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**MASTER'S THESIS**

**SOCIO-ECONOMIC STRUCTURE  
MEASUREMENT REVIEWS IN TURKEY IN THE  
CONTEXT OF DEMAND ANALYSIS**

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## **ABSTRACT**

### **SOCIO-ECONOMIC STRUCTURE MEASUREMENT REVIEWS IN TURKEY IN THE CONTEXT OF DEMAND ANALYSIS**

In this study, it is aimed to contribute to market segmentation studies, which allow the detailed analysis of demand in the globalizing world, and which are increasingly needed in the field of marketing, by examining socio-economic structure grouping and measurement techniques. In this context, within the scope of the study, first of all, information about the grouping criteria used in market segmentation and their advantages and disadvantages are given. Then, the main socio-economic structure grouping criteria and their widespread measurement and evaluation methods, first in the world and then in Turkey, were examined. As a result of these examinations, the reasons underlying the failure to establish the required socio-economic grouping standard in terms of global, regional structures in the world and individual countries have been listed. Evaluations and recommendations that will shed light on future studies in order to eliminate the current deficiencies and problems in this subject are listed.

**Keywords:** Demand Analysis, Socio-economic Structure, Socio-economic Grouping, SES Scale, Market Research.

## ÖZ

### TALEP ANALİZİ BAĞLAMINDA TÜRKİYE SOSYO-EKONOMİK YAPI ÖLÇÜM DEĞERLENDİRMELERİ

Bu çalışmada küreselleşen dünyada, talebin detaylıca analiz edilmesine imkan veren, özellikle pazarlama alanında her geçen gün artan oranda ihtiyaç duyulan pazar segmentasyon çalışmalarına, sosyo-ekonomik yapı gruplama ve ölçümleme tekniklerinin incelenmesi yoluyla katkı sunulması hedeflenmiştir. Bu bağlamda çalışma kapsamında öncelikle Pazar segmentasyonunda kullanılan gruplama kriterleri ile bunların avantaj ve dezavantajları hakkında bilgi verilmiştir. Ardından belli başlı sosyo-ekonomik yapı gruplama kriterleri ve bunların öncelikle dünyada ve ardından Türkiye’deki yaygın ölçüm ve değerlendirme yöntemleri irdelenmiştir. Yapılan bu irdellemeler sonucunda, gerek küresel, gerek dünyadaki bölgesel yapılanmalar ve gerekse tek tek ülkeler boyutunda, ihtiyaç duyulan sosyo-ekonomik gruplama standardının oluşturulamamasının altında yatan nedenler sıralanmıştır. Bu konudaki mevcut eksiklik ve aksaklıkların giderilebilmesi amacıyla gelecekte yapılacak çalışmalara ışık tutacak değerlendirme ve öneriler sıralanmıştır.

**Anahtar Kelimeler:** Talep Analizleri, Sosyo-ekonomik Yapı, Sosyo-ekonomik Gruplama, SES Ölçeği, Pazar Araştırmaları.

## PREFACE

In a rapidly globalizing world, effective analysis of demand is of great importance in all areas that direct the economy, especially in marketing. For this reason, it is necessary to examine the demand tendencies, consumer attitudes and behaviors of large masses of people in a way that allows comparisons in both national economies and regional and global dimensions. Although there are many criteria used in studies conducted in this context, it is obvious that both socio-demographic and socio-economic grouping and measurement criteria should have a common language and method.

Therefore, in this study, socio-economic status (SES) measurement criteria and methods, which are widely used especially in the field of marketing, were examined on the basis of practices in the world and in Turkey, and current deficiencies and problems were tried to be determined in order to shed light on future studies.

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## LIST OF ABBREVIATIONS

|        |                                                                            |
|--------|----------------------------------------------------------------------------|
| AÇIAK  | Outdoor Audience and Research Committee                                    |
| ARDER  | Researchers Association                                                    |
| BİAK   | Press Audience Research Board                                              |
| CAPSES | Capital Based Socio-economic Status                                        |
| DVD    | Digital Video Disc                                                         |
| e.g    | For example                                                                |
| etc    | et cetera                                                                  |
| ESeC   | European Socio-Economic Classification of Occupations                      |
| ESOMAR | European Society for Opinion and Marketing Research                        |
| EU     | European Union                                                             |
| ILO    | The International Labour Organization                                      |
| ISCO   | International Standard Classifications of Occupations                      |
| MIE    | Main Income Earner                                                         |
| MIP    | Major Income-Generating Person                                             |
| NGOs   | Non-governmental Organizations                                             |
| NORC   | National Opinion Research Center                                           |
| NS-SEC | National Statistics Socio-Economic Classification                          |
| OSS    | Occupational SES Scores                                                    |
| PC     | Personal Computer                                                          |
| RIAİK  | Radio Listening Services, Organization, Promotion and Broadcasting Company |
| RVD    | Advertisers Association                                                    |
| SEG    | Socio-economic Group                                                       |
| SES    | Socio-economic Status                                                      |

|       |                                           |
|-------|-------------------------------------------|
| TEA   | Terminal Education Age                    |
| TİAK  | Television Audience Measurement Committee |
| TÜAD  | Turkish Researchers Association           |
| TÜİK  | Turkish Statistical Institute             |
| TÜSES | Turkish Socio-Economic Status Index       |
| TV    | Television                                |
| TYAP  | Social Structure Research Program         |
| UK    | United Kingdom                            |
| USA   | United States of America                  |

## INTRODUCTION

In terms of economic analysis methods and applications, it is of great importance to examine and evaluate the consumption demands, attitudes and behaviors of large masses of people. In the globalizing world, the rapid transformation of the factors affecting the demand together with the increase in interaction with each other necessitates the changes in the number and content of these factors to be handled more carefully and in detail. This reveals the necessity of examining the social structures by considering sociological, economic and psychological factors, and segmenting the demand by considering the combination of the criteria determined in this context.

This work, which you hold in your hand, consists of two parts. In the first part, information will be given about the need for segmentation method especially in market research today, the advantages and disadvantages of this method, the necessary conditions for segmentation and the steps followed; then, some criteria applied in this context will be included.

In the second part, detailed information will be provided about socio-economic segmentation and its measurement, socio-demographic and socio-economic segmentation criteria, which are frequently used in practice; afterwards, examples that are widely used in the world in socio-economic status/group (SES/SEG) measurement, and measurement methods that have been used in Türkiye from the past to the present and are still being used will be discussed in detail. In this way, we will evaluate the deficient and faulty aspects of the current practices, and some suggestions will be listed that will shed light on the work to be done in this field in the future.

# **CHAPTER 1**

## **MARKET SEGMENTATION**

### **1.1. Introduction to Segmentation**

In its simplest definition, segmentation; is to categorize, classify, group, and divide the market into classes. With a more comprehensive definition, it is the division of a large market into sub-groups of consumers with common needs and characteristics and the creation of marketing strategies to target the needs and wants of these groups. Grouping can sometimes be done by demographics, sometimes by needs and sometimes by behavior. The important thing is to define it on the common and dominant characteristics. In making this decision, the targets that the segmentation model is expected to serve are taken into consideration, and attention is paid to selecting actionable criteria. One of the most important purposes of segmentation is processing the market and providing new strategies and tactics.

Since many criteria are applied in segment classification, many criteria will need to be made and combined to find its segment within a set of lead audiences. The important point here is that the target should not be overlooked. Segmentation needs to be measurable, achievable, realistic, defensible, durable, and competitive. While making segment separation, it is essential to know and measure the potential in the relevant segment. It is important to have several customers that will carry out marketing activities specific to the specified segment. There must be similarities to justify the distinction of customers in this segment. Finally, it is important to provide a relative advantage in the field of competition in the market with the service to be provided to the customers in this segment (Yüksel and Mermoud, 2004:110). While creating the segmentation, it is necessary to look at the big picture of the relevant sector. Then, grouping should be done according to the situations that are similar to each other. After gathering customers with certain characteristics for customer segmentation, these customers can be segmented according to sectorial characteristics.

The real potential of the sector is determined, and the values and characteristics of the customers are determined. After segmenting the customers according to their usage habits, target groups and the potential of the groups are investigated. The behavioral values of the groups are compared. Values with the same needs are gathered in groups such as structures and people. Policies of the selected segments are developed, and the most valuable segments are measured and ranked according to their priorities. After looking at the usage habits of the segments and positioning the product/brand, the appropriate strategy for each segment is determined.

With segmentation analysis;

- The most efficient use of limited resources,
- Rating customers according to their added value,
- Opportunity to stay away from segments with intense competition and focus on segments with more competitive advantages,
- Implementation of segment-specific sales policies (price-credit-risk balance),
- Product differentiation according to segments,
- Organizing segment-specific product-promotional campaigns,
- Prioritizing product development processes,
- Preparing the correct products,
- More accurate measurement of profit/loss,
- Developing an effective model in the sales and distribution channel,
- Making a growth/shrinkage preference with the right strategy,
- Development of appropriate pricing policies are ensured.

Before starting the segmentation, segmentation analysis should be done, and research should be done on the state of the market, current, and potential consumer groups. The segmentation plans should be tested before the segmentation phases are completed. With segmentation, the strategy is to provide the right product and service to the right person at the right time; it should be determined based on understanding their needs and finding appropriate solutions. This way, longer-term relationships with customers are established, and loyal customers are created. For example, loyal

customers are essential for banks as they direct customers with a stable income stream, high-profit margin, and high potential to be happy with their recommendations. For a bank to provide such a flow, it needs to work beyond the known marketing strategies. Customer loyalty exists in every industry. The person who wants to buy/rent real estate always receives service from the same real estate agent, the exact hotel is always preferred for vacation even though the location does not change.

Things to consider while performing market segmentation are listed below:

- Measurability,
- Existence of a large enough market to make a profit,
- Presence of customers that can be reached through the company's distribution channels,
- Sustainability that it does not disappear after a short time,
- The customers in the sub-customer group are homogeneous within themselves. In other words, customers in the same segment should prefer the same products.
- Heterogeneity of customers in different segments; that is, potential customers in different segments should prefer different product features.

The market, which is the basic concept of market segmentation, consists of individuals or organizations that have wants and needs to be met, have purchasing power and are willing to spend. In marketing language, individuals and organizations are also called "consumers". In addition, the existence of consumers is identical with their demands. Therefore, in the marketing discipline, the market; they are people or organizations that need a certain good or service, have money to buy and are willing to spend their money (Kozak, 2016: 97; Rızaoğlu, 2004: 143). In other words, the market is the place where goods or services are sold (Yükselen, 2003: 94). In economics, the market is defined as any form of organization that allows buyers and sellers to interact quickly and tightly.

## **1.2. Market Segmentation Definition and Purpose**

The way to apply the modern marketing approach correctly is to determine the consumer needs and wishes in the best way (Uçar, 2006: 60). Because although consumers are users of the same product, their expectations from that product are different in various aspects, such as the methods of reaching that product. This situation leads to heterogeneity in the market. Market segmentation is the process of “dividing a whole heterogeneous market into consumer groups (or market segments) that need relatively similar products”. In another definition, it is defined as the homogeneous segregation of customers who have different needs and desires in the market into sub-market groups (Kotler et al., 1999: 240).

Market segmentation has an essential place in the literature and was first used by Wendell Smith. Smith (1956) defined the heterogeneous market as dividing the heterogeneous market into smaller homogeneous markets according to different product preferences of consumers. Different marketing strategies are required to satisfy the needs of consumers. For this, the definition of the target market will form the basis. While segmenting the market, the consumer's similar aspects and standard points are handled, and each is divided into homogeneous subgroups (Lin, 2002: 249). In short, market segmentation can be defined as bringing together consumer groups with similar needs or similar demand structures, similar perceptions about goods and services, and similar purchasing tendencies and behaviors and dividing the market into subgroups (Blocker and Flint, 2007). Pride and Ferrel (1983) stated that market segmentation means dividing the entire market into sub-market groups and developing a market mix that better responds to customers' needs. McCarthy (1981), on the other hand, stated that the reason for the subdivision of the market is to meet the needs in each segment and to ensure customer satisfaction. McCarthy (1981) divided the market segmentation process into two phases. The first stage is the homogeneous separation of the market, and the second stage is the development of a suitable marketing strategy for each sub-market.

The purpose of market segmentation is to analyze demand of consumers. Because the market shows different demand characteristics. Therefore, market segmentation is done according to the distinctive characteristics of consumers. E.g., demographically, age, gender, and economically, homogeneous groups are formed in the market by using different criteria such as consumer needs and purchasing power (Bieger and Laesser, 2002: 5). After an entire market is segmented in this way, the marketing mix is developed by selecting the most successful market or more segments as the target market. Thus, because consumer needs are met better, resources are used more effectively (Mucuk, 1997: 107). Therefore, it is aimed to concentrate marketing activities at one point and to use the marketing budget in the most effective way (Kozak, 2016: 100). The main purpose of market segmentation is to create customer groups integrated within themselves but disjointed when compared to groups outside themselves. Marketing managers apply different marketing strategies to each market segment by following the characteristics of this segment. If the market segmentation is carried out accurately and correctly, the total demand for the products and services of the companies will increase (Cengiz, 2008:49-50). A market segment is a group of customers who react similarly when faced with a particular marketing mix.

The sectors of the two buyers may be the same, but these buyers expect different benefits from different products. The business plans its market segmentation method by setting some goals. According to the segmented market, goals can be grouped under four headings: Evaluation, focus, definition, and scaling activities. Thanks to market segmentation, the business can seize opportunities and identify competitor positions in order to develop methods according to defined segmentation. Market segmentation, which has been moved to definite limits in the customer market, means preparing a separate marketing mix for each customer. This does not mean that a business loses its perspective on individual customers when its market is segmented. Also, when appropriate strategies are developed to reach the identified segments, the business can position itself against competitors to benefit defined customer groups. The starting point in segmentation is customer choices. User or consumer choices remain outside the segmentation methods of businesses and form the focal point of

marketing methods. User or consumer choices can be divided into three groups (Çalık, 2004: 109-112):

*Homogeneous choices:* Markets where the choices of all consumers are similar. However, it is not correct to specify these markets as natural segments, at least two qualities should be considered in defining these markets.

*Scattered Choices:* If consumer preferences are spread over the entire market area, these choices represent different but uncertain consumer choices. In other words, even if the customer has met his needs by choosing a substitute product in the market, he can turn to that market when the product that has been developed and has the desired qualities is presented to the market. In the scattered selections, the customer selections that are spread over the entire market with various demands are at the forefront.

*Clustered choices:* The market can reveal different sets of preferences that are classified as natural market areas. The business in this market has three strategic alternatives. It can continue its business activities in a central location for all groups. (Undifferentiated Marketing) The business can position its product or service in the largest segment of the market. (Condensed Marketing) Alternatively, can develop several brands for each different area intended by the business. (Differentiated Marketing)

If the aims of market segmentation are summarized and expressed in articles;

- To identify the distinctive features of existing market segments,
- Segmentation according to the determined features,
- To determine the value and size for each detected part,
- To reveal the position of competitors in the market,
- To identify market segments that are inadequate in service.

Market segmentation also has other purposes, such as increasing consumer satisfaction and efficiently using the enterprise's resources. Also, the consumer of a segmented market is more satisfied than the consumer of a market which is not segmented. Because since his needs and wishes are reviewed in more detail, the product offered to him also meets his needs and wishes and is more satisfied. While segmenting the market, it should be done according to the answers to the questions below (Rızaoğlu, 2004: 104).

- To whom; which market segment will be addressed,
- What; what consumers look for in a good or service,
- How; develop marketing programs suitable for consumers' needs and wishes,
- Where; the place where the goods or services will be promoted,
- When; when the goods or services will be available.

According to these questions, more effective and efficient market segmentation is made.

### **1.2.1. Advantages and Disadvantages of Market Segmentation**

With market segmentation, the market can be divided into several segments based on customer needs and wants. It is necessary to make a new market program for the sections in question. Many benefits can be achieved by market segmentation in businesses (Rızaoğlu, 2004). The benefits of market segmentation are given below:

- Market segmentation; it enables the business to direct its marketing actions to designated groups in the market, not to consumers or buyers.
- Competitive advantage is achieved in the market, and promotion tools and methods are applied (Weinstein, 1986: 11).
- It enables more efficient use of business resources, and the most profitable market segments can be reached (McKercher et al., 2002: 25).
- Market segmentation creates a chance to get to know the customers in the target market better after the target market is selected. Because satisfying the

customer starts with knowing him the best way (Mgebrishvili and Todua, 2009).

- In the case of analyzing the markets, it may be possible to identify previously overlooked market segments (İçöz, 2001: 166).
- While segmenting the market, segments that do not receive or receive inadequate service are provided (Mgebrishvili and Todua, 2009).
- It provides convenience to the managers in choosing the most appropriate distribution channel and helps them decide which type of distributors should be worked with (Nakip, 1994: 9).
- It allows the marketing manager to make the right decisions and helps the market segments with intense competition to emerge.
- Performance is better observed during or after the activity in the market (Altunışık et al., 2002: 125).
- More precise marketing objectives are developed.
- Market segmentation helps not only what people prefer more about a product but also where and at what price they want to buy this product.
- Better marketing strategies are put forward to expand the market (Çakıcı and Aksu, 2006: 54).
- A reasonable marketing budget is prepared, leading to effective product positioning (Kozak, 2016: 102).
- It enables to act more consciously in the market (Rızaoğlu, 2004: 145).

While segmenting the market, there are some disadvantages as well as benefits. Some of these drawbacks are given below (Weinsten, 2004:18):

- Increased costs, market segmentation strategy is more costly than a mass marketing approach. For example, differentiation usually means new product/service offerings, various promotional campaigns, channel development and expansion, increased internet spending, and additional resources for implementation and control (Weinstein, 2004:18).
- Requires great corporate responsibility, marketing orientation, and strong agreement by the firm. This includes support in personnel areas, resources for

hiring marketing consultants, management's time investment, and acting on prescribed recommendations (Weinstein, 2004:18).

- Market segmentation research provides meaningful marketing information. The general (not individual) market segment that acquires explains the purchasing behavior of customers (Weinstein, 2004:18).
- All markets focus on only one segment, which creates situations where it will not be profitable. It will be more profitable to focus on the market where it will be efficient instead of addressing a segment or the entire market (Korkmaz et al., 2009:195).

### **1.2.2. Effective Market Segmentation Conditions**

In order to effectively segment a market, some segmentation conditions are needed (Rızaoğlu, 2004: 144). However, there is no single condition for market segmentation. Each business should determine different variables according to its resources and competitors and suitable for the service characteristics of the business. When businesses fulfil these principles and conditions, they can benefit from market segmentation (Birdir, 2009: 12). These conditions that ensure the effectiveness of market segmentation are as follows;

- Measurability,
- Size (Sufficiency),
- Accessibility,
- Differentiability,
- Comfortable operating,
- Specificity.

#### **1.2.2.1. Measurability**

A market must be able to be measured numerically according to various variability and characteristics. The measurability of a market only depends on data that can be run on measurable variables. For example, when Holiday Inn hotels targeted a

market for the hearing impaired in the USA, they determined that there were two million completely deaf people and nine million people with partial hearing loss in this market (İçöz 2001). According to these data, it is found that marketing has an importance in terms of measurability. Moreover, the characteristics of the consumer, the size of the market segment and their purchasing power should also be measurable (Kotler, 2000: 274).

#### **1.2.2.2. Size (Sufficiency)**

The market for which a market segment is determined must be profitable and large enough to be worth the marketing efforts (Kozak, 2016: 105). A department should be as homogeneous as possible to implement the marketing program (Kotler, 2000: 274). Knowing the characteristics of homogeneous market segments enables managers to adapt effectively to the wishes and needs of the consumer. If the chosen market segment is not significant and profitable enough, the variables considered in the segmentation can be reduced. For example, a thermal tourism business operating in Afyon may see teachers in Bulgaria as a target market. However, the final decision can be made if the size of the market is considered. While doing this, variables such as whether the market is essential and the income status and number of those who make up the market should be taken into account because the number of variables used in market segmentation and the size of the market are inversely proportional (Kozak, 2016: 104).

#### **1.2.2.3. Accessibility**

It should be possible to reach the market section. As the opportunity to reach consumers increases, more information can be given to them quickly and on time, and consumers can be persuaded on several issues (Kozak, 2016: 103). The business tries to reach the consumer with its promotion efforts. These are various accessibility promotion tools such as personal selling, sales promotion, and public relations through advertising (İçöz, 2001: 164; Birdir, 2009: 16).

In order to develop and implement effective marketing strategies, businesses have to know potential or current consumer behaviors, expectations, current and future needs and wishes (Karahana and Varinli, 2002: 6). Today, it is easier to reach the consumer, and many tools are available for this. E.g., such as the television programs being watched, the internet, newspapers, magazines, national and international radios (Kozak, 2016: 103). In addition, the market should be economically accessible with low costs (İçöz, 2004: 164).

#### **1.2.2.4. Differentiability**

Differentiability, which is a market segmentation element, should be conceptually distinguishable from each other, and each market segment should have a significant difference from the other (Kotler, 2000: 274). It is essential whether the determined market can be differentiated from other market segments in terms of characteristics such as demographic, geographical, and psychological (Kozak, 2000). E.g., Congress market and businesspeople market should be able to react differently to the marketing mixes proposed for them (Birdir, 2015: 13).

#### **1.2.2.5. Comfortable Mobility (Activity)**

Effective programs can be formulated to make and attract market programs for market segments (Kotler et al., 1999:251; Kotler, 2000: 274; Rızaoğlu, 2004: 145). Marketing activities and promotion mix elements should be usable and result achievable. (Kozak, 2016: 104). This situation is also defined as activism in the literature.

Market segment and the situation of the competitors should be examined, and attention should be paid to the existence of current and potential competitors (Çakıcı et al., 2002: 288). If the market segment has a competitive advantage, it can operate easily (Birdir, 2015: 14). For example, a small hotel business may identify many market segments. However, it may not be possible to implement a separate marketing program for each market segment, provide adequate staffing needs, and have other resources. For this reason, for the business to compete effectively with others, it is

necessary to determine market segments suitable for its opportunities (İçöz, 2001: 165).

#### **1.2.2.6. Specificity**

Knowing whom the market segment consists of what the consumers want and what the consumers expect from the product gains importance in this criterion (Rızaoğlu, 2004: 145). Therefore, consumers need to be recognized. It is essential to know consumers' geographic, demographic, and psychographic characteristics in the market segment (Kozak, 2016: 104). In other words, this criterion is also called market identity.

#### **1.2.2.7. Responsiveness**

The market segment is a case of measuring consumers' reactions to the marketing mix activities to be performed. It would not make sense to turn to a market group that does not react to all kinds of marketing activities (Kozak, 2016: 104). The market segment and its reactions to marketing factors should be known (Rızaoğlu, 2004: 145).

### **1.2.3. Stages of Market Segmentation**

When the literature is examined, the market segmentation process generally consists of three stages. These stages are the research stage, the analysis stage and the grouping stage (Kotler, 2000:147). However, according to Kurtz (1995), the market segmentation process consists of five stages. These stages are:

- Defining goals,
- Market segmentation,
- Definition,
- Identification of market potential,
- Estimating possible market share, and
- Selection of specific market segments.

The market consists of various parts. The use and importance of each segment is different depending on the situation, so marketers should select the critical market segment and work on the selected market segment (Shubladze et al., 2008). The market segmentation process must be done carefully to get the right results and make the marketing mix for the segments (Kozak, 2016:101).

It is possible to explain the steps that the business should follow in order to be able to segment the market after obtaining information about the consumers in the market and evaluating the features of the product to be offered to the consumer as follows (Altunışık et al., 2004: 135-136). The first stage; is the starting point of market segmentation; it is knowing the size of the market that the business intends to enter. However, it is essential to know the market shares, strengths, and weaknesses of the competitors in the market. The second stage; is to identify and list the wishes and needs of potential customers in the market. The third stage; is where the benefits that consumers expect from the product offered by the business are determined and listed. The fourth stage; based on the list created in the third stage, it is tried to determine what benefits the consumers in the market segments expect from the product to be presented to them the generally expected benefit. The fifth stage; is named based on the typical characteristics of the consumers in each of the market segments, and the size of these segments in the market is measured. The sixth stage checks whether the market segments that emerge because of market segmentation have a homogeneous feature by being separated from each other correctly and logically. Thus, the attitudes and behaviors of the consumers in each market segment are determined, and their common characteristics are understood. These market segments can be further privatized and divided into new segments if deemed necessary. Finally, the market segmentation process is completed by reviewing the characteristics and size of the existing market segments. In general, in the market segmentation process, businesses first decide which market to take place in and what kind of market segmentation they will do. Then, by examining the profile of consumers in the market with its resources and capacity in the light of specific criteria, it defines a narrower consumer group and determines it as a target audience. At this point, the business decides how to position its product in the market, and this positioning prepares the ground for the way

consumers define the product (Büyükbalcı, 2016: 101). Marketing activities are continued with the promotion actions to be made for the homogeneous groups obtained.

#### **1.2.3.1. Research Phase**

In the research phase, the researcher uses interview, focus, and Delphi group research techniques to understand customers' motivations, attitudes, and behaviors (Kozak, 2016:101). Then, in the light of the information obtained, the researcher creates a questionnaire and starts collecting data to understand the behaviors and attitudes of the customers towards the product (Kotler, 2000: 147).

#### **1.2.3.2. Analysis Phase**

The variables are divided into different categories in the analysis phase by performing factor analysis to remove high correlation variables from the obtained data. A certain number of different sections can be created using cluster analysis (Kotler, 2000:147; Uğurlu, 2007:79). Thus, more detailed information about the target audience can be obtained.

#### **1.2.3.3. Grouping Phase**

A grouping study is carried out at this stage according to which behavior, attitude, demographic, and psychological criteria each market segment focuses on customers (Kozak, 2016:102). As a result, each segment is given a name according to its distinctive features, and thus the market segmentation is completed (Kotler, 2000:147).

#### **1.2.4. Criteria of Segmentation**

There is no single way to segment the market; the marketer should try to use the variants of the different segments singly or together. Because market segmentation criteria (demographic, geographic, psychographic, and behavioral) may not suit every market (Kotler, 1972:209; Kotler et al., 1999:385). Individuals with the same

demographic and economic data may have different attitudes and behaviors. For example, some people are inclined toward luxury goods, while others are inclined toward valuable goods. Therefore, marketers prefer to use market segmentation criteria together. Market segmentation based on a single criterion can be misleading. Therefore, partitioning by considering the second or third criterion gives better results. For example, a marketer who considers users between the ages of 18-24 can measure the differences by considering the variables such as age, income, and gender (Babukhadia, 2007:1).

The variables used to segment the market are gathered into four groups when the literature is examined. These; are geographic, demographic, psychographic, and behavioral variables (Kotler and Armstrong, 1991: 219). In addition to the four main variables, Rızaoğlu (2004: 78) also based on price, product, and distribution channel segmentation. According to Kotler and Keller (2006: 247), the variables used in the consumer market segmentation are grouped under two groups. These; are demographic, geographic, and psychographic segmentation. The other is behavioral segmentation. İslamoğlu (2009: 100-101), considered market segmentation as six variables. These are geographic segmentation, demographic segmentation, utility segmentation, volume segmentation, psychological segmentation, and specific market segments.

#### **1.2.4.1. Geographical Segmentation Criteria**

Geographical segmentation is the most helpful beginning for the demand analysis steps of marketing (İçöz, 1972: 104). The geographic segment consists of customer groups that share the same place in the market (Rızaoğlu, 2004: 147). Generally, geographic segmentation ensures that a large geographic market is divided into smaller geographic or regional units (Tuckwell and Jaffey 2016:129). Segmentation according to geographical criteria is made according to the size of regions, counties, cities, neighborhoods, population number, density, and climatic conditions (Mamuladze, 2010: 145). Today, a company can operate in one or several different geographical regions and consider the needs and wishes of customers

according to geographical differences. However, many companies have shown their products, advertisements, and sales efforts to meet the needs of regions, cities, and sometimes neighborhoods (Kotler et al., 2017: 190). In addition, the customer's needs and wishes may differ according to each region. E.g., Individuals living in cold climates prefer warm and sunny places for their holidays. Therefore, it can significantly affect the competition between airlines of specific destinations, especially during peak holiday seasons.

Geographical segmentation is a good guide for efficient use of media such as radio, television, magazines, and newspapers. Regional broadcasting radios and televisions are practical tools to reach customers. In addition, geographical segmentation is insufficient in custom designing advertisements because the customer potential in this region is not the same (İçöz, 1996:104).

#### **1.2.4.1.1. Region**

If we look at the world in general, each continent has its own market segment. For example, the South American, North American, and European markets (Kozak, 2016:105). Regional broadcasting radios and televisions, press tools are ideal tools to reach their customers effectively. (İçöz, 1996:104). For example, if the tourists coming to a region are British, the hotels in this region should be equipped according to the British's language, culture, wishes, and desires (Uğurlu, 2011: 159).

#### **1.2.4.1.2. Country**

Climatic conditions, size, and population density of cities should be considered when segmenting the market according to countries (Todua, 2012:250-249; Kozak, 2016:107). Generally, each business should focus on those living in its own region of its own city while making geographical segmentation (Aygün, 2006:34). For example, in Atlantic City, New Jersey, Las Vegas, Nevada, similar gambling hotels target different geographic markets because they are in different locations, despite offering the same activities (gambling, entertainment, and recreation) to their customers (Burke and Resnick, 1991:39). In addition, countries can be divided according to their

economic, political situation and different food habits. For example, the French, Italians, and Spaniards use vegetable oils in food preparation, while the Germans and English prefer butter (Todua, 2012:250).

#### **1.2.4.1.3. Density**

Market density indicates the number of potential buyers in a given area unit, such as kilometer square, and is the most heavily used variable. Population density affects people's product preferences. E.g., as the population density increases, the demand for security tools increases, but the demand for green space and garden tools decreases (Göknar, 2013: 33).

#### **1.2.4.1.4. Climate**

Distribution of consumers according to the climates of the regions they live in. For example, the Mediterranean climate is like the Black Sea climate. Even if variables such as region, city, population, climate, settlement, and location are known, geographic segmentation alone may not provide sufficient information. Therefore, using it with demographic, psychographic, or behavioral segmentation can further increase productivity (Rızaoğlu, 2004: 147).

#### **1.2.4.2. Demographic-Socio-economic Segmentation Criteria**

In market segmentation, customers' needs, wants, and product usage rates primarily depend on demographic characteristics. Therefore, market segmentation according to demographic criteria is often applied in businesses. It is also a popular way of segmenting customer markets, as demographic criteria are relatively easy to measure (Camilleri, 2018:72). There is a relationship between demographic variables and customers' wants and preferences. For example, people between the ages of 35-44 are more willing to travel and, at the same time, use accommodation opportunities frequently (İçöz, 1996: 104). On the other hand, demographic criteria can be reached more quickly than other criteria, and therefore it is the most used criterion in selecting market segments (Kotler, 1972: 211). Although marketers use different criteria while

segmenting the market, they need to know the market segments' demographic characteristics to evaluate the target market and reach the results accurately and effectively (Armstrong et al., 2015:242). With demographic segmentation, markets are grouped according to age group, gender, family size, family life cycle, income, occupation, education level, religion, race, ethnicity, social class, generation, and nationality (Kotler, 1972: 211; Kotler et al., 2017:196). Market segmentation by demographic criteria is essential for several reasons. The demographic cue is quickly replaced by quantitative assessment, readily available from open sources, and demographics can determine demand for the service.

#### **1.2.4.2.1. Age**

The age factor is frequently used in market segmentation. Because with age, people's expectations, activities, and financial situations change (Todua, 2012: 254). In addition, customers' preferences in the market change with age (Kotler et al., 2017:227). Some businesses segment the market to offer different products or marketing strategies based on age or family status (Armstrong, 2015:242). For example, Mcdonald's company uses different methods to attract customers of different ages. Adult commercials use trailers that show dance music, dynamic stories, and fast-changing, while commercials for older people use relatively calm and emotional trailers (Todua, 2012:254). As the individuals age, they become more sensitive to prices and less likely to change their views on brands (Todua, 2012: 254). However, one should be careful to guard against stereotypes when segmenting the market by age. Because some people around the age of 80 can sit in a wheelchair, while some people of the same age can ski or play tennis. Similarly, while some 40-year-old couples send their children to university, other 40-year-old couples may be newly married (Kotler and Armstrong, 2014:217).

Generally, market segmentation by age is also used in the tourism industry (McCabe, 2009:149). For example, third age tourism, youth tourism, and middle-age tourism types have been developed based on age (Kozak, 2016:108). The demands and needs of tourists differ according to age groups. Young groups especially want

entertainment, sports, music, and movement in accommodation establishments. However, elderly groups prefer to rest, silence, and calmness (Tekeli, 2001:20). The travel behavior of many people aged 18-35 may not differ much depending on whether they are single or married. However, it can vary enormously depending on whether they have children or not. The ages of children in families also create different travel needs. For example, families with young children under the age of 4 and those with children between the ages of 10-15 have different travel needs. At the other end of the age scale, the travel activities of those aged 50 to 70 vary widely, depending on whether they are retired or still at work and their activity patterns (Middleton et al., 2009:110).

#### **1.2.4.2.2. Gender**

Market segmentation by gender has been fundamental to production since the 19th century. Since ancient times, businesses have emphasized hard and rough features in products produced for men, while they have emphasized gentle and elegant features in products produced for women (Todua, 2012: 254). Market segmentation by gender has been used for a long time, mostly in clothing, cosmetics, and magazines (Armstrong et al., 2017:242). Men and women have different tastes and values. Therefore, they prefer different products and services (McCabe, 2009:149). For example, women tend to be more socially minded, while men tend to be more expressive and goal oriented. Women tend to benefit from most of the data available in their immediate environment.

On the other hand, men tend to focus on the part of the environment that helps them achieve a goal. According to the results of a study examining how men and women shop, men often need to be invited to touch a product. However, women are likely to shop without advice from others (Kotler and Keller, 2008:217). According to the results of another research, 90% of the decisions about home improvement works are made by women (Kotler, 2006:225). In addition, accommodation establishments divide their customers according to gender criteria to satisfy their customers. They can

offer different products and services to their customers in these sections and reach them with different messages (Aygün, 2006:29).

#### **1.2.4.2.3. Occupation**

Although it usually covers income, occupation is a separate segmentation variable (Aygün, 2006: 31). The consumer's occupation is one of the factors that affect purchasing behavior. Depending on the individual's profession, and the products he prefers, his lifestyle and decisions will also vary. There may be differences in people's expenditures in different occupations who earn the same income. E.g., a doctor and a plumber may earn the same income, but their spending habits may differ (Gökner, 2013: 60).

#### **1.2.4.2.4. Income**

Different market segments can be created by dividing customers into different groups according to income (Kozak, 2016:108). According to income, market segments are divided according to different income groups (Kotler et al., 1999:389). The most frequently used criteria when segmenting according to income status are; low-income, middle-income, and high-income groups. However, each income group is divided into groups according to their economic development (Kozak, 2016:108). Segmentation by income is generally used in industries such as industrial production, shipbuilding, financial services, and tourism (Kotler, 2006:225). Some businesses focus on high-income customers during segmentation and try to market expensive and high-value products to them (Mgebrishvili and Todua, 2009:194). For example, luxury hotels offer special packages to attract wealthy tourists (Armstrong and Kotler, 2011:194). However, another part of the business focuses on low-income customers and tries to market them with affordable products (Mgebrishvili and Todua, 2009:194). A travel product designed specifically to appeal to a low-income target market can be taken as a good example (Burke and Resnick, 1991:36). However, dividing customers into groups according to income may not always give the right result (Mgebrishvili and Todua, 2009:194). For example, the USA's first buyers of color televisions are workers. Because the workers found it more profitable to buy color television rather

than going to the cinema and theater. However, manufacturers produced color televisions for high-income customers (Mgebrishvili and Todua, 2009:194). While most accommodation enterprises divide their markets into segments, they should also pay attention to the economic stability of the country, industrial structure, income level, and income structure (Aygün, 2006:30).

#### **1.2.4.2.5. Education**

Another factor used as a market segmentation variable is education. Education categories of people; primary school, high school, university, college, postgraduate, and graduate, and market segmentation can be made according to these categories (Burke and Resnick, 2000:38). Segmentation by education is important as an efficient criterion for assessment measures such as long-term income and occupation. However, the use of training criteria sometimes causes difficult situations. In some businesses, marketing managers act unethically and lead their customers with low education levels to buy unhealthy or untested products. The types of products sold directly depend on the education level of the people. Increasing the level of education normally increases the demand for high-quality products, books, cultural purposes, rest, and relaxation (Mgebrishvili and Todua, 2009:109).

#### **1.2.4.2.6. Race and Ethnicity**

Race and ethnicity are important demographic variables due to cultural norms and traditions. Race and ethnicity influence types of food and food preparation, attitudes towards travel and vacations, and destinations (McCabe, 2008:150). Ethnicity and racial discrimination are mostly used in the USA (Hispanic American, African American, and Asian American) (Kozak, 2016:109). Multicultural markets also differ in terms of being first and second (or more) generations, immigrants, and born and raised in the U.S (Kotler and Kellen, 2012:222).

#### **1.2.4.2.7. Religion**

The market can be divided according to various religions (Lake, 2009:139). The fact that customers belong to one of the Muslim, Christian, Jewish, and other religions and belong to one of the Orthodox or Protestant denominations will also create a different market segmentation criterion. Likewise, people belonging to some sects in the religion of Islam are determined as a market segmentation factor in some products (Kozak, 2016: 110). According to religious differences, people have different characteristics. E.g., Muslims do not like to dress openly and do not drink alcohol. Jehovah's witnesses do not celebrate birthdays, Christmas, and Easter (Lake, 2009:139). Religion is an important feature that should be taken into account, especially in marketing studies for the food and beverage industry (Kozak, 2016:110).

#### **1.2.4.2.8. Social Class**

It is defined as the relatively homogeneous subdivisions of a society that have adopted the same values, interests, lifestyle, and behavior. Many companies shape their goods or services according to certain social classes. Social class has an important effect on automobiles, clothing, furniture, games and entertainment activities, and the choice of retailers (Kotler, 2000: 266). Social class distinctions differ from country to country. However, the consumers in each group have different occupations, and therefore they constitute different income groups (Birdir, 2009: 33).

#### **1.2.4.2.9. Family Life Cycle**

Being an elementary or extended family also creates a market segmentation group. Each stage of the family life cycle combines the clients' age, family status, and child's age. Customers' needs and income levels may change depending on the family life cycle stages. Also, the family lifecycle provides more accurate market segmentation by age. For example, the needs of a 28-year-old single man are often different from the needs of a married man of the same age (Todua, 2012:255). Family members influence all purchases. A family is a cohesive unit, and often the ties within the family are stronger than in other groups. All family decisions have a mutual

influence. There are three main influences: father, mother, and other family members. Each member's motivations and beliefs are different and affect the decision-making process. Therefore, family members influence each other when purchasing a product. In this respect, a marketer needs to know the family structure and consumption characteristics (Khan, 2006: 69). Todua (2012: 256) discussed the family life cycle as seven stages: young people living alone or with their families, childless couples, young couples, couples with children under the age of six, young couples with children over the age of six, elderly couples living with children, older couples living with their children and older people are living alone.

#### **1.2.4.3. Psychographic Segmentation**

Psychological variables are derived from two main characteristics: personality traits and lifestyle profiles. Psychological profiles are often used to aid geographic and demographic segmentation when geographic and demographic segmentation fails to understand customer behavior. Although geographic and demographic segmentation gives information to the marketer about customer segments, psychological variables provide additional information about these segments, improving understanding of current and potential target markets (Gunter and Furnham, 1992:26). Psychographic segmentation divides customers according to their attitudes, values, lifestyles, and interests (Pickton and Broderick, 2005:377).

Psychographic segmentation is the classification of consumers according to their personality traits. Psychographic factors include personality traits such as being sociable and self-confident and lifestyles such as attitudes and interests. Segmentation made in a way that brings these two factors together is more beneficial (Adcock et al., 2001:123-124). Some difficulties are encountered in segmentation according to psychological factors. Such as, (Cemalcılar, 1998: 49):

- Accurate measurement of psychological factors is difficult.
- The relationship between psychological characteristics and customers' needs is not always clear-cut.

- It is impossible to enter the segmented market segments according to the psychological factor.

#### **1.2.4.4. Behavioral Segmentation**

Behavioral segmentation is based on customers' attitudes towards a product. Many marketers use behavioral variables such as time, benefits, usage rate, user status, buyer's readiness stage, loyalty status, and attitude to segment the market (Kotler and Keller, 2009:263).



## **CHAPTER 2**

### **SOCIO-ECONOMIC SEGMENTATION AND MEASUREMENT**

This section will discuss socio-economic and socio-demographic metrics and some socio-economic scales applied in the world and in Türkiye.

#### **2.1. Socio-demographic Metrics**

Demography comes from the Greek demos (people) and graphein (to write). Demography uses various variables and related concepts to examine the population characteristics of a society and its change over time. The data obtained provides precious information in determining and following the general features of societies. Age, gender, and marital status are among the most frequently used demographic criteria in research studies.

##### **2.1.1. Age**

It is the most used and indispensable criterion in academic studies carried out in all branches of science. Age has a decisive role among many other SES criteria such as education, occupation, employment status, and income of individuals. For example, based on age alone, it can be thought that individuals under the age of 18 continue their education, those in the middle-aged group work in an income-generating job, and individuals over the age of 65 are generally retired and not working (Danış, 2015).

##### **2.1.2. Gender**

Another frequently used demographic variable is gender. A person's gender indirectly affects essential SES variables such as employment, education, and income. In some societies, gender is the most crucial factor in SES. For example, low rate of employment by gender negatively affects income, and therefore SES.

### **2.1.3. Marital Status**

Marital status is a critical demographic criterion in terms of reflecting the status of the family, which is the smallest unit of society. One of the SES parameters is that household income is closely related to marital status. Household income is lower if the person is single and generally higher if married (Danış, 2015; (Kut and Salgür, 2015).

### **2.1.4. Socio-cultural Criteria**

The individual, a social being, is accepted as a whole together with the society in which he lives. For this reason, it is necessary to examine the socio-cultural characteristics of both the individual and the environment around him, especially for the results of the study to provide more precise and accurate information. The characteristics of people, such as age, gender, belief, race, and ethnicity, are evaluated among socio-cultural criteria (Horasan, 2015).

### **2.1.5. Religious Belief**

It is a variable examined and included in the evaluation, especially in some studies abroad. It is based on the assumption that individuals with different beliefs may have different approaches. Since approximately 89.5% of the population in Türkiye is Muslim, the status of religious belief is not questioned in the studies carried out. However, the differences arising from the practices in fulfilling daily religious duties on the social issues examined may be significant depending on the situation (Özkök, 2019).

### **2.1.6. Race and Ethnicity**

These are the other variables that are questioned under the socio-cultural title to understand societies' general structure and are investigated in studies conducted in many countries. For example, in studies conducted in the United States, participants are examined by dividing them into ethnic subgroups such as "African-American", "Hispanic", "Asian", and "Caucasian origin". In Türkiye, these criteria are mainly not examined in studies. The determining attitude in questioning of this variable is that the

researcher states that the differences are not for discrimination purposes but with the intention of illuminating social issues and providing more conscious service delivery. As long as the attitude is correct, there is no harm in examining race and ethnic origins scientifically.

### **2.1.7. Family Structure**

The concept of family, which is a socio-cultural factor, is a social unit as old as human history. Although it has undergone various structural and formal changes, it has maintained its importance in the 21st century. It has become a focal point where many biological, sociological, economic, and political discussions are made. The concept of family has not fundamentally changed over time; however, there have been some changes in the members of the family and the duties and responsibilities of the members. While the extended family system was more common in the basic social structure before the Industrial Revolution started in the 18th century, the extended family was replaced by the elementary family model consisting only of mother, father, and children due to the changing social dynamics after the industrial revolution. In the continuation of this change, there were differences in family types according to the settlements. Although there are different types of families, there are always functions, life periods, life cycles, duties, and responsibilities of the family members. In recent years, current approaches and models are not about the concept of a family but rather what it can be. According to this approach, families are classified according to various characteristics such as size and place of residence (Willems et al., 2005; Power and Matthews, 1997; Tüzün et al., 2006).

### **2.2. Socio-economic Metrics**

In this section, income, education, occupational/employment, residential area, property ownership, and ownership of other goods, which are socio-economic indicators used in various scales and indices, will be discussed.

### **2.2.1. Income Status**

When making proxy measurements, income level is one of the most frequently examined variables. Income is usually calculated as the monthly or annual earnings of the individual or household. Income level can be asked directly (e.g., salary, household income) or indirectly (e.g., taxes paid, expenses). The question of income is problematic due to many factors, and when used alone, it has low reflective power of SES. One of these reasons is that in societies where the informal economy is high, people want to hide their real income for various reasons, such as taxes. This rate reaches up to 30% of society. Other causes include that the person's income is not at the same level throughout the year (e.g., seasonal workers, self-employed). It is controversial whether to consider additional income outside of work, such as rental income (Kut and Salgür, 2015). Another problem is that it is not known clearly according to which criteria the economic income valid in the research will be grouped. In this sense, only the minimum wage and poverty line figures announced periodically by the state are limit measurements that can be determined precisely. Apart from this, the purchasing power of money, which varies depending on the settlement area, is also a problem in countries with heterogeneous communities such as our country. Evaluating the assets owned over time, as well as income, is another way to assess the financial situation of the person. On the other hand, these assets are the savings acquired in the long term and left to the next generations, such as bank accounts and real estate. Asset measurement is a reliable method and increases the representativeness of SES, but it is not always easy to evaluate it. Although it is a controversial issue, some researchers have argued that using the 3-year average income of individuals instead would be more helpful in determining the income status (Oakes, 2015).

### **2.2.2. Educational Status**

Another variable frequently used in determining SES is the individual's education level. It is relatively easy and quick to answer compared to other questions. Contrary to income level, educational status is an excellent predictor of SES for individuals over 25. The reason for this is that the educational status of people does

not change relatively after the age of 25. In other words, people who receive advanced education after the age of 25 are considered high-achieving individuals. In determining the educational status of individuals, either the highest degree attained so far (e.g., high school, university, master's degree) or the total period of education is used. However, this question is insufficient to determine SES for people who currently continue their education. In such cases, SES is tried to be determined indirectly by using the education level of the individuals in the household, especially the father (Kut and Salgür, 2015).

### **2.2.3. Occupational/Employment Status**

The individual's employment status is one of the crucial factors in determining the socio-economic level. Whether a person works or not directly affects both his own and the household's total income. It is accepted that retired or civil servants generally have a fixed income, and that the income of freelancers may vary throughout the year. In some research, the individual's occupation is questioned instead of working status. In this way, general information is obtained about the social status and education of the person in the society and his income. The research that has been and is being done in the field of SES mainly focuses on occupational status. Because occupational status and prestige include the education period required to have that profession and the average income obtained from that profession, it is difficult to say that the education and income variables in Türkiye change in direct proportion to the occupational status in all circumstances. It is thought that it is not easy to ask the people living in the household what their profession is and develop an evaluation tool from the answers obtained. Because it is also known that whether individuals work in the profession they specify or not, the profession and the job are not always related to each other. For example, the person may have received a physics teacher education but may be a driver. On the other hand, factors such as being the driver of someone else's vehicle or your own vehicle, and what the workplace is like, for example, a public institution, are also very determinative. Also, one's occupation may be a teacher, but may also be a taxi driver on weekends, public holidays, and perhaps at night. When all these are taken into account, it is thought that all variables such as the work done, where the

work is done, whether the work is the primary job and/or additional work, the way the wage is received, the status of the job, the status of being subordinate or superior should be taken into account (Kut and Salgür, 2015; Oakes and Rossi, 2003).

#### **2.2.4. Residential Area**

The places where people live appear as another variable in determining the SES of individuals. Especially the conditions of the place where they live have an influential role in the life of individuals. In most studies, the distinction between living places is made in the form of rural and urban. Depending on the universe of the study, this distinction can be made between countries, cities, even different districts, and neighborhoods of the same town.

Based on the fact that some SES criteria such as education and income of individuals living in settlements where the social structure differs will be different, it is accepted that the settlement is an effective parameter on social hierarchy and status. Geographical conditions and environmental factors also affect such data. The climate of the place where you live, the level of development of the surrounding region, and the opportunities it offers are also adequate on SES. Access to basic needs such as health and education services also varies according to the place of residence.

In addition to the settlement, the type of residence, how many rooms it has, size in square meters, type of building, type of heating, and whether the individual is the owner or tenant of the house are also questioned. The general acceptance in this regard is a direct link between the house's type, characteristics, and property status and SES (Globardes et al., 2007; Kut and Salgür, 2015).

#### **2.2.5. Real Estate Ownership**

One of the main clusters used in SES studies is ownership. It is thought that the immovable properties that belong to the household, which have the right to use and sell, should be considered within the scope of ownership. From this point of view, the house that is inhabited, a second house owned outside of this, and the land, field, and garden are considered in this context.

### **2.2.6. Household Goods Ownership**

The second title, which is handled within the property's theme, is mainly for consumption and/or usage. In this title, the infrastructure characteristics of the household and whether it has materials to reflect the consumption of the household are taken into account. Various items (such as dishwasher, automobile, dish antenna, cable broadcast, digital TV, multiple televisions, DVD, separate freezer, computer, internet connection, original painting, antiques) owned by the household in the house they live in is to be asked.

### **2.3. Socio-economic Status and Measurement**

There is no widespread consensus on socio-economic status, which is accepted as economic and social status determinant. The most important variable of socio-economic status is the occupation of the individual. In addition, other components such as education, income status, wealth, and living area are also essential factors in determining socio-economic status (Coleman, 1983; Kalaycıoğlu et al., 1998).

The concept of class, which is frequently used in the same sense as socio-economic status, has caused serious theoretical discussions. The stratum model, which was developed with the social mobility studies initiated by Glass in England in 1954, was developed by Goldthorpe in the 1980s as a class/stratum model based on the occupation to differentiate professions in society was tried to be revealed. After 1980s, the increase in interest in consumption, innovations in technology, and changes in living standards led to a different perception of the concept of social class. Bourdieu (1986–87) claimed that in determining socio-economic status, variables such as occupation, income, and education should be replaced by subjects reflecting different tastes such as lifestyle, consumption style, interests, and leisure habits (Kalaycıoğlu et al., 1998:127). In the late 1960s and early 1970s, many studies were conducted discussing which concepts of social class and income would better explain consumer behavior. Studies have revealed that the role that marketers assign to the concept of social class has decreased in importance. It was claimed that the concept of social class was less explanatory than the concept of income in explaining consumer behavior until

the new claims made by Schaninger, Domingez, and Page in 1981 regarding the concepts of social class and income. Domingez and Page argued that social class would be more appropriate for products that emphasize the concept of lifestyle rather than products that fall into high-spending groups in marketing research. In addition, the concept of income may be more meaningful in marketing research for products that do not belong to high spending groups but are not related to the concept of class. He stated that for both concepts to give good results in marketing research, the products in question should be used in products that fall into an average spending group and are seen as status symbols (Coleman, 1983:272).

The concepts of income and social class are not sufficiently related. One of the reasons for this situation is that social status is related to the individual's occupation rather than income. E.g., blue-collar workers are considered to have more income than a good social class, while white-collar workers are deemed to have a better social class than income. Another explanation that the concepts of social class and income are unrelated is that income is related to the individual's age at the time of earning. While individuals who work in their first job at a young age earn an income below the average income of their social class, as they get older, they begin to reach the average income level of the relevant social class. Again, the number of those working in the family is another reason that affects the relationship between income and social class (Coleman, 1983:272-273). For all these reasons, more than one factor should be considered while trying to analyze the social class structure in a society.

### **2.3.1. Some Socio-economic / Socio-demographic Measurement Methods Around the World**

Socio-economic status level; it is mostly studied as an important factor in social sciences and medical research. Many scales have been developed worldwide to measure the level of socio-economic status.

It is known that socio-economic status measurement studies were first carried out in the USA at the National Opinion Research Center (NORC). On the other hand, the SES discussions in Britain go back to the 1850s. Studies in Britain cover the SES

debate comprehensively, both theoretically and empirically. It can be said that the first agreed social class scheme of the European Union (EU) was developed in 2001, although previous SES studies were produced by countries separately. Australia is one of the countries with rich literature in terms of SES discussions. In Australia, where the SES debate has been going on for 40-50 years, the state has also supported these debates. It can be said that SES studies in Japan are few. This situation stemmed from the fact that Japanese researchers positioned their societies in a quite different place from Western societies. According to them, the concepts of inequality and stratification, which can be discussed in the context of Japan, have different content than these concepts in the West. This perception of difference is the main reason why the first SES study in Japan took place in 2013. The number of SES studies in Latin America is very limited and has been developed for use in studies in the field of health (Sunar, 2016).

When it comes to Europe, the first steps towards the development of a common social classification system covering European Union countries were taken in 1999 and the European Socio-Economic Classification of Occupations (ESeC) social class scheme was created in 2001, which is basically based on “business relations”.

Looking at the current practices, it is seen that there is no standard the European Society for Opinion and Marketing Research/ESOMAR-based approach. In general, occupational and educational knowledge are combined, and a certain degree of property ownership is added to this combination. In some Western European countries, segmentation is done only by income groups, but this is not already called SES (TÜAD, 2012).

In the following headings, some of the most well-known SES measurement applications applied in the world will be briefly mentioned. Then, the details of the socio-economic classification scale developed by ESOMAR will be given.

#### **2.3.1.1. Duncan SEI & Nam-Powers OSS (Duncan Socio-economic Index)**

It is a measurement technique that was first used in the United States of America (USA) in 1950 to determine the census and population characteristics. It measures SES using the correlation between an individual's education and income. Therefore, the profession of the person is also examined in this context (Chandola and Jenkinson, 2000). So, determinants used in this SES measurement method are the individual's education, occupation, and income (Oakes, 2015; Minnesota Population Center, 2015).

#### **2.3.1.2. Household Prestige Scale**

The Household Prestige Scale developed by Rossi in 1974 measured the total income and expenses of the household and the ownership of household goods such as televisions, refrigerators and white goods. Similar to the Duncan Socio-economic Index, the education and occupational status of the individuals are also taken into account while calculating the total income of the individuals in the household. It is seen that economic parameters are used more intensively in this measurement (Oakes, 2015; Globardes et al., 2007).

#### **2.3.1.3. Cambridge Scale**

In this measurement method developed in the early 1970s, SES is based on the role of individuals as a social being in the society they live in and their interaction with other people. There are different ratings for men and women. SES is determined on the assumption that people in similar occupational groups will have similar friendships, lifestyles and positions in society. An item represents each employee segment and a score from least advantageous to most advantageous. Scoring individuals determine the SES according to the group they belong to. Thus, people are divided into 4-6 basic classes (Oakes, 2015; Globardes et al., 2007; Kut & Salgür, 2015).

#### **2.3.1.4. CAPSES/Capital Based Socio-economic Status**

It was developed by Oakes and Rossi in 2003. It is aimed to evaluate the dynamic social structure that is in flux with a more appropriate measurement technique. In this measurement, capital is evaluated not only in the material dimension, but also in a wide scope that includes the characteristics of the person and the social environment. Along with capital and access to capital, the educational status of the individual is also taken into account (Kut & Salgür, 2015; Oakes & Rossi, 2003).

*Tangible capital:* It is considered as the income of the individual or the household (society living under the same roof), savings and assets (house, car, computer, television, furniture, white goods, etc.) (Oakes and Rossi, 2003).

*Human capital:* It is evaluated as an individual's education, occupation, employment status and abilities (Oakes & Rossi, 2003).

*Social capital:* The situation of the person in society and his relations with people in both working and living environment are examined and evaluated. SES measurement in children is made through their families (Oakes & Rossi, 2003).

#### **2.3.1.5. NS-SEC/National Statistics Socio-Economic Classification**

It is one of the metrics developed and used in the UK. The basis of this measurement is the Nuffield Classification Scheme, which was developed and used in the 1970s. The first large-scale use of NS-SEC was during the UK census in 2001. It is a measurement method that deals with a person's occupation from many different aspects. While in the original version of the NS-SEC, individuals were divided into 17 different classes in terms of their occupations. Individuals were divided into eight different main classes in the frequently used and more practical analytical version. These eight main classes are further divided into subclasses in the original version. These main classes are respectively;

- Senior executives and professional employers
- Senior managers and professionals

- Middle-class workers
- Small employers and freelancers
- Handicraft workers
- Those who work part-time routine jobs
- Those who work in routine jobs
- Those who have not worked for a long time

#### **2.3.1.6. International Standard Classifications of Occupations (ISCO)**

The International Labour Organization (ILO) is a United Nations agency founded in 1919 whose mandate is to advance social and economic justice through setting international labour standards. The ILO developed the International Standard Classification of Occupations in 1968 as a tool to enable international comparison of occupational information and to define and present occupational information. ISCO provides a system for the collection and classification of occupation-related information from censuses and other statistical surveys, along with administrative registers. ISCO-68, which was updated in twenty-year periods in the face of changing conditions over time, was followed by ISCO-88 and ISCO-08. The European Union, on the other hand, applies the ISCO-08 (COM) system, which is the European version of ISCO-08. The Turkish Statistical Institute (TÜİK) has translated and adapted ISCO-88 and ISCO-08 (Sunar, 2016).

#### **2.3.1.7. SES Studies in the European Union**

##### **2.3.1.7.1. European Socio-Economic Classification of Occupations (ESeC)**

In the European Union (EU), a common socio-economic classification method has been tried to be developed in order to develop a common stratification measurement tool covering the European Union countries. Thus, it is aimed to measure

the social structure and social positions of individuals and to harmonize statistical data in Europe by developing a common socio-economic analysis.

In 1999, studies for the development of a common class scheme based on the concept of business relations and encouraging comparative and interdisciplinary studies for all countries affiliated to the European Union began. In 2001, the European Socio-Economic Classification of Occupations (ESeC), a categorical social class scheme, was created. By facilitating the analysis of data sources in Europe, ESeC not only promises to understand socio-economic inequalities, but also has the opportunity to be a common analysis tool for studies in areas such as health and education. According to this schema, individuals have certain resources and therefore face certain possibilities and constraints on their behavior. Those who share similar resources and structural positions share similar opportunities and constraints in terms of "life opportunities" and therefore act similarly.

ESeC uses "work relationships" to determine job positions. What is meant by "work relations" is labor market relations and social relations that emerge through employment contracts. Each ESeC category should therefore be as homogeneous as possible and different from other categories. In the class analysis of ESeC, 3 basic job position distinctions are made by using the work relations approach:

1. Employers: Those who buy someone else's labor and establish some degree of authority over them;

- 1a. those with 1-9 workers are small,

- 1b. those with 10 or more as large employers.

2. Those who own their own business: those who do not buy the labor of others and sell their own labor to an employer

3. Employees: those who come under the authority of an employer by selling their labor

In addition, the "excluded" category, which includes those who are not involuntarily involved in paid jobs, has been added as the fourth category. Those who

are unemployed for a long time, who want to join the workforce but cannot, form this category.

At ESeC, a class position was a combination of occupation, job status, and company size. Occupations are determined according to ISCO-08. Job status is divided into employers, self-employed, managers, managers and employees. The size of the company is determined by the distinction of small and large employers or lower-level and senior managers.

#### **2.3.1.7.2. ESOMAR/European Society for Opinion and Marketing Research**

As the marketing networks of manufacturing and service industries have acquired an international outlook over the years, the demand for more directly comparable market research information from one country to another has increased accordingly. This issue has become much more critical as the economic integration of countries in the European Union increases.

ESOMAR is an organization of worldwide public opinion and marketing research experts. It was founded in 1948, started in Europe but operated worldwide. Today, ESOMAR counts more than 750 organizations and over 40,000 individuals as its members in nearly 130 countries. These members are both research providers and research users. Its members are usually advertising and media agencies, universities, public institutions, and government departments. In addition, ESOMAR's primary purpose is to support and disseminate public opinion and marketing research to improve decision-making on social and business issues worldwide (Süher, 2003).

According to ESOMAR, the ideal solution to the points raised is to work with a socio-economic and socio-demographic classification appropriate for all countries. For this purpose, ESOMAR has taken the lead and put forward the ESOMAR Social Grade (ESOMAR Social Grade) scale in its final form. This initiative aims to provide researchers with a more applicable basis for applying and interpreting multinational studies to improve cross-country comparability and facilitate the analysis of valid

subgroups in the total sample. Naturally, what is at issue here is the creation of a consensus or a common language in large-scale international research. Therefore, ESOMAR wants and encourages it to spread to European countries first and then to all countries worldwide. On the other hand, using this system in question will provide integrity in research conducted in that country or data from different sources (Süher, 2003).

To meet these needs, ESOMAR has started to look for ways to standardize some of the practices used in market research surveys. “The Standard Demographic Classification” published by ESOMAR in 1997 for the measurement of socio-economic status, shows the initiative to develop a standard system for assessing people's social and economic standing in various countries in Europe.

The ESOMAR Social Grade Scale is a composite scale and consists of the following elements;

- *Main Income Earner's occupation to the household, determined in the light of the questions developed by the ESOMAR working groups.*

ESOMAR's first working group identified the Main Income Earner (MIE) as the most significant contributor to household income, regardless of gender, age, or employment. This definition has not been changed in other studies.

- *Main Income Earner's Terminal Education Age (TEA)*

The Education Completion Age is regulated to include any subsequent educational or occupational training following the Main Income Earner's study period. ESOMAR Second Working Group changed the understanding of education level (university, high school, etc.) presented by the first group to the age of completion because they established a link between many diplomas given by European Union countries and determining the equivalences is a very complex process (ESOMAR, 1984).

- *In the case of an inactive or inactive Main Income Earner, the household's economic status is based on the household ownership level of 10 selected durables.*

In determining the appropriate Social Grade category for all Main Income Earners in active employment, a two-dimensional matrix is used with sub-variables occupation and education completion age.

For all Main Income Earners not in active employment, an alternative two-dimensional matrix is used to place subjects in an appropriate Social Grade category. In such cases, when the person who is assumed to be the highest income earner in the household is not working for some reason, the occupation of the Main Income Earner is replaced by the economic status of the household (ESOMAR, 1997).

It should be noted that the MIE's Terminal Education Age (TEA) takes into account any professional training or education undertaken by the respondent even after completion of the main period of education. Five categories are defined for the TEA: 21 years or older, 17-20 years, 15-16 years, 14 years, 13 years or younger. Again a 'no answer' category is included for non-response.

The economic status scale reflects the penetration of ownership of ten key consumer durable items at household level. The original objective in compiling the Economic Status Scale was to construct a variable capable of representing the financial status of the consumer, without the inevitable problems associated with asking sensitive questions about income and having to cope with high non-response rates. Instead of attempting to determine household income, the focus is placed on the ownership of key consumer durables selected to reflect the level of disposable income in the household. However, it is recommended that the Economic Status Scale should only be used to assess a respondent's Social Grade when it is impossible to obtain details of the MIE's occupation. The Economic Status should not be regarded as an easy alternative method. The ten products selected for inclusion in the scale are:

- A color TV set
- A video recorder

- A video camera
- 2 or more cars
- A still camera
- A PC or home computer
- An electric drill
- An electric deep fat fryer
- A radio-clock
- A second home or a holiday home/flat.

Social grade matrix for actively employed and non-actively employed MIE's are shown in Table 1 and Table 2.

Table 1: Social Grade Matrix for Actively Employed MIE's

|                                   | Active<br>Main Income<br>Earner<br>(MIE) | Occupation of the MIE |          |            |         |          |            |         |
|-----------------------------------|------------------------------------------|-----------------------|----------|------------|---------|----------|------------|---------|
|                                   |                                          | e<br>1+2              | e<br>3+5 | e<br>4,6+7 | e<br>12 | e<br>8+9 | e<br>11+14 | e<br>15 |
| Terminal Education Age of the MIE | 21+                                      | A                     | A        | B          | B       | C1       | C1         | D       |
|                                   | 17-20                                    | A                     | B        | C1         | C1      | C2       | C2         | D       |
|                                   | 15-16                                    | B                     | C1       | C2         | D       | D        | D          | E1      |
|                                   | 14                                       | C1                    | D        | D          | E1      | E1       | E1         | E3      |
|                                   | 13                                       | D                     | D        | D          | E3      | E2       | E2         | E3      |

Source: ESOMAR, 1997

Table 2: Social Grade Matrix for Non-Actively Employed MIE's

|                                   | Non-active<br>Main Income<br>Earner<br>(MIE) | Economic Status<br>(no.of consumer durables owned) |    |    |    |    |       |
|-----------------------------------|----------------------------------------------|----------------------------------------------------|----|----|----|----|-------|
|                                   |                                              | 5+                                                 | 4  | 3  | 2  | 1  | 0/N.A |
| Terminal Education Age of the MIE | 21+                                          | A                                                  | A  | B  | C1 | C1 | D     |
|                                   | 17-20                                        | A                                                  | B  | B  | C2 | C2 | D     |
|                                   | 15-16                                        | B                                                  | C1 | C1 | E1 | E1 | E2    |
|                                   | 14                                           | C1                                                 | C2 | C2 | E1 | E2 | E3    |
|                                   | 13 or less                                   | D                                                  | D  | D  | E2 | E3 | E3    |

Source: ESOMAR, 1997

The definition of each of the MIE Occupation categories on which the matrix is based is as follows:

**e1:** General management, director or top management with responsibility for 6 employees or more;

**e2:** Self-employed professional;

**e3:** Employed professional;

**e4:** General management, director or top management with responsibility for 5 employees or less;

**e5:** Middle management, other management with responsibility for 6 employees or more;

**e6:** Middle management, other management with responsibility for 5 employees or less;

**e7:** Business proprietor, owner (full/partner) of company OR owner of a shop, craftsman, other self-employed person with responsibility for 6 employees or more;

**e8:** Employed position, working mainly at a desk;

**e9:** Business proprietor, owner (full/partner) of company OR owner of a shop, craftsman, other self-employed person with responsibility for 5 employees or less;

**e10:** Student;

**e11:** Employed non-manual position, not at a desk but travelling or in a service job;

**e12:** Farmer & Fisherman;

**e13:** Responsible for ordinary shopping and looking after the home, housewife;

**e14:** Supervisor & Skilled manual worker;

**e15:** Other (unskilled) manual worker, servant;

**e16:** Retired or unable to work through illness, unemployment or temporarily not working.

The cells of these two matrices are used to allocate the individual respondent to one of the eight ESOMAR Social Grade categories: ranging from A (high) through B, C1, C2, D, E1, E2 to E3 (low). This eight category classification represents the optimal solution to achieving a balance between the objectives of:

- Obtaining fairly evenly sized sub-groups per market,
- Making rational and meaningful groupings of occupations and education levels,
- Ensuring reasonable homogeneity within the aggregated cells, based on the Economic Status scores within each cell.

An additional Social Grade category has also been introduced (N.A.) to which problem cases resulting from non-response are allocated.

A brief description of each Social Grade category has been compiled:

**A:** Well-trained high-level managers and professionals responsible for a wide staff and well-educated, mid-to-high-level managers, Well-educated professional people working independently.

**B:** Middle managers are well-educated middle managers with a smaller mandate or not very educated senior managers responsible for fewer staff members.

**C1:** Well-educated, mindful workers, skilled workers, and business owners: junior managers in the jurisdiction; well-trained head workers, supervisors/skilled manual workers, and small business owners; managers with a very low level of education.

**C2:** Skilled workers and head workers are better trained supervisory/skilled workers, moderately educated mental workers, and small business owners.

**D:** Skilled and unskilled manual workers and people in weakly trained mental/management positions: supervisory/skilled and unskilled manual workers and poorly trained mental workers with low education level; poorly educated top/middle managers or smaller business owners

**E:** Skilled and unskilled manual laborers, small business owners, and farmers/fishers with low levels of training.

**E1:** This group predominantly includes poorly trained manual supervisory/skilled workers, better-educated unskilled workers, poorly trained out-of-office mental workers, and small business owners.

**E2:** This group mainly includes supervisory/skilled manual workers with very poor training, small business owners, and those with very poorly trained out-of-office mental strength.

**E3:** Includes unskilled manual workers and farmers/fishers with very low levels of training.

Accordingly, for ongoing research, ESOMAR also offers a more practical version of these eight Social Rating categories, consisting of 4 categories:

**AB:** Managers and professionals.

**C1:** Well-trained and skilled employees with head power.

**C2:** Skilled workers and those who work with head power.

**DE:** Unskilled manual workers and other low-educated workers and workers

It is stated by the ESOMAR Professional Standards Committee that;

- Unfortunately, the classifications were not updated since 1997 because some companies found it too expensive to add these questions to the normal demographic questions they asked. Furthermore, the list of household goods needed to be reviewed on a regular basis and many companies adapted the questions themselves, depending on region as a basis for measuring household wealth and income in a comparable way across countries.
- ESOMAR is now currently progressing another project regarding demographics which aims to develop best practice recommendations to address inconsistencies in demographics that create barriers in the exchange and evaluation of international data making it difficult to compare the results of data from different countries or from one study to another. An expert project team from a range of international suppliers is working together to review best practice to describe the age question in as globally consistent a way as possible to develop best practice recommendations for key geographies around the world.
- The recommendations, founded on evidence-based best practice, are designed to improve quality standards, and facilitate multi-country research projects and surveys to provide more meaningful global/regional results that are more comparable from one project/region to another. It is also planned to cover how to ask about working status as well as gender in the coming months. The recommendations will be published on ESOMAR's website, and the first set of proposals will probably be issued in September, 2022 (ESOMAR, 2022).

### **2.3.2. Socio-Economic Status (SES) Segmentation Studies in Turkiye**

When socio-economic status segmentation studies in Turkiye from past to present are examined, in addition to occupation, SES is determined as a concept related to individuals' income, education, property ownership etc.

The VERI Socio-economic Status Index (VERI SES Index), which was developed for settlements with a population of 20,000 or more in Turkiye, has been used in various studies since 1995. Four basic variables in the VERI SES Index; occupation, education level, properties owned, place of residence and house ownership were taken into account. Households were divided into five strata by weighting according to four different variables. As a result of integrating the four variables with equal weights, the final categories showing the socio-economic status of the households were formed (Kalaycıoğlu et al., 1998).

In addition, the TİAK SES scale, created by The Television Audience Measurement Committee (TİAK), was designed in 1995 and later revised and updated in 2000. This scale is calculated by taking the weighted average of 3 main determinants: occupation, education and property ownership. A change in the scale was needed in 2006 because the scale was determined by the occupation, education and property status of the only person who brought the main income to the household and included variables that were invalid over time.

In 2004, studies to develop a new SES Scale were initiated under the leadership of the Researchers Association (ARDER). As of 2006, a new scale has been created to meet the concept of socio-economic status in the marketing and research sectors (Çağıl, 2006). The new definition was created by considering the characteristics of the whole household, not the characteristics of the only income generating person in the household, that is, the unit of the scale is “household”. In the definition of SES, the educational and occupational status of the dominant individuals in the household and the dominant individuals in previous generations are weighted. The concept of household consists of the head of the household and the spouse of the head of the household. In this new scale, where the determination of the head of the household is

left to the choice of the household, the indicators used are; the education and occupation of the head of the household, the spouse of the head of the household, the parents of the head of the household and the spouse of the head of the household. No property ownership was used as a SES variable in the scale. In this scale, mental-physical and paid-unpaid distinctions were made in the categorization of the occupations (Çağl, 2006). ARDER SES Scale was used extensively in related sectors in Türkiye until 2012.

The Researchers Association was renamed Turkish Researchers Association (TÜAD) in 2009, taking the prefix "Turkish", and a study was started in 2010 to update the SES scale in response to the need in the relevant sectors, and the study was completed in 2012. While the previous generation information of the household head was used in the weighting in the 2006 SES scale, only the occupation and education status of the person who brought the main income began to be taken into account in the 2012 SES scale. This change has caused shifts in socio-economic status groups. Previously, in order for a household to be included in the AB SES group, the education of the previous generation of the household head generating the primary income was also taken into account. With the new regulation, when the head of the household is evaluated together with the income-ownership variables, if the head of the household is a university graduate, he or she can be in the upper socio-economic status group regardless of the parent's education level. As a result, while the households in the profile that used to be in the AB group were classified in a subgroup, the households in the lower group started to be included in the upper group with the increasing income.

In addition to these, the SES scale developed by Sibel Kalaycıoğlu and her friends within the scope of the project named "Social Stratification, Mobility and Socio-Economic Status in Ankara City Center" in 2008 and The Turkish Socio-Economic Status Index developed by The Social Structure Research Program (TYAP). (TÜSES) have made significant contributions to the literature.

In this section, detailed information will be given about the SES segmentation and measurement methods used and still being used in Türkiye, for which the summary information is provided above.

### 2.3.2.1. VERI Socio-Economic Status (SES) Index

The VERI Socio-economic Status Index developed by VERI Research Company as a social stratification model and used by many research institutions, was put into practice in 1995. This index dealt with the household and the individuals in the household as a unit (VERI Arastirma, 2005).

The VERI SES Index is a composite index consisting of an equally weighted integration of values based on four basic variables. The variables and process used in this index are as follows (Tüzün, 2000:372, as cited in Suher, 2003).

- Occupation of the head of the household and its members (all household members),
- Average education level of household members aged 15 and over,
- Properties owned in the household,
- House ownership and social value of the place of residence.

#### 2.3.2.1.1. Occupation

The weight scores of the people in the household according to their working style and position are shown in Table 3 (Suher, 2003).

Table 3: Occupational Scores - VERI SES Index

| Occupation                       | Score          |                  |
|----------------------------------|----------------|------------------|
|                                  | Household Head | Household Member |
| Employer (employing more than 5) | 12             | 12               |
| Self-employed                    | 11             | 11               |
| Director (more than 5 employees) | 10             | 10               |
| Director (max.5 employees)       | 9              | 9                |
| Employer (max. 5 employees)      | 8              | 8                |
| Farmer (more than 1 worker)      | 7              | 7                |
| Civil servant                    | 6              | 6                |
| Freelance                        | 5              | 5                |
| Labourer                         | 4              | 4                |
| Retired                          | 3              | 3                |
| Farmer (max. 1 worker)           | 2              | 2                |
| Unemployed/Housewife and other   | 1              | 0                |

Source: VERI Corporation, 1997

According to the model, a household's working position and style score will be at least "1", regardless of the number of people working in the household, and there will be no upper limit for this score. The weight of the working position score in the total index was determined according to the distribution of the total household score by strata. These index scores are shown in Table 4 (Suher, 2003)

Table 4: Occupation Index Results - VERI SES Index

| SES Categories          | Occupational Score | Index Score |
|-------------------------|--------------------|-------------|
| Upper Class (A)         | 16 and more        | 5           |
| Upper-Middle Class (B)  | 10-15              | 4           |
| Middle Class (C1)       | 6-9                | 3           |
| Lower-Middle Class (C2) | 4-5                | 2           |
| Lower Class (D)         | 1-3                | 1           |

Source: VERI Corporation, 1997

### 2.3.2.1.2. Education

The education level scores given to each person aged 15 and over in the household are given in Table 5 (Suher, 2003).

Table 5: Educational Scores - VERI SES Index

| Education                           | Score |
|-------------------------------------|-------|
| Bachelor's degree                   | 15    |
| High school                         | 11    |
| Secondary school                    | 8     |
| Primary school                      | 5     |
| None                                | 1     |
| Highschool student or Undergraduate | 11    |

Source: VERI Corporation, 1997

The average education score of the household is obtained by adding the education scores given to each person aged 15 and over in the household and dividing by the number of people included in the calculation. This score reflects a level ranging from "1" to "15" (Tüzün, 2000:375). The conversion of the household average

education score to the weighted stratification index score is given in Table 6 (Suher, 2003).

Table 6: Education Index Results - VERI SES Index

| SES Categories          | Educational Score | Index Score |
|-------------------------|-------------------|-------------|
| Upper Class (A)         | 12-15             | 5           |
| Upper-Middle Class (B)  | 9-11              | 4           |
| Middle Class (C1)       | 6-8               | 3           |
| Lower-Middle Class (C2) | 4-5               | 2           |
| Lower Class (D)         | 1-3               | 1           |

Source: VERI Corporation, 1997

### 2.3.2.1.3. Property Ownership

Ownership scores of selected items are given in Table 7 (Suher, 2003).

Table 7: Property Ownership Scores - VERI SES Index

| Property Ownership        | Score |
|---------------------------|-------|
| Otomobile                 | 17    |
| Personal Computer         | 5     |
| Dishwasher                | 4     |
| Automatic washing machine | 2     |
| Video camera              | 1     |
| Music set                 | 1     |
| Photograph camera         | 1     |

Source: VERI Corporation, 1997

The conversion of this score to the stratification index weight score is given in Table 8.

Table 8: Property Ownership Index Results - VERI SES Index

| SES Categories          | Property Ownership Score | Index Score |
|-------------------------|--------------------------|-------------|
| Upper Class (A)         | 27-31                    | 5           |
| Upper-Middle Class (B)  | 22-26                    | 4           |
| Middle Class (C1)       | 10-21                    | 3           |
| Lower-Middle Class (C2) | 4-9                      | 2           |
| Lower Class (D)         | 0-3                      | 1           |

Source: VERI Corporation, 1997

#### 2.3.2.1.4. House Ownership and Social Value of the Place of Residence

According to VERI Research Company, "land prices per square meter" lists determined by the Ministry of Finance, which are the basis for property tax returns in Türkiye and which are renewed every 4 years, and which cover all avenues and streets, have been accepted as criteria. Based on these lists, the mode, median and arithmetic average values of the land square meter prices of the streets and avenues of the individual neighborhoods for the settlements with a population of over 20,000 in each province were examined, the neighborhoods were sorted from the highest to the lowest values, and all neighborhoods were divided into square meters of land prices. It was divided into 5 subgroups and included in the scoring system. (Tüzün, 2000:376, as cited in Suher, 2003). According to the VERI Research Company, the last update on this subject was made in 2000 and these values are used on a provincial basis, not in general terms. The square meter prices of the land determined in 1994 and used in general terms and their breaking points for 5 groups are given in Table 9 (Suher, 2003).

Table 9: House Ownership and Social Value of the Place of Residence Index Scores – VERI SES Index

| Land Prices per Square Meter | Index Score |
|------------------------------|-------------|
| 500 000 TRY or more          | A           |
| 250 000 TRY-499 999 TRY      | B           |
| 100 000 TRY-249 999 TRY      | C1          |
| 50 000 TRY-99 999 TRY        | C2          |
| 49 999 TRY or less           | D           |

Source: VERI Corporation, 1997 (with 1994 prices)

As stated above, these values have been revised according to the year 2000 and started to be used on a provincial basis. The residential area location value is given to the households in that neighborhood. By integrating this residential area location value with house ownership, the stratification index weight score is reached (Table 10) This

process reveals a 5-fold stratification created according to the place and the ownership of the residence (Tüzün, 2000:377, as cited in Suher, 2003).

Table 10: House Ownership and Social Value of the Place of Residence Index  
Results – VERI SES Index

| <b>Residential Area and House Ownership Category</b> | <b>Index Score</b> |
|------------------------------------------------------|--------------------|
| Living in region A or B and owning a house           | 5                  |
| Living in region A or B and not owning a house       | 4                  |
| Living in region C1 and owning a house               | 4                  |
| Living in region C1 and not owning a house           | 3                  |
| Living in region C2 and owning a house               | 3                  |
| Living in region C2 and not owning a house           | 2                  |
| Living in region D and owning a house                | 2                  |
| Living in region D and not owning a house            | 1                  |

*Source: VERI Corporation, 1997*

#### 2.3.2.1.5. Outcome Scores and SES Categories

As a result, the index scores from the 4 variables in the model are summed and finally the socio-economic stratification index values in Table 11 are reached and the social status of the household is determined.

Table 11: Index Weighting Structure and Calculation of Outcome Score – VERI SES Index

| <b>SES Categories</b> | <b>Strata</b> | <b>Total Score</b> |
|-----------------------|---------------|--------------------|
| Upper Class           | A             | 17-20              |
| Upper-Middle Class    | B             | 14-16              |
| Middle Class          | C1            | 11-13              |
| Lower-Middle Class    | C2            | 8-10               |
| Lower Class           | D             | 4-7                |

*Source: VERI Corporation, 1997*

### **2.3.2.2. *TİAK Socio-Economic Status (SES) Scale***

In 1992, representatives of advertising companies, media planning and advertising agencies, and TV channels representing the media market came together to form Television Audience Measurement Committee (TİAK) in order to supervise the TV audience measurement research carried out in Türkiye and to ensure their practical use. TİAK preferred AGB in the selection of the company to carry out such research studies (AGB Anadolu, 2003).

In this context in 2000, ACNielsen Zet updated the TİAK socio-economic status (SES) scale, which was first designed in 1995 on behalf of AGB. Accordingly, the three basic criteria in the definition of TİAK SES scale were: property ownership, education, and occupation. TİAK's definition of socio-economic status was based on the household score obtained by adding the selected durable consumer goods scores of the household with the occupation and education score of the person with the highest vocational and educational score. Education and occupation scores were added for all individuals over the age of 18 in the household to select the person with the highest income in the household. The person with the highest score in the household was assumed to be the person with the highest income.

ACNielsen Zet, which developed the TİAK SES scale on behalf of AGB, updated the SES distribution for the audience it represented in large sample (20,000) database surveys every year. In this way, the market would analyze and develop its marketing strategies using this up-to-date data (Karakaya, 2006).

#### **2.3.2.2.1. Property Ownership**

In order to divide the households into segments in terms of consumption level, durable goods in the household are taken as basis, and a weight coefficient is created based on this. Durable consumer goods in the household are examined in two aspects (TİAK, 2001):

- Penetration levels of durable goods

- The average number of items in households with and without durable consumer goods

By using the possessions, it is tried to separate the following ratios as + and -, taking into account the normal distribution of the population:

- + - 5%
- + - 10-15%
- + - 20-25%
- + - 35-40%

Considering the above criteria, the following items are selected.

- Video camera
- Microwave oven
- Dishwasher
- Car
- Camera
- Automatic washing machine
- Normal washing machine
- Oven
- Refrigerator

In households with less than 50% penetration of the items selected above, the total score of the houses is calculated by giving (+) points to the houses that have the items and (-) points to the houses that do not have the items with a penetration higher than 50%. The purpose of making such a score is to accept the average as zero and give negative points to the households below the average and points to the households above the average. In order to score, the average number of items in the households with or without the selected items is calculated. As a result, the scores in Table 12 are given.

Table 12: Property Ownership Scores - TIAK SES Scale

| Property                  | Ownership |        |
|---------------------------|-----------|--------|
|                           | Yes       | No     |
| Video camera              | (+) 12    |        |
| Microwave oven            | (+) 11    |        |
| Dishwasher                | (+) 11    |        |
| Car                       | (+) 10    |        |
| Camera                    | (+) 9     |        |
| Automatic washing machine |           | (-) 10 |
| Normal washing machine    |           | (-) 11 |
| Oven                      |           | (-) 11 |
| Refrigerator              |           | (-)13  |

Source: TIAK, 2001

#### 2.3.2.2.2. Occupation and Education

In order for the obtained weighted property ownership score to be used together with education and occupational knowledge, these questions must have similar values or be standardized (TIAK, 2001).

For this reason, the average values of this "weighted property ownership score" obtained are taken according to the occupation and education of the person who provides the household's main income. In questions about education, the important thing is the last school the person is graduated from. An individual who says he has dropped out of high school in his second year is considered a secondary school graduate. The occupational and educational scores of the TIAK SES Scale are given in Table 13 and Table 14.

Table 13: Occupation Scores - TĪAK SES Scale

| Occupation                       | Score  |
|----------------------------------|--------|
| Self-employed                    | (+) 23 |
| Employer (employing more than 5) | (+) 20 |
| Director (more than 5 employees) | (+) 19 |
| Director (max.5 employees)       | (+) 16 |
| Business owner (max. 5 workers)  | (+) 10 |
| Civil servant                    | (+) 9  |
| Farmer (more than 1 worker)      | (+) 8  |
| Retired                          | (+) 1  |
| Freelance                        | (-) 1  |
| Labourer                         | (-) 3  |
| Farmer (max. 5 workers)          | (-) 11 |
| Unemployed                       | (-) 11 |

Source: TĪAK, 2001

Table 14: Education Scores - TĪAK SES Scale

| Education         | Score  |
|-------------------|--------|
| Bachelor's degree | (+) 18 |
| High school       | (+) 9  |
| Secondary school  | (+) 3  |
| Primary school    | (-) 2  |
| None              | (-) 14 |

Source: TĪAK, 2001

For example, someone who is a high school graduate, and a civil servant has 18 points.

### 2.3.2.2.3. Outcome Scores and SES Categories

While calculating the total points of the households, the above-mentioned item points are calculated for each household. Then, the weighted occupational and education scores for people over the age of 18 in the household are collected, and the total score of the person with the highest score and the item score are combined (TĪAK, 2001).

While defining the new socio-economic status of the households, the above-mentioned total score is taken as a basis and divided into 6 groups in total using the score limits in Table 15 (TIAK, 2001).

Table 15: SES Categories and Outcome Scores - TIAK SES Scale

| SES Category | Total Score    |
|--------------|----------------|
| A            | 53 or more     |
| B            | 35-52          |
| C1           | 14-34          |
| C2           | 02-13          |
| D            | (-) 31 - 1     |
| E            | (-) 32 or less |

Source: TIAK, 2001

It is tried to find out whether the individuals related to their employment status are working in any place or not. If individuals are not working, they are included in one of the following categories (Karakaya, 2006).

**Housewife:** These are the women who do not work, are not students and do not seek a job, do not express themselves as unemployed, have a pension, alimony or family assistance, rental income from their spouse, father, or mother. Not only married women but also other women (housewives) who fit this characteristic are included in this group.

**Student:** Those who work constantly in a regular job are evaluated as an employee and are not registered in the student category even if they are students. However, students who work part-time (for example, field researchers) to earn their pocket money are registered in the "student" category.

**Child:** Individuals under the age of 11 who do not go to school and are unemployed are considered children.

**Unemployed:** Persons who do not have a regular job, are not students, or are not retired are included. Those who are not currently students but are preparing for university, men and women who are thinking of working and also express themselves as unemployed are included in this group. Persons who do not work and do not plan

to work and live on financial income such as any rent, interest income, or family assistance are also included in this group.

**Retired:** Retirees are included in this group. Retired but also employees are included in this group.

Whether they are freelance or paid work is questioned and evaluated separately people are working. In the case of one's own business, independent work, the number of people they employ becomes essential. The number of people employed by the person is questioned, and if he employs more than one person, he is included in the employer category. It is included in one of the categories of "Employer employs (1-5) people" or "employer employs 6+ people" according to the number of people employed by it. Persons engaged in agriculture or animal husbandry on their account are considered in the category of farmers. The number of workers employed by the farmers is determined by considering the people who are hired and employed externally (not within the family). Those who work by themselves, tradespeople and artisans, and peddlers who do not employ a paid person (except their children), whether they work alone or with a partner, are included in this group. Tradespeople and artisans, merchants, industrialists, and business people who employ a paid person or persons are included in the employer category. If the number of paid employees is between 1 and 5, the "employer (1-5 employees)" category is valid, and if there are six or more, the "employer (1-5 employees)" category is valid.

**Self-employment gained through education:** This group includes college graduates who do their training, such as doctors, lawyers, pharmacists, architects, accountants, financial advisors, and veterinarians. The important thing here is that he is doing the job he was trained in. Those who work with someone else are the group that works at a desk or with physical strength. The critical point here is the work that the person does rather than the staff at the place where he works. A person on the staff of civil servants who works with physical strength is considered a worker.

**Manager:** If the person works for someone else and has an administrative duty (management), the person is asked how many people he is responsible for. If the number of people he is responsible for is between 1-5 people, he is included in the

"manager (responsible for 1-5 people)" category, and if it is six or more, "manager (responsible for 6+ people)" categories. Mayors, bank managers, accounting managers, prosecutors, judges, rectors, chairman of the board of directors, general managers, deputy general managers, chiefs, inspectors, passenger and cargo ship captains, passenger plane pilots, captains, majors, colonels, generals, school principals and the like are included in this group.

Persons who work for someone else and do not have an administrative duty are included in the civil servant category. Workers are those who use hand and body power more than brainpower.

However, the 2012 Turkish Researchers Association (TÜAD) SES classification scale, which will be detailed in the following parts of the study, is currently used to determine the status of households in TIAK's Database Research and Television Audience Measurement.

### **2.3.2.3. ARDER Socio-Economic Status (SES) Scale**

Founded in 1988, Researchers Association (ARDER) is a professional organization of legal and real persons whose main field of activity is marketing and public opinion research. ARDER, in cooperation with the Advertising and the Advertisers Associations, conducted a SES study in 2006 to take a single reference in terms of consumer analysis and target audience approach in marketing activities in Türkiye.

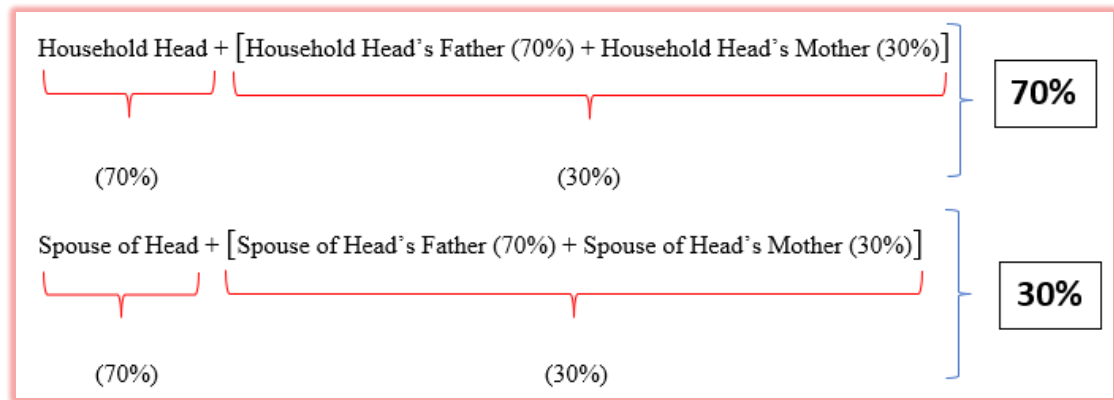
The Researchers Association socio-economic status scale is the result of a 2-year study that started in 2004 and was completed in 2006. Important user groups such as the advertising industry, the marketing industry, the market research industry, and the media industry have chosen this scale in order to obtain an up-to-date and standard measurement criterion suitable for simple and fast use, covering the habits, lifestyles and values of the consumers or users.

The principles based on the establishment of the SES scale were determined as follows (Çağlı, 2006:10-14).

- The Scale Should Be Simple
- The Scale Should Be Applied Quickly
- The Scale Should Be Suitable for Large-Scale Field Applications
- The Scale Should Not Force Field Staff
- The Scale Should Be Based on Objective Criteria
- The Scale Must Be Time-Stable
- The Scale Should Be Based on the Concept of “Household.”
- The Scale Should Consider the Characteristics of the Chief Constituting the Household and the Chief's Spouse
- The Scale Should Consider the Previous Generation in addition to the Current Household
- The Scale Should Not Use Any Ownership Status as an Indicator
- The Scale Should Consider the Educational Status of the Household
- The scale should consider the Occupational Status of the Household

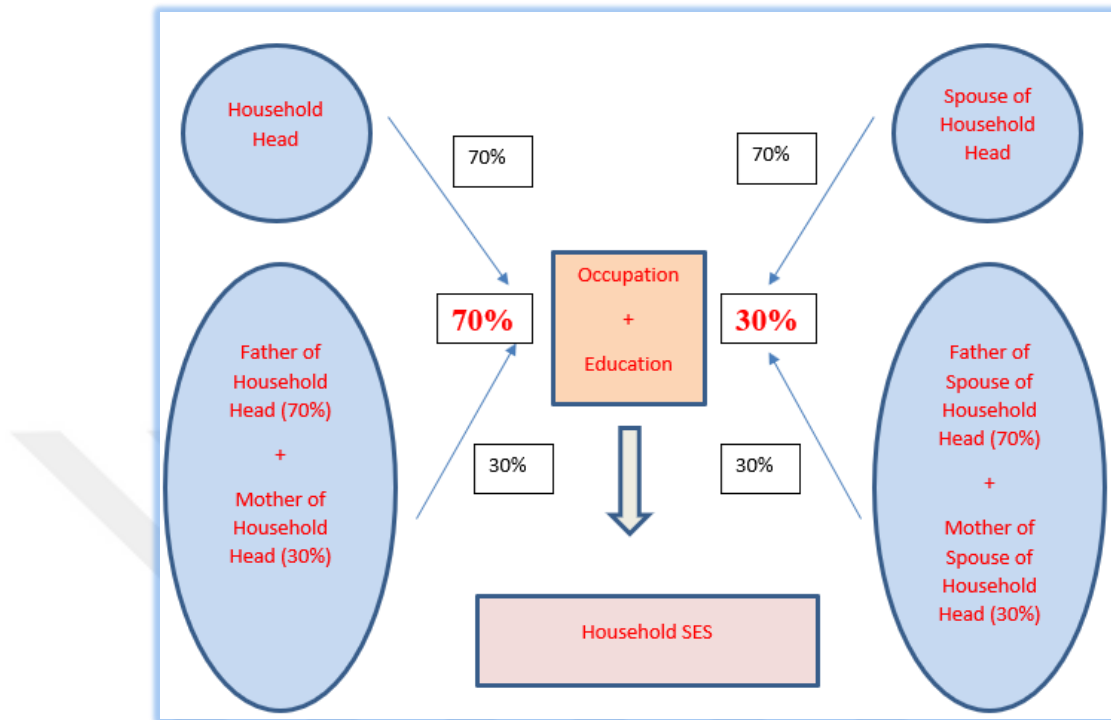
The unit of analysis of this scale was “household”. The concept of SES has been put forward as a concept that belongs to the household and includes all individuals in the household, not the educational and occupational characteristics of everyone in the household. The concept of household is defined as "Head of Household" and "Spouse of the Head of House" in the scale. In the light of the analyzes made on the data available while the scale was being developed, it was deemed appropriate to apply a coefficient of 70% to the head of the household and 30% to the spouse of the head of the household (Figure 1 and Figure 2).

Figure 1: Coefficients Applied to Household Members - 2006 ARDER SES Scale



However, the criteria based on the 2006 ARDER SES scale are the education and occupation status of the household. In this scale, the educational and occupational values of both the current head of the household and the spouse of the household head, as well as the parents of both, are taken into account. It is seen that 70% weight is applied for the current generation and 30% for the previous generation. Since it would not be possible to determine the head of the household in the previous generation households, it was deemed appropriate to apply a weight of 70% to the individuals in the "father" position and 30% to the individuals in the "mother" position for convenience. At this scale, it does not matter whether the previous generation parents are alive or not (Karakaya, 2006).

Figure 2: Calculation Criteria and Coefficients - 2006 ARDER SES Scale



### 2.3.2.3.1. Education

One of the most important criteria used in the 2006 ARDER SES Scale is the education level of the household, which is widely used in the scales developed in this area. Since the scale is based on "household" as a unit, "educational status of the household" is taken as the basis. Therefore, this concept in question consists of the concepts of "Household Head's Education", "Spouse of the Household Head's Education" and "Previous Generation's Household Education". Accordingly, the "educational status of the household" was calculated by determining the education level of a total of 6 people, including the head of the household, the parents of the head of the household, the spouse of the head of the household, and the parents of the spouse of the head of the household, using the coefficients detailed in Figure 1. The scoring list for household head and the spouse of the household head's educational status is given in the Table 16 (Karakaya, 2006).

Table 16: Education Scores - ARDER SES Scale (Household Head and the Spouse of the Household Head)

| <b>Education</b>                                                           | <b>Score<br/>(Household Head<br/>and Spouse of the<br/>Head)</b> |
|----------------------------------------------------------------------------|------------------------------------------------------------------|
| Post graduate, master, doctorate, specialization in clinical medicine etc. | 30                                                               |
| Bachelor's degree (formal education)                                       | 20                                                               |
| Bachelor's degree (open education)                                         | 15                                                               |
| Associate degree (2 years)                                                 | 13                                                               |
| High school (Regular)                                                      | 10                                                               |
| High school (Vocational)                                                   | 7                                                                |
| Secondary school                                                           | 5                                                                |
| Primary school                                                             | 0                                                                |
| None                                                                       | (-) 5                                                            |

*Source: ARDER SES (Çağlı, 2006)*

Since the prevalence of previous generation education categories decreases sharply in upper education categories, some inflation multipliers were used in the senior education of the previous generation individuals. In cases where Vocational High School, Normal High School and Associate Degree education were encountered in the previous generation, it was applied to 1.5 times the normal scores of these education levels. Likewise, if the University and Postgraduate education levels are seen in the previous generation, the normal scores of these education levels are applied to be doubled. Accordingly, the scores to be applied for the education levels of the individuals in the position of "Father" and "Mother" in the previous generation households are given in the Table 17, with inflation multipliers applied.

Table 17: Education Scores - ARDER SES Scale (Previous Generation)

| <b>Education</b>                                                      | <b>Score - Previous Generation<br/>(Father and Mother of the Household Head and Spouse of the Head)</b> |
|-----------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| Graduate, master, doctorate, specialization in clinical medicine etc. | 60                                                                                                      |
| Bachelor's degree (formal education)                                  | 40                                                                                                      |
| Bachelor's degree (open education)                                    | 22,5                                                                                                    |
| Associate degree (2 years)                                            | 19,5                                                                                                    |
| High school (Regular)                                                 | 15                                                                                                      |
| High school (Vocational)                                              | 10,5                                                                                                    |
| Secondary school                                                      | 5                                                                                                       |
| Primary school                                                        | 0                                                                                                       |
| None                                                                  | (-) 5                                                                                                   |

Source: ARDER SES (Çağlı, 2006)

#### 2.3.2.3.2. Occupation

The other most important criteria used in the 2006 ARDER SES Scale is the occupational status of the household, which is widely used in the scales in the literature. Since the scale is based on "household" as a unit, "occupational status of the household" is taken as a basis. Therefore, this concept in question consists of the concepts of "Household Head's Occupation", "Spouse of the Household Head's Occupation" and "Occupation of Previous Generation Households". Accordingly, the "occupational status of the household" was calculated by determining the occupational status of a total of 6 people, including the head of the household, the parents of the head of the household, the spouse of the head of the household, the parents of the spouse of the household head, using the coefficients detailed in Figure 1. Occupational categories and scores used for the calculation is given in Table 18 (Karakaya, 2006).

Table 18: Occupation Scores – ARDER SES Scale

| Occupation                                | Score |
|-------------------------------------------|-------|
| <b>INACTIVE</b>                           |       |
| Housewife                                 | 0     |
| Unemployed                                | (-)10 |
| Inactive with profession                  | 11    |
| <b>WORKING - MENTAL</b>                   |       |
| Self employed with vocational training    | 23    |
| Employed with vocational training         | 20    |
| Self employed without vocational training | 17    |
| Employed without vocational training      | 14    |
| <b>WORKING - PHYSICAL</b>                 |       |
| Self employed with vocational training    | 13    |
| Employed with vocational training         | 10    |
| Self employed without vocational training | 3     |
| Employed without vocational training      | 0     |

Source: ARDER SES (Çağlı, 2006)

### 2.3.2.3.3. Outcome Scores and SES Categories

In the final stage of the scale setup, the total ARDER SES score of each household is obtained by calculating and adding together the education and occupation scores weighted by the coefficients of the household head, the head's spouse, and the previous generation. Thus, the household is assigned to one of the 6 SES groups shown in Table 19 (Karakaya, 2006).

Table 19: Outcome Scores and SES Categories - ARDER SES Scale

| SES Category | Total Score  |
|--------------|--------------|
| A            | 33 or more   |
| B            | 12-33        |
| C1           | 2-12         |
| C2           | (-)2 - 2     |
| D            | (-7) - (-)2  |
| E            | (-)7 or less |

Source: ARDER SES (Çağlı, U, 2006)

Researchers Association (ARDER) took the name of Turkish Researchers Association (TÜAD) in 2009. The ARDER SES scale was revised in 2012 with a new sample in order to transform it into a standard formation that responds to changing needs, integrates different variables, and is applicable to the entire industry. By adding different criteria that are directly related to consumption, the use of the scale in the sector has been made common and widespread.

#### **2.3.2.4. TÜAD Socio-Economic Status (SES) Scale**

Turkish Researchers Association (TÜAD) is a professional organization of legal and real persons whose main fields of activity are marketing and public surveys. In 2009, Researchers Association (ARDER) was granted the right of using “Turkish” forename with the approval of Ministry of Interior and registered as "Turkish Researchers Association (TÜAD)". TÜAD is in an active position in determining and renewing the socio-economic status (SES) scale, which is used in the research sector and defines the target audience segmentation in the TV monitoring measurement system in Türkiye.

A new "SES Committee" was formed in December 2009 under the leadership of TÜAD. It is determined that the 2006 definition of SES has a static structure, giving more weight to the social aspect due to education, and cannot reflect the development (change) of SES in parallel with the change in the economic situation of the households. The most important of all the shortcomings was the lack of attention to the income variable of the household. In addition, it is determined that the weighting of this effect (30%) in the scale adopting the idea of the influence of previous generations on the socio-economic status of the household is arbitrarily determined without any statistical basis. Selected features of the second generation and definitions used in occupational groupings created difficulties in using them in field studies. Due to these two factors, different SES scales are used in the sector, and a common language could not be formed in panels and adhoc studies. For this reason, TÜAD started a new SES measurement method study in 2010 in order to update the socio-economic status grouping of households in Türkiye in a way that better meets today's needs and to offer them to common use. According to the field study analysis, it was

concluded that the occupation-education combination of the spouse and the previous generations did not play a decisive role. The study, which lasted two years, was put into practice in 2012 (TÜAD, 2012).

In this new approach, it is underlined that socio-economic status should not be expected to be 100% related to income; it has been emphasized that there is no equality such as "income = lifestyle", nor can there be an equality such as "income = SES". At this point, the aim is not to provide 100% correlation between SES and income groups, but to minimize the deviations that occupation and education fail to explain SES groups.

In this context, in the pilot study conducted on 350 households in the province of Istanbul during the period of July-August 2010, it was concluded that property ownership was far from being a discriminating factor in SES groupings. In addition, it was determined that the head of the household and the person who brought the main income to the household were the same person in 87% of the households.

Based on all these determinations, as a basic approach, it has been decided to follow a path that brings the 2006 SES applied in the panels and the SES currently being applied in the Adhoc field closer to each other and adds an income effect to it. At this point, the study focused on the following main topics:

- In the context of the person to be interviewed, besides the necessity of the first interviewer to be the person who brings the main income to the household, it has been tried to determine how to reach this person if a second person needs to be interviewed.
- In the occupational dimension, it has been revealed that it is necessary to determine more understandable and non-subjective criteria instead of distinctions such as vocationally trained / uneducated, mental / physical workers.
- In the income factor, studies have been carried out on how this information can be integrated into the SES group definition.

In this context, in order to test the new approach, analyze its relationship with the 2006 SES implementation, and create a revised voice scale, a comprehensive field

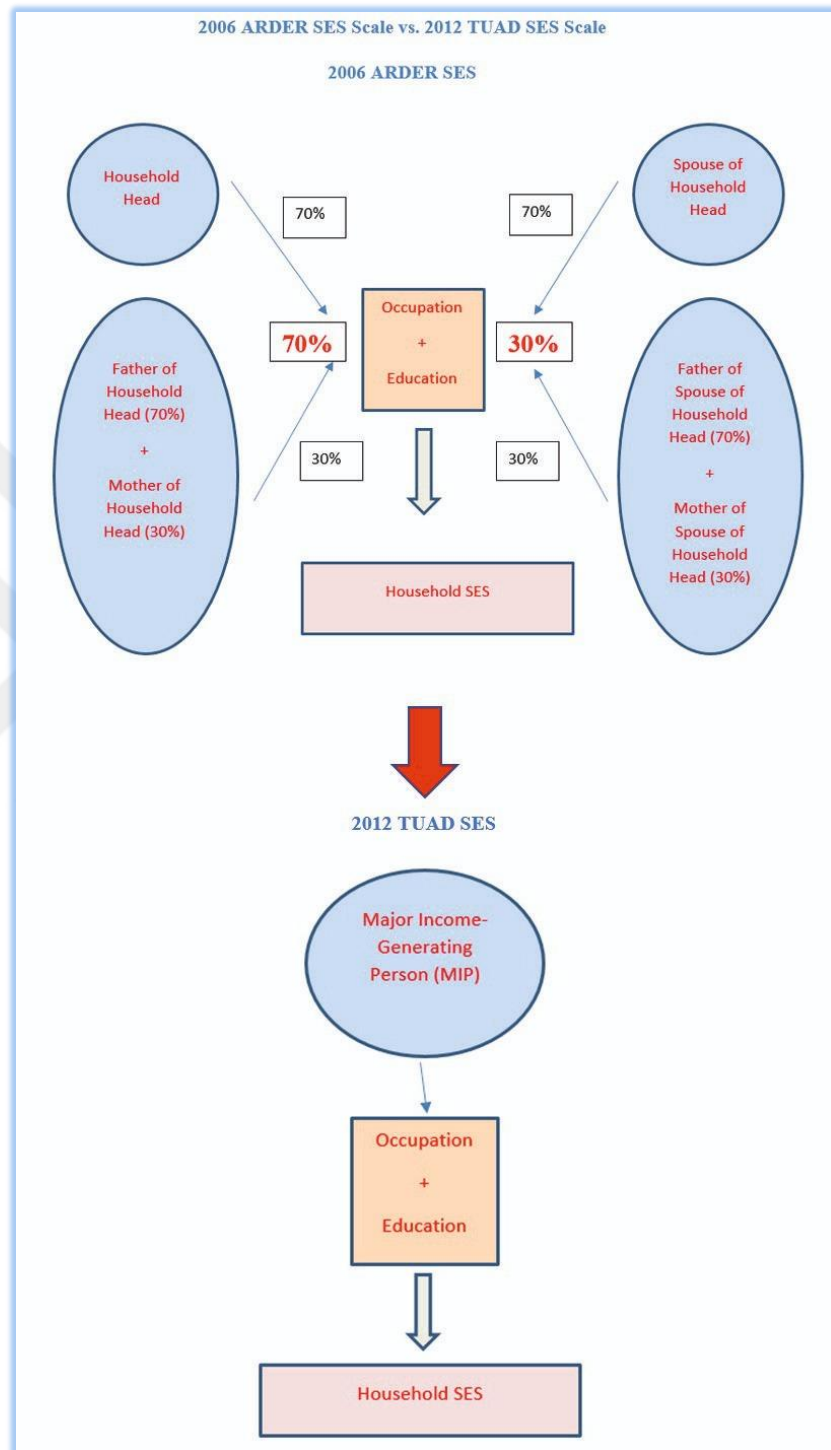
research study was carried out on 5000 households across Türkiye in February-July 2011. In addition, a SES perception survey was conducted in which actors in the sector such as TÜAD, RVD, RD, TİAK, BİAK, AÇİAK, RİAK members and all TÜAD summit participants were included. Thus, it is aimed to determine whether the practitioners have different SES definitions and which variables are included in these definitions and to what extent.

According to the analysis, the factors that primarily affect the SES assignments are respectively:

- Household total income,
- Education of the Major Income-Generating Person (MIP) for the household,
- It has been determined as the occupation of the MIP to the household.

At this point, it has been noticed that the spouse of the household head plays a decisive role in the combination of vocational-educational SES groupings. According to the 2006 ARDER SES measurement practices, a glassware maker who was assigned to a lower group in the education dimension because he and his family were uneducated in the past can be promoted to C1 with a new approach (TÜAD, 2012).

Figure 3: 2006 ARDER SES Scale s. 2012 TÜAD SES Scale



#### **2.3.2.4.1. Occupation**

In the occupational dimension, instead of the definition of physical/mental, educated/uneducated in the 2006 ARDER SES scale, “more understandable” occupational groupings were used, and these were placed on scales proportional to income. In addition, the unemployed are evaluated differently depending on whether they have additional income or not.

When it comes to the retirees, it has been decided that those who are retired and no longer working will be assigned one level below the SES category they would have been assigned according to their profession if they had not retired (TÜAD, 2012).

The occupational grouping list designed by TÜAD SES committee is given in Table 20.

Table 20: Occupational Grouping List – 2012 TŪAD SES Scale

| <b>Occupation-Major Income-Generating Person (MIP)</b>                         |                                                                                                          |
|--------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| <b>NOT HAVING A JOB WITH SALARY, UNEMPLOYED</b>                                |                                                                                                          |
| 1a                                                                             | Unemployed - Currently not working - don't have side income/receiving subvention                         |
| 1b                                                                             | Unemployed - Currently not working - have regular side income                                            |
| 2a                                                                             | Housewife - don't have side income/receiving subvention                                                  |
| 1b                                                                             | Housewife - have regular side income                                                                     |
| 3                                                                              | Student (without a job salary)                                                                           |
| <b>WORKING WITH SALARY OR PAYMENT</b>                                          |                                                                                                          |
| 4a                                                                             | Labourer/Retainer -Working by piecework (Irregular, from time to time)                                   |
| 4b                                                                             | Labourer/Retainer -Working regularly (Doing the same job unless special conditions)                      |
| 5                                                                              | Workmaster/Qualified workman - Has workers working under his command                                     |
| 6                                                                              | Civil servant who doesn't direct /Craft / Expert etc.                                                    |
| 7                                                                              | Director (1-5 employees)                                                                                 |
| 8                                                                              | Director (6-10 employees)                                                                                |
| 9                                                                              | Director (11-20 employees)                                                                               |
| 10                                                                             | Director (more than 20 employees)                                                                        |
| 11                                                                             | Military man (Military specialist sergeant, officer)                                                     |
| 12                                                                             | Expert with payment, seniority and qualifications (Lawyer, doctor, architect, engineer, academician etc) |
| <b>WORKING FOR THEIR OWN ACCOUNT - INDEPENDENT BUSINESS - QUALIFIED EXPERT</b> |                                                                                                          |
| 13                                                                             | Farmers (Working by themselves or with their families)                                                   |
| 14                                                                             | Street Hawker -Own job (Including Free Lance), not giving service in a store                             |
| 15                                                                             | Working alone, store owner, tradesman (Including taxi drivers)                                           |
| 16                                                                             | Business owner with 1-5 employees (trade, agriculture, manufacture, service)                             |
| 17                                                                             | Business owner with 6-10 employees (trade, agriculture, manufacture, service)                            |
| 18                                                                             | Business owner with 11-20 employees (trade, agriculture, manufacture, service)                           |
| 19                                                                             | Business owner with more than 20 employees (trade, agriculture, manufacture, service)                    |
| 20                                                                             | Freelance qualified expert (lawyer, engineer, financial advisor, doctor, pharmacist etc.)                |

Source: TŪAD, 2012

#### 2.3.2.4.2. Education

The educational categories taken into account while designing the TÜAD SES scale are given in Table 21.

Table 21: Educational Grouping List – 2012 TÜAD SES Scale

| Education                            | Duration          |
|--------------------------------------|-------------------|
| Post graduate                        | 16 years and more |
| Bachelor's degree (formal education) | 14 years and more |
| Bachelor's degree (open education)   | 14 years and more |
| Associate degree (2 years)           | 13-14 years       |
| High school (Regular)                | 11 years          |
| High school (Vocational)             | 11 years          |
| Secondary school-graduate            | 8 years           |
| Primary school-graduate              | 5 years           |
| Primary school-drop out              | < 5 years         |

Source: TÜAD, 2012

#### 2.3.2.4.3. Combination of Occupational-Educational SES Categories

The final SES categories generated by TÜAD SES Committee based on the combination of the education and occupation of the major-income generating person (MIP) in the household and of not active working retirees are provided in Table 22 and Table 23 below.

Table 22: Combination of the Education and Occupation of the Major-Income Generating Person (MIP)

| MAJOR INCOME-GENERATING PERSON (MIP)                                                                        | 1                                                                                                                           | 2                                    | 3                                  | 4                          | 5                     | 6                        | 7                           | 8                         | 9                         |
|-------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|--------------------------------------|------------------------------------|----------------------------|-----------------------|--------------------------|-----------------------------|---------------------------|---------------------------|
|                                                                                                             | Post graduate                                                                                                               | Bachelor's degree (formal education) | Bachelor's degree (open education) | Associate degree (2 years) | High school (Regular) | High school (Vocational) | Secondary school (Graduate) | Primary school (Graduate) | Primary school (Drop out) |
|                                                                                                             | 16 years +                                                                                                                  | 14 years +                           | 14 years +                         | 13-14 years                | 11 years              | 11 years                 | 8 years                     | 5 years                   | < 5 years                 |
| RETIRED                                                                                                     |                                                                                                                             |                                      |                                    |                            |                       |                          |                             |                           |                           |
| * Retired - working                                                                                         | * to be coded according to pre-retirement profession                                                                        |                                      |                                    |                            |                       |                          |                             |                           |                           |
| ** Retired - not working                                                                                    | ** to be coded at a lower SES group according to the pre-retirement profession listed in the table for RETIRED, NOT WORKING |                                      |                                    |                            |                       |                          |                             |                           |                           |
| NOT HAVING A JOB WITH SALARY, UNEMPLOYED                                                                    |                                                                                                                             |                                      |                                    |                            |                       |                          |                             |                           |                           |
| 1a Unemployed - Currently not working - don't have side income/receiving subvention                         | E                                                                                                                           | E                                    | D                                  | D                          | D                     | C2                       | C2                          | C2                        | C2                        |
| 1b Unemployed - Currently not working - have regular side income                                            | D                                                                                                                           | D                                    | C2                                 | C2                         | C2                    | C1                       | C1                          | C1                        | C1                        |
| 2a Housewife - don't have side income /receiving subvention                                                 | E                                                                                                                           | E                                    | D                                  | D                          | D                     | C2                       | C2                          | C2                        | C2                        |
| 1b Housewife - have regular side income                                                                     | D                                                                                                                           | D                                    | C2                                 | C2                         | C2                    | C1                       | C1                          | C1                        | C1                        |
| 3 Student (without a job salary)                                                                            |                                                                                                                             |                                      | D                                  | C2                         | C2                    | C2                       | C2                          | C2                        | C2                        |
| WORKING WITH SALARY OR PAYMENT                                                                              |                                                                                                                             |                                      |                                    |                            |                       |                          |                             |                           |                           |
| 4a Labourer/Retainer - Working by pricework (Irregular, from time to time)                                  | E                                                                                                                           | D                                    | D                                  | C2                         | C2                    | C2                       | C1                          | C1                        | B                         |
| 4b Labourer/Retainer - Working regulary (Doing the same job unless special conditions)                      | D                                                                                                                           | C2                                   | C2                                 | C1                         | C1                    | C1                       | B                           | B                         | B                         |
| 5 Workmaster/Qualified workman - Has workers working under his command                                      | D                                                                                                                           | C2                                   | C2                                 | C1                         | C1                    | B                        | B                           | B                         | B                         |
| 6 Civil servant who doesn't direct / Craft / Expert etc.                                                    | D                                                                                                                           | C2                                   | C2                                 | C1                         | C1                    | B                        | B                           | B                         | B                         |
| 7 Director (1-5 employees)                                                                                  | C2                                                                                                                          | C1                                   | C1                                 | C1                         | C1                    | B                        | B                           | A                         | A                         |
| 8 Director (6-10 employees)                                                                                 | C2                                                                                                                          | C1                                   | C1                                 | C1                         | B                     | B                        | B                           | A                         | A                         |
| 9 Director (11-20 employees)                                                                                | C1                                                                                                                          | C1                                   | C1                                 | B                          | B                     | B                        | A                           | A                         | A                         |
| 10 Director (more than 20 employees)                                                                        | C1                                                                                                                          | C1                                   | B                                  | B                          | B                     | A                        | A                           | A                         | A                         |
| 11 Military man (Military specialist sergeant, officer)                                                     |                                                                                                                             | C2                                   | C2                                 | C1                         | C1                    | B                        | B                           | A                         | A                         |
| 12 Expert with payment, seniority and qualifications (Lawyer, doctor, architect, engineer, academician etc) |                                                                                                                             |                                      |                                    |                            |                       |                          | A                           | A                         | A                         |
| WORKING FOR THEIR OWN ACCOUNT - INDEPENDENT BUSINESS - QUALIFIED EXPERT                                     |                                                                                                                             |                                      |                                    |                            |                       |                          |                             |                           |                           |
| 13 Farmers (Working by themselves or with their families)                                                   | D                                                                                                                           | D                                    | D                                  | C2                         | C2                    | C2                       | C1                          | B                         | B                         |
| 14 Street Hawker - Own job (Including Free Lance), not giving service in a store                            | C2                                                                                                                          | C2                                   | C2                                 | C1                         | C1                    | C1                       | B                           | B                         | B                         |
| 15 Working alone, store owner, tradesman (Including taxi drivers)                                           | C2                                                                                                                          | C1                                   | C1                                 | C1                         | C1                    | B                        | B                           | A                         | A                         |
| 16 Business owner with 1-5 employees (trade, agriculture, manufacture, service)                             | C2                                                                                                                          | C1                                   | C1                                 | B                          | B                     | B                        | B                           | A                         | A                         |
| 17 Business owner with 6-10 employees (trade, agriculture, manufacture, service)                            | C1                                                                                                                          | C1                                   | C1                                 | B                          | B                     | B                        | A                           | A                         | A                         |
| 18 Business owner with 11-20 employees (trade, agriculture, manufacture, service)                           | C1                                                                                                                          | C1                                   | B                                  | B                          | B                     | B                        | A                           | A                         | A                         |
| 19 Business owner with more than 20 employees (trade, agriculture, manufacture, service)                    | C1                                                                                                                          | C1                                   | B                                  | B                          | B                     | A                        | A                           | A                         | A                         |
| 20 Freelance qualified expert (lawyer, engineer, financial advisor, doctor, pharmacist etc.)                |                                                                                                                             |                                      |                                    |                            |                       |                          | A                           | A                         | A                         |

Source: TUAD, 2012

Table 23: Combination of the Education and Occupation of the Major-Income Generating Person (MIP) for NOT Working Retirees

| MAJOR INCOME-GENERATING PERSON (MIP)<br>RETIRED, NOT WORKING                                                             | 1             | 2                                    | 3                                  | 4                          | 5                     | 6                        | 7                           | 8                         | 9                         |
|--------------------------------------------------------------------------------------------------------------------------|---------------|--------------------------------------|------------------------------------|----------------------------|-----------------------|--------------------------|-----------------------------|---------------------------|---------------------------|
|                                                                                                                          | Post graduate | Bachelor's degree (formal education) | Bachelor's degree (open education) | Associate degree (2 years) | High school (Regular) | High school (Vocational) | Secondary school (Graduate) | Primary school (Graduate) | Primary school (Drop out) |
|                                                                                                                          | 16 years +    | 14 years +                           | 14 years +                         | 13-14 years                | 11 years              | 11 years                 | 8 years                     | 5 years                   | < 5 years                 |
| <b>RETIRED B</b><br>Before Retirement;<br><b>WORKING WITH SALARY OR PAYMENT</b>                                          |               |                                      |                                    |                            |                       |                          |                             |                           |                           |
| 4a Labourer/Retainer - Working by piecework (Daily paid)                                                                 | E             | E                                    | E                                  | D                          | D                     | D                        | C2                          | C2                        | C1                        |
| 4b Labourer/Retainer - Working regulary (Monthly paid)                                                                   | E             | D                                    | D                                  | C2                         | C2                    | C2                       | C1                          | C1                        | C1                        |
| 5 Workmaster/Qualified workman - Has workers working under his command                                                   | E             | D                                    | D                                  | C2                         | C2                    | C1                       | C1                          | C1                        | C1                        |
| 6 Civil servant who doesn't direct / Craft / Expert etc.                                                                 | E             | D                                    | D                                  | C2                         | C2                    | C1                       | C1                          | C1                        | C1                        |
| 7 Director (1-5 employees)                                                                                               | D             | C2                                   | C2                                 | C2                         | C2                    | C1                       | C1                          | B                         | B                         |
| 8 Director (6-10 employees)                                                                                              | D             | C2                                   | C2                                 | C2                         | C1                    | C1                       | C1                          | B                         | B                         |
| 9 Director (11-20 employees)                                                                                             | C2            | C2                                   | C2                                 | C1                         | C1                    | C1                       | B                           | B                         | B                         |
| 10 Director (more than 20 employees)                                                                                     | C2            | C2                                   | C1                                 | C1                         | C1                    | B                        | B                           | B                         | B                         |
| 11 Military man (Military specialist sergeant, officer)                                                                  |               | D                                    | D                                  | C2                         | C2                    | C1                       | C1                          | B                         | B                         |
| 12 Expert with payment, seniority and qualifications (Lawyer, doctor, architect, engineer, academician etc)              |               |                                      |                                    |                            |                       |                          | B                           | B                         | B                         |
| <b>RETIRED C</b><br>Before Retirement;<br><b>WORKING FOR THEIR OWN ACCOUNT - INDEPENDENT BUSINESS - QUALIFIED EXPERT</b> |               |                                      |                                    |                            |                       |                          |                             |                           |                           |
| 13 Farmers (Working by themselves or with their families)                                                                | E             | E                                    | E                                  | D                          | D                     | D                        | C2                          | C1                        | C1                        |
| 14 Street Hawker - Own job (Including Free Lance), not giving service in a store                                         | D             | D                                    | D                                  | C2                         | C2                    | C2                       | C1                          | C1                        | C1                        |
| 15 Working alone, store owner, tradesman (Including taxi drivers)                                                        | D             | C2                                   | C2                                 | C2                         | C2                    | C1                       | C1                          | B                         | B                         |
| 16 Business owner with 1-5 employees (trade, agriculture, manufacture, service)                                          | D             | C2                                   | C2                                 | C1                         | C1                    | C1                       | C1                          | B                         | B                         |
| 17 Business owner with 6-10 employees (trade, agriculture, manufacture, service)                                         | C2            | C2                                   | C2                                 | C1                         | C1                    | C1                       | B                           | B                         | B                         |
| 18 Business owner with 11-20 employees (trade, agriculture, manufacture, service)                                        | C2            | C2                                   | C1                                 | C1                         | C1                    | C1                       | B                           | B                         | B                         |
| 19 Business owner with more than 20 employees (trade, agriculture, manufacture, service)                                 | C2            | C2                                   | C1                                 | C1                         | C1                    | B                        | B                           | B                         | B                         |
| 20 Freelance qualified expert (lawyer, engineer, financial advisor, doctor, pharmacist etc.)                             |               |                                      |                                    |                            |                       |                          | B                           | B                         | B                         |

Source: TUAD, 2012

With the revision brought to the SES scale, the education of the previous generation of the household head that brought the primary income was also taken into account in order for a household to be included in the AB SES group. With the new regulation, when the head of the household is evaluated together with the income-ownership variables, if the head of the household has a university graduation, he or she can be in the upper socio-economic status group regardless of the parent's education level. As a result, while the households in the profile that used to be in the AB group were classified in a subgroup, the households in the lower group started to be included in the upper group with increasing income (Acar, 2020).

This scale study, developed by the SES Committee formed under the leadership of TÜAD and published in 2012, is aimed to contribute to research studies in the following key points:

- Clarifying the relationship between income and occupation grouping, which can be easily accessed in daily life compared to other variables. In the SES group assignment, the occupation has a more dominant role than education and thus contributes to the integration of the economic factor into the SES grouping.
- To enable people to be in different SES groups in parallel with their career and economic development.
- Dispersion between the groups became clearer after differentiation of C1 from C2 which is an important dispersive for especially lower and upper SES groups.
- Bringing a more practical, more understandable approach that brings time advantage in fieldwork.
- To create a suitable basis for the formation of a common language in the sector by adopting an approach that is multi-participant, widely communicative and open to feedback from research users and practitioners.

#### **2.3.2.5. Turkish Statistical Institute (TÜİK)**

There are no studies by the Turkish Statistical Institute on socio-economic classification scales or social classification. However, TÜİK uses classifications that do not include stratification and hierarchy for occupational class and working status. All occupations in TÜİK are coded following the International Standard Classification of Occupations (ISCO-08).

#### **2.3.2.6. Ankara SES Scale Study**

In 2008, Sibel Kalaycıoğlu, Kezban Çelik, Ümit Çelen and Sinan Türkyılmaz conducted a research titled "Social Stratification, Mobility and Socio-Economic Status

in Ankara City Center". In the scale developed by Kalaycıoğlu and her friends within the scope of the project, the unit of analysis was determined as "household" and the following variables were discussed:

- Average year of education,
- Income per person in the household,
- House of residence ownership,
- Second house ownership,
- Car ownership,
- The way the house is heated (heating system, stove etc.)
- Dishwasher ownership,
- Second TV ownership,
- DVD player ownership,
- Having internet connection,
- Household Job Status Points.

### **2.3.2.7. TÜSES SES Index Study**

The Turkish Socio-Economic Status Index (TÜSES), developed by Social Structure Research Program (TYAP), is the sum of three components and gives the socio-economic status score of the person/household. These components are summarized as follows (Sunar et al., 2019):

**Occupational Prestige:** Although the occupation is a personal feature, it is seen that the income, lifestyle and identity formed with the occupation are also reflected in the household. It is common in the literature that the “occupational prestige” of a household or family is determined by the most highly regarded occupation in the household. Therefore, in the TÜSES SES Index study, the occupational prestige variable was obtained by considering the highest professional prestige score in the

household. For this purpose, a prestige scale for occupations was created through a quantitative research.

**Income:** Income closely affects consumption and lifestyle, which is a socio-economic indicator. The lifestyle that households create with their income is reflected in their status indicators. It is seen that the income variable in TÜSES is considered as the average household income calculated based on the total income of the household and the number of people living in the household.

**Education:** Certain professions with high status and income in Türkiye can only be obtained with a high level of education. In the TÜSES SES Index study, the education level of a household is determined by the highest education level in that household.

As a result of the study, it was stated that there are 4 basic SES categories in Türkiye:

- Upper SES Group
- Upper-Middle SES Group
- Lower-Middle SES Group
- Lower SES Group

## **2.4. Limitations of Commonly Used SES Metrics**

As explained in detail in the previous sections, SES can be explained by a single variable such as occupational prestige, or can be measured by combining various variables such as occupation, education, income, wealth, place of residence, etc.

**Income:** Income is an easy information to obtain in research studies; respondents may be asked directly to quantify their annual income or to choose it from various income ranges provided by researchers. However, although the income variable is a variable that is thought to directly affect the SES level, it is not collected as a data in many studies and/or not used in data analysis. Because people can often

be reluctant to publicly state their income and/or tend to "inflate" their earnings. Besides, income can fluctuate from year to year and even from month to month.

***Education and Occupation:*** Educational status is an information that can be easily obtained by asking people for the total number of years of education or the highest degree of diploma they have. In addition, the tendency of people to answer questions about their education level and reflect the correct answer is higher when compared to income questions. However, the level of education may not reflect the quality of education. This means that education alone may not be the best indicator for income or wealth and therefore SES.

For such reasons, research that has been done and is being carried out around the world to date in this field has focused on the occupational status. Because the occupation status and prestige ranking includes the education period required to have that occupation and the average income that can be obtained from that occupation. However, it is difficult to say that especially the education and income variables of Türkiye change in direct proportion to the occupational status in all circumstances.

Survey respondents generally have no problem sharing information about their profession. However, using occupation alone to measure SES would exclude a large portion of the population, such as retirees, students, the unemployed, and children.

***Occupational Prestige Scales:*** While creating occupational prestige, a calculation is made by considering income and education and a ranking is made accordingly. In the scoring system, where income and education variables are evaluated together, it is accepted that the rising score indicates the rising job/occupational status and is included in the index. However, when handled in this way, the prestige provided by the occupation is overlooked.

Also, other ongoing "additional studies" in addition to the main study should be considered. However, flexible and part-time jobs, which have increased significantly in recent years, can cause difficulties in terms of the work individuals do, which job is a side job, and from which job the person provides the job/work status.

**Wealth:** It is also known that income does not equal wealth. Income refers to the amount of money earned by an individual or household, while wealth refers to the amount of accumulated resources that are generally accrued or inherited over a lifetime. Wealth can vary significantly between social groups, even among those with similar incomes.

While income from work is included in the amount of income, there are also types of income from different sources such as pension, investment income, real estate income, alimony, and relief funds. In other words, people may have other sources of income besides their income from their main job, or they may have some regular income even though they do not have a job.

**Retirement:** How the retired people will be evaluated is another complex issue. The type of retirement, whether the retiree continues to work actively and getting additional income makes it difficult to determine precise criteria for how this person will be evaluated.

**Ownership:** Ownership is also a difficult subject to define. A wide range of ownerships, ranging from property ownership to real estate ownership, which will be decisive in SES scales, the inability to list them clearly and in a standard way, and even if they are listed, the need to update them at the same pace in a rapidly changing world causes some constraints.

One disadvantage of treating SES as a single variable is that SES is typically understood to have multiple components, including household income, education level, and occupational status. Treating SES as only one of these components contradicts the traditional definition of SES. Also, a single variable has more measurement errors than a composite variable. Some of these problems can be circumvented by treating SES as multiple separate variants. However, doing so complicates reporting, analysis, and interpretation. Separate variables form separate operational definitions of SES, this may lead potentially conflicting data about it.

## **2.5. Evaluations and Recommendations**

When the studies on the human population are carefully analyzed, it is seen that these studies are mainly handled within the scope of research for marketing purposes. The place and importance of consumer attitudes and behaviors, which differ in many basic areas such as health, population mobility, population structure, sports and technology, especially in marketing research is obvious. For this reason, as discussed in detail in the first part of the study, segmentation of target audiences has become indispensable for effective analysis of demand for companies, institutions, governments and even non-governmental organizations (NGOs) in today's commercial life. In other words, it is extremely important for these actors in the economy to analyze the specific characteristics and demands of the target audience in depth and to develop strategies to meet them.

As examined in the previous parts of the study, unfortunately, it cannot be said that the effort to develop a socio-economic measurement standard that can enable the human masses to be divided into homogeneous sub-populations, that is, to be segmented, in order to compare them with the same criteria on a global scale, has not yet achieved the desired effectiveness. As a matter of fact, the fact that the studies carried out by organizations such as ESOMAR, which are prominent in the world, especially on a European scale, are quite old (1997) and are not updated to meet the economic, sociological and demographic dynamics of the rapidly changing world, which makes the validity of these measurements questionable.

When the situation in question is examined for Türkiye, it is possible to say that the socio-economic status grouping practice developed under the leadership of TÜAD and currently used by the main actors of the research sector is also quite old (2012). For this reason, in Türkiye, although marketing is fundamental, it is seen that all service providers have difficulties in determining their target audiences in a wide range from health to education, from sports to technological developments, from defense industry to non-governmental organizations. It has been analyzed that the development of a standard socio-economic status or grouping measurement method,

which will enable comparisons at the national level and global comparisons needed by global companies, has been lagged behind.

At this point, within the scope of this study, some evaluations regarding the identified deficiencies and possible needs in the future, based on the current SES grouping and measurement practices, are included. In the light of these evaluations, we believe that it will make a positive contribution to the literature to include some recommendations regarding the points to be considered while implementing the socio-economic segmentation applications needed by the global world, especially in Türkiye. These recommendations can be listed as follows:

1. First of all, we would like to state that transforming the concept of “household”, which is one of the economic units considered within the scope of economics, to “individual” should be considered as an alternative. Based on the triad of "state", "firm" and "household", which are expressed as economic units in economics, it is quite natural to use the household as a unit in current studies. However, in the changing and developing world, in the economy and in all other fields, the individual comes to the fore every day. It is an undeniable fact that the rapid spread of individualization and the individual's attitudes and behaviors differ significantly from the attitudes and behaviors of the household. From this point of view, in order to ensure efficiency in demand analysis, it is thought that including research and analysis based on the individual as a unit in socio-economic status groupings will significantly increase the efficiency in measurements.

2. "World view" has an increasing effect on consumer attitudes and behaviors in a wide area from basic needs to leisure activities and can dominate demand. Therefore, in socio-economic measurements based on the individual as a unit, it is thought that taking into account the world view of the individual in order to determine and analyze the effect of his individual preferences will contribute to socio-economic measurements.

3. As mentioned before, since each of the criteria included in socio-economic status measurements has some limitations in itself, it is thought that developing the socio-economic status scale based on several sub-scales in itself will yield more

meaningful results. For example, we believe that a SES scale based on sub-scales such as education scale, work scale, social life scale, consumption patterns scale will provide effectiveness in target audience analysis. For this reason, it is thought that developing at least 4 sub-scales under the socio-economic status scale and then linking them with certain weights to the main scale, that is, to the socio-economic status or group scale, will provide more rational results.

4. It is clearly seen that an arrangement should be made in the measurement criteria such as education, occupation/employment status and property ownership, which are indispensable in current practices. Because the consumption attitudes and behaviors of the household are increasingly dominated by the consumption attitudes and behaviors of the individual. For example, in a situation where the person interviewed within the scope of the research is the head of the household, the tablet computer that he does not own may be a product owned by all his children, and in this case, it can be noticed how low the household representation of the household head is.

5. In the global context, while the locational differences between countries are gradually decreasing, it is observed that the increasing locational differences within the country have a significant impact on consumer attitudes and preferences. The existence of brands/companies that set up their stores in certain locations in order to reach different target audiences suggests that SES scales should also be designed taking this factor into account.

6. It is noteworthy that occupational prestige measurements, which are frequently used in socio-economic measurements in the world, have no equivalent in Türkiye. We believe that a generally accepted occupational prestige ranking should be established for Türkiye to be included in socio-economic status measurements.

7. The fact that current socio-economic measurements do not take into account the concept of “wealth” indicates the existence of a significant deficiency in the economic dimension of socio-economic measurement. Due to the fact that income is not equal to wealth, we believe that the current SES measurements, which only consider the income of the individual from his work, are insufficient to determine the socio-economic status of the individual.

**8.** The necessity of updating socio-economic status scale studies, which were developed to set a standard for the relevant sectors and actors in the economy, at intervals that can adapt to rapidly changing and developing economic and social dynamics, is often overlooked both in Türkiye and in the world examples. We believe that rather than updating in standard periods, it is necessary to evaluate whether there is a "need for updating" in frequent and standard periods, and accordingly, fast action mechanisms should be established and activated when necessary.

**9.** We would like to underline that the developed and modified measurement criteria and methods should be designed in the light of measurement-based evaluations, not subjective evaluations.

**10.** Considering the importance of socio-economic segmentation in terms of both enabling a detailed analysis of demand in economic terms and creating the strategies needed by the market in both the public and private sectors, it is seen that the studies on this subject are not enough and rich in the literature. Therefore, we believe that it will be critically important for future academic studies in this field to be conducted on the basis of field measurement and in cooperation with the actors in the sector.

## CONCLUSION

In the first part of the study, detailed information is provided about the concept of "segmentation", which has an increasing importance in the analysis and evaluation of human populations. In order to categorize and understand the tastes, preferences, attitudes and behaviors of consumers, which are one of the factors that determine demand in economics, market segmentation stages and criteria, which have a wide literature especially in the field of marketing, are given in detail. In this context, information was given about the socio-economic and socio-demographic segmentation criteria, which constitute the main subject of the study, as well as geographical, psychological and behavioral criteria.

In the second part of the study, besides some socio-demographic criteria such as age, gender, marital status, belief, ethnicity, family structure, socio-cultural factors; Detailed information was provided on socio-economic segmentation criteria consisting of income, education, occupation/work status, place of residence, certain ownerships and their impact on consumer attitudes and behaviors. Then, information was given about the socio-economic and socio-demographic grouping practices and studies in the world, which has a very wide range; similarly, SES measurement studies that have been and are still being applied in Türkiye are included. In this context, historical studies have shown that a common standard has not yet been achieved in socio-economic status grouping and measurement methods, both in different countries in the world, in regional structures such as the European Union, and in Türkiye. Especially in the context of market research that allows in-depth analysis of consumer demand, it is not possible to obtain a global measurement systematic that will enable global comparison and analysis, and countries and sectors have not been able to reach a common grouping and measurement methodology within themselves.

In the current socio-economic grouping studies, it is possible to come across examples that are based on a single criterion such as occupational prestige, as well as some or all of them based on multiple criteria such as education, occupation, income, property or real estate ownership, place of residence. In cases where a limited number of selected criteria are used, it is seen that these criteria are insufficient to explain the

socio-economic structure due to some limitations; in cases where all possible major criteria are put into use, it has been observed that field applications in research processes become difficult and difficulties are encountered in analyzing data. It has been determined that this does not allow a comparative analysis of the demand in the globalizing world, thus causing a common language and method to be formed in the shaping of economies.

In the last part of the study, these determinations and evaluations and suggestions consisting of actions and measures that can be taken to solve the problems are listed. It is expected that these determinations and suggestions will be further developed and supported by studies to be carried out in the future, especially at the doctoral level, to contribute to both the literature and the actors in the economy.

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