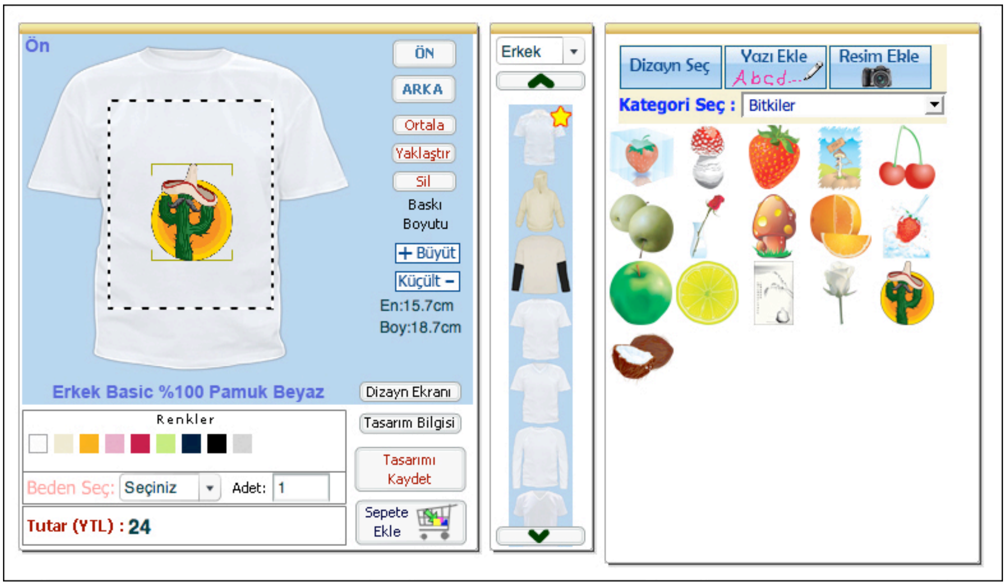


Figure 2.9: Design your T-shirt **(Tish-O, 2008)**

Tish-O, founded in 2007, is a new generated brand of Demal Tekstil and the first online T-shirt design brand in Turkey **(Tish-O, 2008)**. Tish-O offers design templates including various types, sizes, and colours of T-shirts and a wide range of pictures to be added in the design of customers (Figure 2.9). Furthermore, customers are allowed to load their own picture from their computer, add writings on the T-shirt design by the guidance of a web-based tool, change the size and location of the pictures, and save their design samples in their accounts. After the design process, ordering the original design is possible. Tish-O produces the T-Shirt individually for the customer and posts it directly to the given address in three days.

Figure 2.10: Design your own credit card **(Garanti, 2008)**

Garanti Bank of Turkey offering membership and credit cards similar to many other banks has a credit card customisable for each customer according to their needs and wishes (Figure 2.10). This credit card named ‘Flexi Card’ is built in three steps such as choosing a rewards promotion, setting an interest rate and bonus rate, and choosing a template or creating a design for the credit card **(Garanti, 2008)**.

Automobile design requires customisation of the features and accessories in order to respond to the special requirements and demands of the customers. Toyota is one of the samples offering customisation for customers’ own preferences and necessities. Customers are guided to choose their own requirements among various alternatives step by step, and also informed about the prices for each choice (Figure 2.11). Customisation helps the customer in shaping the product as well as saving money by removing the features unnecessary for the user.

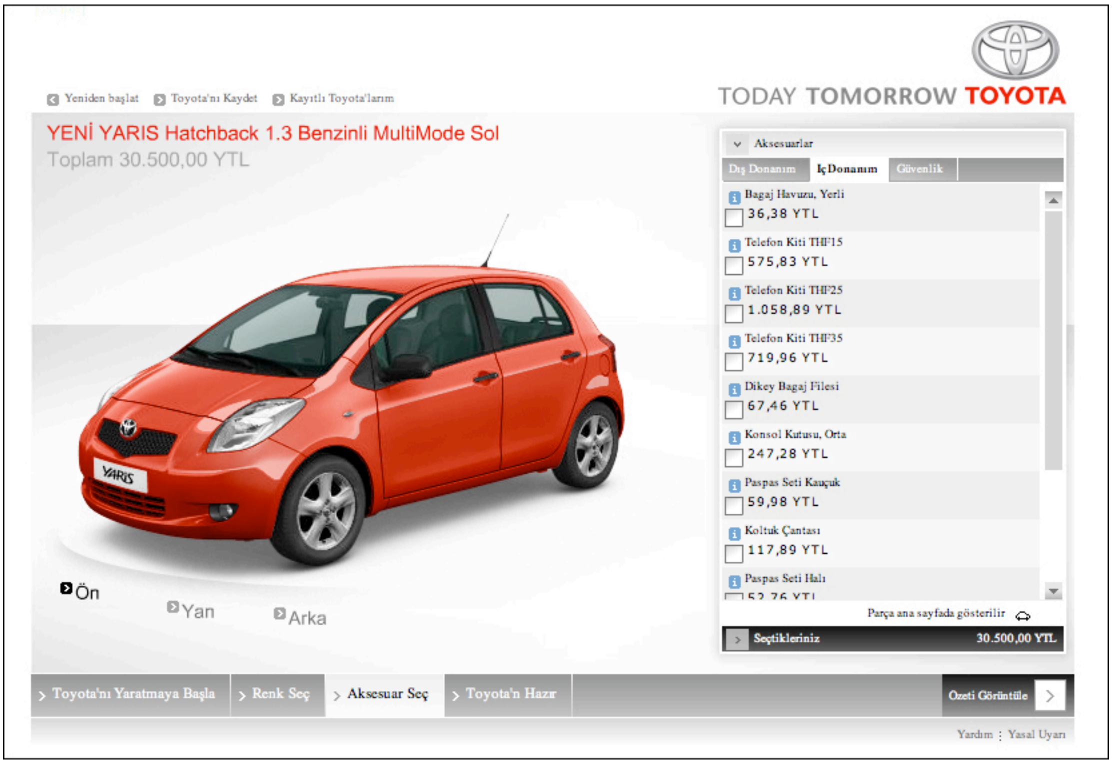
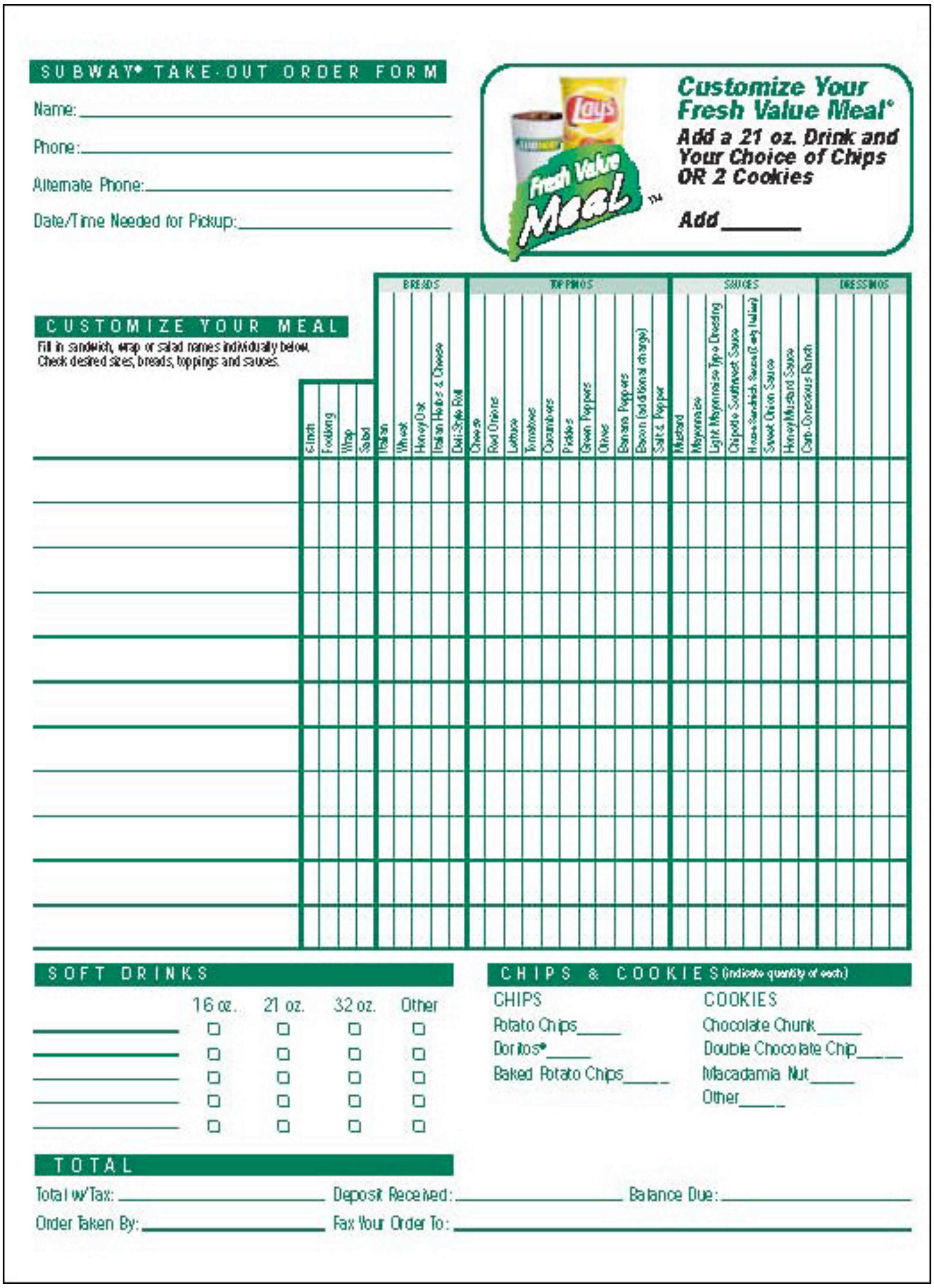


Figure 2.11: Build your own Toyota **(Toyota, 2008)**

Automobile industry needs component modularity and customisation in order to be able to offer reasonable prices for each customer with various requirements. Mass customisation is also necessary for food market. Just ordering ready and fast food is an ordinary process; therefore, customisation in food ordering makes the process more attractive by involving customer into the preparation of the food. For instance, Subway Restaurants in Canada offer a variety of ingredients for sandwiches and salads (Figure 2.12). In the menu, various alternatives for breads, sauces, chips, cookies, and so on.



SUBWAY® TAKE-OUT ORDER FORM

Name: ________________

Phone: ________________

Alternate Phone: ________________

Date/Time Needed for Pickup: ________________

Customize Your Fresh Value Meal®

Add a 21 oz. Drink and Your Choice of Chips OR 2 Cookies

Add ______

CUSTOMIZE YOUR MEAL

Fill in sandwich, wrap or salad names individually below. Check desired sizes, breads, toppings and sauces.

	6-Inch	Footlong	Wrap	Salad	BREADS: Italian	Wheat	Honey Oat	Italian Herbs & Cheese	Deli-Style Roll	TOPPINGS: Cheese	Red Onions	Lettuce	Tomatoes	Cucumbers	Pickles	Green Peppers	Olives	Banana Peppers	Bacon (additional charge)	Salt & Pepper	SAUCES: Mustard	Mayonnaise	Light Mayonnaise Type Dressing	Chipotle Southwest Sauce	House Sandwich Sauce (Zesty Italian)	Sweet Onion Sauce	Honey Mustard Sauce	Carb-Conscious Ranch	DRESSINGS					

SOFT DRINKS

	16 oz.	21 oz.	32 oz.	Other
______	☐	☐	☐	☐
______	☐	☐	☐	☐
______	☐	☐	☐	☐
______	☐	☐	☐	☐
______	☐	☐	☐	☐

CHIPS & COOKIES (indicate quantity of each)

CHIPS

Potato Chips____

Doritos®____

Baked Potato Chips____

COOKIES

Chocolate Chunk____

Double Chocolate Chip____

Macadamia Nut____

Other____

TOTAL

Total w/Tax: ______ Deposit Received: ______ Balance Due: ______

Order Taken By: ______ Fax Your Order To: ______

Figure 2.12: Customise your meal **(Subway Menu, 2008)**

Similar to the menu of Subway Restaurants, Otantik Kumpir in Turkey has a menu offering various ingredients for ‘Kumpir’ (Figure 2.13). ‘Kumpir’ is the baked potato usually mixed with butter and cheese. All the other ingredients like sauces, salads, etc. are additional ingredients. Most of the customers enjoy the process of choosing their favourite ingredients whereas the others have the opportunity to order a ‘Kumpir’ from the templates including the popular mixed ingredients.

Figure 2.13: Ingredients for Kumpir **(Otantik Menu, 2008:8)**

The ingredients are mass-produced and also customers are allowed to choose the ones and customise their food order. Ingredients or recipes are also the mass produced components of the end product. In other words, products and services have no specific features to become to be able for customisation; however, a sort of variety and modularity as well as harmony among the components is required.

Customisation, implemented in various markets, intends to lead customers to involve in the process. Therefore, customers are allowed to dominate the end product according to their requirements and also encouraged to make their own decisions as well as their own faults.

3. IKEA, PRODUCT DESIGN AND CUSTOMISATION

This chapter begins with a brief history of the Swedish home furnishing retailer IKEA and the development of IKEA concept. Next, the role of product design and innovation in the development of IKEA product range and the significance of customisation in improving the concept and the product range of IKEA are explained. Last, the structure of the Turkish furniture industry and the adaptation of IKEA into the Turkish market are given.

3.1. IKEA History and the Development of IKEA Concept

In 1943, Ingvar Kamprad establishes and registers his firm IKEA, "selling such items as pens, wallets, jewellery and picture frames" **(Zentes et al., 2007:131)**. Five years later than the opening, furniture is included into the product range of IKEA, whereas the first IKEA catalogue is published and distributed as free of charge in **1951 (Inter IKEA, 2008)**. The first furniture showroom of Almhult (Sweden) is opened in 1953, allowing customers to examine the furniture in details. By the development of the IKEA concept in 1955, IKEA starts to design its own furniture in order to provide functional, stylish and affordable home furnishings, also for avoiding some problems with the suppliers. In 1958, the first IKEA store is opened in Almhult, with more than 100 IKEA co-workers. The idea of self-assembly furniture and flat packages develops in 1959, and allows IKEA to reduce transport costs and so prices of the products. In 1961, IKEA has the first non-Scandinavian suppliers, based in Poland, with 20,000 chairs delivery. The first store outside Sweden, in Oslo (Norway), is opened in 1963.

In 1965, the largest IKEA store is opened in Stockholm and introduces the Cook Shop with a range of kitchen products in addition to the furniture range **(Inter IKEA, 2008)**. By the success of the opening, the IKEA concept developed into opening the warehouse and allowing the customers serve themselves. In 1973, IKEA opens the first store outside of Scandinavia in Switzerland. Afterwards, concentration on innovative ideas in design and also in strengthening the IKEA concept develops the IKEA range and services. "IKEA's growth was quite spectacular during the 1970s and 1980s, thanks to a strategy based on offering products with a certain quality level at a relatively low cost" **(Canals, 2000:68)**. In order to achieve this strategy, IKEA starts a policy that has three legs. First, buying raw materials with quality at low prices, and replacing expensive ones with similar quality but cheaper materials helps in reducing prices of the range. Next, IKEA develops long-term relationships with the suppliers of these materials, even provides them information about materials required and helps in improving their manufacturing processes. The third policy is maintaining continuous production in these factories throughout the year by ordering a constant level of product or material.

Innovative ideas by IKEA designers encourage design quality and support low price concept. For instance, a plastic chair called SKOPA is developed in 1973, by a supplier usually produces plastic buckets **(Inter IKEA, 2008)**. Similarly, TAJT multifunctional seating unit represents one of the good examples, since it is made by using a low-cost raw material (denim) from another industry in order to create a hard-wearing and low priced product (Figure 3.1).

Figure 3.1: SKOPA chair & TAJT seat/recliner **(Inter IKEA, 2008)**

The range of furnishings called as STOCKHOLM is created in 1984, in order to offer the expected features of a classic high quality product, but not a high price. This range receives the 'Excellent Swedish Design Award'. Especially, the MOMENT sofa wins a prize for the innovative design in 1985, since a supermarket trolley manufacturer helps IKEA with the frame (Figure 3.2). The IKEA PS collection, allowing designers be in charge of the design process and shape the latest creations, is presented in 1995.

Figure 3.2: LACK coffee table & MOMENT Sofa **(Inter IKEA, 2008)**

IKEA product range stands for innovative and modern design and redesigning of some Scandinavian furnishings and accessories is also significant for IKEA. For instance, an 18th century Scandinavian furnishing is launched in 1996, and the DALA horse, a historic Swedish souvenir is transformed into a contemporary design object in 2002 (Figure 3.3).

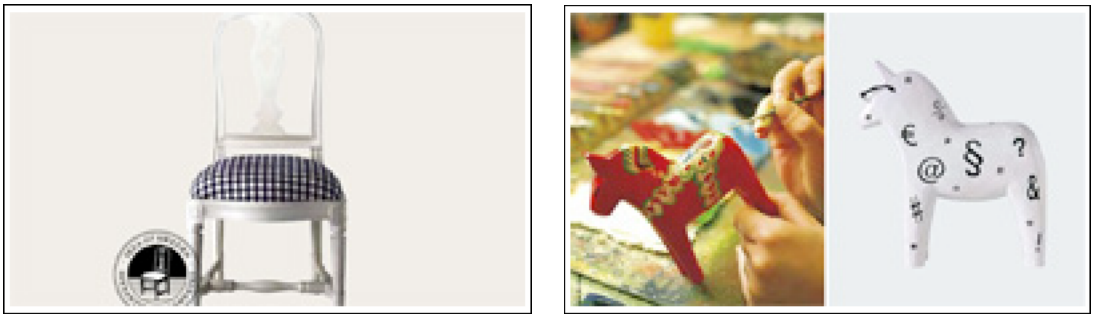


Figure 3.3: 18th Century furniture & DALA horse **(Inter IKEA, 2008)**

Children's IKEA range, including products developed and designed especially for children, is introduced in 1997. IKEA stores, offering such various ranges for home furnishing, are supported also by online facilities. Since 1997 IKEA can be accessed through the Internet.

IKEA has developed a well-defined concept, leading the company to become the world's largest furniture retailer. This concept, especially avoiding common statements of any market, is based on "offering a wide range of well designed, functional home furnishing products at prices so low that as many people as possible will be able to afford them" **(Inter IKEA, 2008)**. Since its foundation in 1943, the IKEA concept has been improved and introduced to more people around the world. It has been so efficient and internationally reasonable that has enabled facing "no direct competitors with an equivalent global scope" **(Zentes et al., 2007:131)**. All the processes, including the way that IKEA products are designed, manufactured, distributed, displayed, sold and assembled, are defined by the IKEA concept.

The founder of IKEA and the concept, Ingvar Kamprad has developed the idea of offering functional and stylish home furnishing products by avoiding expensive ways of manufacturing but keeping the high quality of goods and innovative design **(Inter IKEA, 2008)**. He has considered introducing Swedish culture and style to the world, since even the name IKEA is composed of the initial letters referring to the founder's name, his parents' farm and his hometown in the Southern Swedish region of Småland: Ingvar Kamprad, Elmtaryd and Agunnaryd.

The core principles of the company are quality and economy, in order to achieve the goal offered by the IKEA concept **(Prime, 1999)**. The principle of quality is significant in three periods of product life, which are design, range and use. First, each product in the range is designed by and for IKEA, enabling the company to keep quality high and under control, rather than dealing with the other designers and manufacturers. Second, each article for sale in the stores belongs to IKEA range, which is a coherent whole. The range is designed according to some specific classifications like young-old, high-low income or modern-classic. Third, quality of the usage period is tested for checking the aspects of products concerning strength and workability as well as surface and resistance. All IKEA furniture tested has the quality label of Möbelfakta, which is adapted from Swedish standards system, identifying materials, construction and durability of the products. The principle of economy in IKEA, associated with the quality principle, involves various methods for saving money especially by the involvement of customers. Among those methods, there are developing own products, focusing on flat-packs and buying in quantity, while customers help themselves in taking away their own purchases and assembling their own furniture.

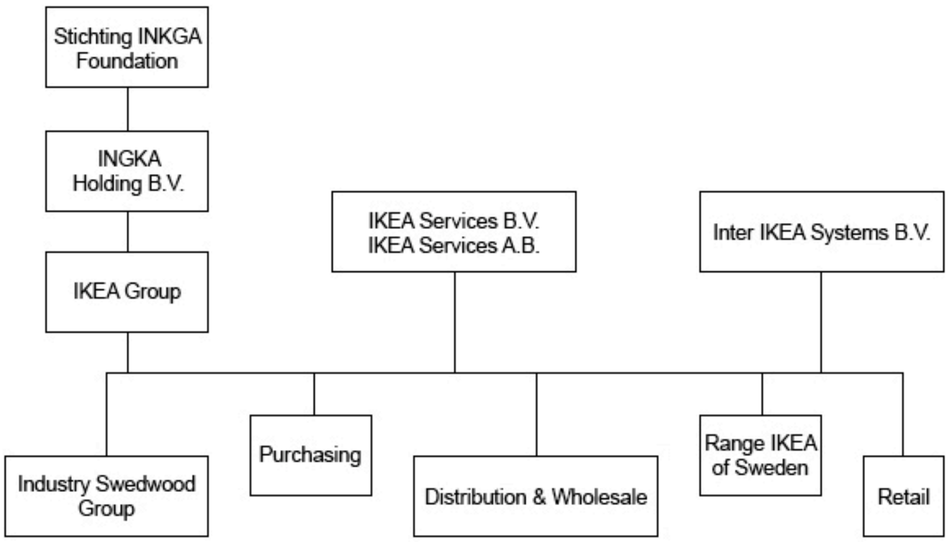


Figure 3.4: Ownership and organisation structure **(Zentes et al., 2007:132)**

The development and achievement of all the activity from product design to after-sales service need a good management as well. The founder of the innovative concept, Ingvar Kamprad is not the only manager in charge of all the process going on. Stichting INGKA Foundation, registered in the Netherlands, is the owner of the whole IKEA group **(Zentes et al., 2007)**. As the Figure 3.4 shows, INGKA Holding B.V. is the leader company of all the companies including the IKEA Group. IKEA Services B.V. (Netherlands) and IKEA Services A.B. (Sweden) own a total of nine staff delivering support for the work within the companies of the IKEA group. The

IKEA concept and trademark belong to Inter IKEA Systems B.V., also has franchising agreements with the IKEA stores worldwide.

In addition to the IKEA concept, this well developed ownership structure of IKEA has helped the company in growing as “the leading home furnishings brand in the world with more than 235 stores in more than 30 countries and more than 110,000 co-workers” **(Inter IKEA, 2008)**.

The IKEA concept is based on the ideas away from the traditional viewpoints of the furniture business and exactly opposite of conventional furniture retailing **(Zentes et al., 2007)**. For instance, IKEA has located large stores on the outer edge of the cities, whereas traditional home furniture stores are located as boutiques in city centres. Instead of shop assistance, IKEA encourages customers to serve themselves. Moreover, IKEA has shifted the traditional focus, which is on middle to upper-middle-aged customers, to younger people.

3.2. IKEA Product Design and Modularity

IKEA works generally with standardised product range, store and services all around the world, but also some features of the products, stores and services are customised depending on the culture and lifestyle in many countries.

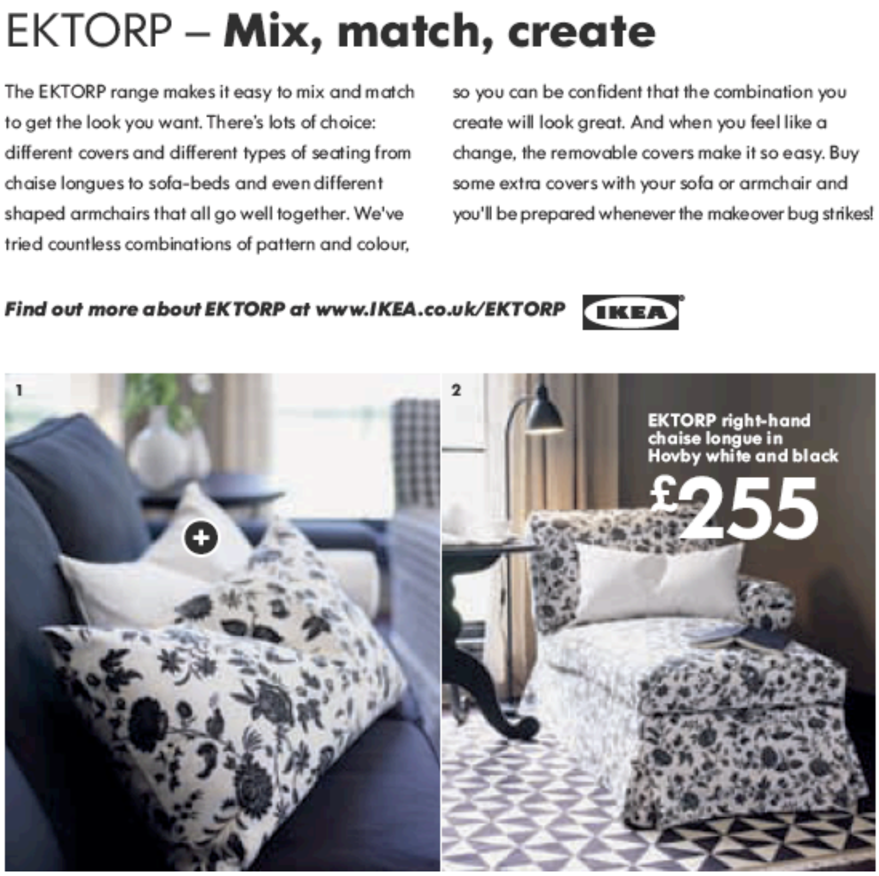


Figure 3.5: IKEA Sofa combinations **(IKEA Sofas, 2008:7)**

Innovative and modular design is the significant tool in developing the IKEA range of furniture and accessories, allowing customers enjoy the variety and create their own combinations (Figure 3.5).

> "The basic assumption was that most of the Habitat stock – wood, plastic, ethnic basket-work, chromium plate and giant floor cushions – would somehow mix and match in all possible combinations to make an acceptable background for the modern middle-class way of life. This concept has since been marketed to an even wider audience by the Swedish firm Ikea." **(Lucie-Smith, 1993)**

IKEA has a range of products offering practical solutions for fundamental activities such as eating, sleeping, socialising, studying and storing items, also for people who have limited budget and limited space in their houses or offices **(Inter IKEA, 2008)**. This range of products reflects the IKEA concept since they are simple, stylish and functional as well as affordable for many people.

Each IKEA store worldwide has the same articles, not the whole range but the 'core' products defined among the range, in order to avoid any distortion in the IKEA concept and image **(Gürel, 2008)**. These 'core' products in the range, called as 'SBAS', are more than 4,000 basic articles for each new IKEA store (Figure 3.6). In addition to these articles, 'BAS' articles, more than 8,000, that are supporting and improving the 'core' product range of IKEA, whereas 'EXTRA' articles refer to the free range of products, which are produced in a temporary supplier and a lower amount for an approximate period of sale. However, these 'EXTRA' articles have the potential to transfer into the basic range or to end in a short period.

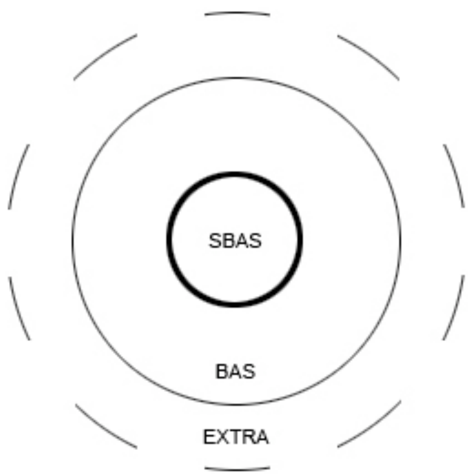


Figure 3.6: Structure of the IKEA product range

All IKEA products have the label "Design and Quality, IKEA of Sweden", except the ones which have the name of the original designer as their label, and are sold in the IKEA stores **(Inter IKEA, 2008)**. IKEA designers work for each product by starting with a functional need and a predefined price. Their innovative ideas and knowledge of low-cost manufacturing processes lead in creating functional, stylish and low-priced products. Furthermore, IKEA purchases large volumes of these products in order to reduce the cost. By the fact that most of the IKEA products designed as to fit in flat packages, IKEA ensures the low price offer of its concept.

Next, the IKEA store also has a well-developed and well-designed structure as part of the IKEA concept. It is quite organised in order to display all the furniture and accessories in the range as well as to lead the customers to experience self-shopping. The IKEA store, improving since the first store in 1958, is quite large in order to introduce a wide range of products as well as to give innovative and inspiring solutions presented in its realistic room settings and homes inside the same store **(Inter IKEA, 2008)**. IKEA visitors are allowed to examine any product in the store, and even encouraged to sit, lie down, open and close drawers, mix and match accessories, and compare styles and prices.

In order to present the range, each IKEA store is organised in two floors called 'showroom' and 'market hall'. A wide range of furniture is displayed both individually and as combinations of room settings and homes in the showroom, whereas home accessories including various products other than furniture are displayed in the market hall. These floors also have some specific areas like living room, kitchen, bathroom, textile, lighting, and so on. The specification helps customers in finding the products they need and comparing the specific group of products in an easy and efficient way.

The IKEA store works for improving the shopping experience of customers and also encourages them for shopping on their own by providing many necessary tools such as pencils, notepads, tape measures, store guides, IKEA catalogues, shopping bags, strollers and trolleys **(Inter IKEA, 2008)**. In addition to an organised shopping experience, IKEA stores offer some other facilities and activities especially for the visitors who would like to enjoy a day in the store. The IKEA restaurant serves local favourite food depending on countries and introduces unique Swedish dishes, while the exit café serves 'hot dog', various sandwiches, and ice cream. IKEA Swedish food market offers a range of biscuits, crackers, cakes, jams, seafood, sauces and so on. Moreover, IKEA stores have a ballroom, a cinema for children, and a separated room for baby care. "The kid's corner allows parents to fully experience the IKEA world without disturbance" **(Zentes et al., 2007:138)**. On the other hand, children are welcome in the store even when they jump on sofas or beds, run or shout around the store, and so on.

IKEA offers some services like sewing, delivery, and assembly for an additional price, not included in the product price, when any customer asks for support. "Post-sale, the direct involvement on the part of the customer becomes apparent when he has to transport and assemble his furniture himself" **(Zentes et al., 2007:138)**. This after-sale process is the most distinguishing feature of the IKEA concept besides being an advantage or disadvantage for the customers depending on their own opportunities like a large car enables carrying the products to home.

Finally, the catalogue and the website are other significant components of the IKEA concept and supporting design and inspiration ideas. The most interesting and important feature of the IKEA catalogue to be highlighted is that it is not only a partial index of the IKEA range, but also an inspiring guide offering innovative solutions for home decoration. Furthermore, the catalogue has prices "valid for a 12-month period" **(Inter IKEA, 2008)**, and it is distributed for free.

Following the first advertisements of IKEA only in some local newspapers, appeared in 1940s, Ingvar Kamprad begins to deal with individual sales calls. The first edition of the IKEA catalogue, published in 1951, increases the demand and leads to the first furniture showroom of Almhult (Sweden) in 1953. Today, the IKEA catalogue is produced in more than 25 languages for about 34 countries **(Inter IKEA, 2008)**.

The IKEA Website, similar to the catalogue, displays almost all the range supported by inspiring ideas and allows online shopping in some countries and for some products in the range. Customers enjoy the online tools and programmes and are encouraged to practise home furnishing and combinations of their own.

3.3. IKEA and Customisation

By using the strategies that help in strengthening the communication with the customer and also suppliers, IKEA competes in the market through an original way. These strategies, based on customising the business, lead IKEA into adapting various cultures and lifestyles around the world. According to **Thackara (1997:80)**:

> "Customisation is a range of responses to new market and technological conditions. These responses include increasingly specialised products or services; flexible and targeted distribution systems; new ways of organising work that bring consumers and producers closer together; and information networks that dissolve boundaries between the firm, its suppliers, and customers."

Thackara (1997:95) describes a checklist for customisation, mostly implemented by design and manufacturing companies. This checklist consists of the followings, which are generating some hints in order to develop a successful organisation:

- Connectivity among players
- Consumers are active participants in development processes
- Technologies and processes are adaptive
- Flat organisation; few steps between supplier and user
- Fast, effective service, not price
- Integrated operational management to optimise processes

- Design and manufacturing know-how
- Close mesh with suppliers
- Smart distribution and logistics
- Retail alternatives to reduce transaction costs
- Time-based skills

Although it is not always possible to achieve all these indications at once, it builds a sort of guide in developing strategies for customisation and companies often prefer to focus on some of them as a beginning attempt.

These hints also assist in finding out the properties of a developed system like IKEA experiences for more than 40 years. To begin with the phase of ‘connectivity among all players’ refers to various features of IKEA system. First of all, it is possible to name the departments of each store as players, and these departments have similar level of importance in IKEA. Next, each store is a player of IKEA worldwide, therefore it is necessary to share and consider any problems, achievements as well as experiences. Finally, the connectivity among IKEA, designers, suppliers, and customers is so essential that it is the requirement for improving and maintaining continuity of the concept.

Since the IKEA vision is based on “creating a better everyday life for the many people” **(Inter IKEA, 2008)**, it is only possible if ‘consumers are active participants in the development processes’. Comments, complaints and demands of customers are considered by IKEA so carefully that it is the most important data to ensure the efficiency of the system. Furthermore, the starting point of the IKEA system is customers as active participants especially in the store: "You do your part. We do our part. Together we save money" **(Inter IKEA, 2008)**.

Considering the innovative ideas like the LACK coffee table, made from a strong, light material that is usually used for interior doors as well as the MOMENT sofa, which has a frame manufactured by a firm producing supermarket trolleys **(Inter IKEA, 2008)**, it is obvious that ‘technologies and processes are adaptive’ for IKEA and IKEA designers.

IKEA pays attention to the quality and safety of the products as well as the satisfaction of customers about these products and the IKEA concept. Therefore, any comments and complaints of the customers directly influence the improvement of products and services. Since IKEA is in charge of all the processes including design of the products, finding the proper suppliers and locations of the stores, it is only ‘few steps between supplier and user’ in the IKEA system.

After shopping in IKEA, customers can take their products to home and begin to use in the same day. If the customer needs delivery support or sewing for any textile shopping, IKEA offers ‘fast, effective service, not price’ dominated. This service opportunity adds value in shopping experience, and supports customisation, as it is additional service not included in the price of products.

Since IKEA controls the efficiency of the system and customer satisfaction by its ‘integrated operational management to optimise processes’ including suppliers, logistics, sales, communication and interior design working for realising the IKEA concept.

Designers and suppliers of IKEA are encouraged with an advanced ‘design and manufacturing know-how’ by the company. IKEA designers work in a process by starting with a functional need and a predefined price for each product **(Inter IKEA, 2008)**. Their innovative ideas and knowledge of low-cost manufacturing processes lead in creating functional, stylish and low-priced products.

IKEA has ‘close mesh with suppliers’ in order to keep communication and support updated, therefore it becomes possible to achieve reducing costs for raw materials, manufacturing technologies, and required volume of production.

It is essential to work on effective strategies for ‘smart distribution and logistics’ in IKEA that logistics department organizes the process to transport articles not only between suppliers and stores but also in each IKEA store. Smart logistics is a must in the warehouse and the stores, because IKEA works with huge amount of articles. **Thackara (1997:84)** emphasises the importance of new distribution concepts in managing innovation: “Logistics is one of the least glamorous but most potent support systems for continuous innovation and customisation.”

IKEA works with alternative suppliers instead of ‘retail alternatives’ to reduce transaction costs, as a home furnishing retailer worldwide. However, each IKEA store is working with the range individually, it is possible to reduce costs for each store by managing the preference and promotion of the products except the core range (see Figure 3.6).

The system of IKEA develops by the assistance of the company’s ‘time-based skills’ during more than 50 years. All the experience in retailing worldwide, the innovative ideas in design and manufacturing know-how are features requiring some time to be gained and used efficiently.

The issues discussed through matching the points of Thackara’s checklist with the features of the IKEA system encourages this study in defining IKEA as a company successful in implementing mass customisation. However, it is significant to distinguish the point that IKEA is successful in its own way of mass customisation, since there is no best way but good strategies that may lead each company to achieve mass customisation.

As mentioned in **Lampel and Mintzberg's study (1996)** considering mass customisation, standardisation and customisation do not refer to two different groups of strategies. According to their segmentations of strategies (see Figure 2.1), the IKEA system can be defined in both strategies of 'segmented standardisation' and 'customised standardisation'. It is 'segmented standardisation', since IKEA has standardised products and customises its distribution between its suppliers and stores all around the world, and also it is 'customised standardisation' when IKEA allow customers customise products of any combinations and assemble these products, in addition to customise the distribution process.

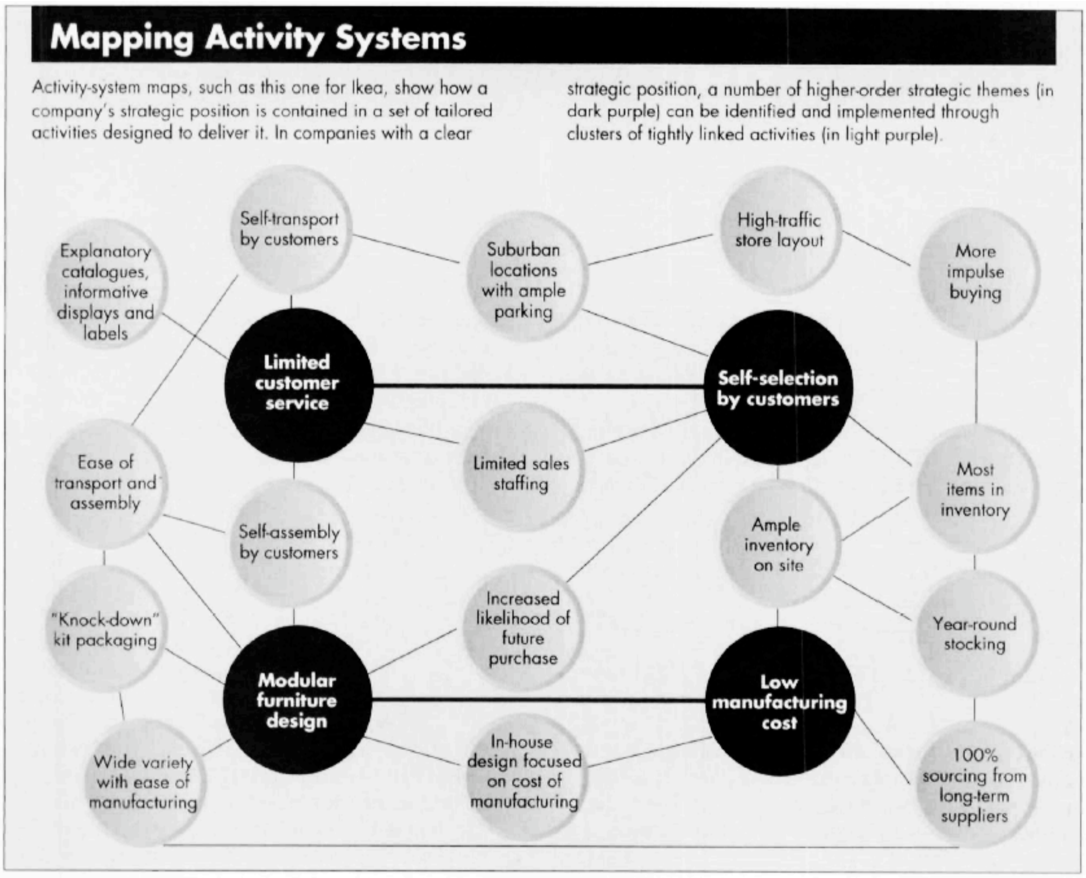


Figure 3.7: IKEA activity system map **(Porter, 1996:71)**

In the map of strategies for IKEA (Figure 3.7), links between the activities and strategies of the company are shown. Limited customer service, self-selection by customers, modular furniture design and low manufacturing cost are the higher-order strategic themes of IKEA, which are linked to the activities in this map.

There is no obligation to customise many features of the firm strategies, therefore standardising as much as possible and adapting only what is necessary is more reasonable **(Zentes et al., 2007)**. IKEA standardises many strategies but also customises for adapting different situations as well as responding to various needs and demands of the customers, since the IKEA concept serves for “the many” not for a specific group of people. For instance, IKEA has “only one set of instructions for the assembly of a piece of furniture, regardless of country, because it contains no written language, but only visual instructions” **(Levy/Weitz, 2007 cited in Zentes et al, 2007)**, as seen in Figure 3.8.

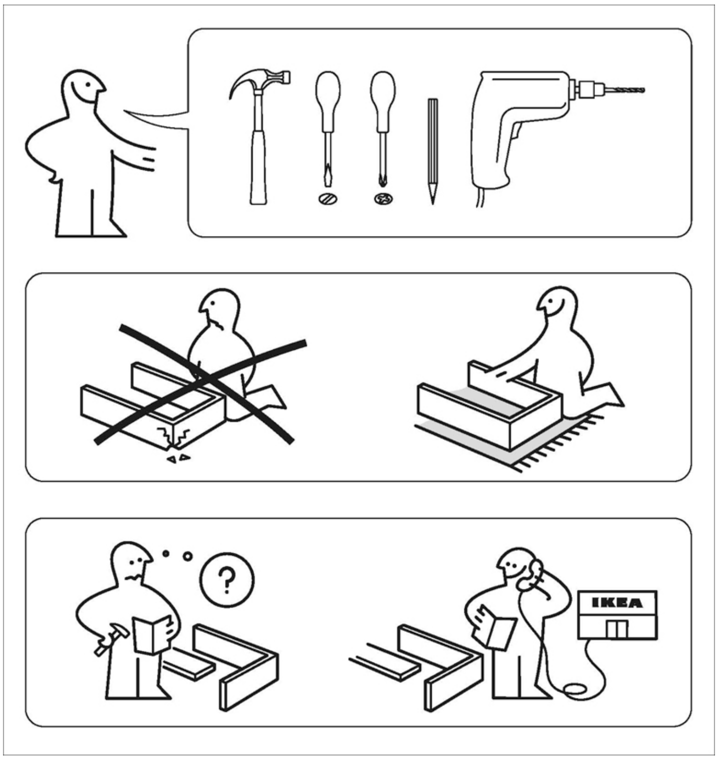


Figure 3.8: IKEA Instructions **(IKEA Manual, 2007:3)**

The wide range of IKEA products is one of the characteristics making the company attractive for customers, since variety and low price are brought together for them. However, it is essential to control both how this range of products is presented and “the nature of the input the customer is asked to provide” for any retailer like IKEA, since “a sales interaction has the potential to become too complex and frustrating for the customer” **(Huffman&Kahn, 1998:509)**. All the choices for each particular product in the range, especially the feature of modularity in IKEA kitchen furniture, bookcases, wardrobes, and other storage units, require to be displayed in a way that will ensure avoiding any confusion of the customer (Figure 3.9).

> “Hence, the main dimensions of retailing which establish IKEA’s positioning are clearly price, variety of merchandise, and store atmosphere. IKEA offers the same product range on an international scale, and adapts the store layouts, presentation of the products, home services offered, and prices only where necessary in accordance with national economic and cultural conditions and circumstances. This enables IKEA to transfer its profile appropriately worldwide.” **(Miller, 2004 cited in Zentes et al., 2007)**

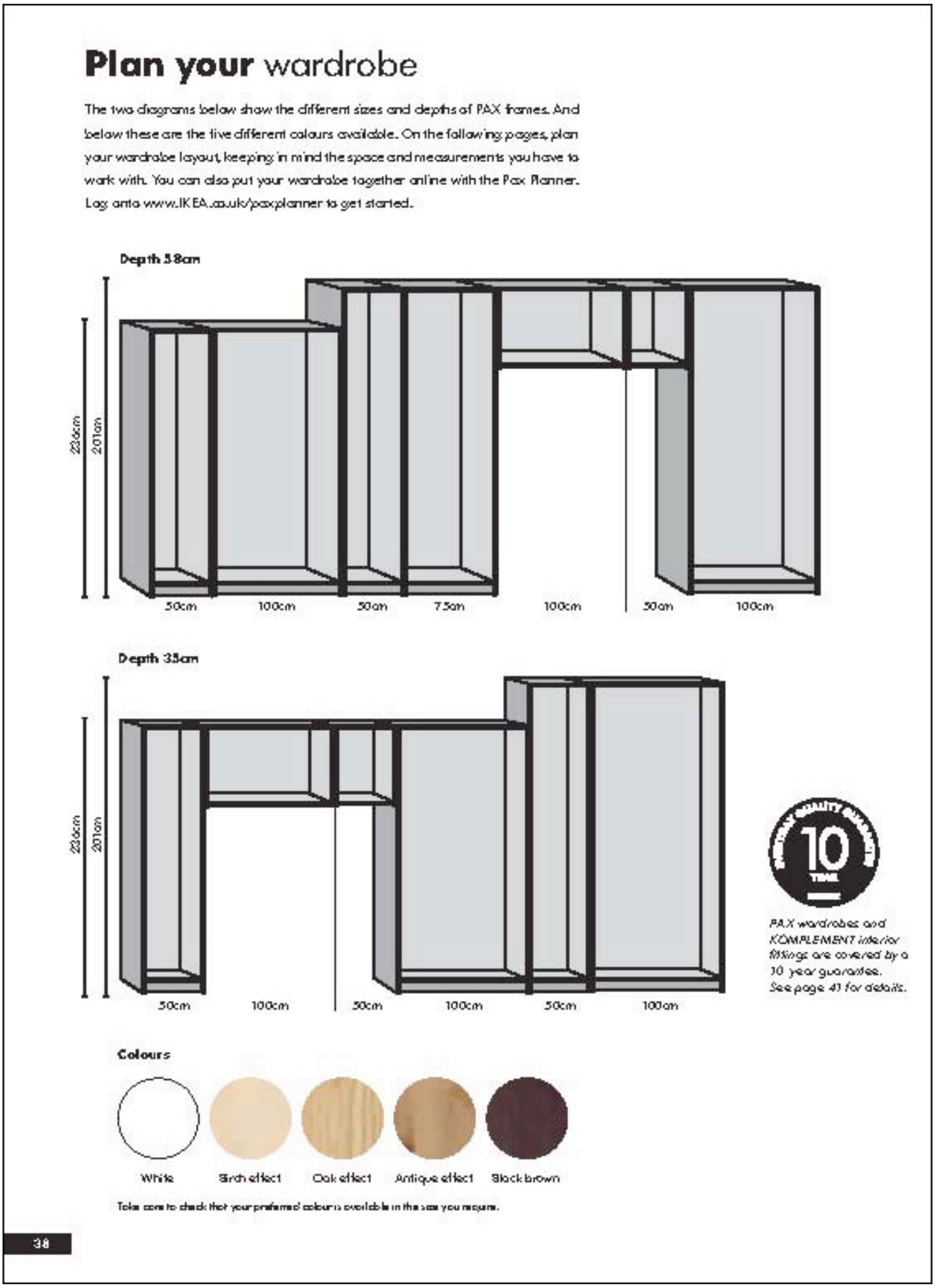


Figure 3.9: IKEA Wardrobe units **(IKEA Wardrobes Brochure, 2008:38)**

Moreover, IKEA tends to create some sort of data warehouse from the customer interface and feedback for the product development and other parts of the organisation **(Wikström, 1995)**. On the other hand, **Davis (1996:169)** states that "every buy is customised, every sale is standardised" and explains that "to buy a plain vanilla couch, for example, from the Ikea Svenska A.B., and then choose from a wide variety of fabrics and pillow styles" result in "a customised purchase for the cost of a mass-produced item".

The role of customers in choosing and buying the exact product or service they need is essential for increasing the value and satisfaction of the process including before and after shopping. **Schreier (2006:317)** describes the reason behind this influence as "the pride of authorship effect" and explains that "customers may also be likely to value the output of self-design more highly if they take pride in having created something on their own (instead of traditionally buying something created by somebody else)".

Furthermore, there are some promising differences between "the old concept of industrial production and the new concept of emotional production" such as the transition "from consumers to people", "from products to experience", "from function to feel", and "from communication to dialogue" **(Amerongen et al, 2003:177-178)**. In this transition from consumer to people, there is a new concept based on a mutual relationship:

> "Instead of focusing on narrowly defined product categories, the new perspective asks what product and services fit into what kind of consumption situation. We are moving away from thinking about an isolated product to arrive at a broader space of meaning for the customer. Ikea, the Swedish furniture company, lives from cross-selling based on the notion of the consumption situation. In its stores, furniture items and accessories are displayed as part of consumption situations, this creating an imaginary lifestyle for the customer."

Customers are encouraged to make their own decisions considering their specific needs and priorities while using their creativity by the variety of IKEA product range and the supporting IKEA system. **Sanchez (2002:217)** describes the IKEA way of mass customisation:

> "Ikea, the Swedish furniture maker and retailer, has harnessed the modular idea for both its product and process architectures, giving it considerable strategic flexibility. Ikea creates modular designs for its Scandinavian furniture products. It carefully designs and specifies the components in its products (such as table tops, table legs and hardware) so that they can be combined in different ways to create a range of new products. But the company has also developed modular process architecture to coordinate the global sourcing and shopping of components for its furniture."

Considering the structure and the problems of the Turkish furniture industry besides its structure, its concept and the system of IKEA, it is essential for the Turkish furniture enterprises to gain the understanding of the way IKEA works. **Gürpınar (2008)** explains that the Turkish enterprises that will be competing with IKEA in the market have started to change strategies and rearrange prices. Moreover, influences of IKEA on the Turkish furniture industry are claimed to be encouraging the local enterprises for developing their strategies in the market, although it seems to be destructive for the industry and especially the major furniture enterprises.

3.4. IKEA in the Turkish Furniture Industry

IKEA, with more than 235 stores in more than 30 countries, entered the Turkish market in 2005. MAPA Home Furniture and Accessories Trading Co. Inc., affiliated by MAYA in 2003, has become the franchisee of Turkish IKEA **(MAYA, 2008)**. On May 5th 2005, the first IKEA store opened in Ümraniye, Istanbul, and after a year in Bornova, Izmir the second store opened on April 6th 2006. The third IKEA store opened on November 8th 2007 in Bayrampaşa as the second store of Istanbul, while the construction of the fourth store continues in Bursa.

3.4.1. Structure of the Turkish Furniture Industry

Furniture manufacturing in Turkey is based on ateliers and factories. The ateliers, small enterprises mostly working as carpentries, are difficult to be studied since the total number of them is over 70.000 **(Kayacıklı and Emil, 2003)**. They produce often for the local market and also work for furniture repair and restoration. These small enterprises, generally based on family business, produce handcrafted pieces and work with the specific orders of customers. Besides, they make the necessary components in the range of factory-based enterprises. It is complicated to outline the structure with features and problems of the industry, as small and medium enterprises are mostly out of record while there are quite few factory-based manufacturing enterprises in Turkey.

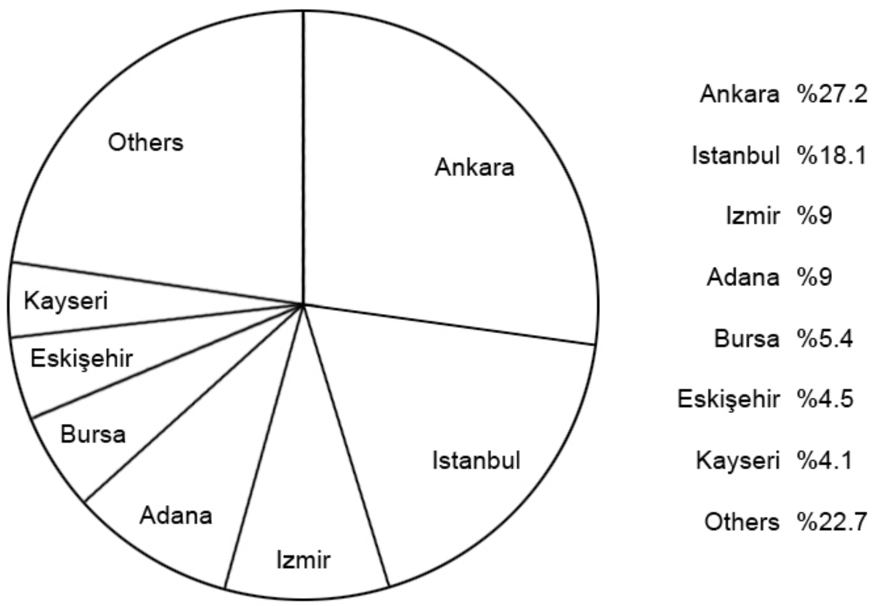


Figure 3.10: Turkish furniture industry **(Kayacıklı and Emil, 2003)**

Medium enterprises, trading and manufacturing for the local market, produce generally in relation to the traditional style and the needs of customers **(Kayacıklı and Emil, 2003)**. Since these enterprises produce through both handcraft skills and technology, they are not able to implement an expected quality production strategy and to sign up for exportation. The major enterprises, in an effort to improve exports, are the minority in the Turkish furniture industry, and as a result this improvement is not expeditious enough to create confidence in the market.

Özkaraman (2004:241) explains about the structure of the Turkish furniture industry in 2000s and outlines five groups in this structure:

- The manufacturers who work through traditional production: Carpenters and others
- The ones transferred from any other industry to the furniture industry: Kelebek, etc.
- The franchised ones in Turkey: La Casa, etc.
- The ones working together with foreign companies in partnership: Tepe-Mobili, etc.
- Home improvement retailers: Bauhaus and others

Considering the locations of furniture enterprises, **Kayacıklı and Emil (2003**) highlight the dominating influence of crowded towns like Istanbul, Ankara, Izmir and some others. These locations are preferred to be established by the enterprises to do the manufacturing because of the customer potential in these locations (Figure 3.10), although enterprises of other industries prefer to locate around regions according to their proximity to resources.

Table 3.1: Problems of the Turkish furniture industry **(Aksayar, 2006; Akyüz, 2006; Gürpınar, 2007; Kayacıklı and Emil, 2003; Özkaraman, 2004)**

Production	- Need of high volume production and quality in raw material - Lack of standardisation and need of technology/equipment
Marketing	- Lack of market awareness - Need of advertising/promotion
Finance	- Cost of effort, energy, materials, etc. - Need of regular income/support
Employment	- Lack of qualification as it is all family business - Need of qualified employers and education/profession
Lack of organisation	- Weak communication among the enterprises - Need of sharing/developing know-how
Design	- Not concentrated in unique/well developed products - Need of designers/engineers and innovation and flexibility in design - Lack of awareness for copyright rights

The improvement of the Turkish furniture industry depends on the development of the exports **(Gürpınar, 2007)**. However, it is a priority to deal with problems of the industry. These problems are defined to be concerning qualified employers, raw material, finance, technology and design, while **Özkaraman (2004)** describes certain problems concerning production, marketing, finance, employment, and lack of organisation among the enterprises. Problems defined by various researchers are shown in the Table 3.1, bringing together the common issues in these studies.

Aksayar (2006) explains the latent features of the Turkish furniture industry and highlights the importance of developing the issues that has kept enterprises away from the expected success in the European Union market. However, Germany and Italy are defined to be the major manufacturers worldwide, whereas Italy is the major exporter and USA is the major importer worldwide. Newly industrialised countries and peripheral markets are expected to lead the competition as a consequence of the characteristics of the industry and the demand of customers, although it seems that European Union and USA dominate the production and trade as the leading markets **(Kayacıklı and Emil, 2003)**.

3.2. Furniture Design and Customisation in Turkey

Furniture is usually referred to the goods, stable or mobile, used for sitting, sleeping, dining, resting, working, organising, and supporting all other activities of everyday life in a house, office, school, garden, restaurant, and so on **(Kayacıklı and Emil, 2003)**. Therefore, it is defined to be in several groups like upholstered and non-upholstered seating units, bedroom furniture, kitchen furniture, dining and living room furniture, bookcases, office furniture, separate furniture, and seating furniture for vehicles. On the other hand, it is possible to label furniture according to the user, the area of use or the style group.

Since furniture is defined as the pieces used for home furnishing and supporting the activities in the living spaces, it has had structural changes and different stages depending on the various life styles, understanding of culture and aesthetics of societies all through ages **(Özkaraman, 2004)**.

King (2006:51) explains a variety of furniture types and terms commonly used in the furniture industry. These are modular, casegood, seating, movable, built-ins, COM, and RTA furniture. First, *modular furniture* is “an unlimited number of pieces that can be used in a number of different configurations” and often upholstered and sectional. Due to its repeated movement and weight on the furniture, it is essential to choose upholstered pieces with good frame padded with cotton or polyester batting. Then, *casegood furniture*, named after the box-like shape of pieces in this category, refers to any piece of storage furniture. “Chests, dressers, and other cabinets fall into a category of boxlike structures that usually have drawers, sometimes in combination with doors or lids” **(Hingley, 1998:88)**.

Next category, *seating* has both upholstered and non-upholstered pieces like sofas, armchairs and chairs (Figure 3.11), whereas *movable furniture* refers to the pieces able to be moved easily and mostly the ones with rollers and casters **(King, 2006)**.

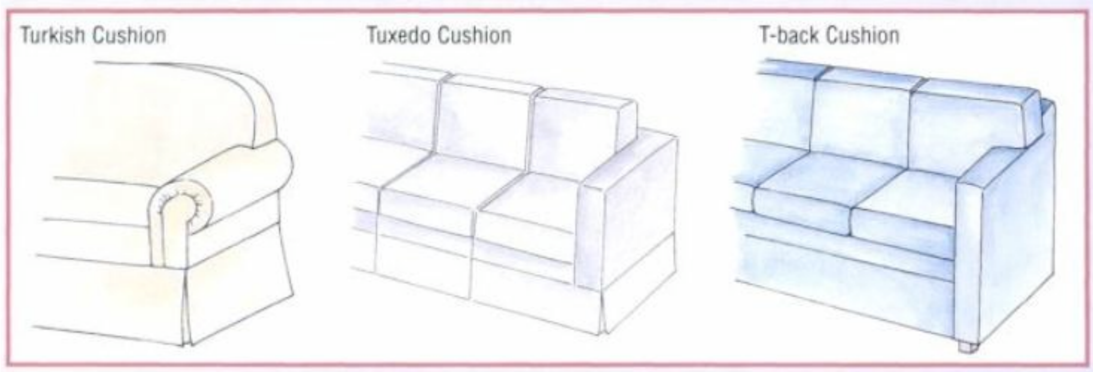


Figure 3.11: Upholstered furniture **(King, 2006:52)**

Then, *built-ins* include wall-to-wall shelving, cabinetry with furniture-style feet, banquettes, and also fold-away beds **(King, 2006)**. Other furniture category, named *COM*, refers to custom-ordered pieces and this type of furniture let the customer choose among the options of finishes and fabrics, even sometimes options of feet, trim, shape and wood for building up their own furniture. Since it is quite alike carpentry type of manufacturing, it requires an interval before receiving, usually 6 to 12 weeks. Last, *RTA* refers to ready-to-assemble furniture, which comes in pieces and is assembled after delivery.

Kayacıklı and Emil (2003) describes the recent preference in furniture to be space saving and multifunctional besides being aesthetic, user friendly, and strong, such as sofa beds, wardrobe-beds, beds with storage, and so on. In addition, **Akyüz (2006)** explains the increase of demand in the Turkish furniture market, parallel with the increase in population as well as welfare in recent years.

Akyüz (2006) defines the main aspects of furniture design as individuals, technology and economics. The factors related to individuals can be described as ergonomical, psychological, sociological, cultural and aesthetic. These are all connected among each other. Next, technical factors including material and construction alternatives lead the designer to identify a certain design that corresponds the demand and use of furniture. On the other hand, this technical process of material and machine, requires updated know-how, has the potential to restrict the design effort. Last, economics in furniture design is essentially related to the process and therefore, furniture designer shall manage a well-developed cost and price balance in order to satisfy both the manufacturer and the customer.

According to **Margon (1954:13)**, the priority in furniture design is given to the needs and demands of customers:

> "A furniture designer may be rightfully compared to an actor, who is dependent upon his audience for acceptance or derision. He can create the most beautiful pieces of furniture, but if the public feels that his work does not fit their needs and thus does not buy it, then all his labour is of no avail. How then is the public to be expected to appreciate what is good design in furniture? Only by having a knowledge and reverence for tradition, an understanding of the needs of the present, and a vision of the future will, a conscious public help to develop modern design in furniture."

Unique and contemporary furniture design has a significant role in the competitive market worldwide **(Gürpınar, 2007:111)**. Furthermore, design is considered to be fulfilling some expectations including individual and social. However, this important task of design is not identified in the Turkish furniture industry, except the major enterprises of the industry working by an effort of design and brand management since 2000s. For instance, most of the manufacturers in Siteler (Ankara) are likely to copy European design, whereas few generate unique design pieces and work with designers in-house **(Öz, 2004 cited in Gürpınar, 2007)**. More to the point, **Eroğlu (2007:57)** explains about the significance of design in his research on small and medium enterprises in Ankara:

> "Enterprises make use of catalogues and magazines (%74), Internet (%12), customer demand (%57) and design department (%36) in order to generate models and designs. Presence of design department has an effect on the trading of these enterprises. Considering the influences of educated team working in the design department on the vision of the enterprise, the taste of customers, the communication between the enterprise and customers, and the cultural level of the organisation, it might be essential for other enterprises to work through this approach."

Aksayar (2006:79) emphasizes the significant role of furniture design in the market of European Union and explains that it has been well developed since the Industrial Revolution. In the European Union countries, design has the major support of the governments, whereas awareness of the importance of product design and brand identity emerges recently in the Turkish furniture industry.

Education level is the most important factor manipulates the customer's choice for high standard and quality. The more customers are aware of goods and quality, the more they demand during their shopping experience. However, this becomes the weakness of the Turkish furniture industry and decreases customers' satisfaction in Turkey **(Alan, 1998)**.

Gürpınar (2007) highlights the rising importance and role of furniture design for Turkish enterprises willing to succeed in the global marketplace as well as the local market. **Aksayar (2006)** also recommends applying modularisation into furniture design and production in order to manufacture each piece separately by sharing these pieces among several small furniture enterprises, and then it becomes possible to develop the equipments and know-how for these enterprises.

3.4.3. IKEA and the Home Furnishing Retailers in Turkey

The rising competition in the Turkish furniture market has affected the local enterprises and encouraged them for developing their products and strategies. IKEA has also influenced the market by its various and low priced products. Most of the home furnishing retailers, especially in Istanbul, have changed their advertisements, products, services and so on.

Some enterprises like Doğtaş, Bellona and Kelebek offer free guidance in planning combinations and rooms for their customers. They also encourage customers to choose among the product range and make combinations (Figure 3.12 and 3.13). Similar to the IKEA way in combinations and suggestions, they offer “mix & match” opportunity for sofas and armchairs (Figure 3.5). There are also similarities visible in the presentation of products that focuses on low price and variety (Figure 3.14 and 3.15). Some enterprises are revitalising their catalogues, brochures, web sites and advertisements, while the others concentrate on developing innovative and unique products.

evinize iyi gelecek...

Modern hayatın tüm ihtiyaçları, rahatınız ve evinizin güzelliği düşünülerek tasarlanan yepyeni mobilya ve aksesuar koleksiyonumuzla tekrar sizlerleyiz.

Dinamik şehir hayatından yola çıkarak “mix&match” (karıştır ve yakıştır) anlayışıyla hazırladığımız tasarımlarımızla, herkesin kendi zevkini evine yansıtmasını amaçladık.

Siz de; form, renk ve fonksiyon olarak mükemmel bir uyum sergileyen koleksiyonumuzdaki her parçayı kendi mekanınıza ve zevkinize uygun olarak istediğiniz gibi kombine edebilirsiniz. Hem size hem de evinize iyi gelecek, yepyeni bir anlayışla tanışacağınız mağazalarımızda misafirimiz olmanızdan mutluluk duyacağız.

Figure 3.12: Kelebek home furnishing retailer’s catalogue **(Kelebek, 2008:2)**

Modoko, which is a group of several small enterprises in Istanbul, has emphasised their distinguishing features and services in their recent advertisements **(Modoko,**

2008). Various design products for different combinations, helpful staff in the stores of Modoko, free delivery and assembly service of these enterprises have been highlighted in these advertisements (Figure 3.16).

IKEA introduces design and customisation into the Turkish furniture market, that's why the rising competition in the market brings about an advantage for the local enterprises to improve their strategies concerning products and services.

Figure 3.13: Doğtaş home furnishing retailer's catalogue **(Doğtaş, 2008:72,73,103)**

Figure 3.14: Galeri Irfan's brochure **(Galeri Irfan, 2008:9)**

Figure 3.15: KLIPPAN sofa in the IKEA catalogue **(IKEA Catalogue, 2008:70)**

Figure 3.16: Modoko Advertisements **(Modoko, 2008)**

4. METHODOLOGY OF THE STUDY

Maxwell (2005:15) defines "goals for a study" as the guide including "motives, desires and purposes", while distinguishing them from "the usual meaning of purpose which refers to the specific objective of a study". He emphasises the significant role of goals in developing and designing the research:

> "These goals serve two functions for your research. First, they help to guide your other design decisions to ensure that your study is *worth* doing, that you get something of value out of it. Second, they are essential to *justifying* your study, a key task of a funding or dissertation proposal."

According to **Punch (1998:199)**, objectives are the essential tools in a qualitative research and in the development of its methodology. He describes how to analyse the qualitative data and emphasises its richness and complexity that result in different ways of analysing those data:

> "Despite this variety and diversity in approaches underlines the point that there is no single right way to do qualitative data analysis – no single methodological framework. Much depends on the purposes of the research, and it is important that the method of analysis is integrated from the start with other parts of the research, rather than being an afterthought."

Throughout the development and design of this study, the following objectives have been stated as the main issues for the research:

1) to gain an understanding of the IKEA concept and the development of its product range,
2) to point out the essential role of product design and customisation in the development of the IKEA concept and its product range,
3) to explore the reasons that make IKEA a tough competitor among the other home furnishing retailers in Turkey.

This study utilised mainly the interview and questionnaire methods in order to satisfy these objectives, besides the literature review. First, the literature review concerning product design, customer satisfaction, customisation and IKEA developed the background and revealed a clear understanding of the subject (aim-1 and aim-2). Second, interviews were carried out with the managers of IKEA-Turkey and helped in gathering the data on the adaptation of the IKEA concept and its product range into the Turkish furniture market (aim-3). Last, the questionnaire was held among the customers in IKEA (Bayrampaşa, Istanbul) store in order to explore the opinions about IKEA and the other home furnishing retailers in Turkey (aim-3).

Fink (2003:8-19) outlines a checklist for deciding a survey's context:

- Identifying specific purposes
- Preparing appropriately worded, meaningful questions for participants
- Clarifying research and other objectives
- Determining a feasible number of questions
- Standardising the questioner
- Standardising the response choices

These steps have been used in order to develop survey questions in this study.

4.1. Literature Review

Throughout the research, a range of literature concerning product design and customisation, customers' need for customisation, mass customisation, modularity in product design, IKEA concept, product design in IKEA, customisation in the IKEA concept, the IKEA system, and Turkish furniture industry has been studied in order to achieve the following objectives:

1) to gain an understanding of the customers' need for customisation and the customisation idea in product design,
2) to gain an understanding of mass customisation concept and its strategies,
3) to gain an understanding of the relationship between the customisation concept and customers' attitudes,
4) to gain an understanding of the IKEA concept and its product range structure,
5) to gain an understanding of the product design and customisation in IKEA,
6) to gain an understanding of the product design and customisation in the Turkish furniture industry,
7) to gain an understanding of the interaction between IKEA and the other home furnishing retailers in Turkey.

In addition to the books, journals and articles involving these keywords, academic research and essays considering the Turkish furniture industry, furniture design, customisation and modularity in furniture design have been studied.

4.2. Interviews

Semi-structured interviews, held with the managers of IKEA-Turkey, were studied in order to achieve the following objectives:

1) to find out about the customers' comments on IKEA and its product range,
2) to find out about the adaptation of IKEA and its product range into the Turkish market.

The managers of different departments in IKEA-Turkey were chosen for the interviews because they were experienced about the IKEA concept and the positioning of IKEA-Turkey in the Turkish market. These managers chosen for the interviews and the major topics of these interviews are listed in the Table 4.1.

Table 4.1: The IKEA-Turkey managers and the interview topics

IKEA- Turkey managers chosen for the interviews	**Major discussions of the interviews**
The manager of the IKEA range department	- Customers' comments on the IKEA product range - Comparison between IKEA and other retailers - Adaptation of the IKEA range into the Turkish market
The manager of the IKEA sales department	- Customers' comments on the IKEA product range and the IKEA system of shopping experience - Customers making use of the IKEA planning tools and combinations of products - Comparison between IKEA and other retailers - Adaptation of the IKEA concept and the shopping system into the Turkish market
The manager of the communication and interior design department	- Customers' comments on the IKEA store, interior design and communication - Comparison between IKEA and other retailers - Adaptation of the IKEA concept, the IKEA store and the product range in Turkey
The manager of the IKEA customer services department	- Customers' comments on the IKEA concept, the product range and the IKEA system of shopping experience - Comparison between IKEA and other retailers - Adaptation of the IKEA concept and the shopping system into the Turkish market
The manager of the IKEA food and beverage department	- Customers' comments on the IKEA restaurant and food, - Comparison between IKEA and other retailers - Adaptation of the IKEA restaurant, the snack bar and the Swedish food market in Turkey

These topics, also related to the main objectives of this study, were converted into questions and guided in the development of semi-structured interviews. These interviews have been helpful in gaining a better understanding the IKEA concept and the strategies of IKEA-Turkey for introducing its concept and its product range to the Turkish home furnishing market.

4.3. Questionnaire

The questionnaire of this study explored about the answers of nine questions in order to fulfil these following objectives,

1) To find out about the customers' comments on IKEA and its product range
2) To find out about the customers' opinion on variety, modularity and combinations of the IKEA product range,
3) To find out about the customers' comments on IKEA and the other home furnishing retailers in Turkey.

In the Table 4.2, these objectives of the questionnaire and the questions are listed to clarify the specific purposes of the survey.

Table 4.2: List of questions and objectives of the questionnaire

Questions	**Question Type**	**The Questionnaire Objectives**
1 – 2	- Closed-ended form - Categorical responses	- General information about the customers
3 – 4 – 5	- Closed-ended form - Categorical responses	- Objective 1 - To learn about customers' way of customisation
6	- Closed-ended form - Categorical responses	- Objective 1 - To discover customers' need of customisation
7	- Closed-ended form - Categorical responses	- Objective 2
8 – 9	- Open-ended form	- Objective 3

Besides closed-ended questions in the survey, open-ended questions were also developed not to limit the respondents' answers and to gather various data.

> "Questions take one of two primary forms. When they require respondents to use their own words in answering, they are called *open* or *open-ended*. When the answers are preselected for the respondent to choose from, they are called *closed* or *closed-ended*. In general, closed questions are considered more efficient and reliable than open-ended questions for getting information from groups of people." **(Fink, 2003:35)**

An open-ended response choice was also added for the questions between 4 and 7 in order to learn about the respondents' comments in more detail (See Appendix-G).

> "The responses to 'check all that apply' questions are almost always categorical, because each check means 'Yes, I belong in the category.' Each category or choice that is left blank is assumed to mean, 'No, I do not belong.'" **(Fink, 2003:47)**

The characteristics of this survey that developed the structure of the questionnaire are listed in the Table 4.3, according to a sample given in the book "How to Ask Survey Questions" written by **Fink (2003)**.

Table 4.3: The characteristics of the survey

	A Questionnaire Concerning IKEA and Customisation	Effects on Questions and Respondents
Purpose	Identify the shopping experiences and preferences to guide the study in finding out the influences of IKEA in the market	Questions are about furniture and home/office furnishing accessories
Respondents	Randomly chosen customers in the IKEA restaurant (100 respondents)	Questions are for people of differing ages and education
Surveyor	Self-administrated, printed questionnaire are handed out	Questions must be easily read and understood
Responses	Both open and closed type	Respondents may not answer the open questions efficiently
Time	Weekdays, between 18:00-20:00	Respondents are expected to be comfortable while answering the questions on a weekday, in comparison with weekend
Timing	Survey takes 10 minutes	Respondents are expected to answer all the questions
Resources	Survey must be printed	Pens and pencils are needed
Privacy	All responses will be nameless	“Honest” questions like the questions 5, 8 and 9 are more likely to be answered

The questionnaire helped in finding out several explanations of the IKEA customers about the features of IKEA and its products that they find different in comparison with the other home furnishing retailers in Turkey.

5. FINDINGS AND DISCUSSION

This chapter gives the findings of the survey and discussions on the opinions of the IKEA customers about IKEA and the product range. These findings and discussions helped the study in exploring the reasons that make IKEA a tough competitor in the Turkish market.

Considering the objectives of the interviews with the managers of IKEA-Turkey, the following tables are developed in order to highlight the significant issues in these interviews. In the Table 5.1, the data related to the first objective of the interviews, which is to find out about the customers' comments on IKEA and its product range, is given and grouped by the IKEA concept and the IKEA product range.

Table 5.1: IKEA concept, its product range and customers in Turkey

	The significant issues that IKEA-Turkey managers described in the interviews	Key elements of these issues related to the survey
IKEA concept related issues	"It is possible to sell some popular products more; lets say 20 articles among 100. But it is not that possible to sell these articles without displaying the other 80, which makes the variety in the range." (Gürel, 2008)	Variety, IKEA product range
	"80 percentage of the customers complain about the self-assembly and delivery, which becomes a weakness of the concept in Turkey. Nowadays, we focus on showing the benefits of self-assembly and delivery, besides the opportunity of priced assembly and delivery service of IKEA." (Gürel, 2008)	Self-assembly, self-delivery
	"Turkish people are not used to self service in shopping, that's why they demand for more staff around the store." (Gürel, 2008)	Shopping experience in IKEA-Turkey
	"Customers do not read the communication around the store. In Turkey, we used to ask for help instead of discovering on our own, which is the same in the furniture market." (Bakiler, 2008)	Shopping experience in IKEA-Turkey
	"Customers realised that their cars have enough space for furniture they purchased in IKEA and enjoy the products in the same day. But they have to wait longer when they visit the other furniture retailers in Turkey." (Bakiler, 2008)	Shopping experience in IKEA-Turkey
IKEA product range related issues	"Customers with a high level of education enjoy the variety of the product range, whereas customers with different level of education, age or income have some difficulties with this variety." (Gürel, 2008)	Variety, IKEA product range, shopping experience in IKEA-Turkey
	"Once, I was surprised about a mouse toy that I had thought it would fail in sale, but we were out of stock in a little while." (Gürel, 2008)	Variety, design
	"Customers could afford design products, like a taxi driver who explained about IKEA coffee table that he	Design, low price

	bought for its design and low price." (Gürel, 2008) "Women demand for sofas with more storage or functions and also for desks and tables which have a sort of board (prevents the visibility of legs). It is not always possible to satisfy these demands of the market as IKEA works with volume of production in order to decrease the cost." (Gürel, 2008) "Customers are not used to have bookcases at home, so we had difficulties in introducing and selling these articles." (Gürel, 2008)	Customers' demand in Turkey IKEA product range, shopping experience in IKEA-Turkey

In the Table 5.2, the data related to the second objective of the interviews, which is to find out about the adaptation of IKEA and its product range into the Turkish market, is shown and grouped by the IKEA concept in the Turkish market, the IKEA product range in the Turkish market and also in the global market.

Table 5.2: IKEA concept and its product range in Turkey

	The significant issues that IKEA-Turkey managers described in the interviews	Key elements of these issues related to the survey
IKEA concept in the Turkish market	"80 percentage of IKEA customers in Turkey are married with children or live single like students, hence we have started to change the decoration of room settings." (Gürel, 2008)	Adaptation to the market
	"We prefer not to offer a set of products with price reduction in order to avoid any similarity with Istikbal or others in the market." (Gürel, 2008)	Distinction in the market
	"We do not prefer to offer payment term of 12 months in order to save the concept and be different among the competitors." (Gürel, 2008)	Distinction in the market
	"We recall any products that has problem. That's how we offer guarantee after sale and achieve customers' trust in the market." (Gürel, 2008)	Distinction in the market
	"In comparison with the IKEA stores abroad, they have more planning tools for customers and more customers willing to make their own combinations. We need to encourage Turkish customers for planning and lead them to make their own decisions." (Bakiler, 2008)	Adaptation in the market
	"Customers have the advantage of self-delivery in IKEA, because they can start using the product in the same day they purchased." (Bakiler, 2008)	Distinction in the market
IKEA product range in the Turkish market	"Despite of the demand for bed with storage, we stopped selling it as the price was triple of the similar ones in the market." (Gürel, 2008)	Adaptation in the market, low price, customers' demand in Turkey
	"As the major goal is to introduce the core product range and the concept into the market, lack of tea glass in the range is not a problem right now." (Gürel, 2008)	Distinction in the market, IKEA product range
	"Low price and variety are the obligations of the IKEA concept, so there is no statement in adding tea glass into the range." (Gürel, 2008)	Distinction in the market, low price, variety
	"Due to the popularity of beech in the furniture market, we had ordered beech more, but birch and oak have been in demand among the furniture range." (Gürel, 2008)	Variety, customers' demand in Turkey

	"Price is the most customisable and adaptable feature of IKEA in the Turkish market. Sofa, mattress, textile and wooden products are difficult in achieving low price goal, but wood veneering is competitive." (Gürel, 2008)	Adaptation in the market, low price
	"We need to present combinations more, as customers have difficulties in seeing the possibilities and benefits of modular products." (Bakiler, 2008)	Adaptation in the market
IKEA product range in the global market	"Considering the city or the market, IKEA enlarges its product range mostly by adding 'BAS' range." (Gürel, 2008)	Adaptation in the market, variety
	"Adaptation in the markets always has a risk for the concept, for instance Australia." (Gürel, 2008)	Adaptation in the market
	"In comparison with Europe, IKEA stores in Far East countries have to work with 'free range' that are short term products and Seasonal brochures instead of annual catalogue avoiding imitations." (Gürel, 2008)	Adaptation in the market, distinction in the market
	"SBAS is significant as it is the core articles in the range, while BAS articles are supporting variety and customisation in the range." (Gürel, 2008)	Variety, IKEA product range
	"IKEA has no individual products for different markets, but different sizes of its products are sold in some markets like US." (Gürel, 2008)	Adaptation in the market

The data gathered by the questionnaire is analysed and given in the following tables. Beginning with the general information concerning gender, age, status, education level and occupation of the respondents, initial tables are developed by grouping each feature with gender respectively.

In this survey, respondents are categorised in age groups in order to concentrate on the specific needs and wants of different ages. Therefore, these stages are said to be between 18-24, between 25-29, between 30-39 and above 40 years old. First group includes the respondents who are usually university students or recently starters in living on their own and working. Next group is the working and usually single or newly married ones, whereas the other group of 30-39 is established at work, and has more developed requirements at home or office. The last group includes the respondents who are experienced in living at home, working and enjoying children or grandchildren.

Table 5.3: Respondents grouped by gender and age

	18-24	25-29	30-39	40+	Total
Male	17	12	13	10	52
Female	13	18	11	6	48
Total	30	30	24	16	100

According to the Table 5.3, Male respondents are similar in number with female ones: %52 male and %48 female respondents. Also, age groups have similar share of male and female respondents. However, age groups of 18-24 and 25-29 seem to be dominant among the respondents and representing early stages in this survey.

Table 5.4: Respondents grouped by gender and status

	Single	Married	Married, with children	*No reply*	Total
Male	31	16	4	*1*	52
Female	22	20	6	-	48
Total	53	36	10	*1*	100

Next, status results are grouped by gender and age data of the respondents. These data is helpful in understanding background of the customers attended in the survey. In the Table 5.4, it is given that %53 of the respondents are single, while it is %36 for married and %10 for married-with children. Here, it looks as if single male respondents dominate the questionnaire results, followed by single female and married female respondents.

Table 5.5: Respondents grouped by age and status

	Single	Married	Married, with children	*No reply*	Total
18-24	26	3	1	-	30
25-29	16	14	-	-	30
30-39	7	13	4	-	24
40+	4	6	5	*1*	16
Total	53	36	10	*1*	100

On the other hand, status results are put together with age grouping in order to find out the dominance in relation to the age results of respondents. According to the Table 5.5, 18-24 years old and single respondents with %26 of the results are more than older single and all married ones, while the respondents married and with children are quite few among the overall results. This result might be related with the period of time as the questionnaire was carried out on weekdays and after 6 p.m.

In the Table 5.6, education level results of the respondents are given by grouping with gender results. It is noticeable that respondents with a university degree are leading the results of this questionnaire, followed by the results of the ones with a high school degree. Both male and female respondents share similar education level according to the results.

Table 5.6: Respondents grouped by gender and education level

	Primary school	Secondary school	High school	University	*No reply*	Total
Male	3	0	15	32	*2*	52
Female	0	1	13	33	*1*	48
Total	3	1	28	65	*3*	100

Table 5.7: Respondents grouped by gender and occupation

	Architecture, designer, etc.	Other career	Housewife	Student	*No reply*	Total
Male	1	28	0	5	*18*	52
Female	2	30	5	3	*8*	48
Total	3	58	5	*8*	*26*	100

Since this survey has been developed for exploring the preferences of the IKEA customers in furnishing their houses and offices, occupation results of the questionnaire are studied by separating the ones related to any design background. Therefore, the respondents are given in several groups including architectures and designers, other professions, housewives, and students in the Table 5.7. In this survey, architectures and designers are the ones who has experienced "mix and match" in their projects, and are familiar about planning their own combinations as well as customisation. As the respondents with other professions are leading the results of the survey, it is more promising to find out about the advantages and disadvantages to have this customisation opportunity for non-designers or architects with IKEA products.

Table 5.8: Respondents grouped by gender and store visits frequency

	1^{st} visit	1-2 visits weekly	1-2 visits monthly	Once in 3 months	Once in 6 months	Once in a year	Total
Male	4	5	19	20	3	1	52
Female	2	4	20	9	9	4	48
Total	6	9	39	29	12	5	100

The results about the IKEA store visit frequency are shown in the Table 5.8, and dominated by the respondents who have %39 of the results and visit the store once or twice in a month. Also the ones visiting the store once in three months have %29 of the results.

Table 5.9: Preference of the respondents in assembly of accessories

	Accessories			
	Self assembly	Assembly service	*No Reply*	Total
Male	39	3	*10*	52
Female	41	2	*5*	48
Total	80	5	*15*	100

The results concerning the preference of the respondents in the assembly process of the IKEA products are shown in the Table 5.9 for accessories and the Table 5.10 for furniture assembly. To begin with accessories, %80 of the respondents chooses self-assembly in preference to the assembly service. The results of male and female respondents are quite equivalent for both self-assembly and assembly service preference.

Table 5.10: Preference of the respondents in assembly of furniture

	Furniture			
	Self assembly	Assembly service	*No Reply*	Total
Male	40	6	*6*	52
Female	22	12	*14*	48
Total	62	18	*20*	100

%62 of the respondents prefer self-assembly of furniture they purchase to pay for assembly service according to the results, shown in the Table 5.10. Here, the percentage of self-assembly responses for furniture has a decrease in results compared to the ones for accessories, whereas the percentage of assembly service preferences has an increase in results. Moreover, female respondents seem to tend toward assembly service rather than self-assembly of furniture, while there is no particular difference in the percentage of male respondents for their preference of self-assembly for both furniture and accessories.

According to the results of assembly preferences for both accessories and furniture, there is a quite amount of respondents who had no reply, which might indicate that these respondents had no experience of assembly for any IKEA product since it has a percentage more than assembly service choice for both furniture and accessories.

Table 5.11: Experience of the respondents in planning their own combinations

	Yes, I have planned a combination of articles.	No, I have not planned a combination of articles.	Total
Male	20	32	52
Female	19	29	48
Total	39	61	100

In the Table 5.11, the results about any experience of respondents in planning their own combinations are shown and grouped according to gender. These results of the Question-3 (see Appendix-G) require to be studied together with the results of following questions in relation to arrangement of combinations as the respondents with negative response to this question also explain about their experience of combinations in these following questions. Although %61 of the respondents says that they have no planning experience for combinations, they have comments on this kind of experience as the results of next two questions. These results are shown in the Table 5.12 and the Table 5.13, including findings of the respondents both have planned and have not planned their own combinations.

Table 5.12: Experience of the respondents while planning their own combinations

	Yes, I had my own combination.	Total
I made all planning on my own.	33	41
I made use of the planning stands in the store.	8	12
I made use of online home planning tools and programme.	8	9
I had assistance of IKEA staff and we planned together.	2	6
I worked with an interior designer and planned together.	1	1
I worked with an interior designer who planned for me.	0	0
Other	*2*	*4*

In the survey, the two questions that follow Question-3 are developed in order to gain an understanding of the reasons for planning their own combination or no combination. Therefore, in the Table 5.12 and 5.13 there are some negligible results of respondents who replied the irrelevant question. In the Table 5.12, these results are the ones state that “No, I did not have my own combination” as this question has been developed for the ones who experienced some combinations of their own (see Question-4 in Appendix-G). The same for the results in the Table 5.13, the ones are negligible for the survey as they belong to the respondents saying, “Yes, I had my own combination” for Question-5 (see Appendix-G).

Table 5.13: Experience of the respondents explaining why having no combination

	No, I did not have my own combination.	Total
I prefer having the recently planned combinations.	27	28
There are too many products.	11	12
It takes a long time to plan.	7	9
I do not know enough about the products to plan a combination.	6	7
I am anxious about any mistake in the combination.	4	4
Other	*8*	*8*

Since these questions are open for multiple selections, the given results do not refer to any precise percentage of respondents. However, these results are helpful in presenting the popular responses for the respondents’ experience of planning their own combinations. In the Table 5.12, the leading results belong to %33 of the respondents who explain that they have experienced planning some combinations and achieved the process of combining articles on their own. These results are followed by %8 of the respondents including the ones who are making use of the planning stands in the store and online tools respectively. On the other hand, the most common response for defining the reason of not planning own combinations is that they prefer ready-made combinations (Table 5.13). These responses referring to any confusion about product variety and combinations are quite matching with the statements considering the relationship between customers and customisation, mentioned in the initial chapters of this study.

In the Table 5.14, the results of Question-6 are given by grouping them according to the respondents experienced in planning their own combinations and not experienced in combinations. Since this question has been developed as a “check all that apply” question **(Fink, 2003a:47)** and searches for any comment of both respondent groups (see Appendix-G), the results are quite efficient for representing the respondents' understanding of making their own combination, which refers to the concept of customisation mentioned throughout this study.

Table 5.14: Explanation of the respondents about planning their own combinations

	Yes, I had my own combination.	No, I did not have my own combination.	Total
It allows me to express my individuality and taste.	28	26	54
It is more appropriate for my house and requirements.	26	19	44
I do not have to buy any group of furniture or accessories.	21	18	39
It is affordable.	17	17	34
No reply	*1*	*9*	*10*
Other	*2*	*3*	*5*

To begin with the most common explanation of the respondents for the preference of own combinations is that it allows them to express their individuality and taste. It refers to the description of "consumer sovereignty" by **Black (2002:82)**, which is "the tastes of consumers rather than the preferences of producers, which determine what goods are provided", whereas the explanation by **Cagan and Vogel (2002,42)** is that "everyone has a number of product categories, where they expect a product to make a statement about who they are and how they want to live their lives." Moreover, this explanation may possibly refer to "the pride of authorship effect" defined by **Schreier (2006:317)**: "Customers may also be likely to value the output of self-design more highly if they take pride in having created something on their own (instead of traditionally buying something created by somebody else)".

Next explanation is that it is more appropriate for their house and requirements, which refers to customisation of goods and services according to the specific needs. Also, **Slater (1997:28)** explains this individual choice of customers that "we do not consume in order to build a better society, to be a good person and live the true life, but to increase private pleasures and comforts".

Other explanation among these results is that they do not have to buy any group of furniture or accessories. Since it has been traditional purchasing way for home furnishing in Turkey, IKEA surprises and also attracts customers with its separate or modular products allowing mix and match among the whole range.

The last common explanation of the respondents about planning their own combinations is that it is affordable for them. As they do not have to pay more for any pieces that they do not need, it costs less than some other ready combinations with default pieces. These pieces may be frames, doors, shelves, drawers, hooks and knobs for a building a wardrobe, while covers, frames, legs and pillows for creating a sofa of their own.

Table 5.15: Preference of the respondents in home furnishing and accessories retailers in Turkey for home and/or office use

	Home	Office
IKEA	43	17
Home improvement retailers (Koçtaş, Bauhaus, etc.)	39	16
Major enterprises (Istikbal, Kelebek, Çilek, etc.)	38	6
Small and Medium enterprises (Masko, Modoko, etc.)	29	13
Traditional manufacturers (Carpenters, etc.)	25	10
Franchisers/Import furniture retailers (Mozaik, etc.)	8	2
Project of an architecture/interior designer	8	1
No reply	*9*	*63*
Other	*4*	*1*

According to the Table 5.15, showing the results of Question-7 (see Appendix-G), IKEA, home improvement retailers and the major enterprises like İstikbal, Kelebek and Çilek are the most common preferences of the respondents for furniture and accessories in their houses. Since the questionnaire has been conducted among customers in the IKEA store, the responses for the IKEA choice are most probably affected. However, these results are helpful in presenting the common preferences of the respondents in home or office furnishing besides IKEA.

The previous results given in this study have been considering two objectives of the survey, which are to find out about the IKEA customers' shopping experiences in relation to modularity and variety of IKEA product range, and to find out about the recent preferences of IKEA customers in home furnishing. In addition to these objectives, those questions have been developed as the ones that make respondents remember and be concerned about their experiences before answering the last questions of the survey (see Appendix-G). Since these last questions of the questionnaire have been developed as open-ended questions, the following results are aimed to be considering the third objective of the survey, which is to explore about IKEA customers' understanding of the IKEA concept and product range in comparison with the other furniture retailers in Turkey.

Question-8 invites respondents to write down the positive comments on the IKEA store and the product range and compare to the other home furnishing retailers in Turkey, while Question-9 asks respondents about their negative comments. Results of these questions are grouped around some keywords like design, variety, quality, montage, and so on. In the Table 5.16, grouping for the results of the respondents' positive comments is clarified and the repetition of each keyword is given in order to present the most common comments. According these results, the positive comments in common are in relation to design, low price, variety, store, and inspiration. Besides, the other topics refer to the comments explaining about functionality, quality, easy montage, staff, customisation, shopping experience, and guarantee.

This study explores about the role of design and customisation in satisfying the customers' demands and requirements, hence these results are analysed in order to find out any comments related to those concepts. Although the comments referring to the topic of customisation seem to be the minority among the results, these positive comments of the respondents mostly refer to the components of design and customisation, which are design, low price and variety. Considering the definitions of mass customisation mentioned in the previous chapters, the terms of design, low price, and variety are involved in these definitions. For instance, in the definition of mass customisation by **Pine (1993)**, it is providing tremendous variety and individual customisation, at prices comparable to standard goods and services to enable the production of products and service with enough variety and customisation that nearly everyone finds exactly what they want. Furthermore, the modularity in the IKEA product range, enabling and increasing "mix and match" possibilities, attracts the IKEA customers and inspires the Turkish furniture enterprises for developing modularity in their products.

In the Table 5.17, these common comments of the respondents are grouped by gender in order to examine the relationship between gender and understanding of the IKEA concept and product range. In general, the difference in the comments in relation to design, variety, store, and also inspiration is negligible. However, the difference in comments concerning low price, functionality, and easy montage seems to be related to gender. Since male respondents tend to pay for shopping and assemble the furniture more often than female ones, they might have pointed out that they like low price and easy montage, while female respondents are more concerned with the functionality of the furniture and accessories than male ones, they might have enjoyed that feature of IKEA product range.

Table 5.16: Positive comments of the respondents comparing the IKEA store and the product range to the other home furnishing retailers in Turkey

Common comments of respondents	Common topics in responses	Responses contain each topic
- Unique products / furniture / accessories - Distinctive / attractive / aesthetic / smart products - Well thought details / solutions - Modern / contemporary / practical style	Design	43
- Affordable design / products - Reasonably priced furniture and accessories - Economical for different budgets	Low price	43
- Lots of alternatives - Various/different/ modular products - Alternatives with numerous combinations	Variety	43
- Well designed store / display / rooms / homes - Not comparable to any other furniture stores - Comfortable / pleased tour throughout the store	Store	24
- Inspiring combinations / rooms / homes - Good solutions / practical details - Interesting / attractive presentations - Inspiring / encouraging my creativity	Inspiration	17
- Multifunctional / functional details - Practical / functional / useful design	Functionality	14
- Reasonable price for different quality levels - Material / details good in quality	Quality	13
- Easier montage than expected - No price added for the ones with easy montage	Easy montage	11
- Polite / smiling / careful / helpful staff	Staff	6
- Modular / various pieces to be combined - Flexibility/ mix & match opportunity of products	Customisation	5
- Enjoying time / examining products in the store - Comfortable tour without insisting staff around	Shopping experience	5
- Guarantee to change the product / any pieces - 2 / 5 / 10 years guarantee for most of the range	Guarantee	3

Table 5.17: Responses for "positive features of IKEA product range and IKEA store compared to the other home-furnishing retailers in Turkey" grouped by gender

	Male (52 people)	Female (48 people)	Total (100 people)
Design	22	21	43
Low price	24	19	43
Variety	21	22	43
Store	12	12	24
Inspiration	10	7	17
Functionality	4	10	14
Quality	9	4	13
Easy montage	7	4	11
Staff	4	2	6
Customisation	1	4	5
Shopping experience	3	2	5
Guarantee	2	1	3
No reply	*7*	*4*	*11*

These comments of the respondents are also given in the Table 5.18, grouped by age. According to these results in the grouping, younger respondents of the survey, who are between 18-24 and 25-29 years old, are more concerned and pleased about design, low price and variety features of IKEA product range.

The combination of design and low price seems to be the secret of IKEA success in attracting customers in Turkey as well as variety in the product range. It has been stated that "where mass production and distribution occur, some consumers feel forced to accept the preferences of the mass rather than pay a high price for individuality" **(Britannica, 1957:328)**, however, now customers seem to enjoy design and variety together with low price that IKEA product range refers to be a good example in this case.

Since unique design, modularity, variety and well-thought details in a product range are mentioned to be significant by the respondents, the Turkish furniture enterprises willing to be successful in the local and foreign markets need to develop their range in these features and especially to work with designers or design consultants. Some of the furniture enterprises have begun to improve their product range and marketing strategies including free guidance of design and customisation, whereas some of them prefer to imitate some popular products, inspirations and strategies of IKEA in their range, brochures and catalogues.

Table 5.18: Responses for "positive features of IKEA product range and IKEA store compared to the other home-furnishing retailers in Turkey" grouped by age

	18-24 (30 people)	25-29 (30 people)	30-39 (24 people)	40+ (16 people)	Total (100 people)
Design	11	16	10	6	43
Low price	14	13	10	6	43
Variety	13	14	9	7	43
Store	9	6	6	3	24
Inspiration	6	4	5	2	17
Functionality	3	5	4	2	14
Quality	4	4	2	3	13
Easy montage	2	5	3	1	11
Staff	3	1	1	1	6
Customisation	1	3	0	1	5
Shopping experience	4	1	0	0	5
Guarantee	0	2	0	1	3
No reply	*2*	*3*	*4*	*2*	*11*

While Question-8 of the questionnaire has been exploring about the positive comments of the respondents, Question-9 has been developed for finding out the negative comments on IKEA store and product range, and asking the respondents to compare these to the other home furnishing retailers in Turkey (see Appendix-G). The results of this question is clarified by bringing common comments together in some specific groupings similar to the previous results and given in the Table 5.19 in order to show the repetition rate of each comment. According to these results, the negative comments in common are concerned to quality and price, whereas the other topics refer to the comments explaining about delivery, montage, store layout, popularity, crowded store, staff, stock out, transportation, and style of the range.

These results represent that the complaints about self-delivery and self-assembly do not dominate the disadvantages of IKEA in the market.

Table 5.19: Negative comments of respondents comparing the IKEA store and the product range to the other home furnishing retailers in Turkey

Common comments of respondents	Common topics in responses	# of responses contain each topic
- Problems with quality and endurance - Low quality in some products / furniture / material - Low quality / no quality - Low quality in sofa, upholstery, veneering, etc. - No quality in low priced products	Quality	25
- Not low price as it is introduced - Some products have high price compared to market - Not low enough with promoted products - Less low priced products than high priced ones	Price	17
- Extra priced delivery - Difficulties with self-delivery of large sized furniture	Delivery	8
- Extra priced montage - Montage is often not on the same day with delivery - Possible damage in self assembly	Montage	8
- Too large store and not enough shortcuts/exits - Confusing/tiring layout and forced tour in the store	Store layout	6
- Common choice of furniture and accessories - Alike products and decoration of houses in awhile	Popularity	5
- Extremely crowded store, especially weekends - Difficulty to find and examine the products in crowd	Crowded store	4
- Tired/careless personnel - Not enough personnel around the store	Staff	4
- No stock for some products/popular ones - Waiting longer for some products when out of stock	Stock out	4
- Out of the city centre - Difficult/long way without a private car	Transportation	4
- Too much expression in Swedish style - Products not fitting in Turkish style	Style	2

It is essential for understanding both positive and negative comments of the respondents, since this study aims to find out about the influences of the IKEA concept and the product range on the Turkish furniture retailers in addition to the IKEA customers in Turkey. In the Table 5.19, it seems to be quality and price that the respondents are not pleased about IKEA, although most of the Turkish furniture enterprises focus on the self-delivery and self-assembly by assuming that it is the most significant disadvantage of the IKEA concept. However, these topics have been less pronounced in this survey when compared to the marketing strategies of these furniture retailers supposing opposite of these results.

On the other hand, it might be more reasonable and efficient if the Turkish home furniture retailers do concentrate on the features of their product range by the means of quality and price. Since the results refer to the complaints mostly about quality and price of IKEA products, it seems to be an advantage for the Turkish furniture industry. Furthermore, design and variety are the other essential features (Table 5.16) that these enterprises should focus on in order to satisfy the customers in Turkey, as it is important to be successful in the markets abroad as well as in the local market.

Table 5.20: Responses for “negative features of IKEA product range and IKEA store compared to the other home-furnishing retailers in Turkey” grouped by gender

	Male (52 people)	Female (48 people)	Total (100 people)
Quality	10	15	25
Price	10	7	17
Delivery	5	3	8
Montage	4	4	8
Store layout	5	1	6
Popularity	3	2	5
Crowded store	3	1	4
Staff	2	2	4
Stock out	1	3	4
Transportation	2	2	4
Style	1	1	2
No reply	*14*	*12*	*26*

These negative comments of the respondents are grouped by gender in order to examine the relationship between gender and understanding of the IKEA concept and product range, in the Table 5.20. According to these results grouped by gender, quality seems to be more concerned as a problem by female respondents, while the complaints about price and store layout are more pronounced by male ones. The comments on delivery, montage, and popularity are the topics common for both genders of the respondents.

The remarkable result in these comments among the others is related to popularity of the IKEA products. These respondents are concerned with the common choice of furniture and accessories, and that many people similar products, decoration and solutions in houses or offices soon. In addition to the disadvantage of quality and price complaints about IKEA, this might become a latent advantage for the Turkish home furnishing retailers if they improve their products in a way to offer unique design differentiates their brand identity and product range from IKEA as well as any other competitors in the local and global market.

Table 5.21: Responses for “negative features of IKEA product range and IKEA store compared to the other home-furnishing retailers in Turkey” grouped by age

	18-24 (30 people)	25-29 (30 people)	30-39 (24 people)	40+ (16 people)	Total (100 people)
Quality	7	9	5	4	25
Price	5	5	4	3	17
Delivery	3	1	2	2	8
Montage	3	1	2	2	8
Store layout	4	0	2	0	6
Popularity	0	2	1	2	5
Crowded store	1	2	1	0	4
Staff	1	1	1	1	4
Stock out	0	1	2	1	4
Transportation	1	3	0	0	4
Style	1	0	1	0	2
No reply	*8*	*7*	*8*	*3*	*26*

In the Table 5.21, the negative comments are grouped by age and according to this grouping; all ages of the respondents seem to share the comments equivalently. In addition to these results, it might be essential that it is %11 of the respondents who have had no positive comments on the IKEA store and the product range, while it is %26 of the respondents who had no negative comments.

This survey has aimed to find out about the customers’ comments on IKEA and its product range, especially about modularity and variety of IKEA products, and also IKEA customers’ understanding of the IKEA store and the product range in comparison with the other furniture retailers in Turkey.

6. CONCLUSION

This study, concerning about influences of the IKEA concept and the product range on the Turkish furniture industry and the customers in Turkey, has aimed:

4) to gain an understanding of the IKEA concept and the development of its product range,

5) to point out the essential role of product design and customisation in the development of the IKEA concept and its product range,

6) to explore the reasons that make IKEA a tough competitor among the other home furnishing retailers in Turkey.

In order to satisfy these objectives of the study, the survey comprising interviews and a questionnaire has been carried out besides the literature review concerning mainly about the relationship between product design, customers, customisation mass customisation and IKEA.

Various needs and demands of customers in the global market have changed in a way that requires variety and customisation in industrial products and/or services. Some alternative strategies of the market have recently developed into a new period called mass customisation, which brings about flexibility in design and production. Modularity, variety and low price in products have been the goals for the strategies of mass customisation, and usually work with design templates or online tools enabling customers to create their own product combinations. IKEA, the Swedish home furnishing retailer, works with similar strategies focusing on variety and low price in its product range in order to satisfy different needs and requirements of customers worldwide. Especially in furniture design and manufacturing, modularity and variety are significant features, because home decoration requires different dimensions and functions for customers with different necessities.

The furniture industry in Turkey is mainly based on small enterprises like ateliers, carpenters and small factories that are usually family businesses manufacturing for the local market and also for furniture repairs and restoration. The major enterprises of the industry like Istikbal, Kelebek, Çilek, and others, improve their design approach, manufacturing methods and marketing strategies and have succeeded in some countries as well as the local market.

This study has explored the comments of IKEA customers on IKEA, its product range in comparison with the other home furnishing retailers in Turkey. The survey results including the interviews with the managers of IKEA-Turkey and a questionnaire carried out with IKEA customers in the Bayrampaşa store helped in gathering the data required to find out about the comments of customers and the main reasons that make IKEA a tough competitor in the market.

According to the findings of this survey, IKEA and its product range catch the attention of customers by its design, variety and low price features in the range. Considering the definition and strategies of mass customisation, these features are components of customisation, which is also new in the Turkish market. Moreover inspiration and functionality are the characteristics of its product range and stores distinguishing IKEA from the other retailers in the market.

It is important for the customers, who attended the survey, to express their individuality, to find affordable products for their specific needs, and they do not want to buy a set of furniture or accessories, as it is usually the tradition and obligation in the Turkish market. It is also essential that customers are worried about the popularity of IKEA products because they consider that people will have houses with similar products and decoration in a short time.

Considering these findings of this survey, it seems to be significant to offer variety, modularity and low price in addition to unique design and inspiration in order to succeed in satisfying the customers' different needs and demands in the Turkish market, which is representing the global market.

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APPENDIX - A

Interview with the Manager of IKEA-Turkey Range Department, Seda GÜREL

OKSAY: IKEA deneyiminiz ile başlayabilir miyiz?

GÜREL: 4 senedir, IKEA ürün gamı için satın almadan sorumlu olarak çalışıyorum. Çok ilginç bir firma, Ümraniye'de ilk mağazayı açtığımız zaman genel konseptin oturmasıyla ilgili bazı problemlerle karşılaştık. Fakat daha sonra bunu yurtdışı ile konuştuğumuz zaman, yaptığımız tartışmalarla gördük ki; bu problemler aslında her ülkede karşılaşılan problemlermiş. Önemli olan hangilerinde aksiyon alıp hangilerinde alınamayacağı ile ilgili. Neden? Çünkü IKEA hakikaten hani konsept diyoruz, gerçekten bir konsept mantığında kurulmuş ve hacimli olarak satmaya yöneltilmiş bir firma.

Mesela ürün gamının structure olması bile, genişliği bile zorunlu olmak durumunda. 'Testament of a furniture'a baktığın zaman çok net bir şekilde ürün gamının nasıl olması gerektiği ve sebepleri çok net bir şekilde anlatılıyor. Customisation'a girdiğin zaman bu ilk aşamada yapılması gereken bir şeydi. Çünkü çok kolay bir şekilde costumise ettiğini düşünerek -çok ince bir çizgi-, kendini piyasadaki diğer rakiplerle aynı formatta bulabilirsin ki; IKEA'nın diğer bazı marketlerle yaşamış olduğu bir durum. O yüzden biz; kesinlikle IOS (IKEA of Sweden) ne diyorsa aynısını yapıyoruz, birebir getiriyoruz ancak biraz Türk pazarı hakkında deneyim kazandıktan sonra yavaş yavaş costumise etmeye başlayacağız diye düşündük. Aynı şey ürün gamı için de geçerli, yani çok yeni ürünler almadık, çay bardağını almadık, yani ben çay bardağını eklememek için çok çaba sarfettim. Fakat daha sonra ekledik, Paşabahçe'den kaynaklanan ufak bir faturalama probleminden dolayı. Çünkü önemli olan core artikel grubunu insanlara göstermek ve IKEA kültürünü anlatmak. IKEA ürün gamına baktığında 'SBAS' ve 'BAS' diye bölünüyor. 'SBAS' olanlar esas konsepti anlatmaya yeterli olucak ve konsept için yani esas "core business"ımızı yapan şeyler. O yüzden, onlara müthiş bir şekilde uymak ve hiçbir şekilde istisnalara izin vermemek durumundayız. Fakat ne oluyor şimdi costumise'a nereden başlıyorsun; ürün gamından başlamak her zaman riskli çünkü çok kolay bir şekilde kontrol elden çıkabilir. Bizim mağazalarımızı dolaştığın zaman, ilk açıldığımızda 'Room setting'lerin her biri bir situation'ı gösterir ve bunlar dünya standartlarına göre yapılır. Fakat şimdi baktığında, bizim halkımızın %80'i ya çocuklu, ya 'starting out' şeklinde yaşıyor. Yani hani böyle 'established' yok, 'living single' yok. Biz ne yapıyoruz? Room setting'lerimizi bu mantığa göre costumise etmeye başlıyoruz, örneğin daha çok çocuklu çözüm gösteriyoruz, daha az 'living single' gösteriyoruz. Çünkü %2 'living single' yaşıyor. Böyle bir talep yok nerdeyse. Buradan yavaş yavaş başladı. Bunun nedir sonucu: mesela Almanya'ya baktığın zaman -bizim satış ekibi görse çok beğenir-, 'set mobilyalar' öneriyolar çünkü adamlar aşmış artık, yani IKEA'nın ne olduğunu biliyorlar. O yüzden, mesela ANEBODA'nın setini 'price reduction' vererek satabiliyorlar. Bizde bu aşamada bunu yaparsak –daha kimse IKEA'yı bilmezken- denilecek ki, İstikbal vs. ile sen aynısın. Bir anda rakiplerle aynı kotaya giriyorsun. Başka bir şeyi örnek göstereyim mesela, bu 12 vade teklifi yapmamamızın en büyük nedenlerinden biri: konsepte zarar vermemek ve rakiplerden farklı olabilmek.

IKEA bazı şeylerde costumise olmayarak farklı duruşunu koruyabiliyor ve her ülkede de böyle olmuş ve her ülkede de başarılı olmuş bir uygulama bu. Suudi Arabistan, Kuveyt, İsrail, Yunanistan, İzlanda vs.. Geniş bir ülke yelpazesi var ve bu gibi noktalardan feragat etmeyerek başarıya gitmiş bir firma, fakat bir noktadan sonra yavaş yavaş artık marka tanındıktan sonra özellikle, pazarın istediği spesifik ihtiyaçlara cevap vermeye başlıyoruz.

IKEA konseptinin basic dediğimiz şeyden hiçbir zaman, ne olursa olsun, isterse zarar etsin, feragat kesinlikle etmez. Çünkü sistem ona göre kurulmuş durumda, büyük bir çark dönüyor ve düşün sen, Türkiye olarak onun ufacık bir parçasısın. Yani birkaç ülkede denenmiş, kendi çözümlerini; mesela Avustralya'da denenmiş. 'Service oriented' diye bir servis vermeye başlamışlar müşterilerine, fakat temelleri bir kenara attıktan sonra geri dönüşü de yok ve derken bugün bir isteyen yarın iki istiyor, üç dört istiyor ve kontrolü elden kaçırıyorlar, sonunda işi durdurdular orda. Ve sorumluluk yepyeni bir franchise şirkete verildi. Hani basic'ler her zaman olmak durumunda, basic'lerin establish olduğundan emin olduktan sonra yavaş yavaş ince ayarları yapmaya başlıyorsun. Yani IKEA hiçbir zaman mesela fiyatlarının içine 'self delivery-assembly' koyacak bir firma olmadı. Kesinlikle koyamaz yani koyması çok büyük bir hata ama baktığın zaman yine toplumumuzun %80'i 'self delivery-assembly'i negatif bir şekilde görüyor. Bunu Türkiye şartlarında kabul etmek durumundasın. Ne aksiyon alacağını, nasıl costumise edeceğin sorusu, hadi 'self delivery-assembly' verelim değil; mağaza kendi 'clear price' imajını costumise ettikten sonra benim 'self delivery-assembly' sistemim de var, bunu da ön plana çıkarıp belli bir para karşılığında istersen ucuza gelsin, istersen servis parasını ver, ikisini beraber paket olarak al ama hiçbir zaman bu bunun içinde yer almayacak. Bu zayıflığımızı gördük, müşterinin bu talebini gördük şimdi mağaza içinde bizim para karşılığında 'delivery-assembly' verdiğimizi anlatıyoruz, gelecek senelerde daha programlı anlatıcaz.

'Self delivery-assembly'nin ekstra üstüne gittik, halbuki belki de öyle yapılmaması gerekiyordu. Etsin ama servisin de burada olduğu kuvvetli bi şekilde duyurulsun. Biz konsepti oturtmak kaygısıyla, böyle birşey olduğunu insanlara biraz push etmek adına hata değil aslında doğru yapıldı ama bir noktada artık değişmen lazım, push etmek adına sanki yokmuş gibi davrandık yani herkese yaptırtmak istedik, o da işte sanki bir çocuğu eğitiyormuşsun gibi sert davranmanın getirdiği bir şey oldu.

OKSAY: IKEA müşterilerinin IKEA ürün gamı ile ilgili en sık dile getirdikleri görüş, istek ve şikayet konuları nelerdir?

GÜREL: Ürün alanlarına spesifik çok ihtiyaç oluyor. Onları satış ekiplerinden de alırsın. Nedir bunlar? Çalışma masası, ofis furniture'da bayanlar önü panelli masa istiyor vs. gibi en çok sorulan soru. Oturma odaları bölümünde 'storage function'ı daha fazla olan koltuklar istiyorlar. Yani ürün alanlarına spesifik bizim için çok var ama bu illaki Türkiye'de var, diğer ülkelerde yok değil. Çünkü bir şeyi offer ediyorsun ve offer'ın üzerine her zaman bir talep gelir. Biz bu talepleri alıp yurt dışına gönderiyoruz fakat önemli olan, IKEA için o talebin birçok ülkede çok olması ile bir volume production yapılıyor ve IKEA'nın onu hakkaten o şekilde offer etmek için strength'i olsun onu verebilsin. Üretimde eğer onun safety'sini sağlayamayacaksa hiç girmiyor bile. Biraz daha uzun vadeli bakıyorlar. Fakat şöyle bir anımı anlatabilirim; görüş, istek ve şikayet konularında, ürün gamıyla ilgili genel bir cevap hakikaten bir şikayet yok.

OKSAY: Özellikle ürün gamına yönelik görüşler neler?

GÜREL: Bu sabah bir taksi şoförüyle geldim. Adam: "Ya sizin IKEA bütün marangozları şunu bunu öldürdü" dedi. Aslında öldürmedi, onlar işte müşteri için iyi oldu vs.. ama "artık design ürünleri ucuza alabiliyorum, evimde benim sehpalarım var, eskiden eşim bakardı iç geçirirdi, alamazdık" diyor.

Daha çok böyle design ürünleri olması insanların hoşuna gidiyor, daha şık olması, inspiration'ları hoşlarına gidiyor. Fakat şu anımı paylaşayım; daha ilk mağaza açılmadan önce, piyasaya bakıyoruz hangi ürünler satar diye, tüm rakiplere gittik, gördüm ki her yerde kayın satıyorlar, dedik biz çılgın gibi kayın satıcaz IKEA'da. IKEA'da da kayın, huş var, meşe var genel olarak. Ve bütün kayın ürünlere çılgın bir 'forecast' verdik çünkü herkes kayın alıyor. Mağazayı açtık, açıldıktan bir sene sonra bir sene boyunca overstock olan ürün kayındı, kimse kayın almak istemiyordu. Yani huş peşindeler, huşa meşeye bayıldılar, böyle İskandinav tarzı, bizim hani en çok hangi ürün gamı satılıyor diye baktığımızda 'artikel frame'i hepsinin farklı ama eşit seviyeye getirdiğinde, İskandinav ve country çok ön plandaydı. Bizim country'miz de böyle alışılan tadda bir country değildir. Böyle ağır mobilya yoktur, daha böyle İngiliz tarzı, daha fresh colour olan bir country'dir. Bence bu hani satışlara baktığımız zaman müşteri görüşlerini, müşterilerini yansıtıyor. İskandinav ve country ağırlıklı çünkü çok IKEA'ya yönelik bir şey, bir tarz oluşturduk bence ve şartlar da o yönde gidiyor. Onun haricinde eksik fonksiyonlar var. Çay bardağı örneği, rakı bardağı örneği. Fakat bizim ordaki neden biz bunu almak istemiyoruz çünkü aldığımız zaman; piyasadaki üreticilerden alıyorsun, adam her zaman fiyatını yükseltmek gibi lükse sahip ve sen aldığın zaman başka adam aynı ürünü sattığı için fiyatı ucuz tutmak durumundasın ve bu zaten IKEA'nın ürün gamında olmadığı için senin hiçbir zaman kazanacağın bir savaş değil yani bir çay bardağı getir o bir tane olucaktır, bunun ikincisi, üçüncüsü yoktur. Yani bu senin zayıf noktan olmuş oluyor. Zayıf noktanı bu şekilde kapatıp yama yaparmış gibi bir çay bardağı koyduğun an müşteriye yaptığın bir statement yok. Yani benim öyle güzel çay bardaklarım var ki fiyatları da şöyle diyemiyorsun. O yüzden mümkün olduğunca yapmamaya çalışıyoruz. Şuna çok önem veriyoruz, en ufak bir problem olduğu zaman gidip, basına duyurup re-call (geri çağırma) yapıyoruz ki, bu bir olumlu etki yaratıyor. IKEA'nın müşteriyle ne kadar ilgilendiğini görsünler. Mutlaka görüşlerini etkiliyordur diye düşünüyorum.

OKSAY: IKEA ürün gamı belirlenirken nelere dikkat ediliyor? IKEA müşterilerinin görüş, istek ve şikayetleri belirleyici oluyor mu?

GÜREL: Aslında bize IOS'ten geliyor. Biz belirlemiyoruz. Yani ben oturup her sene başında, şunu şunu alıp da ürün gamım bu olsun demiyorum. IKEA'nın 2 tip ürün gamı var : 'SBAS' ufak olan diğeri de 'BAS', 8500 artikel kabul eden bir çerçeve. Böylece, ürün gamı 12000-12500'e kadar çıkabiliyor, o da markete özel ürünlerden dolayı fakat şunu yanlış anlamayalım. Markete özel derken yeni bir ürün demiyorum. Mesela, US örneğini verdim. US için yeni bir koltuk satılmıyor. Bir koltuk satılıyorsa, bunun 5 kişilik ya da 4 kişilk olanı üretiliyor, fakat adı aynı kalıyor, yani aileleri bozup markete özel yeni bir aile yaratılmıyor. Biz 'SBAS'ı almak durumundayız, çünkü bütün dünyada IKEA mağazaları 'SBAS' almak durumunda. Dediğim gibi, 'SBAS' konsepti en iyi anlatan ve hani IKEA'yı IKEA yapan bir ürün gamı. Fakat biz neyi gördük, mesela satışlar başladı gördük ki, mutfak ürünlerinde inanılmaz bir başarı var ve müşteri çok sevdi, çok alıyor ve devamlı bir istek halinde, şu da olsa bu da olsa, bunun renklisi yok mu, vb.. O yüzden, 'BAS'ı ekledik ve yavaş yavaş başladık mutfak için. Örneğin, 'BAS' ürün gamı, müşteriye daha çok seçenek sunuyor, peki o zaman ciron artıyor mu? Evet ama yine de SBAS haline gelmiyor bu ürün gamı. Çok enteresandır, o da işte ürün gamının genişliğinin kuvveti. Biz de başlarda çok soru alıyorduk, bir ürün satış alanında 100 çeşit varsa ve zaten 20'i satıyorsa 80'i atalım. Ama 80'i attığında, 20'si satmaz, 100 çeşidi tutmak durumundasın ki, o 20 ürünü satabilesin. Bu işte zamanla oturan bir bakış açısı.

OKSAY: Bu deneyimler, yeni açılacak mağazaları etkileyebilir mi? Örneğin, 10 mağazadan sonra mutfak bölümünün başarısı ile, planlamada mutfak bölümü geniş tutulacak denebilir mi?

GÜREL: Yok. Hiçbir zaman diğer bölümlerden küçültülmüyor. Bursa örneğin, daha ufak olduğu için 'SBAS' ile başlıyor, müşteri talebine göre ürün gamını genişletiliyor. 'BAS'la oynamak şehir ya da markete özel olabiliyor. Yani satış tarafı güzel ama bir de bunun lojistik tarafı var, depolanması var, sipariş tarafı var yani daha sistem oturmadan, 8500 ürünün yönetimini verdiğin zaman sistem çok yavaş döner. O yüzden, mümkün olduğunca temel ile başlamak istiyoruz. IOS ürün gamını veriyor, üzerinde çok büyük bir değişiklik yapmıyoruz. Şu anda aynı şey, fakat bizim depolamamız ve ülke olarak kuvvetimizi biliyorlar, bir deneyim oluştu. O yüzden, ben bunu gerçekten istiyorum ya da istemiyorum gibi belirleyebiliyoruz. Toplasan 20 ürünü geçmez ama mesela mağaza açıldığından beri bazalar istenildi. Ben de IOS'ten baza istiyorum diye söyledim 4 tane depolamalı baza geliyor dediler. Ama o kadar komik fiyatlar ki, rakiplerde fiyatlar çok ucuz, ciddi para kaybettiğimiz bir sektör, benim bunu satmam için ve kar yapmam için İstikbal'in Yataş'ın 3 katı fiyata satmam lazım. Bu noktada düşündüm ya ben bu ürünü getirip fiyat kırmalıyım ve para kaybedeceğim ya da hiç almayacağım. Sonunda almak istemiyoruz dedim. Mesela IOS'ten bir telefon alıyorum; diyorlar ki, bir nevresim var! Bayıldık! ama, üzerinde domuz resmi var. Domuz resmi, Müslüman ülkelerine uygun bir şey olabilir mi? hani o tip sorular da geliyor bazen. Sonuç olarak, ürün gamını tamamen belirlemek üzere bir çalışma yapılmıyor.

OKSAY: IKEA ürün gamında IKEA-Türkiye'de beklenenden çok ilgi gören veya hiç ilgi görmeyen şaşırtıcı ürünler oldu mu?

GÜREL: Yine design ürünler çok ilgi gördü. Satmaz diye düşündüğüm birçok ürün sattı. Design faktörü işin içine girince çok etkili oluyor. LUDDE koyun postu mesela bir girdi, top seller! Sonra grisi geldi dediler, yükledik siparişi, fiyat aynı kaldı zam yapmadık ama bir geldi nefret etti insanlar.

Bir gün ürün spesifikleri yapıyorum, mağaza turu atıyorum, Çocuk bölümüne bir baktım ürünü hiç hatırlamıyorum. Fare!! Dedim ben bunu ne zaman aldım? O kadar iğrenç duruyor ki, fare basmış gibi her tarafı. Keşke almasaydım satmaz dedim, ama müthiş sattı. Mal yetiştiremedik o kadar çok sattı.

Bir de mobilya bölümünde country ve İskandinav çok satıyor dediğim gibi. Bookcase'leri satmakta çok zorlandık. Çünkü bizim halkımızda 'bookcase' kültürü yok. Alayım kombine yapayım, BILLY'den display kurayım, hem kitaplık da yapayım.. Yok öyle bir şey! Onu öğretmek çok zaman aldı. Yani TV-medya dolapları bölümünde bayağı zorlandığımızı hatırlıyorum.

Basic IKEA ne verirse versin müşteri öğrenmek zorunda. Kesinlikle değiştirilemez. IKEA konsepti dediğin üretimin parçası. Eğer az parçaya indiriceksem; IKEA konsepti Türkiye'de çalışmıyor. Konseptin ilk maddesi ürün gamına dokunamazsın! Satmasa bile olmak zorunda. Açılışında da gördüm, eğitim seviyesi biraz daha yüksek olan insanlar bunu eğlenceli görüyorlar. Fakat eğitim seviyesi belli yaş üstü, gelir seviyesi düşük olan insanlarda anladığım kadarıyla böyle durumlar daha fazla yaşanıyor. Orda işte, satış personelinin daha iyi olması gerekir.

Türkiye'de niye bu kadar servis var insan gücü bu kadar ucuz? Çin gibi vs bir yerde restauranta gidince dört garson bakar bir kişiye yurt dışında bir restauranta bir garson bakar ve her şeyi kendin yaparsın . bunu değiştiremeyiz ve halkımızı her nekadar anlatmaya devam etsekte baya bir zaman alır. Ben çok ümitli değilim. O yüzden de satışçı arkadaşların, IKEA felsefesini kafalarının bir kenarına koyarak mümkün olduğu kadar müşteriyle diğer ülkere göre daha alakalı olmalı gerek. Yönlendirilmeye ihtiyaçları var.

OKSAY: IKEA Ümraniye, IKEA İzmir ve IKEA Bayrampaşa mağazaları karşılaştırıldığında, IKEA ürün gamı farklılık gösteriyor mu?

GÜREL: Yok ama Bursa'da olacak. Tamamen lojistik ile ilgili nedenlerden dolayı. Ben lojistiğin dört dörtlük işleyeceğini bilsem, Bursa'ya da aynı ürün gamını açarım çünkü tüm mağazalarımız 8800 artikeli alacak gibi yapılıyor. Ümraniye ve Bayrampaşa arasında kesinlikle bir fark yok. İzmir'de de şu an yok ama Bursa dediğim gibi farklı açılıcak.

OKSAY: IKEA yurtdışı mağazaları ile karşılaştırıldığında, IKEA ürün gamı farklılık gösteriyor mu?

GÜREL: Hayır. Avrupa göstermiyor, Uzak Doğu ile çok fark var. Bütün ürün gamı Avrupa ile Uzak Doğu'da çok farklılık gösteriyor. Daha çok ürün gamıyla birlikte çalışmıyorlar. Öncelikle pazarları çok farklı ve devamlı 'free range' çalışmak zorundalar. Mesela bir koltuk çıkıyor, çıktıktan bir gün sonra rakiplerinde aynısını bulabiliyorsun, yeni olan çok hızlı kopyalanıyor. 'Free range' ile çalışarak katolog ile de çalışmıyorlar, yılda 4 broşür olarak çıkıyorlar. Ürünler kopyalanmasın, yıllık fiyatlar müşteriye verilmesin diye. Ama dediğim gibi Avrupa ile aynı sadece bir yatağın farklı size'ları olabilir.

'Free range' ile çalışmak çok zordur. 'Free range' demek bir ürüne bir üretici bulunmuş bir designer bulunmuş, ama daha ürün gamına ekleyip eklememe konusunda emin değiliz. Birkaç markette test edelim satarsa, IKEA spefikasyonlarının üzerine uygulayalım, sağlam olsun global olsun vs.. ondan sonra koyuyorlar. 'Free range' test etme ürünü gibi bir şey aslında. Biz bir ürünü alırken bir yıl boyunca bir milyon tane alacağız diyoruz mesela.

IKEA'nın en büyük customisation'ı fiyat stratejisidir. Bize en çok soru bununla ilgili geliyor. IKEA sadece recommend eder bir fiyatı sana ve biz fiyatı çalışırken şu an mesela 2009 fiyatlarını belirliyoruz, hiç birzaman elimizde maliyet olmaz, çünkü sen Pazar oriented bir fiyat vermek zorundasın. İşte tek costumise ettiğimiz şey bizim fiyatlarımız. Ürün gamı aynı tutuluyor fakat fiyatlar markette neyse ürüne bağlı olarak %20-%30 bir gap olmak durumunda. Örneğin, koltuk konusunda IOS'in recommend ettiğinin ciddi altında satıyorum, şilteler de çok altında satıyorum, tekstilde çok altında satıyorum. Bütün dünyadaki IKEA'da müthiş bir rekabet ağı var, analiz etme ağı. Bize de gelip test ediyorlar ve şunun comparable bir ürün olması paralelinde dünyada benzeri ne kadara tutar diye bir fiyat fikri oluşuyor, onlar da ona göre bir fiyat belirliyorlar ama hiçbir zaman marketlerde alıp birebir uygulama değil. Mesela bizde de ahşap olan ürünler, diğer ülkelerdeki IKEA'lara göre daha pahalıdır. Neden? Ahşap değil de ahşap kaplama olan ürünler? Çünkü Türkiye'de ahşap kaplama ürün yok. Olmadığı için IKEA'nın recommend ettiği fiyatlar o kadar ucuz ki, yani biz o fiyata Türkiye'de dandik folyo kaplama alıyoruz. O yüzden, bizdeki ahşap kaplama ürünlerin müşteriye anlatılması gerekiyor. "Bu folyo değil, ahşap kaplama" şeklinde açıklayın, diyorum. Ahşap kaplamayı folyo fiyatına satıyoruz, hala çok ucuzuz ama yurt dışında, mesela Hollanda'da, İsveç'te her şey ya masif ya da ahşap kaplama. Dolayısıyla ciddi olarak fiyatları çok düşük. Ama tekstile geldiğinde koltuklara, şiltelere.. Biz heralde en ucuz ülkelerden biriyiz. Zaten sistem ona costumise ediceksin diyor.

APPENDIX-B

Interview with the ‘Showroom’ Manager of IKEA-Bayrampaşa Store Sales Department, EMRAH BAKİLER

OKSAY: Müşterileri self-servis alışverişe yönlendirebilmek için hangi yöntemleri kullanıyorsunuz?

BAKİLER: Mağaza girişinde konsept duyurumuz var, ilk önce bununla başlıyoruz aslında ve alışveriş lokasyonlarımızda bunu duyuruyoruz. Müşteriler mağazaya girdikten sonra showroom’a yöneldiğinde etiketlerde de bundan bahsediyoruz, ama burada ilk etapta mağazada ilk defa alışveriş yapacak müşterileri çalışanlar yönlendiriyor. Daha çok müşterileri yönlendirmede diğer önemli nokta şu; sistem bu diyoruz. Ama neden böyle bir sistem olduğunu da anlatıyoruz. Hem mağaza girişinde konsept dokümanları var, hem de çalışanlar bundan bahsediyor zaten. Dolayısıyla, neden hani fiyatın ucuz olduğunu anlatan göstergelerden bir tanesi de self-servis alışveriş aslında. Dolayısıyla daha az elemanla daha verimli işler çıkartabiliyoruz, müşteriler de her seferinde birilerini beklemek zorunda kalmıyorlar, kendileri de öğrenip sonra rahatça bunu yapabiliyorlar. Yani gerek konsept dokümanlarıyla, gerek mavi alışveriş formlarımızla gerekse de personel devreye girerek böylece yönlendirmiş oluyoruz. Buna artı olarak yönlendirme panolarımız var, onlarla da self-servis mobilya alanına yönlendiriyoruz, oradan da alışverişlerini tamamlamaları için bir yöntem izliyoruz.

OKSAY: IKEA müşterilerinin en sık yardım istedikleri konular nelerdir?

BAKİLER: Aslında bununla bağlantılı gidiyor. Bir tanesi “ben nasıl dolduracağım bu formları, nasıl alışveriş yapacağım?”, bir de self-servis alışveriş alanına yönlendirmek için yeni başladığımız daha yeni test ettiğimiz bir şey var; anahtarlık takıyoruz, ‘alışveriş anahtarlığı’. Satış elemanları onu takarak müşteriler sorduğu zaman buradan böyle alabilirsiniz vs. gibi bilmedikleri konularda yardımcı oluyorlar. Bu anahtarlıkta ne var? Biri self-servis alanında satılan ürün etiketi, biri full-servis ürün etiketi bir tane de aksesuar ürün etiketi. Dolayısıyla 3 etiket var, bir de mavi formumuz var 4. Bunların hepsini arka arkaya asarak müşteriler gördüğü zaman, bunu görürseniz böyle yazıyorsunuz, böyle böyle yapıyorsunuz gibi yönlendirmelerimiz var. Çünkü bilgilendirmeler genelde okunmuyor. Daha çok bizim halkımızda olan alışkanlık görüntü ile hareket ediyoruz, sanırım daha çok foto grafik hafızamız var. O yüzden bir şeyleri okumaktan sıkılıyoruz. Daha çok istediğimiz, -tabi sektörün de alışkanlığı- birileri bize anlatsın. Güven de yok biraz, güven duymamaktan da kaynaklanıyor, öyle tahmin ediyorum. Yani üniformalı birisi bunu söylerse, bu her kim olursa olsun; doktor, hemşire, polis, üniformalı her kim varsa, o bilgi veriyorsa doğrudur. Biz yavaş yavaş bu alışkanlığı kırmaya çalışıyoruz ama sektörde tersi bir uygulama var maalesef, bu yüzden de bizden daha çok bilgi istiyorlar bu anlamda. Tuvalete nasıl giderimden tut da diğer bölümlere nasıl giderim, kasalara nasıl giderim, buradan nasıl çıkarım.. gibi bir de aşağıda, “ben bunu nasıl koyacağım arabama?” bununla ilgili bir sürü bilgilendirmemiz var. Bunun dışında yine, “nasıl montaj yapacağım?”, “ölçüsü nedir?” gibi sorularla çok karşılaşıyoruz.

OKSAY: IKEA kombinasyon ürünleri ve planlama masaları için, müşterilerin yaklaşımı ve ilgisi ve planlama masalarının kullanım sıklığı nedir? IKEA yurtdışı mağazaları ile karşılaştırıldığında, durum nedir?

BAKİLER: Planlama masalarımız bizim nerde var? Kitaplıklar medya bölümünde var, yatakları odaları, dolaplar bölümünde ve ofis bölümünde var. Dolayısıyla oturma odalarında ve çocuk bölümünde, yemek masaları bölümünde bizim planlama masalarımız yok çünkü bu alanlar daha çok kombinasyon ürünlerin satıldığı bölümler. Yaklaşımı ve ilgisi; eğer yanında bir IKEA çalışanı yoksa planlama masalarını kullanmaya pek hevesli değiller ama biz mümkün olduğunca müşterileri oraya yönlendirmeye, burada neleri çözebileceklerini göstermeye çalışıyoruz. Özellikle mutfak bölümünde elimizden geldiği kadar sık yönlendiriyoruz, zaten şu aralar çalışanlarımızla birlikte çok sık planlama yapıyorlar ama ben yavaş yavaş az da olsa hafta sonu, özellikle müşteriler kendi başına bir şeylerle uğraştıklarını görüyorum. Yurt dışıyla kıyaslandığında 180 derece tersteyiz. Yurt dışında çok daha fazla planlama masası olduğunu gördüm, kendi başlarına çok fazla planlama yapıyor, müşteriler yazıp çiziyor, o yüzden gerçekten insanların kendi kendilerine bir şeyler yapıp istediklerini, kendilerinin ortaya çıkardığı bir ortamı yaratabilirsek o zaman çok fark edecektir. Mutfak bölümünde şöyle bir uygulama başlattık: Kitchen Planner programını müşterilerin öğrenmesi ve bunda bir şeyler yapabilmelerini sağlamak için programı küçük CDlere kaydederek veriyoruz ki, evde de açıp bakabilsinler diye böylelikle bu duruma zaman içinde daha sıcak baksınlar ve planlamalarını bu programla yapmaya başlasınlar amacıyla. Ne kadar etkisi olur şu anda onu ölçemiyoruz ama bugüne kadar yaklaşık 200 CD dağıttık, müşterilerin bununla ilgilendiklerini düşünüyorum, çünkü eğer müşteriler bunu alıyorlarsa mutlaka ev ya da ofiste bunu kullanıyorlardır.

Ofis bölümünde bilgisayarlı planlama masaları yok, daha çok insanlar oturup eliyle çizebileceği ölçülü kâğıtlar var, hani çizip karalayıp 1/100 ölçek gibi çizim yapabilirler. Mutfak bölümünde "Home Planner" diye bir program var 'info desk'de arkadaşlar planlayabiliyorlar. Müşteriler bizim internet sitemizden de indirip kullanabiliyorlar dolayısıyla böyle bir şans var.

Çekinmelerinin sebebi bilgisayar kullanımı olabilir ama az önce de söylediğim gibi daha çok fotografik hafızamız var, daha çok bir şeyi görünce aklımızda kalıyor, çünkü diğeri biraz daha iç mimarların uzmanlık alanına giriyor. 3 boyutlu olarak çevirecek, onu bu alanda uzman kişi çok rahat tasavvur edebilir kafasında, ama müşteri için daha çok alanda örneğini gördüğü zaman kafasında oturuyor. "Tamam, böyle oluyormuş, anlaşıldı" gibi. Yani illaki görmesi gerekiyor. Şöyle diyelim: gösterilen "Best Seller Combination" denilen 'IKEA Toolbox'ta örnekleri gösterilen, daha önce müşterilerin tercih ettiği, kullanıcıya uygun kombinasyonlar var. Tabii ki, kombinasyon kullanıcının evinin büyüklüğüne, küçüklüğüne göre genişliyor ya da daralıyor ama ekstra yeni bir kombinasyon talebi -en azından benim bildiğim kadarıyla- yok. Ama bölümde çalışan arkadaşlar, belki istek doğrultusunda sizlerle görüşüp farklı kombinasyonlar da yaratılabilir mesela.

OKSAY: Self-servis alışveriş, nakliye ve montaj ile ilgili müşteri görüşleri nedir?

BAKİLER: Bu konuda şikayetler: nakliye ve montajın ekstra ücretli olmasından memnun değiller ama dediğim gibi, bu iş hep yine en başta söylediğim soruyla; Self-servis alışveriş sistemiyle alakalı. Bazı müşteriler kendi arabalarıyla gelip nakliyelerini yapabiliyorlar. Mesela '36 saat' aktivitesinde müşterilerin çoğunluğu kendi arabalarıyla gelip yükleyip gittiler, neredeyse nakliye vermediler gibi bir şey. Dolayısıyla aslında müşteriler IKEA sayesinde arabalarının farkına vardılar, koltuklarının yatabildiğini fark ettiler, ürünlerin arabalarına sığmasına çok şaşıran müşterilerimiz vardı. Gerçekten burada aldıkları mobilyaları koyup götürebilcekleri başka mobilya şirketlerine parasını veriyorlar, ama en az 45 gün sonra ürünleri kendilerine ulaşabiliyor. Burada ise ürünü alıp 5 gün sonra da monte edebilir, evinde inşaat varsa mesela evin bir köşesine yatağın altına bizim yassı paketlerimizi koyabilir ve istediği zaman ürünü hiç zarar görmeden monte edebilir.

OKSAY: Büyük mobilyalarda nakliye-montaj gerçekten sorun olabilir, ama benim duyduğum bir örnek şöyle: Küçük ürünlerle ilgili montajlarda bir teyze "ben yaptım, bunu ben monte ettim" diye hevesle anlatıyormuş. Heveslendirici bir yanı da olabiliyor öyle mi?

BAKİLER: Aynen. Bu gerçekten bir ayrıcalık yaratıyor. Ürünü kendisi kurduğu için, "tamam ben belki uzman marangoz değilim, ve onun kadar hızlı kuramıyorum" diyor ama sonuçta kurabiliyor. Yani el kitapçıklarımız resimli ve çizgili olduğu için, kareleri adım adım izlediğinde herkes bunu kurabilir. Biz hep anlatıyoruz, işte burayı biz kurduk, herhangi bir ekip gelmedi diye. Nakliye ve montaj hesaplı aslında 5 parçaya kadar 35 lira. Aslında hiç de pahalı değil, ama işte ekstradan bir fatura çıktığı için insanlar biraz rahatsız oluyor.

OKSAY: IKEA müşterileri, görüş, istek ve şikayetlerini belirtirken Türkiye'deki diğer mobilya ve aksesuar mağazaları ile kıyaslama yapıyor mu?

BAKİLER: Böyle şeyler geliyor, daha çok nakliye ve montajla ilgili geliyor yine aslında. Fiyatlarla ilgili böyle üzerimize akan bir şey olmadı aslında. Çünkü gerçekten düşük fiyatlarla ilgili iddialıyız. Ama özellikle dediğim gibi taksit konusu bize çok fazla soru olarak geliyor. "neden taksit yok?" gibi sorularla sık karşılaşıyoruz (yani kredi kartı taksiti dışındaki senetli taksit satışlar tabi ki)

OKSAY: IKEA-Türkiye ilk açılışından bu yana geçen 3 yıl içerisinde, müşteri memnuniyeti ve/veya şikayetlerinde bir değişim yaşandı mı?

BAKİLER: Şöyle bir şey var tabi; ben bunu ilk İstanbul'da tecrübe ettim, 2. mağaza İstanbul için aslında çok az olduğundan hala IKEA'ya hiç uğramamış müşteriler var. Bütün bu zamandaki verilere baktığınızda değişim şöyle yaşanıyor: Bayrampaşa' ya gelen müşterilerin çoğu yeni, yani -IKEA'yı tanımıyor-, dolayısıyla yeni kitlelerin şikâyetleri hep standarttır. "Nakliye-montaj neden yok?", "neden taksit yok?" vs. vs. gibi. Hep benzer bu tip şikâyetler geliyor.

Bayrampaşa mağazası için şunu söyleyebilirim: en temelde stokları burada daha iyi yönetiyoruz, tabi ki 'stock out' ürünlerimiz var ama 7500 ürün satıyorsanız siz, 100–150 artikeldeki o stok bence hiçbir şey değil. En temel şey bu aslında, biz burada onu çok iyi yönetiyoruz. Bir diğeri daha tecrübeliyiz dolayısıyla sorunları daha başından hatta bazen daha oluşmadan çözebiliyoruz ya da engelleyebiliyoruz. Hani en temel bunu sormuyorlar, dediğim şeylerin başında bu stok sorununu söyleyebilirim. Müşterilerin anketlerinden de gelen ve internetten de yapılan yorumlara bakıldığında stoklarla ilgili yorum çok az; bu da bizim Bayrampaşa'yı daha iyi daha sağlıklı yönettiğimiz anlamına geliyor aslında. Bu 3 yılın sonunda, duruşumuz daha net. Eskiden daha belirsiz cevaplar verirken, tereddütle evet derken şimdi daha iyi bir durumdayız gerçekten.

Yolla ilgili sorunlar var, çok karışık geliyor müşterilere, kolay bir ulaşım yolu değil burası. Belediye izin vermediği için yönlendirme tabelaları koyamıyoruz, dolayısıyla ek bir trafik sorunu çıkıyor ortaya ve bu da bize gelen müşterilerimizin daha mağazaya girmeden bir memnuniyetsizlik yaşamalarına neden oluyor. Şikâyetlerle ilgili bunu söyleyebilirim.

OKSAY: IKEA Ümraniye, IKEA İzmir ve IKEA Bayrampaşa mağazaları karşılaştırıldığında, müşteri görüş, istek ve şikayetleri farklılık gösteriyor mu?

BAKİLER: Evet gösteriyor. Şunu söyleyebilirim: özellikle Bayrampaşa mağazası için Ümraniye'ye gelip de buradaki personel yakınlığını ve güler yüzlülüğüyle ilgili çok olumlu tepki alıyoruz. Bu en temel aldığımız geri bildirim.

Şikayette sabit bir şey var; o da mescit ile ilgili olarak geliyor. Ama bu trend gibi birşey, ilk başta yoğun olarak geliyor sonraları zamanla azalıyor. Biz de bu konuyu çok istekli olan müşterilerimizin isteklerini karşılayacak şekilde ayarladık ama burada hemen yanımızda bir alışveriş merkezi açılacağı için bunun rahatlığı olacak aslında müşterilerimizi o zaman oraya yönlendireceğiz, aynen Ümraniye'de olduğu gibi.

OKSAY: IKEA yurtdışı mağazaları ile karşılaştırıldığında, müşteriye yardımcı olan satış görevlilerinin karşılaştığı farklı durumlar/istekler oluyor mu?

BAKİLER: Yurtdışında insanlar daha çok kendileri buluyor ve satın alıyorlar. Self-servis mantığı yurt dışında çok ciddi işliyor. Kendi başına bir şey yapma, çözme, bitirme anlamında daha erkenden ayaklarının üzerinde duruyorlar aslında. Bizim buradaki insanımız daha yaratıcı daha becerikli olduğu halde, dediğim gibi diğer alışveriş sistemleri de bunu desteklemediği için burada daha hazır bir hizmet bekliyorlar.

Türkiye'de daha önce IKEA sistemine benzer bir yaklaşım görmedim ama şunu söyleyebilirim. Yurtdışında müşteriler, en azından kendi başına bir şey yapmak adına daha hevesliler. Ama yurt dışında IKEA gelmeden önce de düzen bu şekilde yürüdüğü için herhangi bir yadırgama yaşanmıyor. Zaten IKEA için müşteri 2 şey söylüyor: "ya çok sevdim ya da hiç sevmedim." Bu dünyanın her yerinde de aynı. Ama self-servis olayı burada biraz daha karışık, insanların kafasında henüz oturmadı tam olarak ama yavaş yavaş alışıyorlar. Mesela bununla ilgili olarak müşterinin ilginç bir yaklaşımı var: "kendim alırım tamam ama taşıyamam." Hala oturmayan ve zaman isteyen konu bu yine. Hani adalar arasında bir köprü yok şu anda. Ama bu zamanla oturacak ve sistem olması gerektiği gibi işleyecek. O bahsettiğim yanlış alırım endişesi çok fazla var. Çünkü bugüne kadar müşteriler hep kandırılmış, bir mobilya satın almışlar, ürün 45 gün sonra ellerine ulaştığında içinden kendi istedikleri değil de ya farklı bir renkte ya hasarlı ya da farklı bir ürün çıkıyor. Biz de böyle bir durum yok, seri üretim olduğu için bu tip bir sorunla karşı karşıya kalmıyor müşteri. Aslında unuttuğum ve çok önemli bir şey müşterilerin en çok sordukları sorulardan birisi de: " içinden aynı renk çıkar mı?". Müşterilerimizin en büyük avantajı bu. Müşteri gelir, bakar, stokta varsa alır ve evinde kurup hemen kullanmaya başlar.

OKSAY: IKEA, Türkiye'de müşterilere özel bir uygulama eklemek zorunda kaldı mı?

BAKİLER: Örneğin, personel sayımız daha fazla ama bu ilerleyen tarihlerde sistem oturdukça değişecektir. Aynı şehirde 8–10 mağaza var dolayısıyla aynı hamburgerciye sürekli gittiğinde aynı hizmeti alacağını bilmek gibi, burada da aynı mantık var aslında ama bunun için biraz daha zamana ihtiyacımız var.

Sanırım farklı bir uygulama yok, ama belki troleylerle ilgili şunu söyleyebilirim: müşteriler bize arabaların yerini sorduklarında onlara yerini göstermek yerine, eşlik ederek daha yakından yardımcı oluyoruz.

APPENDIX - C

Interview with the 'Market Hall' Manager of IKEA-Bayrampaşa Store Sales Department, FATOŞ PELİT

OKSAY: Müşterileri self-servis alışverişe yönlendirebilmek için hangi yöntemleri kullanıyorsunuz?

PELİT: Başlangıçta zaten bütün IKEA komünikasyonlarını asıyoruz. Girişte 4 tane Banner ile şu şekilde alışveriş yapabilirsiniz, şöyle şöyle yapmalısınız, isterseniz nakliye konusunda da yardımcı olabiliriz gibi detaylı bir şekilde anlatıyoruz. Ama bunları insanlar okumuyorlar ve çoğunlukla bize soruyorlar, biz burada, nasıl alışveriş yapabilirler diye ilk günden beri eğitiyoruz onları. Şöyle yapmalısınız, buraya yazacaksınız şeklinde yönlendiriyoruz. Ümraniye mağazasında bu sorular artık daha da azaldı ama Bayrampaşa yeni bir mağaza olduğu için Avrupa yakası için her ne kadar artık Ümraniye yerine buraya gelen müşterilerimiz de olsa; onlar şu an için yine de azınlıktalar dolayısıyla biz en baştan anlatıyoruz Showroom'da, Market Hall'da ve self-servis alanında nasıl alışveriş yapabileceklerini.

OKSAY: IKEA müşterilerinin en sık yardım istedikleri konular nelerdir?

PELİT: Yine nasıl alışveriş yapabilecekleri konusunda, eve nasıl götürecekleri konusunda yardım istiyorlar sıklıkta ya da nasıl monte edecekleriyle ilgili yardım istiyorlar. Biz de onları nakliye firmasına yönlendiriyoruz. Ama bazen yine de nasıl monte ederiz diye soruyorlar biz de kısacık anlatıyoruz aslında ürünün içinden çıkan kitapçığı adım adım takip ettiklerinde kendilerinin kolaylıkla kurabileceğini gösteriyoruz.

OKSAY: Montajı sizden istedikleri oluyor mu?

PELİT: Kesinlikle öyle şeyler oluyor büyük şeylerde zor olduğu için küçük ürünler için "hemen şurada kursak da ben de götürsem" gibi istekler geliyor, biz de çok basit olduğunu ve kendilerinin evde rahatlıkla yapabileceklerini anlatıyoruz onlara. Bu IKEA konsepti ve "siz üzerinize düşeni yapın biz de üzerimize düşeni yapalım" anlayışını da anlatmış oluyor müşterilerimize.

OKSAY: Tam tersine, kendi monte edeceği için memnun olan müşteri ile karşılaştınız mı?

PELİT: Rastlıyoruz ama bunu direk dile getiren pek olmuyor.

OKSAY: IKEA kombinasyon ürünleri ve planlama masaları için, müşterilerin yaklaşımı ve ilgisi nedir? Planlama masalarının kullanım sıklığı nedir? IKEA yurtdışı mağazaları ile karşılaştırıldığında, durum nedir?

PELİT: Çok zorlandığımız zamanlar oluyor. Ama mesela mutfak bölümünde beni şaşırtan şeyler de oldu; müşteri gitmiş internetten "Home Planner" programını indirmiş, istediği şeyi planlamış ve bizden sadece satın almaya geliyor. Böyle durumlar da oluyor. Ama planlama konusunda insanları yönlendirmek için küçük Legolarımız vardı, müşterilere onları gösterdiğimizde, "dalga mı geçiyorsun ben çocuk muyum?" diyen bunun yanında bunu çok beğenip uygulamaya çalışanlarla da karşılaştık.

OKSAY: Bunlar birebir dolap üniteleri öyle değil mi?

PELİT: Birebir küçük üniteleriydi, sadece kapaklar modül olarak vardı. Planlama masalarıyla ilgili biz müşterilere, nasıl mutfak planlaması yaptırırız diye aktivite gibi bir şey düzenledik. Çünkü en kapsamlı ve karışık olan mutfak planlaması. Bunu yaptıktan sonra diğerlerini de yapabilirler diye. Ama anladığım kadarıyla bu yurt dışından da sorun yaratan bir durumdu, hatta yurt dışından bir çocuk 1 hafta 2 hafta bu konu üzerine eğitim aldı.

IKEA insanları kategorilere ayırmış, biz de burada aynısını uygulamaya karar verdik. Birinci grup, gerçekten bu programı kullanabilen ve istediğini yapabilen bizden sadece satın alma noktasında yardım isteyen insanlar. İkinci grup, bu programı kullanmak istemeyen insanlar. Biz onları fark ettiğimizde onlara bu programı nasıl kullanacaklarını anlatacağımız, biraz daha zaman ayırdığımız müşterilerimiz. Üçüncü grup ise, bu programı hiç kullanamayan, bilgisayarı hiç bilmeyen kişiler. Onlara da daha fazla destek vererek, yardımcı olduğumuz kişiler.

Tabii diğer bölümlerde, hem TV-medya dolapları bölümünde, hem yatak odaları bölümünde, hem de ofiste planlama masaları var. Oralarda da insanların zaman zaman kullandığını çok fazla da yönlediğini görmedim. Daha çok satıştan destek istiyorlar. Ben zamanla bunun oturacağını düşünüyorum. Yani insanlara şuan IKEA konseptini öğretme aşamasındayız.

OKSAY: Self-servis alışveriş, nakliye ve montaj ile ilgili müşteri görüşleri nedir? Yurtdışına göre neler ve neden farklı olabilir?

PELİT: Ben tabii araçlar olarak düşünüyorum. Bir de onlarda alışkanlıklar, işleyen sistem zaten hani hep konuşuruz ya "adam kendisi yapmış evini" diye ya da işçilik çok pahalı. Ona bir para ödemektense ayrıca kendisi yapmayı tercih ediyor ve buna alışmışlarda zaten artık hobi gibi onlar için. Ama biz de o kültür daha oturmadığı için farklı yaşanıyor. Bir de biz de aracın üstünde büyük eşyalarımızı taşımak için ekstra bir parça yok onlardaki gibi ya da kendim kurarım düşüncesi yok. Ürüne zarar verebilirim, iyi kuramam düşüncesi var nedense. O yüzden biz bu bilincin oturması için ve kendilerinin de kolaylıkla aldıkları ürünlerin montajlarını yapabileceklerini göstermek için montaj yarışmaları düzenledik; "Bakın bizim ürünlerimizi kolay kurabilirsiniz kısa bir sürede" diye. Hatta bir ara ben Show Room'da sandalyeleri ya da küçük masaları müşterilerin gözü önünde kuruyorduk ki, ne kadar kolay olduğunu görsünler diye. Hatta ilgileniyorlardı "AA! Bu kadar kolay mı" bu diyorlardı. Özellikle kızlara kurduruyordum ki bakın kızlar bile kuruyor, siz de kurabilirsiniz diye.

OKSAY: IKEA müşterileri, görüş, istek ve şikayetlerini belirtirken Türkiye'deki diğer mobilya ve aksesuar mağazaları ile kıyaslama yapıyor mu?

PELİT: Oluyor ama çok fazla dile getirmiyorlar sadece olsaydı iyi olurdu gibi söylüyorlar başkalarıyla kıyaslamaktan çok. Biz de onlara neden biz de olmadığını anlatmaya çalışıyoruz. Onların bu nakliye ve montaj ücretini ürünün fiyatına dâhil ettiklerini, bizim katmadığımızı dolayısıyla çok daha uygun fiyatlara ürün sunabildiğimizi söylüyoruz.

OKSAY: Daha çok nakliye ve montaj ile ilgili değil mi? Mağaza yapısı ve ürün gamı hakkında kıyaslama yapılmıyor galiba?

PELİT: Evet, ürün gamı ve kalitesiyle ilgili de yorumlar da geliyor ama biz rekabet analizine çıktığımız için ürünlerimizin kalitesi konusunda güveniyorum bize. Tabii nedir, ederi kadar. Görünen yerlerde evet iyisini kullanalım ama görünmüyorsa yalnızca ihtiyacı karşılayacak kadar malzeme kullanalım. Mesela nedir? Bütün deri koltukların tüm görünen yerleri hakiki deridir ama görünmeyen alt tarafları ya kumaş ya da suni deri kullanılır ve biz bunu açıkça müşteriye söylüyoruz, gösteriyoruz. Her şeyi dürüstçe anlatıyoruz, mesela masanın üstünü boyarsın ama altını boyamaya gerek yoktur bu masanın kalitesinden ödün vermiyor gibi örneklerde onlara anlatıyoruz. Bu IKEA konseptine dahil olan dürüstlük politikamızla da örtüşen bir şey sonuçta.

OKSAY: IKEA-Türkiye ilk açılışından bu yana geçen 3 yıl içerisinde, müşteri memnuniyeti ve şikayetlerinde bir değişim yaşandı mı?

PELİT: Yaşanıyor tabii, çünkü öğrendikçe "neden ben yapıyorum" sorularından vazgeçiyorlar. Israrla bunu söylemeye devam edenler oluyor ama sayıları gittikçe azalıyor. Başka şeylerle ilgili mesela: IKEA konsepti Türkiye' de yeni olduğu için herkes akın akın geliyordu ilk zamanlar, çok kalabalıktı bir türlü çıkılamayan bir mağaza gibi görünüyordu. Ben buradan neden çıkamıyorum diye deliriyordu müşteriler, şimdi bütün kısa yolları biliyorlar, sakin zamanlarda gelip rahatça dolaşıyorlar. IKEA konseptini yeni öğrenenler yine şikâyet ediyor konseptle ilgili doğal olarak, onların sayısı da ilk günlere göre azalıyor ama.

OKSAY: IKEA Ümraniye, IKEA İzmir ve IKEA Bayrampaşa mağazaları karşılaştırıldığında, müşteri görüş, istek ve şikayetleri farklılık gösteriyor mu?

PELİT: Kesinlikle değişiyor. Birebir bir şikâyet analizi yapmadım ama benim gördüğüm kadarıyla insanların davranışları çok farklı, bunu anlayabiliyorsun. Mesela İzmir mağazası açılışında gördüğüm; insanlar oturdukları ya da çarşafını kaldırıp incelediklerinde bir yatağı kalktıktan sonra tekrar düzeltiyorlar. Ama Ümraniye ve Bayrampaşa mağazalarına baktığın zaman ilk açıldıklarında hatırlıyorum tüm yatakları yorganları bir tarafa atmışlardı. O davranış farklılığından müşterinin istek ve şikâyetlerinin de farklı olduğunu düşünüyorum. Mesela İzmir müşterisi orada çok fazla mağaza olmamasına rağmen daha araştırmacıymış diye duydum. Yani önce araştırıyorlar sonra inceleyip karşılaştırıyorlar ve sonra satın alıyorlar gibi. İstanbul müşterisi gibi plansız alış-veriş yapmıyorlar.

İletişim okumak adına farklı mıyız bilmiyorum benim söylediğim yalnızca ürünü kıyaslamak ve ne olduğunu anlamak adına, İzmir' de daha sakin alış-veriş yapan bir müşteri profili var anlamında, zaten kendileri de öyleler daha kibar insanlar anladığım kadarıyla.

OKSAY: IKEA yurtdışı mağazaları ile karşılaştırıldığında, müşteriye yardımcı olan satış görevlilerinin karşılaştığı farklı durumlar/istekler oluyor mu?

PELİT: Öyle çok bariz bir örnek bilmiyorum ama ben bu istek ve şikâyetlerin daha az da olsa yurt dışında da olduğunu düşünüyorum. Çünkü en çok sorulan sorular diye bir analiz yapılıyor, bu Türkiye'de çıkan bir uygulama değil, diğer tüm ülkelerdeki mağazalarda olan bir uygulama. Demek ki her yerde müşterilerin belirli talepleri oluyor diye düşünüyorum. Yurt dışıyla bariz bir örnek yok sanırım.

OKSAY: En çok sorulan soruların toplandığı bir bilgi havuzu var mı? Merkez IKEA böylece sorunları ve istekleri daha rahat görebilir değil mi?

PELİT: Öyle bir şey yok ama şu var mesela çay bardağı konusuyla ilgili olarak, o zaman bizim İstanbul merkezimiz bu konuyu IOS'e bildirdi ve ne yapmalıyız diye soruldu. Belki daha çok mağaza açıldığında bu tip konulara bir çözüm bulunabilir, onun dışında burada sorulan sorulara biz burada cevap veriyoruz. Ama örneğin toolbox ve IKEA ideas diye sitelerimiz var daha önce yaşanan bazı şeylerden sonra bulunan çözümlerle ilgili tıkandığımız zaman buralara bakıyoruz eğer varsa faydalanıyoruz yoksa da kendimiz IKEA yöntemleriyle bir çözüm üretmeye çalışıyoruz. Bunun dışında bariz bir örnek aklıma gelmiyor.

OKSAY: IKEA, Türkiye'de müşterilere özel bir uygulama eklemek zorunda kaldı mı?

PELİT: Biz de taksit olayı sürekli karşımıza çıkıyor, müşteriler bu konuda bastırıyorlar. Bankalar bunu bedava vermiyorlar, üzerine belli bir ücret koyuyorlar dolayısıyla bizim de bunu fiyatlara yansıtmamız gerekir. Biz de bunu yapmamak için taksit olayına girmiyoruz ve insanlara dışarıda taksit masraflarının faturalarına yansıtıldığını bir şekilde anlatmaya çalışıyoruz. Bu durum Türklere özgüdür diyemeyeceğim çünkü başka ülkelerde de bu yaşanmış.

Bir de personel sayısıyla ilgili olarak, yurt dışına göre Türkiye' de personel sayısı daha fazla. Başka bizim gibi ülkeler var mı bilmiyorum ama yine bir Yunanistan' dır dır, Arap ülkeleridir, onların da bizim gibi olduklarını zannediyorum. Bu da bir şekilde hizmet istenmesinden kaynaklanıyor aslında.

OKSAY: Personel sayısı ile ilgili olarak İstanbul kalabalık bir kent olduğu için mi böyle bir uygulama var, yoksa İzmir'de benzer bir uygulama var mı?

PELİT: Tabii. Bu m2 ile ya da müşteri yoğunluğuyla da alakalı olarak değişir ama yine de Türkiye 'de personel sayısı fazla. Belki bundan bir 10 yıl sonra IKEA konsepti insanların kafasında oturduktan sonra IKEA personel sayılarına uygun hale getirebiliriz ama şuan için bu pek mümkün değil hala nasıl alış-veriş yapacağını bilmeyen çok fazla insan var. Zaten bunlar Pazar araştırmalarıyla, anketlerle de hep araştırılıyor. İnsanlar IKEA konseptini biliyorlar mı? Anlamışlar mı? Kendileri ürünleri kurmak istiyorlar mı? Kendileri ürünlerini götürmek istiyorlar mı? Bundan memnunlar mı? Beklentileri nelerdir? gibi sürekli anketlerle müşteri araştırmaları yapılarak tespit edilip aksiyonlar alınıyor. Fakat buradaki bahsettiğimiz aksiyonlar hani taksitli alışveriş istiyorlar peki o zaman hemen bunu uygulamaya koyalım değil de "biz bunu nasıl anlatabiliriz" şeklinde aksiyonlar daha çok.

APPENDIX – D

Interview with the Manager of IKEA-Bayrampaşa Store Communication & Interior Design Department, Muhteşem SHIRIN

OKSAY: What are the most common comment, demand and/or complaint about IKEA store, interior design and communication that IKEA customers point out?

SHIRIN: Most of the customers, especially in Turkey, are not able to find the Exit. Maybe they don't know the IKEA concept yet. I hope it will change some time later and the people will find the arrows on the floor, customer guidance tables and boards at the ceiling.

OKSAY: What are the essential details leading the way for developing the interior design, presentation and communication of the range in the IKEA stores? How do the comments, demands and/or complains of the IKEA customers effect on this process?

SHIRIN: The essential detail is to make us as the home furnishing competence specialists through out the world.

OKSAY: As IKEA has a wide range of products, it is so possible that customers get confused and overloaded by those various products and information. How do IKEA avoid this complexity in IKEA range presentations like furniture studios, combinations, etc.?

SHIRIN: Show/sell "solutions" instead of products, clearly communicate specific customer benefits in function, Price and Quality Ladder is an important tool for IKEA because of effective Range Presentation and range shall be presented so that visitor can find products they planned to buy. Furthermore, we present the range by grouping according to function, style and product family, so we lead the customer to the product.

OKSAY: Do the customers make any comparison between IKEA and other furniture stores in Turkey while they comment on the interior design and the communication of IKEA stores? (If yes, what are the most common ones?)

SHIRIN: Most of the time they are surprised that we have really nice home furnishing solutions. Room settings and Homes are always an inspiration resource for the customers.

Has there been any change in the customer satisfaction and/or complaints about the IKEA store and range presentation during the 3 years since the opening of the first IKEA store in Turkey? (If yes, what are the reasons for that change in comments?)

SHIRIN: see brand capital – but this is out of record for external persons..

OKSAY: Is there any difference between the IKEA stores in Turkey and the IKEA stores abroad? (Including construction, interior design and range presentation, etc.) (If yes, what are the causes for the difference?)

SHIRIN: The IKEA concept should be everywhere the same. However we had more construction issues here than in Germany. It is difficult to work with a time schedule, because you can't really guess when the ordered items arrive. You can find more experienced specialists in Germany, but we can compensate this gap with creativity and passion.

OKSAY: Is there any difference between the IKEA stores in İstanbul-Ümraniye, İzmir and İstanbul-Bayrampaşa? (Including construction, interior design and range presentation, etc.) (If yes, what are the causes for the difference?)

SHIRIN: First as I mentioned before, we can't change the concept. There are very strict guidelines how a store has to look like. For sure we have some differences in how we present the range. This depends how Com&In works with Sales and Logistics. Very important task is to convince the other departments that only Com&In is responsible how we present the range. You can see in a store clearly if this accepted or not. If a store doesn't show inspiration then the Com&In manager has to take the responsibility. He or she is responsible to train the specialists and convince the other departments.

OKSAY: Has IKEA Turkey developed any special application about the store, interior design and/or communication for Turkish customers of IKEA in order to familiarize them to the IKEA concept? (Any possible applications soon?)

SHIRIN: We are at the beginning, but normally we take the brand capital into consideration if we do big changes in the store. Brand Capital can tell us the local needs of the people here. For example: Bigger living rooms and smaller kitchens.

APPENDIX - F

Interview with the Manager of IKEA-Ümraniye Food & Beverage Department, CEM AYKOL

OKSAY: IKEA Mağaza restoranları arası farklılıklar var mı? IKEA müşterilerinin şikayet ve görüşleri farklılık gösteriyor mu?

AYKOL: Şimdi IKEA'da yiyecek içeceğin birincil görevi; daha fazla mobilya satmak, daha fazla koltuk satmak, başka hiçbir fonksiyonu yok aslında, mağaza daha çok ziyaretçi getirmek için çalışıyor. İsveçli kültürünü yansıtmak için çalışıyor. Bunu işte menüsü, %50 lokal, %50 İsveçli yaparak sağlıyor. İsveç marketi koyarak yapıyor. Atmosfer, dingin İsveç mobilyaları kullanılarak sağlanıyor, görüntü, resimler vs o şekilde gerçekleşiyor. Türkiye'de de aynı şekilde açıkçası.

OKSAY: IKEA her ülkede, restoranlarda %50 IKEA İsveç yiyecekleri %50 lokal yiyecekler için payını her zaman bırakıyor, öyle mi?

AYKOL: Tabi. Ama bizim burada da gördüğümüz onların İsveçli range'imiz dediği ürünlerin tamamı zaten bizim lokal sayılabilir: somon, mayonez somon tabağı, köfte gibi. Menüdeki yani range'deki salatalar, salata çeşitleri bizim bir varyasyon yapmamızı çok gerektirmiyor. 1–2 çeşit lokal yemek koyuyoruz. Mağazada olduğu gibi, restorantta da %70-75 ziyaretçisi var. Daha hafif daha sağlıklı yiyecekler tercih ediyoruz, orda işte vejetaryen makarnalarımız var, salatalarımız var, tatlılarımız var. Mesela tatlılarımız hiçbir zaman bir pastanedeki gibi büyük kaba dilimler değiller. Dolayısıyla hem yemek hem tatlı yiyebiliyorlar. Atıştırmak isteyenler için kahve tatlı opsiyonlar var, sandviçlerimiz var. Dolayısıyla hani IKEA'nın tavsiye ettiği range'e tamamen uyduk bizde. Ama ek olarak giren, işte ayran oldu. Bizim insanlarımızın bildiği ve "Aa, Ne kadar ucuzmuş" diyeceği belli ürünleri de range'e kattık. Köfte bunun başını çekiyor, zaten olması gereken, IKEA'nın tek reçeteli ürünü köfte. Onu dikte ediyor her ülkeye diyor ki; bu şekilde yapacaksın köfteyi, tedarikçimize de o reçeteyi veriyor ve IKEA ile tedarikçi arasında anlaşma yapılıyor. Siz bizim lisanslı köftecimiz olur musunuz diye, bizim mağazamızda bir fonksiyon yok aslında orda, biz sadece satın alan firma oluyoruz. Bunun yanında çorbalar, soğuk-sıcak içecekler. Burada esas vurgulanan, bu kaliteyi doğru fiyata verebiliyoruz, dolayısıyla mağazamızdaki ürünler de doğru kalite doğru fiyat denkleminde olabilir. Aslında öyle. Birazcık beraber çalışırsak ona varıyoruz. Tepsiyi o yüzden kaldırtıyoruz, sıraya o yüzden sokuyoruz. Kahvesini, çayını o yüzden kendisi dolduruyor. Ama diyoruz ki; siz çok nazik insanlarsınız bir kahve de bizden için, 3. kahvenizi de için, 2. kolanızı da için ama baktığın zaman hiç kimse aslında 3.veya 4. kolasını içmiyor. Ne yapıyor? Bir kahve içiyor, çalkalıyor bir de kola dolduruyor kendine. Dolayısıyla IKEA' nın istediği konsept kavramlar yiyecek-içecekte şu anda hayata geçmiş durumda, bizim için çok keyifli bir şey. Hatta fazlasıyla yapıyoruz çok yüksek oranda bunu gerçekleştiriyoruz.

OKSAY: Sanıyorum bu konuda çok fazla şikayet yoktur, yani mağaza içinde olduğu gibi mekanik alışveriş var ama, Türkiye'de fast food restorantlar ile alışılmış bir self servis yemek kavramı olduğu için yadırganmayabilir. Peki, müşterilerin beğendiği noktalar neler?

AYKOL: Aynen. Müşterinin hoşuna giden şey şu; zaten etrafta gördüğü yiyecekleri yiyebiliyor bizde, ama burda doğru kalitedeki ürünleri alabiliyor. Mutfağımız açık bir mutfak; nasıl üretildiğini, nasıl pişirildiğini, kimin servis ettiğini görebiliyorlar. Genç, cıvıl cıvıl insanlar var bizim servis hattımızda, birçok restoranta oranla daha fazla bayan çalışıyor. Diğer restoranlarda, aşçılar şefler çalışır, gereksiz eldiven, bone, vb. takarlar, ama aslında içerde hiçbiri öyle bir şey yapmaz. Bizim mutfağımız ise açık, dolayısıyla bone takıyorsak takıyoruz, takmıyorsak takmıyoruz, eldiven varsa var yoksa yok. Ama hepimiz bir standart şef görünümündeyiz. Bilhassa bayanlar çok cazip bir alışveriş noktası haline getiriyor restoranımızı.

OKSAY: IKEA Mağazaları arası farklılıklar nelerdir?

AYKOL: Ufak değişiklikler yapıyoruz. Hani işte İzmir mağazasında biraz daha hafif yiyecekler var, hava daha sıcak, çok fazla et ağırlıklı, sos ağırlıklı şeyler servis etmiyoruz ve tabi ki her mağazada yiyecek içecek müdürü farklı olduğu için onların da kişisel tercihleri etkili oluyor. Mesela Bayrampaşa yiyecek içecek müdürünün daha fazla yiyecek geçmişi, deneyimi var, böylece sandviçler, değişik salatalar, değişik çok güzel karışık sandviçler yapabiliyor. Yabancı olmasının da etkisiyle, değişik adaptasyon tabaklar üretebiliyor. Bu tür seçenekleri hemen sisteme adapte ediyoruz biz.

OKSAY: IKEA Mağaza ürün gamına göre, restoran daha serbest çalışıyor diyebilir miyiz?

AYKOL: Tabi biraz daha serbest çalışıyoruz. Yani dikte ettiğimiz ürün gamı yok.

OKSAY: Servis açısından IKEA konseptine daha yakın, öyle değil mi?

AYKOL: Sistematik aynı, yerleşim aynı, bütün mutfak ve restorantlarda işleyiş aynı ondan sonra yönetim tarzı mümkün olduğunca aynı olmaya çalışıyor. Çok yüksek sayıda bir ekiple çalışmayı gerektiriyor. Çok yüksek motivasyon gerektiriyor. Çünkü neredeyse mağazaya gelenlerin %70'i bizden yemek yiyor. Ortalama rakamlara zaten sahipsin, dolayısıyla biliyorsundur. Çok yüksek bir rakam bu. Böyle bir iki tane işletme var Türkiye'de. Büyük kebapçılar falan vs.. yani büyük şirketlerin yemekhaneleri bu kadar yoğun yemek çıkartıyordur. Ama onlar da yine belli saatlerde çıkartıyor. Bizse gün boyu çıkarıyoruz. Bunu epeydir yapıyoruz, yeterince deneyim kazandık.

OKSAY: Alışveriş merkezlerinde restoranlar genelde pahalıdır, fiyatların düşük tutulabilmesi ve yemeklerin kalitesi için neler yapılıyor? Lokal yemekler hangi kriterlere göre seçiliyor?

AYKOL: Tabi ki çalıştığımız bize lokal ürün tedarik eden firmalar var; ve beceri seviyesi çok önemlidir. Ama biz bazı şeyleri onlardan önce yaptık. İşte saksı köfte yaptık, kiş yaptık; kek tarzı bir şeyin içerisinde bir yemek sunuyorsunuz, o mesela çok rağbet görüyor. Börek de satıyoruz, açık büfe kahvaltı veriyoruz. Hani lokal-isveçli karışımı çok ideal durumda, tam IKEA' nın istediği konumdayız. Herkes için bir şey sunabiliyoruz. Bu bazen tabi kalabalıktan dolayı sadece atıştırmak için gelenleri, sadece bir şeyler atıştırmak isteyenleri zorluyor ama o da bir konseptini geliştirme imkanı sağlıyor. Diyor ki: esspresso kafe-bar açarsın mağazanın başka bir lokasyonunda ürün gamını ister değiştir ister aynı tut. Biraz diyor atıştıracakları bir kenara çekersin, hem onlar rahat eder hem de restorantta oturup yemek yiyecek bir aile için de yer açmış olursun. Restoran ticari bir yer değil aslında IKEA için, sadece daha çok mobilya satmaya çalışıyor. Ama restoranda geldiği zamanda kahvesini içsin, katoloğu karıştırsın, satın alma kararını versin ve mağazadan satın almadan ayrılmasın. Bunun sebebi ve bu sistematiğe çok yakında oturtulmuş bir şey. 2001 senesinden itibaren çok düzenli bir hale geliyor.

OKSAY: Düzenli hale getiriliyor derken?

AYKOL: Şöyle anlatayım: İlk açıldığında Ingvar diyor ki: insanlar dışarı gidiyor yemek yemek için, biz mağaza içinde böyle bir şey yapalım, üst kata kafetarya gibi bir şey koyuyor ve 1985'e kadar her mağazada farklı menüler, farklı yemekler, farklı fiyatlar uygulanırken daha sonra bir sistem oturtuyorlar. Fiyat bazında, ürün gamı bazında. 2001 senesinde de bütün satın almaları yönetecek ürün gamını belirleyecek IKEA FULL SERVICE A.B. İsveçli bir firma kuruyorlar. O bilhassa tüm ana grubun satın almalarını, menülerini İsveç marketin ürün tedarik zincirlerini yürütüyor. Ondan sonra bu sistem oturdukça bu sefer şart koşuyorlar; İsveç marketi, İsveç dışında dünyanın her yerinde açılacak diye. Franchise ülkelerin konumuna göre ise, satın almayı da bizden veya lokal yapabilirsiniz diyorlar. Onun standartlarına göre bir manuel çıkartıyorlar, derken 2001'den sonrası çok daha hareketli çok daha düzenli bir şekilde işlemeye devam ediyor.

OKSAY: Artık her IKEA mağaza planında restoran ve İsveç gıda market yer alıyor, öyle mi?

AYKOL: Aynen. 4 konsept var yiyecek içecekte. Personel restoranı kesinlikle olmak zorunda. Bir ana restoran olmak zorunda. Aşağıda çıkarken IKEA' nın uygun fiyat profilini destekleyen bir exit kafe olmak zorunda. orada muhakkak o ülkenin en bilinen ürünü inanılmaz bir fiyatta satmak zorunda. ona Hot Dog diyorlar. 'Hot Dog'unuz 'Hot Dog' mu diye sorarlar. Bu ilk yapılırken, evet bizde de Hot Dog var dedik. Arabistan'da 'şavarma' dedikleri bizim dürüm döner dediğimiz, çok zahmetli bir şey. Bana her sene sorarlar şavarma yapacak mısın diye. Hayır diyorum. Senede 2,5 milyon tane Hot Dog satıyoruz. Başka bir şey satmaya gerek var mı? 'Kızıl Kayalar' gibi olamam hiçbir zaman, dönerde kalite çok farklı, ama sosiste kalite belli. Dolayısıyla onu satabiliyoruz. İsveç marketi çok büyük bir İsveçlilik simgesi. İthal ürünler tamamı. Oradan almak durumundayız ve baktığınızda da piyasaya göre ithal ürünler karşılaştırıldığında çok iyi bir fiyat pozisyonundayız. Orada yaklaşık %80-%90 çeşit ürün sunuyoruz. İşte konserve deniz ürünlerinden tut da peynirler, İsveç köftesi ürünler satıyoruz. Bisküvi, tatlı, reçel, şuruplar falan çok büyük ilgi görüyor.

OKSAY: İsveç gıda market deneme aşamasını diyebilir miyiz? Konsepte dahil olacak mı?

AYKOL: Yok konseptin bir parçası zaten. Biz burada da ilk açıldığımızda, İsveç marketi açamamıştık. 2005 senesinin Aralık ayında, 15 ürünle başladık. Şu an 96 üründeyiz, 100 ürüne varacağız inşallah. IKEA'nın standartlarına ulaşmış durumdayız. 10 ürün grubu var, 10'undan da ürünümüz var şu anda. Biraz bisküvi, tatlı ağırlıklı olmakla birlikte, ithal edebildiğimiz sürece onları da şu anda getirmiş durumdayız.

APPENDIX – G

Bu anket, **İstanbul Teknik Üniversitesi Endüstri Ürünleri Tasarımı Bölümü**'nde yürütülen yüksek lisans tez çalışması kapsamında, "Türkiye'de Mobilya ve Kişiselleştirme" ile ilgili bir araştırma için hazırlanmıştır. Vereceğiniz bilgiler, sadece tez çalışması ve bilimsel makaleler için veri teşkil edecektir.

Yaşınız ___________

Cinsiyetiniz	[ ] Kadın	[ ] Erkek		
Medeni durumunuz	[ ] Bekar	[ ] Evli	[ ] Evli ve çocuklu	
Eğitim durumunuz	[ ] İlkokul	[ ] Ortaokul	[ ] Lise	[ ] Üniversite

Mesleğiniz ___________

1) IKEA mağazasına ne sıklıkta geliyorsunuz?

[ ] İlk gelişim	[ ] Haftada 1-2	[ ] Ayda 1-2
[ ] 3 ayda bir	[ ] 6 ayda bir	[ ] Yılda bir

2) IKEA ürünleri için, size uygun olanları işaretleyiniz.

a) Mobilya: [ ] Kendim monte ediyorum.
[ ] Montaj ekibini tercih ediyorum.

b) Aksesuar: [ ] Kendim monte ediyorum.
[ ] Montaj ekibini tercih ediyorum.

3) IKEA ürünleri ile <u>kendi kombinasyonlarınızı</u> oluşturmayı denediniz mi?

[ ] Evet. (Lütfen ürün grubunu belirtiniz) ______________________

[ ] Hayır.

4) Kendi kombinasyonlarınızı oluşturmayı <u>denediyseniz</u>, hangi yolu izlediniz? (Birden fazla işaretleyebilirsiniz)

[ ] Mağazadaki planlama noktalarını kullandım.

[ ] Satış görevlilerine danıştım, birlikte seçtik ve planladık.

[ ] Internet sayfasındaki ev planlama programlarını kullandım.

[ ] Mimar ile çalıştım, benim için seçti ve planladı.

[ ] Mimar ile çalıştım ama seçimleri ben yaptım.

[ ] Seçimleri ve planlamayı kendi başıma yaptım.

[ ] Diğer (Lütfen belirtiniz) ______________________

5) Kendi kombinasyonlarınızı oluşturmayı <u>denemediyseniz</u>, sebebi nedir? (Birden fazla işaretleyebilirsiniz)

[ ] Çok fazla ürün seçeneği var.

[ ] Çok zaman alıyor.

[ ] Ürünler hakkında yeterli bilgim yok.

[ ] Yanlış yapmaktan çekiniyorum.

[ ] Hazır kombinasyonları tercih ediyorum.

[ ] Diğer (Lütfen belirtiniz) ______________________

6) Ürünleri seçmek ve kombinasyon yapabilmek, sizin için ne ifade ediyor? (Birden fazla işaretleyebilirsiniz)

[ ] Farklı ihtiyaçlarıma ve evimin ölçülerine daha uygun.

[ ] Kişiliğimi ve zevklerimi daha iyi yansıtabildiğimi düşünüyorum.

[ ] Bütçeme daha uygun.

[ ] Ürünleri takım olarak almak zorunda değilim.

[ ] Diğer (Lütfen belirtiniz) ______________________

7) Eviniz ve iş yerinizdeki mobilya ve aksesuarları hangi firmalardan tercih etmiştiniz? (Birden fazla işaretleyebilirsiniz)

ev	iş yeri	
[ ]	[ ]	IKEA
[ ]	[ ]	Küçük ölçekli üreticiler (Masko, Modoko, vb.)
[ ]	[ ]	Büyük ölçekli üreticiler (İstikbal, Kelebek, Çilek, vb.)
[ ]	[ ]	Yapı Marketler (Koçtaş, Bauhaus, Praktiker, vb.)
[ ]	[ ]	Özel üreticiler (Marangoz, vb.)
[ ]	[ ]	İthal mobilyacılar (Mozaik, Pabetland, vb.)
[ ]	[ ]	Mimar/iç mimar projesi
[ ]	[ ]	Diğer (Lütfen belirtiniz) ______________________

8) IKEA mağazası ve ürünlerini, diğer firmalar ile karşılaştırdığınızda <u>olumlu</u> bulduğunuz özellikler nelerdir?

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9) IKEA mağazası ve ürünlerini, diğer firmalar ile karşılaştırdığınızda <u>olumsuz</u> bulduğunuz özellikler nelerdir?

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ABOUT THE AUTHOR

Ödül Alev OKSAY was born in Ankara, 1982. She lived in Edirne and completed the high school education there. After she had graduated from the department of Industrial Design, Middle East Technical University, she started her master studies on Industrial Design in Istanbul Technical University in 2005. She attended Industrial Design courses of Sheffield Hallam University as an Erasmus exchange student in Fall 2006/07. She worked for ZER Electronics Co. as an industrial designer in 2007. Since July 2007, she has been working for IKEA as an interior designer in the Communication & Interior Design Department.

October, 2008 **Ödül Alev OKSAY**