

The Production of Knowledge of Consumption:  
The Development and Organization of Market Research Industry in Turkey

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To my parents, for everything they did for me...

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## **ABSTRACT**

### **The Production of Knowledge of Consumption:**

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This study aims at analyzing the emergence, development, organization and social impacts of market research industry in Turkey from a sociological perspective. With the global transformations altered the operation of capitalism worldwide since early 1970s and Turkey's articulation to this process through neo-liberal domestic transformations, consumption has become more visible in daily life. Market research industry has been a neglected area for social scientists though its sociological relevance in understanding the consumption sphere. Therefore, this study attempts to comprehend the development and institutionalization of market research as a new social force assisting to the organization and manipulation of consumption sphere in Turkey since 1980s. In so doing, the market research industry is analyzed in three dimensions: First dimension contextualizes the emergence, development, organization and operation of market industry in Turkey in a historical and structural map. Second dimension, after analyzing the rise of knowledge generation as a new source of wealth creation and as an inevitable competitive advantage, explores the construction of market research as a separate field in which a special kind of bounded knowledge is being produced. The third dimension is about lifestyle studies undertaken by market researchers which in turn enable us, on the one hand, to understand the indirect role of market research industry in the organization of consumption sphere; on the other hand, to examine the relationship between consumption activities and identity formation given the fact that there is a growing literature on this relationship, especially since 1980s.

## KISA ÖZET

### Tüketim Bilgisinin Üretimi:

### Türkiye’de Pazar Araştırması Şirketlerinin Gelişimi ve Örgütlenmesi

### Şerafettin PEKTAŞ

Bu çalışma Türkiye’de pazar araştırması sektörünün ortaya çıkışı, gelişimi, örgütlenişi ve sosyal etkilerini sosyolojik bir perspektiften incelemektedir. 1970’lerden başlayarak dünyada kapitalizmin işleyişini değiştiren global dönüşümler ve Türkiye’nin bu sürece eklenmesini sağlayan neo-liberal politikalar sayesinde, tüketim günlük hayatta daha görünür hale gelmiştir. Tüketim alanının örgütlenişini anlamada sosyolojik önemine rağmen, pazar araştırması sektörü sosyal bilimciler tarafından ihmal edilmiş bir alan olmuştur. Bu yüzden, bu çalışma, 1980 sonrası Türkiye’de tüketim alanının düzenlenmesi ve manipüle edilmesine yardımcı bir sosyal güç olarak pazar araştırmasının gelişimini ve kumsallaşmasını anlamaya çalışmaktadır. Bunu yaparken, pazar araştırması üç boyutta incelenmiştir: Birinci boyut, tarihsel ve yapısal bir harita çerçevesinde pazar araştırması sektörünün Türkiye’de çıkış, gelişim, örgütleniş ve işleyiş bağlamını tespit etmektedir. İkinci boyutta önce bilgi üretiminin refah yaratan yeni bir kaynak ve vazgeçilemez bir rekabet avantajı olarak yükselişi incelenmektedir. Daha sonra ise pazar araştırmasının, içinde özel ve sınırları çizilmiş bir bilgi türünün üretildiği ayrı bir alan olarak kurgulanması sürecine bakılmaktadır. Üçüncü boyutta ise pazar araştırmacıları tarafından yapılan yaşam tarzı çalışmaları ele alınmaktadır. Böylelikle bir taraftan pazar araştırması sektörünün tüketim alanını indirekt olarak düzenlenmedeki rolünü, öte taraftan da , giderek artan literatüre paralel olarak, tüketim aktiviteleri ve benlik oluşumu arasındaki ilişkiyi anlamaya yardımcı olmaktadır. Bu araştırma sektörde çalışan üst ve orta düzey yöneticilerle yüzyüze gerçekleştirilen on iki mülakata ve bir araştırma firmasında yapılan üç haftalık staj çalışmasına dayanmaktadır.

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*“If market research had not been discovered, someone would have done so.”*

Herald Wilson, former president of UK

## **INTRODUCTION**

This study aims at analyzing the emergence, development, organization and social impacts of market research industry in Turkey from a sociological perspective. In other words, it is an attempt to understand the development and institutionalization of market research in Turkey as a new social force and to account for the inherent social tensions and problems within this process. Through its capacity to understand, explore and track changes in the consumption sphere, market research industry is providing *logistics* to other market forces that are directly manipulating and altering the consumption sphere. Hence, I suggest that market research industry is, to a great extent, indirectly organizing the consumption sphere. Therefore, rather than directly observing the consumption sphere itself, I would suggest, examining the market research industry would be an alternative way of grasping how consumption sphere is organized. Moreover, I argue that such an approach would be illuminating not only for understanding current transformations in the consumption sphere but also deciphering the organic linkages and tensions between different social fields in contemporary Turkey.

Market research, as an institutional way of understanding and, hence, manipulating and molding the consumption practices has emerged as a vital component of consumption and production spheres in post-1980 Turkey. During the last two decades (between 1983-2004), the number of market research firms went up more than ten times vis-à-vis the previous two decades (1960-1983). The market

research industry in Turkey produced a gross revenue of \$59.7 million in 2004. Today more than 8,000 people are employed in this sector, either part-time or full time. On the other hand, thousands of people are annually surveyed or invited to participate in focus groups as part of market research activities. Hundreds of research projects are undertaken every year along with the continuous research aimed at tracking various aspects of consumption activities. The companies which are operating in fast-moving consumer goods (FMCG) industry are the ones that demand and pay the most for market research since FMCG industry is where the most throat cutting competition is felt and where almost all advanced and elaborated marketing techniques are employed to sustain profitability. However, many other goods and services pertaining to manufacturing and service sectors are also under scrutiny of market researchers. These sectors range from banking to tire and wheel retail; from pharmaceuticals and health care to construction materials; from household durables to all sorts of media.

### **HISTORICAL BACKGROUND**

The rapid liberalization process Turkey has undergone since 1980s has largely framed the growth and development of market research in Turkey. This process went hand-in-hand with the accelerated articulation of Turkey to the global capitalist restructuring that has prevailed worldwide since the early 1970s. Turkey's attempts at restructuring its economy towards greater openness and liberalization were a response to this restructuring which seemed inevitable with the striking internationalization of capital. These attempts entailed "both dramatically to reduce the scope of the state and to situate the Turkish economy within the unitary logic of capitalism" (Keyder 1999:13). On the other hand, the decline of welfare states and national

developmentalist projects whose global underpinnings were now withdrawn have coincided with the radical domestic social and cultural transformations caused by the military coup of 1980. Hence, on the one hand, Turkey demonstrated her willingness to integrate with the global restructuring through institutional and structural economic reforms; on the other hand, the formerly state-regulated and, hence, relatively static spatial-temporal dimensions of social field have started to become more open and ready for the penetration of new social forces. In this juncture, multinational corporations were undoubtedly the most important actors that were exploiting the economic as well as the social field in Turkey. Supported with the profit seeking logic of these multinationals, “market institutions moved into the field opened up by the state to create new types of consumerism, introduce novel products and promote these as the symbols of cosmopolitan life styles to be adopted by urban middle classes” (Yenal 2000:159). The liberalization process, thus, had important consequences for the consumption sphere. In this period, Turkey has witnessed the rapid embracement of global consumption patterns as well as the proliferation of actors and institutions to engineer the consumption sphere such as market research firms. The emergence of “the shopping malls and the boutiques of the world brands as temples of luxury consumption” on the one hand; and of “the department stores and hypermarket chains as the celebrated settings where all sorts of commodities meet with the consumers”, on the other hand, have become apparent manifestations of consumerism (Keyder, 1999).

The increases in the number of multinational companies operating in Turkey have resulted in the accelerated adoption of modern marketing activities. Parallel to this process, the increased significance of business education at both undergraduate

and graduate (particularly through MBAs) level has brought about, for the prospective business people, a new business mentality in which the adoption of modern marketing techniques are of crucial importance. Marketing and management, advertising, promotion strategies as well as consumer habits were established as major research areas in *business administration* departments of universities. In sum, consumption has become more visible in Turkey during the last two decades and the role of marketing and advertising as well as market research has grown in an unprecedented manner in the organization of consumption sphere.

### **MARKET RESEARCH AND ITS SOCIOLOGICAL RELEVANCE**

Despite all this background, market research industry has been a relatively neglected area for social scientists. Although the interdependence of market research and social sciences goes beyond their common use of survey techniques, “the interest of sociologists in the growth of market research has lagged behind that of the general literature”, particularly of business literature. The situation is even worse in Turkey. Up to now, there have been just a few scholarly attempts (mainly articles indeed, rather than a full-fledged research) on understanding market research from a social science perspective. Abadan-Unat (1992), Yenil (2000), Neyzi (1990) and Tayanç (2001) – more historical and personal rather than sociological for the latter two, are the only names that we remember at this point.

Sociologically speaking, market research industry is ultimately a knowledge industry in which “the knowledge/information itself becomes a commodity traded” (Gibbons 1994). Knowledge emerges as a central concept in market research industry since what this industry produces as an industry is, indeed, specialized knowledge about consumption. There is a growing literature on the so-called

*information age/society* which is usually focusing more on the production processes and on IT-oriented knowledge generation. Many scholars give much more importance to the production processes and applications within them in theorizing the rise of knowledge as a new source of wealth creation. However, an important observation related to these conceptualizations is the relatively neglected importance of *knowledge on consumption* in this information age. Knowledge production is not restricted to only IT sector or R&D (research and development) in which very highly technical knowledge is produced. I argue that focus group rooms are as important as R&D laboratories in understanding the rise of knowledge as a new source of wealth creation in our age. The generation of knowledge on consumption should also be taken into consideration along with the generation of knowledge on microelectronics-based communication technologies and genetic engineering. Hence, by looking at market research industry, I suggest, we would be able to comprehend the “other side” of knowledge creation processes of our age, at least in the Turkish context. In this study, thus, I aim to examine how knowledge on consumption is produced through market research.

There has also been a considerable, growing literature on consumption, lifestyles and their role in identity-formation. The notion of *lifestyle* is indeed a complex and difficult concept to deal with though it is rooted in sociological theory. This notion, influenced largely by postmodern theories, gained a particular relevance, however, after 1980s. The scholarly studies in this field focus mainly on how lifestyles as new social collectivities and consumption activities are symbolically articulated to form more coherent selves for today’s individuals who are assumed to have free-floating and fragmented identities. In so doing, the reports and the new

categorizations developed by market researchers in understanding and describing market segments and consumption patterns, rather than conventional stratification parameters (such as socio-economic status, class, income, gender, age, etc) were taken as a proof by postmodernists to support their theories. At this point, it would be better to look at how these reports and categorizations are being produced in market researcher industry.

Lifestyle studies and reports are, on the other hand, the products of the knowledge generation process on consumption. To look at these products would help us to see how consumption activities and patterns are perceived by market researchers who, at the end, influence producers' and marketers' perceptions. As a matter of fact, as I mentioned above, market research is indirectly molding the consumption sphere through affecting the marketers' way of looking. Therefore, to focus our lenses more on the market research industry itself and on its products, I would suggest, becomes relevant to better comprehend the organization and manipulation of the consumption sphere in Turkey.

### **OUTLINE OF THIS STUDY**

I approach the development of Turkish market research industry in terms of three main dimensions in this thesis.

The first dimension is historical and structural. In the first part of this study, I try to contextualize the emergence and development of market research industry in Turkey. It is argued the increasing articulation of Turkey to the global capitalist restructuring was an important factor in the growth of market research in Turkey. Though the first research activities traced back to early 1950s and the first market research firm was established in 1961, the industry experienced a real boom in the

post-1980 period. Therefore, in order to understand the development of market research industry it is necessary to consider both global and domestic transformations. To do so, I will first draw a historical map of the growth of the industry. Later, I will focus more on the organization of the sector itself. This part will be a structural map in which I try to understand the actors, the interaction and tensions among them. Included in this map are also some multinational market research companies that operate in Turkey in order to better grasp the effect of global restructuring on market research.

The second dimension will be about the construction of market research as a separate field in which a special kind of bounded knowledge is being produced. As mentioned above, market research industry is ultimately a knowledge industry in which knowledge itself becomes a traded commodity. The rise of market research as a knowledge industry is, however, intimately connected to the global restructuring in which information, in its broadest sense, has become its own raw material. Hence, this second perspective will be twofold. The first one is more theoretical in which I will try to deal with some conceptualizations (mainly those of Castells (2000) and Gibbons (1994)) about the rise of knowledge/information as a decisive source of wealth creation and as an indispensable competitive advantage in today's harsh global competition. In this new role of information, the need for specialized knowledge proves to be pivotal for many business entities seeking to sustain profitability in today's business setting. At this point, market research is considered as an important provider of specialized knowledge.

Besides the relatively less emphasis given to the knowledge produced on consumption processes, many scholars, while dealing with the rise of *information*

*society/age*, also tend to look at the global processes but overlook the local contexts and social mediations that are at work at the lower levels of these processes. To develop an overarching approach to these social mediations is surely beyond the scope of this study. Here, what I would like to do is, rather, to try to understand these mediations in a knowledge industry (market research) in Turkish context. Therefore, in the second part of this second dimension, first I will look at how specialized knowledge generated in marketing discipline functions. Then I will try to view the double-edge function of specialized market knowledge (both mediation and separation). In so doing, I will give much more effort in detecting the strategies employed by market researchers themselves to construct a separate field for market research and the concomitant tensions.

Finally, my third dimension will be about lifestyle studies undertaken by market researchers which in turn enable us, on the one hand, to understand the indirect role of market research industry in the organization of consumption sphere; on the other hand, to examine the relationship between consumption activities and identity formation given the fact that there is a growing literature on this relationship, especially since 1980s. As I touched upon in the previous section, the consumers are today regarded (mainly in post-structural theories) as individuals who have fragmented and free-floating selves and as those who are seeking for a coherent identity through the, again, free-floating lifestyles as new social collectivities. Such a way of looking has been embraced by many marketers and resulted in a *lifestyle marketing* which claimed the inadequacy of conventional parameters in differentiating consumer markets. We can see the manifestations of lifestyle marketing in the post-1980 period (see Yenal 2000). What I observed, nonetheless,

during my research is the persistence of conventional sociological parameters, particularly socio-economic status, in developing lifestyle research as well as other market research projects. Hence, the claim for the inadequacy of existing social categorizations remains at the more discursive rather than practical level among market researchers. In other words, at least in the Turkish context, market researchers still try to understand the consumption sphere through conventional parameters. In this last part, therefore, I will try to give a brief historical review of the evolution of the concept of lifestyle in sociological theories. Then I will focus on some critiques of postmodern theories of symbolic consumption, identity-formation and lifestyles. Finally, I will try to give a detailed analysis of my observations about the lifestyle research studies and categorizations developed in Turkish market research industry.

### **METHODOLOGY**

My research is extensively based on 12 face-to face, semi-structured in-depth interviews done with a variety of people in the market research industry between February 2003 and July 2005; and a three-week internship at a market research company in July 2005. Five of my interviews were with the top managers of leading market research companies in Turkey. All, except one, are either founders or co-founders of their respective firms. They have been in this industry for long years and are the pioneer market researchers in Turkey. Therefore, in these interviews with top managers I was able to obtain a holistic view of the industry and the history and development of market research in Turkey, particularly the conditions of the post-1980 expansion. They also informed me about the “opportunities and threats” (if we use a business terminology) in the sector. Second set of interviews, the remaining seven, were with middle management. Of these seven, one is an executive member of

her company, one is the client representative who is responsible for the sales and marketing of the products of the company (that is, the standard and customized reports); one is the director of the qualitative department; one is the director of the department responsible for rendering specialized research for the retail panel. Among the remaining ones, one is a free-lance moderator and the other is a research analyst.

My primary aim in this second set of interviews was to be able to identify the epistemological, material and motivational mechanisms involved in the process of the *production of knowledge of consumption*. These interviews gave also me a chance to learn about the operation and organization of different companies.

I did an internship in *HTP Exclusive*, a non-multinational ad-hoc research company that carries out customized research, both qualitative and quantitative, for their clients. During the intern, I was able to observe and participate in the daily operations of a research company and became involved in research projects conducted for different sectors, including healthcare, food, medicine and retail. I was able to observe two focus groups, made as a part of a brand image research for a supermarket chain. This was really a fascinating experience for me since I was able to observe behind the mirror glass not only the consumers who participated in the focus groups, but also the members of the client company as well as the market researchers. Furthermore, I was able to observe the operation of CATI (computer-aided telephone interview) research, during one of which I had the chance to follow the responses online. I also participated in training interviewers for a nationwide quantitative research project. Among the trainees were novice interviewers as well as supervisors of their respective field firms coming from different cities of Turkey. I also participated in a meeting where the company presented its panel services to the marketing people of a

client company. Finally, I had the opportunity to look at a variety of reports and analyses prepared after research projects. This was really a valuable experience since I was able to examine the format and language of the reports. This was also a unique experience for me since no other company wanted to share with me these kinds of reports due to their commercial value.

During the research process, I participated in the 7<sup>th</sup> Research Summit held in Hilton Hotel on 12<sup>th</sup> -13<sup>th</sup> November in Istanbul. These two days gave me the chance to meet with a variety of people and to witness the tensions and debates within the sector as well as hopes for its future.

I visited several times the Association of Marketing and Public Opinion Researchers and I had the chance to get the books, booklets and yearbooks at first hand, luckily some of them for free. I also looked at some sectoral magazines and bulletins including A-Bulletin released by the Association monthly, MediaCat and Marketing Turkiye.

**CHAPTER ONE**

**A HISTORICAL AND STRUCTURAL MAP FOR**

**TURKISH MARKET RESERCAH INDUTRY**

## **Introduction:**

In the following, what I would like to do first is to have a closer look at the macro and micro changes that have led to the emergence and development of market research industry in Turkey. As I have said in the introduction, market research industry in Turkey is a relatively new industry and experienced a real boom in the latter half of 1980s. This is, however, not a coincidence. The post-1980 era marked the increasing articulation of Turkish economy to the global restructuring which has been taking since late 1970s and which has radically transformed the production processes on the global-scale. This articulation has been, and is being, taken through the rapid liberalization process of Turkish economy, beginning with the adoption of export-oriented liberalization of early 1980s. Furthermore, the domestic transformations in the post-1980 era have significant consequences far reaching beyond the economic sphere extending to social and cultural realm. Parallel to the decreasing state regulation of the economy, the 1980s witnessed the growing ascendancy of market forces in the organization of the consumption sphere. Market research has become a vital instrument for these, both foreign and domestic, market forces. Hence, in the next section, I will try to briefly look at these processes to contextualize the emergence and the development of market research industry in Turkey. In other words, I will present a historical map for the research industry. In so doing, I will first focus on pre-80 period in order to trace the early attempts in the emergence of the sector. I will, then, have a glance at both global and domestic transformations of the post-80 era that have resulted in the ascendancy of market forces in the spatial and temporal dimensions of social life, of which the development of market research as a market force is no doubt a part. Meanwhile, I will look at a

specific development which has had a remarkable effect on the growth of the market research sector, namely the YOK Legislation after military coup of 1980. After contextualizing the emergence and development of the market research industry, I will examine the industry itself. I will try to draw out a structural map for the industry through scrutinizing the actors, the relations among them, the role the Turkish Association of Marketing and Opinion Researcher as an umbrella institution, the interest and influence of multinationals in the industry and the concomitant tensions. To put it simply, I will try to provide cartography of Turkish market research industry to see how it is segmented within itself.

## **A. The Historical Map**

### **A.1. 1960-1980 Period and the Emergence of Market Research**

In the pre-80 period, it is hard to talk about the wide application of modern marketing strategies in Turkey. As a crucial marketing component, “advertising, in the 1960s, was not a major marketing strategy for many commercial firms” (Yenal 2000:166). Many observers agree that “advertising started to develop only in the 1970s in Turkey after television had become an advertising medium and foreign advertising firms had begun entering the market” (ibid:167). In a similar vein, Yenal describes the general situation of marketing and market research in pre-80 Turkey as follows:

“Before the 1980s, similar to the undeveloped state of advertising in the country, marketing was also in its beginning. Marketing and management, advertising, promotion activities as well as consumer/buyer habits were not established as major research areas in the universities. For most private firms operating in different sectors of industry and trade, market

research was not an important means of developing production and retailing strategies. Even by the end of funds allocated for market research by private firms was a mediocre level, if not significant. According to one research, which was based on a survey of 254 firms, three-fourth of the companies spent less than one percent of their sales revenue for marketing activities ” (Yenal 2000:168)

The first market research activities in Turkey can be traced back to early 1950s. Oil companies began to develop their market research departments in 1950s; and the first market research department in the country was established by Socony Vacuum Oil Company (later Mobil Oil) in 1952 (Neyzi1990:12). In the same year, Unilever initiated some market research with foreign researchers in order to introduce margarine as a new taste for the Turkish market. Then, Unilever founded *G&A Baker* as its own research firm. However, *G&A Baker* has never been an independent research firm since it was responsible for undertaking the research projects of its permanent client Unilever; sometimes it even subcontracted some projects to others since it was working at full capacity (ibid: 7). Therefore, it will not be wrong to suggest that the first market research activities in Turkey were initiated by foreign corporations that were looking for some possibilities to launch business in Turkey. Up until 1983, there were only 5 private firms that were engaged in manifold market research and public opinion polling (Abadan-Unat 1992:184): PEVA (founded in 1961), BAKER (founded by LEVER to undertake mainly its market research projects in 196.), PIAR (in 1975), ESDA (in 1981) and DATA Inc. (in 1981). Among these, ESDA (Ekonomik ve Sosyal Dokumantasyon ve Arastirma A.S) and DATA Inc. were engaged more in public polling and founded in Ankara, while the others

concentrated more on market research and situated in Istanbul.

The first independent Turkish market research firm, PEVA (Piyasa Etud ve Arastirma) was founded in 1961 by N.Neyzi, who was the pioneer market researcher in Turkey. As being the first, PEVA has contributed much to the development of Turkish market research industry and pioneered in many fields. It has, for about 40 years, provided market research services and training in the fields of: market survey projects, feasibility studies, marketing education, selection of personnel, PEVA panels, advertising research and promotion campaigns (Abadan-Unat 1992:184). It has functioned not only as a firm but also as a school for the first marketers of the country. An important number of former PEVA personnel have established their own firms so that the firm might also be considered as a training center for market research (1992:185).

Up until 1970s, PEVA was the only market research firm and almost exclusively conducted research on advertising (Neyzi 1990). It launched the first media survey in 1963 through “Advertising Research Studies” of, first, press and then of radios. Then it began to regularly publish the survey findings in “Study of Press Advertisings” as monthly reports. (ibid:6) The clients of PEVA’s advertising surveys were mainly banks and big industrial corporations of the day such as Arcelik, Eczacibasi, Unilever and Tekfen. In 1968, PEVA launched another periodic research, Doctors Panel, which targeted the pharmaceutical industry. It aimed at measuring the level of the doctors’ consciousness about drug names and, hence, the level of interaction with pharmaceutical firms (ibid). However, PEVA was obliged to end this panel because the pharmaceutical firms could not afford due to the low profit

premiums. Moreover, because IMS (International Medical Survey) Health, an international panel research company watching the sales in pharmacies and drug storerooms, did not want to cooperate with PEVA. With the support of Unilever and Baker, in 1974, PEVA initiated the first consumer panel based on 300 families in Istanbul to provide direct consumption data.

The importance attributed to market research was minute until late 1970s. According to a survey conducted in 1976 and based on 330 firms, half of the firms had a department that was engaged in marketing research and employed, on average, three people with lyc e and university education in these departments. However, these companies spent, on average, less than one percent (0.74 percent) of total sales for market research (K oseođlu 1978:185). According to another survey conducted in 1979, more than two thirds of the companies established a formal marketing department after 1970 (Yenal 2000:169).

Considering the fact that the first appearance of research sector in Turkey coincided with early 1960s when a state-guided planned developmentalist economic policy was initiated, Tunc Tayan  argues that the demand for research was first stimulated by the state through State Planning Organization and other public institutions (Tayan  2001:31). State Planning Organization (SPO) was established in 1961 not only to plan social and economic investments but also to encourage them. SPO was employing various incentive means in order to encourage industrial investments in 1960s. In order to benefit from the incentives granted by the state, a firm was required to obtain an “incentive certificate” from SPO, and to do so, it needed to carry out some research which demonstrated the feasibility of the

investment in question. In addition, public industries, particularly State Economic Enterprises, needed feasibility reports in order to justify their investment projects in a planned economy. Tayanç mentions that this created a ‘demand’ and stimulated the ‘supply’ for research (ibid.); and resulted in the establishment of some research/consulting firms such as SEGEM, SADA, TUSTAS, TUMTAS and Mesnet Muhendislik (Neyzi1990:7) These agencies were mainly located in Ankara and founded usually by ex-managers from public institutions, particularly from the SPO. In 1960s and 1970s, some foreign and international institutions, such as AID (American Aid Organization), World Bank, OECD, also provided financial resources for different research projects (i.e. market and feasibility studies, research for sectoral master plans, etc), hence, created a demand satisfied by these agents (Tayanç 2001:3) However, these firms did not have a deep knowledge of marketing research. This fact is confirmed by an observation by R. Savitt in a seminar held in 1973 in METU about marketing. He complained that in Turkey, marketing research was carried out by engineering firms that were ‘technical’ and did not possess a basic understanding of market problems (Savitt 1973:23). He also suggested and showed ways for Turkey, as a developing country, to give more emphasis to marketing in general, and market research in particular in this seminar (Savitt, 1973). Tayanç also speaks of an important drawback of the afore-mentioned stimulated demand in terms of the development of the market research sector in Turkey. He complains about the attitude of entrepreneurs and research agencies regarding the incentive certificates. The main concern of the entrepreneurs, he observes, was just to take a certificate to prove the feasibility of their investment plans and hence to benefit from state incentives; to do research was, for them, just part of a long bureaucratic procedure. Once they got their

certificate they were no more interested in the research. This has caused an “unhealthy structure” for the sector even during its formation phase, and its negative effects have perpetuated till 80s. More importantly, this structure, Tayanç asserts, has postponed the development of an independent marketing research industry for at least 10-15 years (Tayanç 2001:36). Overall, the limited number and scope of marketing activities leads us to conclude that marketing and market research as a way of understanding and, hence, manipulating and molding the consumer market had little resonance in Turkey, at least until mid-1970s (Yenal 2000:169)

## **A. 2. Post-1980 Period**

Turkey underwent a rapid liberalization process in the post-1980 era. This process has entailed a profound shift in philosophy in Turkey concerning the role of the state in economic affairs. It aimed at decreasing both the scale of public sector activity as well as the degree of state intervention in the operation of the market (Öniş 1991:183). Emphasis on export expansion, liberal approach to foreign investment, progressive liberalization of the trade regime and capital accounts, and the increasing withdrawal of public sector from manufacturing to infrastructural activities have been the main characteristics of the post-1980 neo-liberal period. Hence, the new philosophy represented a rupture from the developmentalist import substitution strategy of the earlier decades based on extensive state intervention. Öniş reminds, at this point, that liberalization and privatization are now a global phenomenon and the Turkish experiment is not unique since several countries have been undergoing similar types of transformation as part of a more general process in the restructuring of the world economy during the 1980s (Öniş, 1991). Therefore, the post-1980 era of

the socio-economic policies, at the same time, marks the beginning of the articulation of Turkey to the neo-liberal politics which have prevailed almost the whole world with the decline of welfare states and developmentalist policies. The paradigm shift in Turkey caused by these policies “has not only produced bureaucratic innovations, but through the reshaping of Turkey’s social stratification has led to new mental images, desires, aspirations, and motivations” (Abadan-Unat 1992:182). Parallel to the decreasing state regulation of the economy, the 1980s witnessed the growing ascendancy of market forces (both domestic and foreign) in the organization of consumption sphere (Yenal 2000:159). The widespread institutionalization of market and public opinion research in Turkey has been extensively promoted in this process.

Concomitantly, we observe an increase, even a boom, in the number of firms founded in the market research sector after the 1980s. As seen in Table 1, during the last two decades (between 1983-2004), the number of independent market research firms went up more than ten times *vis-à-vis* the previous two decades (1960-1983). According to the Turkish Association of Marketing and Public Opinion Researchers Yearbook 2005, there are 84 firms and/or organizations that are doing marketing and public opinion research in Turkey. This number excludes advertising and marketing firms and the ones that are conducting research as an integral part of their job- not as a primary one. It also excludes the short-term companies which mainly do political research and generally disappear after the elections. In the Yearbook 2005, 66 firms are listed as “marketing and public opinion research companies” while 13 of them are listed as “field companies”. The former refers to firms that provide research, consultancy and data collection services, whereas the latter only carry on solely data collection activities. Furthermore, there are 46 people who are members of the

Association but do not work for a specific company, that is they are *free-lance* researchers. According to the Yearbook 2004, 1341 people are employed in head offices and around 7,000 people are employed as full-time or part-time interviewers.

Table 1: The number of marketing and public opinion companies founded in Turkey

Years	# of companies of founded
1960-1983	5
1983-1990	15
1990-2000	30
2000-2004	18

Source: Yearbooks 2000 - 2004 (Pazarlama ve Kamuoyu Arastirmacilari Dernegi)

Market research industry in Turkey has been one of the most sensitive industries to economic crises. Market researchers usually complain about the “undervalued” situation of the sector in Turkey, along with the low level of the gross revenue. For Ali Daniş, the chairman of The Turkish Association of Marketing and Public Opinion Researchers, Turkey is ranked fiftieth among other countries on total market research turnover per GDP listings (Yearbook 2004:149). The reason is obvious to the market researchers: the research budgets along with advertising are to the first to be cut in a crisis situation. This fact is also a good indicator, for researchers, of how market research is approached in Turkish business life. Many researchers accuse Turkish business people of still not discovering the *marketing discipline* as a crucial and value-adding component of the production process (i.e interviews with Daniş, Mutaf). I will discuss how such kind of arguments is used by researchers to open a space for market research in following sections.

It is difficult to obtain comprehensive and reliable estimates of the gross revenue of the industry. Since most market research firms are usually *limited companies* they do not have to publish their revenues and they refrain from doing so. Though the bulk of market research is carried on by those listed as market research and field firms, there are also other actors in the sector such as marketing departments of manufacturing corporations, advertising agencies, consultancy and P&R (public relations) companies. These actors conduct research as an integral part of their job and the budget invested for their research is included in other accounts from which we cannot figure out. We have not much chance, on the other hand, to get reasonable numbers from the “demand” side of the market research. The corporations which demand and pay for such research do not publish their research expenses separately- to a great extent for strategic purposes- but add them to the general marketing expenses. Nevertheless, we do have some estimates. The gross revenue amount (turnover) of the sector was estimated to be about \$51.2 million in 2000, \$42 million in 2001, \$40 million in 2002, \$48.9 million in 2003 and \$59.7 in 2004. The turnover in its heyday, before the last economic crises at the beginning of the new millennium, was about \$50 - \$60 million (interviews with Daniş, Özler, Alyanak). This is a relatively good figure *vis-à-vis* the amount in 1980s. For Özler, in 1980s it was at most about \$10 million. Hence the market research sector in Turkey has grown approximately 5.5 - 6 times in terms of gross revenue during the last two decades. Nevertheless, this growth has not been consistent. The chronic economic instability in 1990s and the economic crises have deeply affected the sector. For instance, during the 2001 crisis, Alyanak estimates that the gross revenue of the sector declined by fifty percent (Alyanak, interview). The industry has been experiencing the post-crisis

recovery since 2003 due to the relatively more stable economic and political conditions. The research industry grew by 22% in 2004 compared to the previous year in terms of annual turnover.

Another important observation about the gross revenue numbers is the uneven distribution within the sector. As in the cases of other sectors, the revenue, hence the power, is concentrated in the hands of a few large firms that are mostly owned by the multi-national market research groups. For instance, in 2003, about 22% (\$10.7 million) of the total revenue of the sector belonged to only two firms which are a joint venture of multinational market research firms. Similarly, according to Özler, when the turnover was about \$50 million before the last crisis, \$11 million of this figure belonged to the market leader, and \$5million to the one that has hitherto had almost the monopoly in TV audience measurement. Both of these firms are joint ventures of their respective multi-national parent corporations that are operating worldwide. Again for Özler, the number of the firms whose turnover exceeds \$1million is not more than 10. (Özler, interview) This situation is certainly not unique to Turkey. Kent, for instance, talks about a similar trend in UK market research industry (Kent 1993). In the world, Alyanak noted, the top 25 multi-national corporations in this sector are conducting about 60 percent of all market research demanded worldwide (Alyanak, interview).

As I mentioned above, Turkish market research industry is a relatively new sector and it has a dynamic character. Since it is still growing we have inconsistencies in numbers. The reason for these inconsistencies, however, is not only due to growth. First of all, there is not a linear growth in the sector. Due to the sensitive nature of the industry to economic instabilities, 2000 and 2001 crises have

deeply affected the research firms. The industry has recently experienced a post-crisis recovery and the turnover has just reached the pre-crisis figures. We also observe a decrease, particularly in last three years, in the number of companies founded. In 2002 only two companies launched business while in 2003 only one and in 2004 three. Another important reason for the dynamism of the sector is mergers and acquisitions. This fact is, surely, closely related to the growing interest of multinational market research groups to Turkish research market. I will handle the nature and effects of this interest when talking about how the market research industry is segmented within itself.

For a thorough understanding of the social and economic conditions which gave rise to the development of market research industry, it is necessary to examine, first, the global capitalist restructuring process, and then the Turkey's articulation with this restructuring in the post-1980 era through domestic institutional and structural alterations appealing liberal approaches to foreign investment. In so doing, my primary concern will be to outline the factors which deeply affected the development, even the boom, of the market research industry in this period.

### **A.2.1. Global Capitalist Restructuring**

Beginning from early 1970s, a series of radical transformations have started to take place which have had "profound impact on both the nature and the composition of global economic activity, on its ownership and location, and on its organizational modes" (Dunning 2000:8) These transformations were basically the restructuring of

the operation of capitalism on the global scale with its emphasis on deregulation and liberalization. Castells (2000 (a)) argues that this restructuring is an extension of a series of reforms which, both at the level of institutions and in the management of firms, aimed at four main goals. Castells enumerates them as follows:

1. deepening the capitalist logic of profit-seeking in capital-labor relationships
2. enhancing the productivity of labor and capital
3. globalizing production, circulation and markets, seizing the opportunity of the most advantageous conditions for profit-making everywhere
4. marshalling the state's support for productivity gains and competitiveness of national economies, often to the detriment of social protection and public interest regulations. (2000(a):19)

Castells, moreover, states that “technological innovation and organizational change, focusing on flexibility and adoptability, were absolutely critical in ensuring the speed and efficiency of this restructuring”. (ibid) For him, this new techno-economic system can be adequately characterized as “informational capitalism”; and this has given rise a new economy which is *informational, global and networked*.

On the other hand, Harvey (1990) seeks to capture this process as a transition from Fordism to flexible accumulation. For him, though this transition has not yet finished, there is a consensus on the fact that there has been a significant change in the way of capitalism has been working. (1990:173) He seeks to comprehend the transformation in the political economy of capitalism in late 20<sup>th</sup> century. He argues that though “we experience radical changes in labor processes, in consumption habits, the acceleration of production and consumption turnover time, a decrease in state

power and practices; and a changing geographical and geo-political configurations”, the basic rules of a capitalist mode of production are still at work. Hence, the transformations do not mark a rupture but a restructuring in modern capitalism. Likewise, Castells also agrees that “the mode of production has been, and is still, capitalism though we experience a *new mode of development* (Castells, 2000 (b):4)

There are pretty many attempts to conceptualize this global capitalist restructuring. Some seek to capture this process as a transition from a *mass production* of earlier periods to *batch-production*, or from a *Fordist* era to a *post-Fordist* one, in which production and labor processes have become more flexible in the whole world. While some others prefer to name this process as a *transition to a flexible accumulation* by focusing on the changes on the operation of capitalism, another group of scholars tries to capture this capitalist transformation along with its socio-cultural and political dimensions. For the latter, what we observe is a *globalization* process in which not only capital (both tangible and intangible), goods and labor but also people, ideas, symbols and images are now easily flowing across boundaries. In this study I will not go into detail and examine these conceptualizations about the transformation we have experienced in late 20<sup>th</sup> century. It is, indeed, a multifaceted and complex phenomenon whose analysis goes beyond the scope of this thesis. What I would like to do, instead, is to point out some characteristics of this process which gave rise to the development of market research industry.

An important characteristic of this flexible accumulation which is significant

for the development of the market research industry is the changing production processes. Manufacturers have shifted from mass production to a new kind of manufacturing processes in which they are able to disperse geographically their production plants along with their increased capability in customizing their products according to local (even personal) tastes in a relatively shorter time. In other words, the new batch-production has made it possible to easily and parsimoniously re-configure the production processes so that manufacturers become now able to rapidly modify and differentiate their end products according to the demands of end-users. Such a shift has prepared the material conditions for manufacturers who are seeking, through market research, to better understand their end-users and consumers, to explore (even create) their needs and satisfy them in a unique way before their competitors. Hence, the infrastructure is now available for the proposals of market researchers who constantly ask manufacturers for alterations in product design, display, packaging, advertising, etc.

Another important peculiar characteristic which has important implications for the development of market research industry in this post-Fordist era is the *deregulation* and *liberalization* of national economies. The neo-liberal atmosphere of this period not only contributed to deepen the logic of capitalism to exploit every opportunity anywhere on the globe for profit-seeking but also caused decline in the state intervention in the economic as well as social and cultural fields. On the one hand, through deregulation and liberalization policies, welfare-state and developmentalist policies have given up, which in turn has given ways to market forces to exploit the field opened up by the state. Market research has emerged as a

vital market force in this process. This was also the case in Turkish context. I will examine it in detail in next section.

On the other hand, deregulation and liberalization policies helped to reconcile, in fundamental ways, the tension between centralization and decentralization of economic power which has always prevailed within capitalism. Capitalism has, thus, become more tightly organized through decentralized yet focused decision-making. In this reconciliation process, “the complete reorganization of the global financial system and the emergence of greatly enhanced power of financial co-ordination” (Harvey 1990; 160) has become of crucial importance. Accordingly, the capital flows have become much easier across boundaries on the globe through new global financial systems in the global restructuring. Foreign capital (mainly from industrialized countries) started to have easier access to domestic markets (mainly of developing countries) as they tended to become more internationalized. The accelerated financial coordination with the new financial systems have furthermore altered conventional forms of investment and brought new ones during 1980s. A key characteristic related to the foreign investment, both in Turkey and in the world in this period, was the expansion of MNCs through new forms of investment and institutional arrangements, many of which involve little or no investment of capital (Öniş 1994). Through either limited or

non-equity arrangements, the foreign investors increased their control over domestic markets. As a result, more multinational corporations began to operate business and to exploit the opportunities in new lucrative markets. Given the fact that multinationals have already been familiar with market research techniques to explore, even to create, and to satisfy consumer needs and that they were about to operate in an unfamiliar context, the demand for market research has increased. Turkey was no exception in this process since it has become more articulated, beginning from 1980, to the global capitalist restructuring through its neo-liberal policies. Before exploring the transformations took place in Turkey corollary to the macro changes in the world, let me state another crucial characteristic of post-Fordist era for the development of market research industry.

The advent of new information and communication technologies and the rise of information as a new, even a crucial, source of wealth creation have also played a significant role in the development of market research particularly for the last few decades. New information technologies have made it possible for information itself to become the product of production process and information has become the raw material of itself. Besides, as the competition became much fiercer on the globe through the changing processes of production and labor, the ability to produce specialized knowledge has become inevitable in sustaining profitability. This, in turn, increased the demand for consumption knowledge, which is supplied by market researchers. Moreover, the “accurate and up-to-date information is now a very highly

valued commodity. Access to, and control over, information, coupled with a strong capacity for instant data analysis, have become essential to the centralized coordination of far-flung corporate interests” (Harvey 1990:169). This in turn contributed to the new operation of capitalism that I mentioned above with “an unprecedented combination of flexibility and task implementation, of co-ordinated decision making and decentralized execution” (Castells200 (b):p.196)

The rise of knowledge/information as a new source of wealth and the global restructuring are, indeed, distinct phenomena. Nevertheless, they have emerged as parallel developments and in time they have become more related as knowledge has become a pivotal element of productivity in flexible accumulation among traditional ones (i.e. capital and labor). I will explore this process and its consequences for market research in detail separately in the next chapter since market research industry is ultimately a knowledge industry and it is intimately related to the increasing significance of knowledge generation. In the following section, in order to better understand the development of market research industry in Turkish context, I would like to

examine the domestic transformations occurred in post 1980 Turkey parallel to the transformations took place in the world.

### **A. 2.2. Domestic Transformations in post-1980 Era**

The domestic transformations in post-1980 Turkey may be regarded as an extension of neo-liberal policies adopted by the economic program of 24<sup>th</sup> January 1980 and implemented in a milieu shaped by the military coup of 12<sup>th</sup> September. The paradigmatic change in the post-80 era targeted to open up the Turkish economy along with the gradual withdrawal of the state from the economic sphere. One side of this opening up was a fundamental transformation occurred in the sphere of exports. The share of exports in GNP rose from 3.9 percent, on average, during 1975-79, to 12.2 percent during 1980-88, and to 16.4 percent by 1988 (Öniş 1992: 217). Another side, however, was the large inflows of external finance since “the structural adjustment program placed major emphasis on foreign direct investment (FDI) as a source of capital inflow and technology transfer” (Öniş 1994:305). The cumulative total of authorized FDI during the 1950-70 period was \$229 million while this figure was recorded as \$6,189.9 million during the 1980-90 period (ibid) . During the course of 1980s, we observe a striking transformation both in the magnitude and composition of FDI vis-à-vis the previous decade of ISI era. In this transformation, the institutional framework and the structure of incentives governing FDI in Turkey have been radically modified in line with the neo-liberal tendencies of deregulation. Within the course of 1980s:

- 1 Key relative prices including the exchange rate, interest rates and the product prices of state enterprises were deregulated and import quotas were largely dismantled.
- 2 The fragmented bureaucratic structure of the previous protectionist period was eliminated and a new unified structure, the Foreign Investment Department of SPO, emerged to eliminate the delays and ambiguities.
- 3 Free trade zones were formed in which FDI activity exempted from Turkish taxes and Turkish labor laws.
- 4 Specific measures were taken to eliminate fiscal (negative) discrimination against foreign firms - these measures were not resulted in a positive discrimination in favor of foreign firms, but in an equal treatment of both domestic and foreign one.
- 5 Finally and most importantly, 100 percent of foreign ownership became feasible for all foreign investors in all sectors of the economy. (Öniş,1994)

As a result of these institutional and structural alterations toward FDI, foreign investment performance of Turkey has progressed during the last two decades. Particularly, 1988 marked a decisive turning point in Turkey's FDI performance: the actual inflows of FDI jumped from an annual average of \$128.4 million during 1980-87 to \$406 million in 1988, \$738 million in 1989, \$789 million in 1990, \$910 million in 1991 (ibid). Accordingly, Turkey witnessed a merger boom during 1980s, involving a number of partnership and joint venture agreements with domestic business groups and foreign investors. This boom may be considered, Öniş argues, as an extension of the merger boom in Europe in 1980s as companies tried to adapt themselves for the single European market materialized with transition to a (European) Union in early 1990s. (1994). Meanwhile, multinational market research

groups started to pay more attention to Turkey as a lucrative research market in this period and they started to collaborate with local firms. This may also explain the increasing interest of dominantly European-based MNCs for Turkish marketing research industry in early 1990s and the concentration of power, within a few MNCs. I will handle the operation of this concentration in Turkish context in the structural map.

A final observation about the domestic transformations related to foreign capital is the changing composition of investments. A major trend in this period involved the dramatic increase of investments in services. Turkey witnessed a proliferation of “service sector in marketing, accounting and management, telecommunications, banking and finance, transport, insurance, computer and data processing, legal services, auditing, consulting, advertising, design and engineering”(ibid:19) Multinationals have also penetrated service sector through joint ventures, licensing or direct investment. Market research as a service sector was no exception in this process.

The structural transformations in the post-1980 era hitherto described resulted definitely in a paradigm change in Turkey. The structural adjustment program initiated in January 1980 targeted to decrease the degree of state intervention in the operation of the market. The state though did not retreat but was reconstructed (Öniş, 1991); it promoted, on the one hand, market forces, both foreign and domestic, through the deregulation of the economy; on the other hand, consumerism as a way of life was promoted by political elites (Yenal 200:159) The rise of neo-liberal politics have weakened the monopoly of (nation) state regulation of economy along with the

decline of welfare state politics and developmentalist projects and hence, market forces penetrated almost every aspect of daily life. The growing penetration of market forces of formerly state-regulated fields of consumption brought itself “the freeing-up of the previously static and relatively fixed spatial and temporal dimensions of social life” (Lee 1993:133). Similarly, Yenal argues that the depoliticization of public sphere after the military coup of 1980 and the dismantling of developmentalist projects left an arena ready to be exploited by new social forces. Into this field opened up by the state, market institutions moved in to create new types of consumerism, introduce novel products and promote these as the symbols of cosmopolitan life styles to be adopted by urban middle classes (2000:159). Hence, the role of advertising and marketing, including market research, in the organization of consumption sphere has grown in an unprecedented manner.

The liberalization of trade had significant implications for the development of marketing as a business discipline in Turkey. Tek (1999) talks about *diffusion effect of imports on marketing* (1999: 38). He observes that in the post 1980 era, not only services and physical goods but the whole business culture and marketing applications deployed during their production were imported. Moreover, MNCs were of particular importance in this regard, since they were undoubtedly the most important figures that were exploiting the economic as well as social field in Turkey. With the advent of MNCs and their control over domestic market, Western-style mode of doing business, promoting modern marketing techniques has prevailed in Turkey. They also pioneered in opening up the Turkish market as a competitive field and activating the domestic actors to take role in this field. Within these modern

marketing techniques, market research was definitely significant since foreign (predominantly Western) *business people have been accustomed to demand research* on which they build their profit-seeking strategic business plans (Mutaf, Özler, Daniş, Bora, interview). Besides, “the emergence of systematic inquiries about significant trends requires the growth of a capitalist economy. Having built its foundation on the concept of competition, such an economy must have reliable information and accurate statistical data” (Abadan-Unat 1992; Tüzün, interview).

In late 1980s, approximately 70 percent of the demand for market research belonged to the foreign firms (Özler, interview). In the following years, the domestic corporations that had relatively sound financial structures and ready to compete with foreign ones began to get involved in research and get rewards. Turkish firms have invested considerable amounts for research for the last decade; but these investments have been hindered due to periodic economic crises. Hence today, the main firms that are paying for market research are still the MNCs operating in Turkey. There are also some other MNCs which are looking for new, efficient and profitable fields to launch business in Turkey and pay for market research.

Before concluding the historical map, I will look at a specific domestic event which has had noticeable effect on the development of Turkish market research.

### **A.3. Academic Reorganization after Military Coup and Market Research Industry**

1980 marks the beginning of afore-mentioned paradigm change in contemporary Turkish history. The economic program of 24<sup>th</sup> January and the

military coup of 12<sup>th</sup> September can be seen as the markers of this paradigm shift. While the economic program outlined the framework of the structural adjustment toward an export-oriented liberal economy, the military coup provided the stable and resolute environment to implement this program through the elimination of highly politicized and terrorized public scene of late 1970s. Such an elimination occurred at the expense of many liberties and strengthened significantly the power of executive *vis-à-vis* the legislature. Universities were definitely no exception. New legislation to re-organize the academia put many political and ideological restrictions on academic liberty. Moreover, it did not provide a “progressive framework for research” (Tüzün, interview). The new legislation, hence, “has led to a massive brain drain from the universities” (Abadan-Unat 1992:191). Many academicians had to resign from their posts due to their opinions, even due to their attire. This exodus has led a number of gifted, highly-skilled intellectuals to take jobs abroad, but a much more significant number of these academicians took up creative leadership roles in other parts of public life, especially within the private sector (ibid:191) They have founded a number of journals, both in literature and politics. Their accumulated knowledge has been instrumental in the publication of encyclopedias. Finally, their experience and knowledge to plan, conduct and analyze research has led to the proliferation of a variety of research institutes, including both political, social and market research agencies. This was not the first exodus experience of academicians in the history of modern Turkey. In each time, they had to look for some opportunities to employ their knowledge and skills outside the academia. Nevertheless what was peculiar this time, paradoxically thanks to the military intervention that has secured the implementation of no-liberal policies, was the fact that they were provided (though not deliberately) a

more appropriate and fertile ground to employ their skills outside universities in a (more) prosperous manner. The increase in demand for market research in the post-1980 era was combined with an increase in supply by the former academicians. As a matter of fact, (market) research is said to be the most familiar field for the academy (interview with Tüzün, Mutaf.). This unintended situation encouraged a progress in the Turkish (market) research industry. Today's most respected (excluding MNCs), albeit not the most affluent, public opinion and market research companies, were founded, and are being managed, by these former academicians (i.e. Sezgin Tüzün in VERI Arastirma, Güntaş Özler in HTP, Pervin Olgun in BAREM RI, A.Esref Turan in Yonelim Arastirma and Emre Kongar in former KAMAR) These academicians can be considered as the first-generation market researchers of the country, with those of pre-1980 period.

A final but important point concerning these former academicians is related to their views on the responsibility of researcher to society. Some argue that being involved in research has been a democratic way of struggle in order to form a liberal public opinion, even in early 1980s when opinions could not be freely expressed and the political parties had to get permission (“icazetli”) (Tüzün, interview). Some argue that a researcher should also be responsible to the society of which s/he is a member and should try to understand it while considering the demands of her/his client company. In general, academician-origin researchers are more likely to emphasize social responsibility *vis-à-vis* profit-seeking endeavors, in tackling research problems in Turkey. This may explain why many former academicians are more involved in social and political research along with market research (i.e. Sezgin Tüzün, A.Esref

Erdem, Emre Kongar, Onur Kumbaracibasi). Ultimately and expectedly, academic-origin researchers tend to emphasize more on the scientific aspects of research in their discourses (i.e. interviews with Tüzün and Mutaf)

## **The Structural Map**

Up to this point I tried to map out the historical processes to contextualize the emergence and development of Turkish market research industry. Now I would like to look at the industry itself in a structural map through scrutinizing the actors, the interactions and tensions among them, the Association and the research types carried on within the industry.

### **B.1. The Actors in the Industry**

The market research industry in Turkey is composed of relatively diverse firms. It would be misleading, however, to assume that the industry is composed of only official entities such as firms or companies. The actors may be sometimes a marketing department of a foreign or local company, or sometimes they may be some informal organizations or people or a network working on project-base. The actors in the industry can be categorized into two parts: those which do research as a primary job and those which do it as secondary. The former one comprises the independent market research firms and the field firms which are collected under the umbrella of Turkish Association of Marketing and Public Opinion Researchers. These companies are the main actors in the sector and they conduct research, both marketing and social, as their primary jobs. The second category of companies is those that do research as an integral part of their jobs and includes advertising agencies, public relations and consultancy firms. The research or marketing departments of the

companies that are operating in various sectors of the economy can also be considered in this second category. I will talk about the informal entities while talking about field firms since these entities mainly engage in data collection for certain research projects.

### **B.1.1. Research as a primary job**

The firms in this category form the backbone of the sector. They come together under the roof of the Turkish Association of Marketing and Public Opinion Researchers. The Association was founded in 1988 aiming at gathering the people working in marketing research business. The Association declares its main purpose as “to encourage the use of economic and social research as a base in the decision making process of executives in the private and public sectors.” (Yearbook 2004:150) I will talk about the Association and its organization in following pages. As mentioned at the very beginning, there are about 84 firms which are carrying marketing and public opinion research in Turkey. Surely, this is not the exact number since this number includes the firms listed in the Association’s Yearbook. There may also be some other ones that do not have any relationship with the Association, or that are operating on a more local base. However, it can safely be claimed that this first category comprises no more than 100 firms.

The firms that conduct research as their primary job in the Turkish market research sector are usually classified into two: those which mainly provide research, consultancy and data collection services; and those which only do the fieldwork and/or data collection. The former could be named as “independent research firms”

while the second as “field firms”. Independent research firms usually carry out *ad-hoc* or *continuous* research projects involving, as needed, both qualitative and quantitative research projects. The field firms are mainly contracted/outsourced firms. Nevertheless, most field firms declare that they are doing many ad-hoc type research. Let me give more details for each type of firm.

#### **B.1.1.1. Independent Marketing Research Firms**

Most of the independent research firms define themselves as “*ad-hoc* company” and they render customized research. These companies are doing their business as projects. They organize their research activities according the demand of their clients and do not generate regular data. Each project is carried out by a project manager who is responsible for all stages of the project and the reporting at the end. S/he is also responsible for the presentation of the findings to the client company. The projects may need either qualitative or quantitative research. Hence, there are two sub-departments, a qualitative and a quantitative, within a customized research department. In a typical ad-hoc company, the departments are the field department which is responsible with the organization and implementation of fieldwork; operations department responsible for data processing and analysis; general administration, and finally the customized research department in which there are qualitative and quantitative sections. Most companies have directors for each section. In an ad-hoc research firm, the contacts with the client companies are usually carried out by customized research departments and the project managers are members of mainly this department. Almost all independent market research firms in Turkey are

providing ad-hoc/customized services for their clients.

The demand for ad-hoc research usually comes from the companies that are operating business in FMCG (fast-moving consumer goods) sector since it is relatively harder to sustain profitability in this sector due to the shortest consumption turnover rates of these consumer goods and due to their extensive availability through almost all distribution channels. Nevertheless other sectors ranging from banking to automotive, from pharmaceuticals to tourism demand ad-hoc research as well. Ad-hoc research projects for brand positioning, brand image and concept development are mainly executed through qualitative techniques of which focus groups and in depth interviews are the most employed ones. There is also a tendency for ethnographic research in which market researchers try to understand the *lifeworld* of the consumer in his or her own setting through house visits. On the other hand, pre- and post-advertising evaluation tests and customer satisfaction are the main ones in which quantitative research is undertaken. CATI (computer-aided telephone interview) and CAPI (computer-aided personal interview) are the other two methods widely used in ad-hoc quantitative research projects.

There are some other research firms which render continuous, along with customized, research. Continuous research consists of omnibuses, periodic research and panels. These firms are the most important actors in the sector since they employ more people and they generate relatively high revenues. According to the Yearbook 2004 of the Association, among 42 companies listed under the heading of “marketing and opinion research companies”, 21 are providing periodic and tracking services.

Among these 21 companies, 7 firms are also providing omnibus services, and 7 are rendering panel services.

Panel research is of crucial importance in the industry since the firms that are running panels are the biggest ones in terms of both revenue and the number of people employed. Panels are not project-based research studies since there is no envisaged end to the research project. A panel research is basically a marketing research method based on collecting information from a continuous, representative and relatively bigger sample regularly and continuously. There are three types of panels: *Media, Retail and Household*.

Media Panels are tracking media consumption. They are basically providing media audience measurement services from a continuous sample in a regular way. In Turkey, AGB Nielsen Media Research is providing a TAM (television audience measurement) service via peplemeter system in Turkey since 1989. This media panel consists of 2.201 houses in 21 cities representing the urban Turkish population. It produces “overnight viewership data of subscribing TV channels, with minute-by-minute audience database and program and breaks database for various target groups”. The company renders standard minute-by-minute and individual-by-individual TAM data as well as special research for a deeper analysis of the data. Likewise, HTP Arastirma started to track radio consumption through its household panel, to which I will turn shortly.

Retail panels collect data on sales of certain products sold through a variety of retail channels. In Turkey, there are mainly four retail panels. The first and foremost

is the retail audit panel of fast-moving consumer goods. This panel is run by ACNielsen which is leading the research market in Turkey as well as in the world. It tracks the sales of packaged consumer goods from a variety of retail points including (key accounts) hypermarkets, supermarkets, *bakkals*, buffets, pharmacies, gas station shops. There are about 2000 retail points in the sample representing whole of Turkey. The company basically provides a monthly database about quantities and prices of products distributed by tracking the shelves and storerooms of retail points in the sample one-by-one. It also gives customized research based on this database for a much deeper analysis of the distribution performance of a client company.

Another retail panel is a medical panel tracking the sales of drugs and medicine from both pharmacies and wholesalers (drug storerooms). This panel has been carried out by IMS (International Medical Survey) Health, an international panel research company. There are also durables and mobile phone retail panels run by GfK Turkey.

*Household* panels, on the other hand, collect information/data from a continuous and representative sample of households regularly about any consumption activity taking place within that household. The data are obtained through either collecting barcodes or invoices of the products purchased or periodic diaries about purchases filled up by a contact person from the household in question (generally the housewives in Turkey). In Turkey, there is now only one household panel and it is run by HTP. This panel is based on a sample of 5000 households, representative of whole Turkey. Currently, under this household panel, HTP has established some sub-

panels to track different consumption activities in the households. These sub-panels are fast-moving consumer goods, media, ready-to-wear and durables panel. Again based on this sample, HTP initiated an Individual Panel through which it is able to track individual impulse consumption (such as ice-cream, confectionary, chewing gum, etc.) taking place outside the house during the day.

HTP defines itself as the “BIG Brother” while talking about its capacity to track the consumption activities in the households. For each household in the sample HTP has information on: number of members, profile of members (age, education, occupation), income, spending distribution, life stage, primary shopper lifestyle, ownership and use of goods and services, and SES. For each product that is purchased HTP keeps track of its: barcode, description, manufacturer, category, brand name, sub-brand name, package type, package size and other relevant attributes depending on category. HTP integrates all these data about the household, its daily shopping transactions and the products bought to prepare regular reports and standard or specialized analyses for its clients. Hence, through its household panel, HTP is able to observe almost all consumption activities related to the households. Given the significant role of family in Turkey, the ability to track household consumption proves to be of crucial importance. Moreover, since households remain in the sample for at least three years, a relationship of trust develops between the company and the household, making it easier to observe and record almost all consumption activities of individuals. As a matter of fact, Özler stated that, as HTP Arastirma, they “even know much more than needed’ (Özler, interview). Therefore I would suggest that such an extensive and thorough tracking and recording of consumption activities

could be read as the manifestation of the increased capacity of market forces to survey consumption sphere and hence to manipulate and mold it.

The market research firms running panels are the most important actors in the industry since they have almost a monopoly in their respective panel businesses. They are able to track consumption activities from multiple sources and to integrate the data collected by using highly sophisticated statistical techniques. In turn, they provide comprehensive and multidimensional insights to their client companies enabling them to take required action for more profit making. These research firms have relatively sound financial structures. The first reason is the fact that running a panel research is an expensive business and requires substantial investment to launch. The initial setup cost is pretty high, and a company which has initiated a panel needs at least a few years to sell its services. Therefore, there are only a few companies that provide panel services not only in Turkey but also in the world. The panels in Turkey, except for the household panel, are all run by the local branches of multinational corporations. Secondly, in panel research, the data are repeatedly collected and it generates regular and hence, statistically, more reliable data. They give researchers the ability to report and analyze the data stored in the databases monthly, seasonally or yearly. Therefore the customer corporations are able to watch out the performance of their companies or products and services in time-series tables. They also have the chance to observe the performance of their competitors and their own market share on a regular basis. Therefore, market research companies providing panel services make annual agreements with their client corporations, and hence, they are more protected against crises. In any case, panel research is by nature syndicated research

since many manufacturing companies must pay for the panel database supplied in monopoly.

The market research firms rendering continuous research are not limited to panel research firms. There are also a variety of research firms in Turkey that are providing tracking or omnibus services. Omnibuses are continuous surveys run by a market research company with a stated frequency and with a predetermined method. Each time the omnibus questionnaire is conducted with a different set of sample. In other words, an omnibus survey is continuous research with a non-continuous sample. The client companies buy space in the questionnaire by adding and paying for questions of their own. The market research firms rendering omnibus and tracking research are able to generate regular data and to monitor consumption activities in different sectors such as:

- 1 banking, finance and insurance
- 2 pharmaceuticals and healthcare
- 3 automotive, wheel retail and tire
- 4 oil products (fuel, liquid fuel, diesel, etc)
- 5 media, advertising and promotion
- 6 consumer durables,
- 7 IT , cellular phones, small appliances

Some companies also track consumption activities of

- 8 children i.e. through BabyMetrobus (a monthly omnibus research about the children of 0-2 ages and pregnant women) and BabyMetrePanel (a research

about the families' consumption characteristics for the children of 0-2 ages)

9 teens and youth i.e. Youth Planet (a research for youth trend and consumption),

10 women, i.e. through Female Omnibus,

Furthermore, there are also periodic surveys in political (i.e. Research on Political Tendencies and Expectations, Research on Municipality Images and Expectations) and social issues (i.e. Life Styles and Socio-Cultural Trends Tracking, VERI SGT Eurobarometer, Zihinsel Engelliler Arastirmasi (Research on Mentally Handicapped), Institutional Social Responsibility, Global Trends, World Environment Research)

Marketing research companies that are doing both continuous and customized research organize their services under different departments. They generally have a separate "customized research" department under which there are qualitative and quantitative subdivisions. Panel research is totally carried out under its specific department. Some larger market research firms may well have subsidiary companies to carry out their various research activities. These are, indeed, research groups composed of former independent market research firms. For Instance, GfK Turkey Group, which is a multinational company, is a research group composed of Procon Gfk and Strateji GfK operating ad-hoc research, GfK Panel operating retail panels and Incekara Research specializing in ad-hoc and syndicated automotive research. Similarly, KMG (Knowledge Management Group), a Turkish research group, consists of *HTP Research* operating in household consumer panel, *Retailing Institute* specializing in retail research and merchandising activities, *Online Information*

*Solutions* operating in CATI and Internet research, *HTP Exclusive* operating in customized research and *Yaratıcı Mecralar* operating in in-door advertising.

This situation is a good indicator of the concentration of power in the market research industry and it is not unique to Turkey. As will be clearer later when examining the operation of multinational corporations in the Turkish context, the trend in the industry is towards “restructuring through acquisitions and mergers to create larger conglomerates of companies” (Kent1993:16). Each group of companies now offers “a complete range of services” and we observe a “growth in the development of proprietary of services” (ibid) Such a concentration of power is intimately connected to the processes of global restructuring that I have outlined in the historical map, namely, the availability both to decentralize the activities and to concentrate focused decision-making. Through acquisitions and mergers, power is concentrated in the hands of few groups that are simultaneously able to coordinate knowledge production about consumption from multiple sources. As these groups become larger conglomerates of companies that are rendering a complete range of research services, their capacity to monitor almost all consumption activities, even on very intimate ones, are increasing.

Such a concentration seems to be causing a continuing segmentation between those rendering both research and consultancy services on the one hand, and data handlers on the other. Data collection is turning into a very mechanical job that these research groups prefer to outsource to field firms. However, this is not a total subcontracting of the whole fieldwork process. Training, supervision, validation and

evaluation of field workers are tightly controlled by research firms subcontracting the research project. The research design is almost carried out again by these contracting research firms. In other words, if I speak in Özler's terms, these research firms/groups do "the intellectual phase of a research" themselves and outsource "the drudgery" of fieldwork to field firms. Such a division of labor has further consequences in opening a space for market research as a separate field and as a profession. I will deal with this process in the third chapter. Now, let me talk about first the fieldwork and then the field firms, which are the second important actors doing research as a primary job.

#### **B.1.1.2. The Fieldwork**

Fieldwork or data collection is a crucial but a troublesome process. Fieldwork process is likely to take the longest time of a research project. Market research data are rarely collected by the people who design the research and, furthermore, the field workers who collect the data typically have little research background or training. (Malhotra 1999: 405) They are usually part-time workers employed on project-basis and charged on number of interviews done (Mutaf, interview). Integrity is a *sine qua non* attribute for a research which includes: a) the respondent should trust the interviewer, b) one who demands information needs to be sure that he gets reliable and accurate information (Danış, interview). At this point, there is always a suspicion about data collection and, hence, 'ethical concerns are particularly germane to

fieldwork' (ibid: 405). Firms have two major options for collecting their data: either they can develop their own fieldwork organization or they can subcontract a fieldwork firm. Nevertheless, in both cases, data collection involves the use of some kind of field force and the execution of all the stages of a fieldwork. All fieldwork involves the selection, training, supervision, validation and evaluation of field workers.

Many market research firms in Turkey are generally reluctant to totally outsource their fieldwork to other agencies since they had in the past some painful experiences that endangered the reliability of their studies. Instead, they prefer to execute all the stages of data collection in house through their fieldwork departments. Large scale surveys, such as a nationwide quantitative research, are nevertheless mainly outsourced. Almost all qualitative research projects are conducted in-house. Fieldwork departments are responsible for the selection, training, supervision and validation of fieldwork workers.

In selecting fieldwork employees, (independent) market research firms, if not subcontract the research to an agency, utilize their branches or representatives. Some independent research companies have branches in different cities across the country, but the number of independent firms which have such direct branches is about 10 and these branches are usually located in Ankara and Izmir. The majority of the demand for market research is, indeed, from Istanbul and the market research firms in Turkey are predominantly located in this city. However, almost all of them express that they are able to undertake research in other regions or cities as well as nationwide. At this point, the local agents assist them. Remembering the fact that data collectors are

part-time employees who typically have little research background or training, these local agents are mostly a representative or a contact person, not a firm or company that is organizing the fieldwork in a specific region. Fieldwork organizations in Turkey are usually based on informal networks. University students, literate housewives, unemployed people, relatives, friends and acquaintances or someone who collected data before and has self-confidence to do the job may be the employees of such organizations. University students are indisputably the most favored part-time workers in the research sector. The experienced ones, in time, would become the contact person or representative for a company in his/her region, as well as in Istanbul, and gather new part-time interviewers and form teams for a research project. Some university students do not only collect data but may also help the company to code and edit the collected data in the office (Mutaf, interview). Fieldwork departments do not solely rely on contact people in selecting and re-calling people for a research project, but also have an updated database of interviewers composed of those who have worked at least once for the company and proved to be reliable. For instance, Barem RI has such a database including about 3000 to 4000 people from all parts of Turkey (Yilmaz, interview) and Alfa Research about 50 people, mainly from Istanbul (Mutaf, interview). These two companies are the ones that prefer to execute fieldwork in house.

Fieldwork departments are also responsible for the training of the interviewers. All of the companies, irrespective of whether the fieldwork is subcontracted, train the interviewers before each project in order not to risk the reliability of the data collection process. Training ensures that all interviewers

administer the questionnaire in the same manner so that the data can be collected uniformly (Malhotra 1999: 407) Furthermore, each company has field supervisors who are responsible for assuring that the interviewers follow the procedure and techniques in which they are trained. Supervision also involves quality control and editing, sampling control (to ensure that the interviewers are following strictly the sampling plan rather than selecting sampling units based on convenience or accessibility), control of cheating and central office control.(ibid:411) The supervision process is highly hierarchical. Ultimately, the fieldwork department engages in a validation process to make sure that the field workers have submitted the authentic interviews. To do so, the supervisors call 10% to 25% of respondents to inquire whether the field worker actually conducted the interviews. (ibid: 412)

#### **B.1.1.3. The Field Firms**

As stated above fieldwork is a crucial but a troublesome process and many market research firms prefer to conduct it in-house due to reliability considerations. Nevertheless, some companies choose to outsource/contract the fieldwork to field firms or agencies. The Association's Yearbook 2005 lists 13 field firms but this figure underestimates the real number since there are many local organizations or agents as mentioned above. For Bora, in all almost all cities of Turkey there are such small or big organizations since "a table and a chair" would be sufficient to start up a small business as a field firm". (Bora, interview) Özler estimates that the number of such organizations would not exceed 100 (interview).

Due to lack of a any formal requirements and the relatively easy and simple

procedures for starting up a field organization/firm, there is a tension between the field organizations and the independent market research firms. Alyanak, during the interview, reproachfully told about the fact that in order to be a researcher you do not have to graduate from a school/department, everybody can be a researcher (Alyanak, interview) However, he maintains that the issue is not whether you do a resercah or not, but, he adds, the important point is whether your research is well controlled/checked or not. In Turkey, he adds, the control mechanism is underdeveloped. Alyanak argues that the distinction between independent market research firms and field firms stated in the yearbooks are not due to needs of the market but aims at putting field firms in an order. As a first step to put them in order, he informs that, the Association called the field firms to be members. Some firms gave a positive answer to this call and became a member and, for the first time, in the Yearbook 2004, field firms are presented in a different category. This tension is manifested also in the attempts to construct the market research as a separate sphere (please see chapter 3)

Though the independent market research companies are predominantly located in Istanbul, field firms are located both in Istanbul and in other cities. For instance, among the 13 field firms listed in the yearbook, 6 are located in Istanbul, 2 in Gaziantep, 2 in Izmir, one each in Ankara, Samsun and Adana. These cities are the ones considered to be the centers for the regions in which they located. That is, in order to conduct research in a southern or eastern city or across the region, the fieldwork agencies located in Gaziantep are often chosen to find interviewers and organize the fieldwork; or some companies choose Ankara to organize the study for

the whole eastern part.

A field firm is expected to fulfill the jobs that a fieldwork department, in case of an in-house data collection, is responsible for. The main job, nevertheless is selecting the fieldwork employees because in almost all other phases the contracting company cooperates with, indeed supervise, the contracted field company. As stated above, all the companies, whether they contract the fieldwork or execute it in house, do not want to risk the reliability of the data collection process. Training is mostly given by the contracting company. It usually sends its own supervisors into the field along with those of the field firm to assure that the interviewers are following the right procedure. As a matter of fact, the intellectual work of a research project (such as sampling, method choice, preparation of questions) is implemented by the independent research firm and the drudgery is outsourced.(Özler, interview) Most of the independent MR companies - about 90 percent Özler claims- are already able to self-administer the fieldwork. Nevertheless, some are reluctant to take the burden of finding out fieldwork workers. Particularly, large-scale quantitative research projects are contracted. There are also companies that totally outsource their fieldwork and data collection to field firms whom they trust. Meanwhile, the interviewers employed in panel research are permanent staff and in pay-roll.

Another interesting observation related to field firms is the fact that they claim to execute a wide range of research projects regardless of their capacity. This claim is indeed not unique to field firms. Almost all market research firms in Turkey assert to provide services in almost every areas and to employ almost all research techniques. (Please see Table 2 and Table 3 below) This situation indicates a larger problem in

Turkish research industry: the lack of specialization. There is not a clear division of labor within the industry. This results in some ambiguities in the definition of company categories as well as in numbers (of turnover, of employees, of companies).

Professional researchers complain about this situation. (interviews with Mutaf, Alyanak) For them, although Turkish research industry is developing, it is still shallow and the actors are trying to get a bigger piece from the same cake instead of making it bigger. Even, Mutaf claims “the firms are trying to gouge one other’s eyes out.” This is also due to the cost-sensitive nature of Turkish marketing research sector. For most Turkish corporations, to pay for MR seems still a waste or extra. (Daniş, interview). In order to overcome this drawback and to present the market research job as a recognized profession to both domestic and international producers and marketers, the companies which conduct research as their primary job collected under the umbrella of The Turkish Association of Marketing and Public Opinion researchers.

<b>Research Methods</b>	<b>percentage</b>
face-to-face random sampling	<b>0.86</b>
face-to-face quota sampling	<b>0.90</b>
face-to-face adress	<b>0.90</b>
mail	<b>0.79</b>
mystery customer	<b>0.83</b>
Business-to-business interviews	<b>0.83</b>
Desk Research	<b>0.86</b>

CATI	<b>0.69</b>
CAPI	<b>0.55</b>
Internet	<b>0.62</b>
Observation	<b>0.86</b>
Focus Group	<b>0.93</b>
In-depth interviewing	<b>0.93</b>

Table 2: The percentages showing the usage of various research methods by 29 independent MR companies listed in the Yearbook 2004

Source: Yearbook 2004

<b>Research Methods</b>	<b>percentage</b>
face-to-face random sampling	<b>1.00</b>
face-to-face quota sampling	<b>1.00</b>
face-to-face adress	<b>1.00</b>
mail	<b>0.69</b>
mystery customer	<b>1.00</b>
Business-to-business interviews	<b>0.92</b>
Desk Research	<b>0.69</b>
CATI	<b>1.00</b>
CAPI	<b>1.00</b>
Internet	<b>0.46</b>
Observation	<b>0.77</b>
Focus Group	<b>0.92</b>
In-depth interviewing	<b>1.00</b>

Table 3: The percentages of using various research methods by 13 field firm listed in Yearbook 2004Source: Yearbook 2004

#### **B.1.1.4. Turkish Association of Marketing and Opinion Researchers**

Turkish Association of Marketing and Public Opinion Researchers (the Association), founded in 1988, aims to gather the people working in market research business. (Yearbook 2003:108) The objective of the Association is stated in its statute (Article 3) as follows:

“The Association endeavors to increase and improve the use of economic and social research tools which will be the ground for effective management decisions in private and public sector.... in order to attain this aim, the association:

- sets professional standards and ethical codes
- organizes training seminars and publishes material for members and public interest
- tries to attract interest to marketing and public opinion research, improves reputation and develops the level of business
- follows the domestic and foreign developments and organizes guiding activities. (Yearbook 2004:149-150)

The number of active members of the Association reached 446 in 2004. The members are composed of the researchers from marketing and public opinion research companies, from universities and public institutions, from corporations (both Turkish and multinational) operating in various sectors and demanding research, and from some advertising, communications and consulting companies. Among the members, 46 people are working as *free-lance* researchers. In order to be a member,

beside some legal qualifications, someone has to be either a manager or a researcher in related institutions or a university member.

The main concern of the Association has been the professionalization of the market research industry so that market research is considered as a serious profession by people both inside and outside the research sector. This concern proves to be sensible given the fact that in today's Turkey, there is, yet, not an ample authority to vigilantly observe the violation of ethical standards. Market researchers believe that such a concern also seems to be vital for the development of the industry. Honor Agreement is an essential tool in this regard in order to strengthen the sanctions against the violation of ethical standards. Honor Agreement is prepared by the Association and the firms/individuals that are conducting research are annually called to sign. Those who sign the agreement certify to

- 1 comply with ESOMAR/ICC and the Association Rules.
- 2 accept to open every phases of their research process to the inspection of the Association
- 3 support the suggestions and notices of the Board of Directors and to cooperate accordingly. (Yearbook 2003:13)

The Agreement was signed by 52 firms as of May 2004. The Ethics Commission and the Discipline Committee are responsible for the enforcement of Honor Agreement. In case of a complaint against a firm managed by one of the members, the Discipline Committee is entitled to investigate and evaluate the situation

The Association organizes 10-15 training seminars throughout the year. These seminars are conducted by members who have different specialization. Some seminars are tuned into certification programs certifying research expertise in respective areas. Every year the Association organizes ‘Research Summit’ where a wide range of people from Turkish and foreign researchers to business people and to academicians come together to contribute to the development of professional authority and autonomy as well as fostering a market for its services.

Through some projects and initiatives undertaken, the Association turns into a notable, institutionalized social actor within and outside the market research industry. For instance, the Association has recently modified its statute so that it is now entitled to open branches abroad and to engage in commercial activities. Moreover, the Association has applied to put “Turkey” in its title so that the Association would become the representative of the whole sector not only *de facto* but also *de jure*. I would suggest that such an attempt would also enable the Association to engage more easily in partnerships/collaborations with foreign entities. On the other hand, during the discussions about the enactment of new “Act of Statistics” (TUIK:Turkiye Istatistik Kanunu), some Association members have met with some politicians to insure that there should be no field restrictions to conduct a research in Turkey.

The Association, furthermore, initiated a SES (socio-economic status) project in April 2004 to update the SES index. Although this index is widely used by for marketing, research and media measuring, there is not a consensus on the definition of it. The project aims at developing a SES index that would be a reference point

within the sector. Furthermore, a Committee for Professional Standards” was established “to improve the research standards and to strengthen the research profession’s image” (Yearbook, 2005:191) Through this project, the Association aims “to ensure that market research is done effectively, right and at the highest standards to help ‘market research’ clients” (ibid). I would suggest that this project may be viewed as an attempt to transform market research into a bounded sphere in which professional standards would play an exclusionary role in order to maintain this boundedness.

Finally, the Association has recently finished its “Market Potential Research” which aimed to determine the potential for market research in the Turkish context. The project sought to determine to what extent *the small and medium-size business enterprises* (that are believed to be the backbone of manufacturing and production industry in Turkey) are familiar with market research and are willing to pay for it to develop their businesses. In other words, this project was a market research for the market research industry itself. The project was undertaken in conjunction with Ad-Givers Association and International Advertising Association. This partnership as well as the project itself, I would suggest, indicate an attempt of market forces, both domestic and international, to pinpoint the obstacles and to look for further possibilities in order to increase their capacity and, hence, to penetrate more in Turkish markets. In any case, in introducing the results of this project, the president of the Association called the market researchers to make these business enterprises more acquainted with and conscious of market research through introductory and training activities. To persuade these organizations/people for market research is

considered “as a continuous part of the mission of researchers”.

## **B.2. Relations with Foreign Companies/Organizations**

In handling market research firms, we have to consider their partnerships with multinational companies and some international research chains. I should remind at the outset that the MR sector, in any case, has been stimulated by foreign concerns since its beginnings. The demand for marketing research did not come from the domestic companies. Rather, the demand for market research was highly stimulated by the multi-national corporations particularly in the post-1983 period. However, the interest of multinational market research firms can barely be traced back to early 90s. We observe today acceleration in mergers with and acquisitions by these multi-nationals on the one hand and in collaboration with various international organizations on the other. The partnership with international organizations and/companies takes two forms: equity-based partnership with a foreign or multi-national company or non-equity collaboration with an international company and/or organization.

### **B.2.1 Relations with Multinational Companies**

In the equity-based partnerships, the market research company either has a joint venture with or is a direct branch of a multi-national company. In some cases, the company is totally and all at once acquired by a multi-national and became a branch of the parent company. We observe a tendency for joint venture type partnerships to evolve over time to being a direct branch. In this regard, the logic of the evolution of a joint venture with a multinational company can be summarized as

follows: The multi-national company proposes a local firm to initiate a partnership and to do business together. In doing so, the ownership of the local firm is shared between them in different ratios. The local firm continues to manage the company with new partners for a few years so that the company is compatible with the business style of the multi-national. Besides, the company benefits from the international experience, brand image and sound financial structure of the parent company. Over time, however, the parent company acquired total ownership of the local one. In Tüzün's words, multi-national companies want you to leave the firm and to transfer it to them in 3 or 5 years after you established the system as they wish. (Tüzün, interview) In return, you certainly get your money. In other cases, a multi-national firm enters the market through foreign direct investment and does not cooperate with a local firm, but founds its own. This situation has implications for the concentration of power within the industry in the hands of a few multinational groups. This power could be financial power as well as the power to homogenize the research processes through imposing certain research techniques.

Despite their relatively restricted number compared to the total number of firms in the industry, the biggest pie of the research turnover belongs to these MNCs. As mentioned at the beginning, %22 of 2003 market research turnover in Turkey belongs to just two of them (TNS Group and NFO Group), excluding the market leader which is also a multi-national. Today, five research groups have an equity-based partnership with a multi-national group and operate in Turkish market research sector: ACNielsen, GfK Turkey, TNS PIAR, AGB Nielsen and Millward Brown. The number of multi-nationals is not restricted to these five companies. For the last two

decades, some other multi-nationals have also launched business in Turkey and they have had partnerships with local companies. However, due to mergers and acquisitions both on the global and local level, the multi-nationals in Turkish research sector, for the time being, have crystallized in these five research groups. For instance, between 1996 and 2003, Plus Remark Arastirma ve Danışmanlik, a local company, maintained a partnership with Infratest Burke and NFO WorldGroup, one of the world's leading research agencies. However, NFO WorldGroup was acquired by TNS Group and Plus Remark ended its cooperation.

In the following, I will focus briefly on four of them as separate cases since they have different, though slightly, stories of entry and operation in the Turkish market. I think it would be better to look at these MNCs in detail in order to grasp the dynamics behind the dynamism of the market research sector.

**ACNielsenTurkey :** ACNielsen Turkey is a branch of ACNielsen Company which is one of the oldest marketing research companies in the world. ACNielsen opened its first international office in the UK in 1939 and, after World War II, progressively expanded its operations in Western Europe, Australia and Japan. It also started business in Asia Pacific in 1994 and in the Middle East and Africa in the late 1990s. In 2001, ACNielsen was acquired by Netherlands-based VNU, a multinational business group which is operating in marketing information, media measurement and business media. Today, ACNielsen's operations span more than 100 countries and its headquarter is located in New York

ACNielsen first initiated a partnership in Turkey with ZET Piyasa Arastirma

Hizmetleri which was founded as a domestic marketing research firm in 1987. The ZET Company went into a joint venture with ACNielsen in 1993 under the name of ZetNielsen. In 1996, ACNielsen became the majority shareholder and ultimately in 2000 it purchased all the shares of ZetNielsen and the name of the company was changed as ACNielsen Arastirma Hizmetleri A.S. In 1997, ACNielsen's Central Asia Department was established within its Turkish office and it is now collaborating with the "Emerging Markets Department" of ACNielsen Company. This department provides services to the Turkish and multi-national companies operating in Turkey that are doing business with Central Asia, Central and Eastern Europe and Middle East.

ACNielsen Turkey is today leading the Turkish market research industry. It mainly offers services in providing measurement and analysis of marketplace dynamics, consumer attitudes and behaviors. It manages the largest retail audit panel in Turkey. ACNielsen also offers other specialized services related to retailing according to the demands of its clients. Furthermore, it provides ad-hoc research, both qualitative and quantitative.

**GfK Turkey Group:** GfK Turkey is a part of German-based GfK Company which was established 70 years ago as Germany's first market research institute. GfK Company operates more than 50 countries with over 120 subsidiaries, offices and participations and more than 5,200 employees. The company provides information and advisory services on media and healthcare industries as well as in consumer and non-food. It also renders ad-hoc type research, both qualitative and quantitative. The company performed € 595.3 million revenue and € 33.3 million consolidated total

income for the year 2003.

GfK Turkey is composed of ProCon GfK, GfK Panel, Strateji GfK and Incekara Research. GfK began to operate a consumption panel in 1987 and merged with ProCon in 1993 to structure the GfK Turkey Group. ProCon was established in 1993 as a domestic research company and has been providing ad-hoc quantitative and qualitative services since this year. The Group then acquired IBS Marketing Research Company in 2001 and incorporated it into ProConGfK. IBS Marketing Research Services was founded in 1985 by David Tonge as a research, consultancy and publication company and was a part of IBS Group. It has carried out many international research projects in Turkey demanded by leading multinational companies and international organizations (such as EU and Worldbank). In 2002, GfK Turkey acquired both Incekara Research and StratejiMORI. Incekara Research, a Turkish firm, was founded in 1990 to operate in ad-hoc and syndicated automotive research. StratejiMORI, on the other hand, has been another joint venture till the acquisition by GfK. It was first founded in 1987 as a domestic research but in 1994, Strateji and MORI, the British research company, became partners under the name StratejiMORI. After the acquisition of StratejiMORI by GfK in 2002, MORI left the country and the company name changed into StratejiGfK. Today, StratejiGfK is operating as an independent company under the roof of GfK Turkey. Ali Levent Orhun and Elçin Üner, co-founders and co-Managing Directors of ProconGfK stated in a press release that (these acquisitions) “demonstrate GfK Group’s commitment to the sector and Turkey and they believe that this will provide a major stimulus to their continuing efforts to tighten their ad-hoc network with the objective to become ad-hoc market leader in the challenging and competitive world of marketing research in

Turkey." Furthermore, GfK Turkey's Baku office is responsible for the research projects in Azerbaijan and Georgia.

Today, along with ad-hoc qualitative and quantitative research projects and omnibuses, GfK Turkey manages a durable retail panel which includes sub-panels of white durables, electronic durables, photo-optics, small domestic appliances, cellular phones, IT and construction materials. It is also operating "Pulse of Turkey", a tracking research study for social, economic and political indicators.

**TNS PIAR:** TNS PIAR is a research company fully owned by UK-based TNS (Taylor Nelson Sofres) Group which operates in 70 countries with over 14,000 full-time employees across the world. TNS Group works in a wide-range of sectors, including automotive, consumer purchasing and behavior, healthcare, information technology, media intelligence, telecoms, and television audience measurement. It also provides social and political polling. In July 2003, TNS Group merged with NFO Group which is another worldwide provider of research-based marketing information, operating in 40 countries.. TNS Group's 2003 turnover, including joint ventures is about £805.2 million, and \$5.5 million of this belongs to TNS PIAR.

PIAR (Piyasa Arastirma Ltd. Sti.) was founded in 1975 as the third market research company -after PEVA and Baker- in Turkey and it became one of the pioneer firms in the Turkish research sector. It is the earliest adopter and initiator of many research techniques and applications in Turkey. PIAR has benefited considerably from Turkey's post-1983 liberal trade policy (Abadan-Unat, p.185). Since 1984, PIAR has been entitled to conduct market research projects on behalf of Gallup International Association in Turkey.

In 1994, PIAR became an official licensee of TNS in the introduction, adoption and application of a number of branded models and techniques and software offered by TNS Group in Turkey. PIAR and TNS have collaborated for 6 years as a research consortium. In February 2000, the Group acquired 75% of the company and the process of full acquisition was completed in March 2003. Meanwhile, the same period also marks the merger of TNS SIAR, a sister company now mainly operating in Central Asia and Turkic Republics. SIAR (Sosyal ve İktisadi Arastirmalar A.S.) was, indeed, established in 1983 as a sister company by the same cadres who founded PIAR. It has been heavily engaged in public opinion research.

TNS PIAR, with its 76 full-time employees and about 1000 interviewers, is capable of conducting nationwide surveys in Turkey, through its 16 fieldwork offices. The company claims to have “a capacity of completing 300 research projects and 250,000 interviews annually” TNS PIAR has the ability to monitor different dimensions of consumption in Turkey through its omnibus tracking. It manages the Personal Care Omnibus, Pharmaceutical & Health Omnibus, Female Consumer Omnibus, Banking Sectorial Omnibus, and Insurance Sectorial Omnibus. Moreover, its periodic tracking surveys include E-Banking, Out of Home Tracking, Kids & Teens Tracking, Turkish National Readership Survey (regular print measurement), Trend Poll (monthly national public opinion survey) and Trend 2004 (monthly national consumer survey).

**Millward Brown Turkey:** Millward Brown Turkey is a relatively new multinational company in the Turkish market research sector. It was founded in 2000 as a FDI of UK-based Millward Brown Company. Millward Brown itself together with Research

International and The Kantar Media Research, constitutes the WPP Group. The Group, collectively, employs 62,000 people (including associates) working in 1,400 offices in 103 countries. WPP companies work in advertising, media investment management, healthcare, branding & identity research and public relations. Millward Brown, on the other hand specializes in advertising research through understanding and communicating the effect of advertising and marketing activity. In line with this aim, Millward Brown Turkey provides research and analysis tools “in predicting the effects of advertising campaigns on sales, in measuring the value and meaning of brands and the depth of relationship that the consumers have with the brand and in tracking and understanding the total communications effectiveness of brand”. It also specializes in conducting both qualitative and quantitative research with kids.

### **B.2.2 Non-Equity Collaborations**

When talking about links with international organizations and/or companies, I mentioned two forms: partnership with a multi-national company or collaboration with an international company and/or organization. Besides a few, but influential, multinational companies, there are relatively more independent local companies which cooperate with international organizations/companies on a non-equity-basis rather than on equity-based one. Excluding multinational ones, today, there are about 10 independent marketing research firms which are collaborating with some multinational research groups/companies, international NGOs and even with some supranational organizations. In this case, not the ownership but know-how is shared and a strategic partnership is formed. Mutaf names this partnership as “project-based business collaboration” (Mutaf, interview). This collaboration may be in one or more

of the followings:

1) being entitled to use one other's branded research methods or techniques

(i.e. Barem Research is entitled to use UK-based Research International's branded techniques, such as *Loyalty Driver<sup>sm</sup>* (a research technique used to measure customer loyalty, *BPTO<sup>sm</sup>* (a research technique used for price and sales forecast. Similarly, Bilesim Arastirma is entitled to use Ipsos-Novaction's *Designor*© and *PriceAid*®)

2) organizing a local, national or an international research on behalf another

(i.e. Bilesim Research's membership in INRA)

3) public polling for a supranational organization

(i.e. ALFA Research is entitled to carry out all qualitative research demanded by European Commission)

4) being the representative company in Turkey

(i.e. Marka & Medya Research is the Turkish representative of *icon brand navigation*. Similarly Yontem Research is the Turkish representative of GlobeScan.)

### **B.3. Observation and Tensions**

As can be observed up to here, early 1990s marks the growing interest of multi-national research companies in the Turkish market research industry. This is mainly due to the fact that 1990 recorded high levels of growth in the global market research industry, but also due to the increasing articulation of Turkey to global capitalist restructuring in 1990s, on the other hand. In any case, in 1990s, the trend in the world was the restructuring of the market research industry through acquisitions and mergers to create larger conglomerates of companies (Kent:1993:16) This caused

a significant concentration of power into the hands of a few large groups for whom research is only part of a greater information and communications industry (ibid). Every group of companies now “offers a complete range of services”. The situation in Turkey was indeed a reflection of this global trend. As a matter of fact, as observed in the cases, almost all multinational research companies operating in Turkey are a part of a larger group of Europe-based companies operating information and communications industries.

A concomitant consequence of this concentration, Kent notes, is “the growth in the development of proprietary range of services”. As the industry consolidates in a few giant groups within which there are many companies specialized in various fields of marketing, information and communications, the competition becomes fiercer; and the companies begin to provide a wide range of services claimed to be unique for each client. Kent states that the market research industry has, in 25 years, moved from a cottage to a high-tech, computer dominated industry in which companies have now packaged their services so that clients can buy ‘off-the-peg’ services with standardized, proprietary techniques, each claiming to offer ‘unique’ advantages over the competition (ibid:17). This situation, in turn, causes a worldwide domination of some research models, techniques, and research types over others.

Some of my interviewees are critical about the dictation of these ‘branded’ models and techniques or methods by the multinationals. Alyanak, for instance, argued that this dictation resulted in the routinization and standardization of both demand and supply of marketing research. After the advent of multinationals, Alyanak claims, their techniques were taken as self-evident. Such an acceptance has

further consequences for local research firms. For him, with the advent of multinationals with their branded techniques the ability of local research firms to develop new research techniques has deteriorated. Similarly, Tüzün criticizes the increasing centralization of decision-making processes related to research with the advent of multinationals:

“...in any case, headquarter of a multinational client company agrees with headquarter of another multinational market research company for a multi-country research. The framework of the research is determined by these headquarters and solely the implementation is delegated to the local branches or joint ventures of these multinational companies.....Besides, a multinational research buyer working with a multinational research supplier may dictate one of its local branches to work with the local branch of that specific research supplier in that country. So, a local branch usually cannot choose a different (local) research supplier” (Tüzün, interview)

When I asked some other interviewees to interpret this situation, the responses were more or less similar: “there is no need to re-discover America! We also consider the needs of the local context” This response reminded me what Wilk proposes for marketing as a discipline. Wilk argues that, as a *global system of knowledge*, marketing represents a framework within which cultural diversity may be organized (quoted from Lien 1999: 242). I would suggest that the latter interviewees’ approach resemble what Wilk depicts for marketing. In other words, I may argue, the latter interviewees seem to accept marketing in general and market research in particular, as a global system of knowledge or a framework whose content can be adapted to the local contexts. However, the creators of this global knowledge system or the

delineators of this framework should also be acknowledged.

A final, and interesting, observation is about the profiles of top managers of these multinational research companies. Almost all top managers of these companies are second-generation business-origin researchers. The first-generation academic-origin researchers are, in varying degrees, critical about MNCs and usually prefer to manage their own local research companies; and usually they engage more in social and political research projects. Certainly, we have exceptions in both sides. Moreover, the companies of the first-generation are the most prestigious ones in the sector along with their multinational counterparts.

**CHAPTER TWO**  
**MARKET RESEARCH INDUSTRY AS A**  
**KNOWLEDGE INDUSTRY**

## **A. Productive and Competitive Role of Knowledge**

Knowledge emerges as a central concept in market research industry since what this industry produces as an industry is *specialized knowledge about consumption*. The rise of market research as a knowledge industry, not only in Turkey but also in the world, is intimately connected to the global restructuring in which information, in its broadest sense, has become a decisive source of wealth creation on the one hand; and an elemental competitive advantage on the other. In the following, I will first try to look at some conceptualizations in order to capture the rise of information/knowledge in late twentieth century. In so doing, I will focus more on M.Castells' observations and then I will point out some issues overlooked by him, which, I think, should be acknowledged in dealing with knowledge generation in our age. Later, I will talk about the further consequences of the rise of knowledge in the last few decades through focusing on its competitive role. This competitive role of knowledge generation will then lead us to better comprehend the increased need for the specialized knowledge on consumption which is satisfied by market research industry.

### **A. I Rise of Knowledge as a New Source for Wealth Creation**

At the beginning of his trilogy *The Information Age: Economy, Society, and Culture*, Manuel Castells(2000 (a)) notes that what is new in our age is not the critical and central of role of information, since information, in its broadest sense, has always been critical in all societies. What is new, for him then, is the *new set of flexible information technologies* which makes it possible for information itself to become the product of production process (ibid: 31). Castells seeks to capture this transformation with the emergence of a new *mode of development*, namely *informationalism*. This

new mode is different from the previous one, namely *industrialism*, since in the new mode, knowledge and information-processing make the sources of productivity whereas in the previous one, the sources of productivity have become the energy resources. What characterizes informationalism is ‘technology and knowledge generation’, ‘information processing’ and ‘symbol communication’ whereas that of industrialism was ‘introduction of new energy resources’ and ‘the ability to decentralize the use of energy throughout the production and circulation processes’ Besides, he argues, informational mode of development is oriented toward technological development, that is toward the accumulation of knowledge and toward higher levels of complexity in information processing, while industrialism was oriented toward economic growth, that is toward maximizing output (ibid:17)

Likewise, Dunning (2000), over the last three centuries, observes a shift in the main resources of wealth in market economies. For him, they have switched from *natural assets* (notably land and relatively unskilled labor) through *tangible created assets* (notably buildings, machinery and equipment and finance) to *intangible assets* (notably knowledge and information of all kinds) which may be embodied in human beings, in organizations, or in physical assets. Likewise, Solvell and Birkinshaw (2000) talks about a transition from ownership of land and raw materials to the increasing value and usage of knowledge as source of wealth creation in the society (ibid: 83) Similarly, Drucker (1993) argues that increasingly there is less and less return on the traditional resources of land, labor and (money) capital; information and knowledge have become the main producers of wealth.

What we observe is the emergence of a new technological paradigm which is characterized by “the use of knowledge-based, information technologies to enhance

and accelerate the production of knowledge and information in a self-expanding virtuous circle” (Castells 2000 (b) p: 10). Knowledge now “acts upon knowledge itself as the main source of productivity”. Besides, Dunning observes, “not only is knowledge heterogeneous commodity and can be put to multiple uses; often, one kind of knowledge needs to be combined with several kinds to produce a particular good or service”. (2000: 9) In other words, information or knowledge becomes its own raw material.

This new paradigm is surely shaped but not totally determined, by the global capitalist restructuring. At this juncture, Castells makes some observations about this new techno-economic system which, I think, would be relevant in order to better comprehend the role of knowledge generation in market research industry. Nevertheless, he sometimes overlooks the operation of sub-processes in this transformation which are, I see, germane to market research. After briefly giving his observations in the following few paragraphs, I will handle some points omitted by Castells.

Castells defines *Information Age* as “a historical period in which human societies perform their activities in a technological paradigm constituted around microelectronics-based information/communication technologies and genetic engineering” (2000 (b):5). This new techno-economic system can be adequately characterized as “informational capitalism” (2000 (a):18); and this has given rise a new economy which is *informational*, *global* and *networked*. It is informational because ‘the productivity and competitiveness of units or agents in this economy (be it firms, regions or nations) fundamentally depend on their capacity to generate, process and apply efficiently knowledge-based information’. It is global because ‘the

core activities of production, consumption and circulation as well as components (capital, labor, raw materials, information, technology, markets) are organized on a global scale, either directly or through a network of linkages between economic agents'. Finally, it is networked because 'under new historical conditions, productivity is generated through and competition is played in a global network of information between business networks' (ibid: 75-77)

Furthermore, he notices that this "new paradigm does not evolve toward its closure as a system, but toward its "openness as a multi-edged network; and it is powerful and imposing in its materiality, but adaptive and open-ended in its historical development. Comprehensiveness, complexity and networking are its decisive qualities" (ibid: 76).

These observations, indeed, help us to grasp how capitalism is operating in its global restructuring and the significance of knowledge generation in this process. Moreover, it is helpful to envisage how multinationals are able to manage both geographical dispersion along with their ability to impose their way of doing business. The new set of flexible information technologies increases the capacity of global business (as well as other) actors in ensuring the simultaneous availability of both decentralization and focused decision making. Such a consequence has certainly implications for market research industry. I will handle these implications in a few pages. But before, I would like to discuss a bit about what Castells overlooked.

What Castells is doing is trying to understand the relation between the global capitalist restructuring and the rise of knowledge as a new source from a global perspective. In so doing, he is more or less disregarding the processes which are at work at the lower levels. For instance, he is not looking at the sociological mediations

taking place at more local contexts that are, I think, helpful in understanding the global process itself. On the other hand, Castells focuses more on the production processes in explaining the emergence of knowledge as a product and raw material of itself. However, he does not consider the knowledge generation about the consumption field. At this point, market research agencies, I argue, appear as important as R& D laboratories or Silicon Valley in terms of generating knowledge as a source of productivity. His concern is, rather, more on IT-oriented technological knowledge. However, the knowledge generation on consumption is also emerging as remarkable in this Information Age, which in turn allows market forces to manipulate and organize the consumption sphere. Hence, in this study, I tried to focus first on the generation of consumption knowledge and second to look at some sociological processes among the knowledge generators (market researchers in my case) in Turkish context. The next part is devoted to this aim. But before going into this part let me continue a bit more on this current one and handle a concomitant result of the process that I hitherto tried to outline: the emergence of knowledge as a decisive competitive advantage and the need for specialized knowledge.

## **A.2. Knowledge Generation as a Competitive Advantage**

With the help of both deregulation of markets and the advent of new flexible information technologies, more global business actors become able to develop their industrial capabilities to seize the opportunity of the most-advantageous conditions. This has resulted in a fiercer global competition. In this competitive setting, major manufacturing elites were challenged since now manufacturing technologies could be imitated and transferred, relatively in an easier way, to low wage countries. They, in turn, responded by provoking the segmentation of traditional markets and speeded up

the search for the new niche areas for safe havens to sustain profitability. However, as the capabilities of the newcomers have increased, niche markets have begun to disappear, and some economists are warning that “the only safe haven is pre-eminence in technological innovation” (Thurow 1992) as well as new strategies to differentiate the existing products in the eyes of consumers so that they would be willing to pay premium for them. They also started to invest more on the generation of knowledge to create new sources and skills that are hard to imitate in order to remain competitive. In this setting, accurate and up-to-date information has become a very highly valued commodity. “Knowledge itself has become a key commodity, to be produced and sold to the highest bidder, under conditions that are themselves increasingly organized on a competitive basis” (Harvey 1990: 160) Hence, the high profitability in businesses is linked to their use of specialized knowledge and their customers’ willingness to pay a premium for services and/or goods which meet their needs. (Gibbons1994: 48). In order to satisfy the demand for specialized knowledge, especially industrialized countries have witnessed a growth of business enterprises funding of R&D for the last two decades (ibid). In this funding, in-house research is neither sufficient nor financially viable to meet competitive demands since business enterprises have to drive now specialist knowledge from a wider range of sources. Moreover, the maintenance of in-house research capability has become more costly since “firms are unsure about the particular knowledge they need; often it could have been produced almost anywhere” (ibid: 111) Therefore, firms have to look for new types of links with universities, government laboratories, with other firms as well as those which are specializing in research to meet the needs for particular knowledge. This, on the one hand has caused, ‘the market for knowledge – the number of places

where it is wanted and can be used- to become wider and more differentiated than it has ever been' (ibid: 49); on the other hand, it has turned knowledge generation itself into an inevitable competitive advantage. There is almost unanimity in business literature to consider knowledge generation as an indispensable competitive advantage of a firm that is trying to operate in today's intensified harsh global competition. (i.e. Nonaka et al.2000). In any case, Solvell argues that "with the emerging global markets offering a new potential to optimize the production function for all firms, irrespective of home base, the value of knowledge and unique practices as a basis for competitive advantage has become more pronounced" (Solvell 2000: .83)

The significance of market research have become more salient in this process since they are providing more and more specialized knowledge about the market reality for the firms which are eager to 'explore' and 'satisfy' the (alleged) needs of the consumers earlier than their competitors to become more successful in turning their first-mover advantage into profit. In order to explore the demand, or to create it, the firms have to have a deeper understanding of their prospective customers through more particular knowledge about them. I will turn back this issue in the next chapter.

As the demand for specialized knowledge increased, the scientific, technological and industrial knowledge production have become more closely connected; and specialized knowledge has been absorbed into a larger process in which discovery, application and use are more closely integrated. This has raised the importance of what Gibbons termed 'context of application'. Context of application refers to "the shift in the mode of knowledge production away from the search for fundamental principles towards modes of enquiry oriented towards contextualized

results”. In other words, problem solving in a research environment is organized “around a particular application” rather than by “following the codes of practice relevant to a particular discipline” Discovery occurs in contexts where knowledge is developed for and put to use. In this novel research environment which is structured by the application or use, knowledge flows more easily cross disciplinary boundaries, human resources are more mobile, and the organization of research more open and flexible. Hence, knowledge generation process is now transdisciplinary, dispersed, transient and highly contextualized. This situation also explains the wider and more differentiated structure of both the supply and demand for knowledge. This is also valid for the demand and supply of market research. For instance, a multinational FMCG corporation may carry out a new research in order to decide whether to change the size of its A-branded shampoos with a market research firm, while it may carry out another brand image research with one another for its B-branded hair gel among others. The latter research firm may be a multinational one and the research in question may be outsourced to a local one to carry out in a particular region on question. This FMCG corporation may, on the other hand, acquire the monthly reports of the household panel, which is being provided by another research company, for its health care product category to observe the performance in the market.

On the other hand this novel research environment gives us clues to understand the networked structure of new global economy. At the heart of the interdependency of the global economy and of the flexibility of [knowledge] production lies “a network enterprise in which the unit of the production process is the business project rather than the firm itself, though the firm continues to be the

legal unit of capital accumulation”. (Castells,2000(b):11). Networks connect among others on specific business projects and switch to another network as soon as the project is finished. Major corporations in this structure, work in a strategy of changing alliances and partnerships, specific to a given product, process, time and space. (ibid) Therefore, what Castells calls business project, I argue, refers in market research industry to the research done in a context of application. This context of application, on the other hand, is where we observe the double-edge function of market research. This context is also where the tension within this function emerges. Now I am going to deal with this double-edge function and the tension within it. Before, I would like to analyze first the meaning and the function of specialized knowledge in market research.

## **B. The Functions of Specialized Knowledge in Market Research**

In the previous section I tried to explain the emergence of knowledge generation as a new source for wealth creation in the global capitalist restructuring on the one hand, and as an indispensable competitive advantage on the other hand due to the increasing need for specialized knowledge. In this part, I will try to analyze the meaning and functions of knowledge generation in marketing discipline in general and in market research in particular. This will give us the opportunity to comprehend the increased visibility of market research industry within the marketing discipline and its emergence as a major market force.

### **B. 1. Specialized Knowledge to Reduce Uncertainty**

As the demand for specialized knowledge increased with the intensification of rivalry in the world, market research has emerged as a knowledge industry aiming at

providing specialized knowledge about the market reality. A deeper analysis, however, reveals that the need and use of specialized knowledge about real and potential consumption activities is highly associated with handling *uncertainty* which is believed to be inherent in today's way of doing business. Uncertainty as a discourse prevails almost the whole marketing practice and market research is seen as an effective medium to tackle it. Even, market research industry as the main knowledge producer on consumption legitimizes itself based on the claim to reduce this uncertainty. Barabba and Zaltman (1991) try to explain uncertainty with "future shock", a term they borrowed from Alvin Toffler. By "future shock", Toffler means the disorientation and decision overload produced by high-speed change.... (which) sometimes leads to breakdown of our capacity for rational decision making (1991:1). They argue that, today people are in the situation predicted by Toffler, and there is no exception for managers. In today's world, the decisions should be made faster and faster and they become more costly since they affect now more people, money, land and resources that ever before. Hence, decisions need to be timely, confident, and based on accurate information. However, due to increased tempo, the time available to check the accuracy of information has shortened and the period of time for which a decision may remain appropriate is getting shorter. For them, this leads to greater amounts of uncertainty surrounding important decisions and uncertainty, more than competitors and resource constraints, is becoming the arch enemy of many managers. (ibid: 4)

On the other hand, Lien suggests an inquiry into the marketing profession, and into the epistemological and material processes involved in the transformation [of the consumption sphere] (Lien 1997: 4.) in order better to understand the nature of

uncertainty and ambiguity which she finds to be central themes in marketing practice. This will, in turn, be helpful to better analyze the complex process of knowledge generation on consumption which is highly associated with the dynamics of the whole marketing discipline. Throughout her empirical studies and ethnographic work about a marketing department (Lien 1997), she finds that uncertainty and ambiguity have appeared to be central themes. In the marketing department(s), feelings of doubt seem more pervasive, and marketing practice is characterized by contingency, ambivalence and doubt, rather than an offensive action. Besides, *unpredictability* and *the ability to act strategically* are two common features in the perceptions of marketers about the marketing practice (ibid: 97). Lien contends that the performative consequences implied by the metaphor of the ‘market as a flux of transformation’ are the most suitable description of marketing practice (ibid: 237) In this flux of transformation, uncertainty refers to the inevitable gap between what is already known and what ought to be known. Marketers are usually not satisfied with the information they have and ask more. Lien observes that marketing people agree that “too little is known about consumers” and that “an effort should be made to improve competence in this field” (ibid: 111) In other words, information about consumers is always incomplete. Lien argues that from the perspectives of both her informants (as well as of mine) and authors of marketing literature alike, this is a major source of uncertainty in marketing decisions. The consumers are, by and large, an unpredictable element, and consequently one that needs to be better understood (1997:112). The notion of “to better understand the consumer” has also emerged as a central theme among my informants. For instance, one’s answer to my question “how do you define your job?” was “to be a bridge between consumer and producer, that is, to try to

understand what the consumer is saying and to comprehend what he wants to say” (Akman, interview). In order to reduce uncertainty and ambiguity about both the consumers and the actors in the market, the marketing people heavily depend on external sources of information, most notably on consumer-oriented market research. Whenever needs for information about consumer preferences or consumer characteristics arise, Lien states, market research institutes are consulted that are providing ‘commercially transmitted knowledge about consumers’ (ibid:113)

In tackling the continual change and uncertainty, Baker and Mouncey (2003), in their “market research’s manifesto”, try to map out the new marketplace which, in turn, widens the gap between what is known and what ought to be known. For them, the macro-marketing environment is itself changing as it shifts from a production-driven to consumption-led economy. This shift has been occurring no doubtedly along with the transition from Fordist to post-Fordist production mode, hence along with, to a great extent, with the global capitalist restructuring. Baker and Mouncey describe this shift as “a seismic shift of economic plates” out of which a new marketplace is emerging where the nature of the exchange is shifting. This move is from mass marketing to relational marketing, or in other words, the focus of marketing activity is moving from “completing transactions” to “building relations” in which emphasis is given to retaining existing customer rather than acquiring a new one, and in which business focus is on defining and meeting the customer needs rather than manufacturing and selling product. In any case, what is first thought to prospective *business administrators* in the very beginning of Marketing 101 lectures is the fact that reaching to and acquiring a new customer is becoming increasingly costly than retaining an existing one. Newly published pop marketing books talk

about the 'rule of consumers' and the need to better understand him or her.(i.e. Solomon 2004, Odabasi 2004, MediaCat2004) Similarly, some argue that "marketing is where the consumer is" (Hamilton 1989:3) Therefore the emphasis is now on the consumer rather than on the product or services offered. "Understanding consumer becomes the main driver of the marketing process. Relatedly, organizational understanding of what drives profitability is shifting form looking down the supply chain to looking up the demand chain" (Baker& Mouncey 2003: 418). As the production process becomes more complex, the distance (temporal, spatial, institutional as well as mental) between the consumer and the producer widens.

On the other hand, as we shift to a new marketplace, Baker and Mouncey argue, old assumption about the consumer is loosing ground. According them, the old assumption of production-driven era was considering the consumer as relatively rational and motivated by largely functional needs. However, as the manufacturing capabilities developed, as new actors started to come to scene and challenged the older ones by manufacturing products that have more or less similar functional attributes, and as the products became more available with the augmented distribution channels, it became more difficult to motivate consumers solely by focusing on functionality of the products or services. Almost all products of the competitors of the same product category seemed to be similar in the eyes of the consumer. Hence, the producers, in order to remain competitive in the market, should ever 'explore', even create, and 'satisfy' the unarticulated needs of the consumers earlier than their competitors or differentiate the existing products in the eyes of consumers so that they become more willing to pay a premium. Therefore, marketing activities should

target beyond what is rational and functional and deal with the irrational; that is they should create or manipulate the symbolic meanings of products or services offered. This need has “brought the cultural context to the fore” and now marketing practices should “adopt an inside-out perspective rather than an outside-in approach” (2003:421). In other words, they should understand the consumer in totality in his cultural and social context with a subjective rather than an objective orientation. Now the role of the market researcher as a specialized knowledge provider is decoding the symbols as a means of understanding the cultural meaning that a consumer charged to the goods. “Market researcher need to get ‘up close and personal’ using optimal mix of techniques” (ibid: 422) For instance, my informants (as well as market research literature) consider the consumer as ‘black box’ that they should unfold. Hence, now the consumer is transformed into a black box that should be deciphered. At this point, it is sensible to argue that as long as the consumer is perceived as a black box, the gap between what is known and ought to be known will never cease. (implication lari ne? expansion of their markets . consumer bases...) Hence, marketers will never satisfy with the generated knowledge about consumer, how much particular or specialized it be, to reduce the uncertainty.

Such a role of market researcher also explains the ascendancy of qualitative techniques along side the quantitative ones in the researcher’s toolbox. Quantitative techniques and the data generated as a result usually fail to provide an understanding of the individuals concerned in the overall context. (Chadwick 2000) Even, before conducting a quantitative research, market researchers insist on conducting some qualitative research first so that they can better design the surveys and hence they are able to both deepen and widen the level of information they will get through them.

Hence, the scope and content of surveys increase which, in turn, leads to a longer period of time per survey. Some of my informants noted that the early assumption that a survey should finish in maximum 20-25 minutes is no more valid. Today, some quantitative surveys finish even in 45 minutes. Furthermore today, qualitative techniques contain not only the standard in-depth interviews, focus groups, projective and elicitation techniques but also “the use of more *in situ* investigative methodologies such as discourse, semiotic and ethnographic analysis to gain an understanding of cultural meaning” (2003:422). The cases below should be illustrative in showing the ascendancy of qualitative techniques in Turkish research industry.

#### **Case: 1**

During my internship, the company was organizing a nationwide quantitative research project. The project was a brand image research for a company that is operating in personal care industry. It has products in each product category of its industry (shampoo, hair crème, hair gel and liquid soap). This quantitative project was indeed an extension of a qualitative one which was undertaken before. In any case, Daniş had stated to me that to conduct a qualitative research as a preparation of a quantitative one would make the latter more effective since the questions of the survey would be to the point. My informants stated to me that since the project would be the first brand image project of the client company they had proposed first to conduct a qualitative one and, based on this, they could develop an extensive quantitative survey. The qualitative project had conducted focus groups with 35 women from Istanbul, who were categorized in 6 groups in terms of socio-economic status, age and the frequency of the brand usage (of the company as well as its competitors) The project aimed at understanding what kind of image the consumers

had for shampoo and hair crème brands of the company and its competitors and at providing insight for the prospective quantitative project. In the focus groups, the researchers aimed at learning the usage habits of these brands/products; the *brand image* of each brand they use (through various projective techniques such as collage, personification, farewell letter for the brand) and finally the evaluation of the packages of these brands. Since, health care product category has been a widely researched one, the project aimed at scrutinizing as much as possible. Later, based on the findings of this project, a new survey was designed for the quantitative research. The questionnaire was about 36 pages and it was taking for one interview about 40-45 minutes. This is a pretty much time for a survey. However, my informants as well as some of interviewees agreed that the former rule about the period of a quantitative interview is now no more valid. The rule (in fact a rule of thumb) was that it should not exceed at most 25 minutes.

## **Case: 2**

In today's competitive environment, even qualitative techniques such as focus groups, are "regarded as "passé" and they are now looking for new techniques from social sciences to unveil crucial data they would not otherwise receive" (Fellman1999: 21). Among these techniques, ethnographic studies are recently gaining credibility and popularity among market researchers. Though ethnographic studies have traditionally been used, particularly in anthropology, its use in market research is relatively a new phenomenon. This is also true in Turkey. Although it is a new qualitative method for marketing researchers in Turkey, there are some companies are employing these studies to gather more detailed and differentiated information about the daily contexts of consumers' lives. I told with one of my

interviewees about the ethnographic studies that she is undertaking. She informed that through these studies, they aim at observing the consumer in her or his *lifeworld* or natural setting. Ethnographic studies are usually conducted through home visits. My interviewee noted that in these visits they pay attention different aspects of the consumers daily life: the layout of the house, the style objects are arranged, pictures hanged on the walls, the books read, the music CDs & cassettes, the ownership of durables. Besides, she explained, in a research, let us say, for margarine, they may ask the housewife to cook something so that they can learn how margarine is used in this process rather than directly asking the way she cooks. They usually check the refrigerators and cupboards, for research studies conducted for food products, to see which products are present; and observe the kitchen overall to see the layout and the existing kitchen appliances. Similarly they check the bathrooms for the cleaning products. She also stated that they are recording the visits through videos or taking photos. Moreover, they may ask consumers to bring some objects, photographs or pictures that they value much and speak about their significance in their lives.

As a consequence, “to be able to generate relevant insights that will enable the organizations to better connect with the consumer” is of crucial importance and becomes a competitive edge in today’s harsh global competition. As long as a firm has more particular knowledge about the consumer, and his consumption milieu, it is more likely to reduce the costs of a developing a new product or to differentiate an existing one since it will be able to precisely define its target market for that particular product and produce and distribute it accordingly. Moreover, as long as the company has more specialized knowledge about the consumer it will be able to

discover more the unarticulated needs and wants of him and to create a new a product or service accordingly, which, in turn, the consumer would consent to pay a premium for it. Hence, the tension between what is already known and what ought to be known about the consumer is continually reproduced and the marketer is never satisfied with the information he has and asks more. Paradoxically, what I suggest here, while market researchers are trying to narrow this gap through the knowledge they generate, they are simultaneously contributing to the widening of it. For instance, as I mentioned at the structural map, HTP operates household panel in Turkey and releases standard analyses for its clients about the consumption activities of household consumers. These analyses include penetration ratios of brands, average availability rate of products and brands in households, opportunity analysis, price indices, etc. HTP provides also special analyses which are charged extra. The latter analyses include more elaborate ones, such as purchasing habits, purchase density for products, brand conversion, purchaser conversion, changes in loyalty rates, demographic analyses, brand positioning, ownership profile, life stage determination, etc. HTP's choice not to put all analyses in a standard report is understandable for practical and profit-related reasons. However, as HTP produces more elaborate analyses from the same database by configuring and re-combining data or by observing another dimension of consumption in the same sample, more particular knowledge has become produced. However, as HTP generates more knowledge about the households through various analyses and as the client company recognizes the existence of these analyses, households turn into entities in the eyes of company marketers that are now *less known* and that should be *better understood*. To do so, the client company should, certainly, pay more.

Having analyzed the association between the need and the use of specialized knowledge about real and potential consumption activities with the *uncertainty* which is believed to be inherent in today's way of doing business, now we can turn to Lien's analysis of double function of market research. Market research functions both as an intermediary translator and as a separation process. In the following, after I briefly sketch out her argument I will try to analyze how these two market research functions are perceived in Turkish contexts. Then, I will focus more on the separation process and I will identify six strategies employed in Turkish market research industry contributing to this separation process. Through this analysis, I will try to show how market research is constructed as a separate field in which a bounded knowledge is being produced.

## **B. 2. The Double-Edge Function of Market Research**

Based on her observations of the marketing department of a Norwegian food company, Lien explores that two strategies are employed in marketing discipline in order to deal with uncertainty and ambivalence: strategies of separation and strategies of mediation. Strategies of separation serve, both at conceptual and social level, primarily to protect the 'boundedness' of the professional sphere from the intrusion of the private sphere rather than the other way around (Lien 1997: 262-265). On the other hand, the strategies of mediation are carried out by intermediary translators, namely by advertising and marketing research agencies. While advertising agencies primarily serve to mediate between manufacturer and the consumer, market research agencies/institutes mediate from the consumer to the manufacturer, as a part of decision-making-support systems. Lien notes that the marketers' (product managers' in her case) need for intermediary mediators is not entirely self-evident. It is founded

upon a recognition of distance, or a recognized inability to understand the consumers that the market research institute itself provides the evidence to sustain (ibid: 265). Nevertheless, the mediative function is the most emphasized feature of market research in business and management circles as well as in literature. For instance, Malhotra states that The Board of the American Marketing Association has approved the definition of market research as follows: market research is the function that links the consumer, customer and the public to the marketer through information – information used to identify and define marketing opportunities and problems, generate, refine and evaluate marketing actions; monitor marketing performance and improve understanding of marketing as a process (1999:11). Similarly, Hamilton, expresses that “listening to the consumer” is almost the best definition of market research (1989:1) Likewise, Barabba and Zaltman, defines market research as “hearing the voice of the market” where the marketing discipline as a whole tries to reconcile the voice of the market with that of the firm. Voice of the market, they mention, indicates “what consumers want and are willing to pay for” while the voice of the firm indicates what the firm is capable of and willing to provide to the marketplace. In any case, marketing as a discipline is responsible for understanding and coordinating the relations between the organization and its environment (1991: 60). In this coordination, market research functions as “sensory organs of the organization” (Organ 1971) and market researchers are the people who ‘connect an informal network with other parts of the company or with similar networks in other organizations’ (Cross & Prusak, 2002) it is through market research that a company adapts (or fails to adapt) to the changes in the environment. I observed during interviews and fieldwork that my informants also agree upon the mediative role of

market research as the primary one.

What is interesting here is the fact that while serving as an intermediary translator between manufacturer and consumer, market research agencies may simultaneously take part in what Lien describes *process of separation* between two. “This is important, because intermediary translators are not merely functional assistants in the effort of aligning the interests of producers with those of consumers; they are also producers of a distinct kind of knowledge which is highly commoditized. This commoditization presupposes a separation of spheres that the intermediary translators themselves provide the ‘evidence’ to sustain” (Lien 1997: 266) Market research is now considered “no more a substructure within marketing” (Baker & Mouncey 2003:430) Market researchers prefer today to regard their job more as a distinct discipline “whose primary and indispensable service is that of offering information about consumers and whose main sales argument is their ability to describe the specific characteristics of differentiated target groups, an ability that is largely an effect of the application of modern statistics”. (1997:266) In this separation process, we come across a boundedness of knowledge which serves to separate the competence of an independent market research agency from the competence of the marketing department (including the market researchers) of a company in generating relevant knowledge about the market reality. The consumption knowledge generated outside the company is taken more legitimate than the one generated in-house. Consequently, when, let us say, a brand manager has a chance to watch out randomly selected consumers in a focus group behind the mirror glass in an independent research agency or to examine the report written afterwards, this represents a source of knowledge that is by definition more legitimate than a comparable report provided

within the firm itself. The knowledge generated by an independent market research agency is by definition regarded more objective, and more representative of the real situation.

### **B.2.1 Strategies for Separation**

During my research, I have observed that market researchers are employing a variety of strategies/discourses that reflect the process of separation within marketing discipline and of defining and maintaining the boundedness of (consumption) knowledge they generate. They are indeed strategies to institutionalize the market research as an economic profession. The process in which market research has emerged and developed as a new social force in Turkey comprises in itself also the process of institutionalization of market research as a profession. In this process, the researchers try to position market research as an independent and autonomous field which has a certain specialization, that is, *a specialization of better understanding the consumers in an objective way*. Moreover, as a part of this professionalization, they try to develop (indeed adopt) a code of conduct for market research and to establish an internal hierarchy within the industry. The activities of the Association and the tensions within the sector that I tried to show in previous chapter (particularly those between independent market research companies and field firms) may be read as the manifestations of this process. This professionalization process of market research resembles more or less those that took place before, for instance, in academic and medical branches. However, in this study I do not strictly dealing with the emergence of market research as a profession. What I would like to do in the following is, instead, to analyze the strategies employed by market researchers to construct a separate field in which a bounded knowledge on consumption is being produced. In

other words, my aim here is to explore how specialized knowledge- which has emerged as an inevitable competitive advantage along with flexible accumulation-functions in Turkish market research industry. In so doing, as I mentioned before, I would like also to look at the sociological mediations that are taking place at lower levels of knowledge generation in today's so-called knowledge society. The strategies used by market. In the following I will try to analyze how they function.

#### **B.2.1.1 Market research as an expertise:**

The main strategy employed in distinguishing the boundedness of market research is the differentiation of competences between what a market research agency and a company has. Market researchers claim to have a different kind of expertise vis-à-vis the marketing department or marketing research staff of a company. Since competitive advantage “resides increasingly in how market information is used rather than in who has in formation” (Barabba 1991:3), market researchers assert to have a specialized expertise in interpreting the data they have collected. Almost all my interviewees agree that a market researcher is one who adds a value to the data s/he collected. This added-value comprises ‘analyzing’, ‘explaining’, ‘interpreting’ and ‘giving meaning’ to the facts they have found about the market reality. Tüzün noted that market research comprises the explanation of the tables and charts more than just preparing and submitting them, adding your experience and aid the firm in setting policies. Özkan stated that they give support to the firms in how they can use the market information more efficiently while Mutaf defined her job as “selling intellect” (akil satiyorum). Similarly, Pekedis, after she defined market researcher as a “service

provider”, stated that she is providing the “interpretation of a research expert”. Hence, an interpretation of a research expert is a different kind of expertise when compared to that of her counterparts for her. Why does such kind of an expertise matter and is distinct? The answers are similar and focus on the privileged position of the researcher; that is, a market researcher, as an outsider, has the ability to look at the market more objectively since s/he is not a direct part of the production processes of the company and free from the organizational and hierarchical considerations in this process given that a marketing department of a company is never able to be unbiased about the goods or services it is offering. Furthermore, as an outsider, a market researcher has the ability “to give a holistic picture of a sector and to detect the all competitors in that sector unlike the marketing staff of a company that cannot wholly view the sector in question and that generally pays more attention to a few fellow competitors (interviews with Tüzün and Akman) Besides, though a company makes an effort, Akman (interview) argues, it is not always successful in “hearing and really understanding what the consumer wants to say”; hence, the company needs an outsider perspective that is able “to read between the lines, to grasp what a consumer implies and transmit it to the producer”; she means a market research conducted by a research agency. For her, this is the *raison d`etre* for the market research.

Market researcher is believed to “better draw the whole picture” (Özler, interview) that integrates information from multiple sources to create effective recommendations for the client company. At this juncture, the most employed discourse about the market researchers’ expertise is their ability to generate *actionable insight*. Actionable insight refers to concrete and relevant

recommendations proposed by the researcher to the client company in the report delivered after a research project. Almost all my informants as well as those whom I met during the internship agree that, to give some recommendations at the end of the report is a must and this recommendation should convey a definite, tangible statement which would help the client company to take action accordingly. As a matter of fact, Baker and Mouncey, in the market researcher's manifesto, remind their fellow researchers to acknowledge that in today's marketing landscape, managers want: i) no more compartmentalized advice, ii) a holistic picture that integrates information from multiple sources and iii) create an effective stream of action-oriented knowledge. During the internship, a research project was about to finish and the project manager was checking out the analyses and making the last modifications in the final report. She had also asked me to prepare some analyses. When I finished my work and submitted them to her I asked: is the report over?" "I should add some actionable recommendations, otherwise the report does not work" was the answer. Similarly, Bakış described her job as "selling action-oriented knowledge" Most of the research agencies, both national and multinational, on their web sites to communicate their expertise to the business world state the phrases like "generating/providing *actionable insight*, *action-oriented knowledge*, *management knowledge for action*, *dynamic information for marketing and production strategies*, etc. Likewise, the market researcher's manifesto suggests researchers to assume a real decision-making role in moving from being perceived as a low-grade commodity business. (2003:431)

On the other hand, most of the interviewees told about another kind of expertise: the ability to convince the (prospective) interviewees to partake in a research project, to be surveyed and to give some data, which are otherwise difficult

to get. For instance, for Özkan (interview) to convince a person for a survey is a special skill of a surveyor and the surveyor gains this skill through the trainings which are given by the researcher(s) for each project. Likewise, when I asked to one of my informants about the persuading processes, he was not so happy with my question and mentioned “you motivate a person for a survey via some “professional tricks (profesyonel tripler)””; then he wanted me to infer his expertise by stating that he (indeed his company) was succeeded in conducting 13,000 surveys up to now.

#### **B.2.1.2 Market research as a confirmation and measurement mechanism:**

In previous pages, it is stated that the consumption knowledge generated outside a company is taken more legitimate and more objective than the one generated in-house by the marketing people. Both the observations of Lien (about the marketing department of a Norwegian food company) as well as mine (about the interviewees) support this inference. Such an approach leads to another strategy in protecting the boundedness of consumption knowledge produced by market researchers. Market researchers are aware of the fact that the analyses and recommendations presented after a research project is not usually in a total contradiction with what a company foresees. In this sense, Akman expresses that no research is a miracle. However, the market research functions as a confirmation mechanism at different levels and settings within the company. As a confirmation mechanism, “what a research does is to relieve the opaqueness and to help the company to initiate a new move”. At the first level, the marketing people are employing the results of a research project to justify their decisions, strategies or tactics about their prospective marketing activities in order to first convince themselves. Due to the uncertain nature of the business world, which I told above,

they are not sure whether their solutions would be effective and efficient and the market research functions to confirm their proposals. At the second level, market research is used to convince the managers. Örüng argues that market researchers within a marketing team of a company may often hesitate to be in a plain contradiction with superiors though s/he intends to propose some brave but efficient marketing initiatives. At this point, a report from a market research agency would be more convincing and hence it can confirm what the company researcher offers. At the third level, company would use market research to measure the performance of its previous activities as well as of their branches. For instance, Pekedis mentioned that the companies, particularly multi-national companies, should set annual *smart targets* at the beginning of the year. Smart targets, however, are required to be measurable and quantifiable, hence the company needs a measurement mechanism according which these targets are set at the beginning and their performance is measured at the end. For her, market research reports function as a measurement mechanism. This is particularly the case for the panel research which is providing periodic and regular data. Moreover, a company, Özkan noted, “needs data/information to prove its past performance” and market research is providing these data, for they are believed to be by definition objective and legitimate. Besides, in evaluating the performance of its regional or local affiliates, Pekedis informed, a headquarter of a multinational company generally prefers to utilize market research reports which are prepared by local market research agencies (or local branches of a multinational research firm). This is also the case for national corporations. They also evaluate the performance of their regional branches based on the data they get from panel research. What is interesting here is that, in case of contradiction between the data provided by research

agency and the branch of a company about, let us say, the monthly penetration level, the headquarter takes that of the former valid and acts accordingly. (Pekedis, interview)

### **B. 2.1.3 Market research as business within business**

Some prefer to handle market research as a *business within business* – one that must produce, sell, and deliver its own product (Barabba and Zaltman 1991). The product is the accurate and usable market information/knowledge produced and delivered early enough to aid all decision makers in the firm. At this point, market research sector resembles what Gibbons names a knowledge industry. Gibbons (1994) contrasted *knowledge industry* and *knowledge-based industry*. For him, knowledge-based industries attempt to understand and improve the operation of a particular manufacturing process and are primarily concerned with products and process development. By contrast, for knowledge industries the information/knowledge itself becomes a commodity that is traded. In knowledge industries, once knowledge is produced it may be available for re-use in some other combination. Value is added by the reiterated use of knowledge; reconfiguring it with other forms of knowledge to solve a problem or to meet a need. (ibid: 84-85) What Gibbons indicates about the generation of knowledge through reconfiguring is observable in the market research sector. For instance, ACNielsen Retail Panel is providing periodic data on the selling activities of about 2500 retail points in Turkey and it makes projections for the whole of Turkey. The main product of the company is its standard report sent to the clients, which is indeed a monthly database showing the monthly sales of all products in various distribution channels along with purchase price. The company, however, renders also special services for the particular

problems of its clients through special reports. Cagla Bakış, the director of Modeling and Analysis Department for retail audit panel of ACNielsen, is responsible for generating knowledge to solve a specific problem of a client. Bakış makes special analyses and produces particular knowledge to meet a particular need. In so doing, she is reconfiguring the base data and generating specialized knowledge. She informed that “where you look at data matters since each time you can generate different knowledge for different purposes”. Hence, once you have the base data - the retail audit data for a certain period of time collected monthly from all over Turkey- then it is a modeling issue to generate a further specialized knowledge demanded by the client. You can produce either the standard report or a special analysis for A company and another one for B company. All are the products of ACNielsen and they are priced differently. Hence, it is possible to generate various reports or analyses from the same data just by reconfiguring them, or re-using in different combinations. In this sense, market research industry is a knowledge industry in which the consumption knowledge is commoditized. In any case, Appaduari notes that one feature that characterizes the capitalist type of exchange is the fact that *‘knowledge about commodities is itself increasingly commoditized’* (1986: 54) While market research industry is increasing the capacity of market forces to commodify another aspect of life day by day; it is, itself, in another process of commodification: commodification of consumption knowledge. Therefore, as a business within business, which is producing, distributing and selling a different kind of product, the market research agencies need to think and act with an entrepreneurial spirit. Such an entrepreneurial spirit is also clearly visible in Turkish market research industry. For instance, Özkan noted that every project that they finished is their product. Similarly,

Pekedis, while complaining about some “(Turkish) managers who cannot still realize the importance of knowledge in marketing”, boldly states that “what I sell are these reports and the client should pay for these products.” She continues:

“When I want to buy a pack of pasta I pay the price. I never say: “O! give me one, since you already have”, Likewise, a client, a pasta producer let’s say, who paid for the standard report and looks for an extra datum not stated in the standard report, should pay its price. He should not say: “O! Give me this datum or number or figure, since you already have!”

Hence, a piece of information turns now into a commercial product as a pack of pasta, but it is certainly more expensive. Furthermore, every research agency I studied has an “operations department’ in which collected data are processed to develop information products and services. These departments are, at the same time, where facts and data collected are transformed into information through analyses which are usually perceived as the core of strategic management since the success of decisions and actions is largely based on the quality of analyses. (I will deal with this production process in detail in subsequent sections.). Every research agency also has a “marketing and sales” department which is responsible to convince the companies to buy the products of the agency - standard reports, branded research techniques, special analyses, periodic data, a survey report, a focus group project presentation, etc - which would satisfy an important need and to market and sell them.

Therefore, as a distinct business within the business, that is offering a different kind of products, market research industry is separating and protecting its boundedness.

#### **B.2.1.4 Market Research between consultancy and fieldwork:**

The actors in market research industry, authors of marketing literature as well as marketing people agree that market research is more than just data collection. The recent trend in the industry is towards consultancy research in which market research firms are called to involve not only in data collection but in a considerable degree of consultancy work before and/or after data collection. Market researchers, in different settings, express, even warn, that market research is more than solely data collection or preparing some charts and analysis, or “more than clipboards and opinion polls” (Turtle&Katryniak, 1992) since competitive advantage resides increasingly in how market information is used rather than in who has information . At this point, Shaw and White (1999) indicate that the research industry faced with challenges from consultants on the one hand, and from IT specialists on the other. In the former case, they argue, the competencies of consultancies in synchronizing information with strategic initiatives and introducing consistency to the procurement and processing of projects push the current research process to one side. The threat from IT industry is that processes can be dramatically transformed and speeded up through a restructuring and automation of data handling. In consistent with what Shaw and White notes, Özler (interview) mentioned that consultancy firms seem to be their formidable competitors since “they are more able to differentiate their products” (that is consultancy) *vis-à-vis* the researchers. He also noted that, consultancy firms, particularly foreign ones, have already conducted research in Turkey since research is indispensable for consultancy. On the other hand, Pekedis argued that there is a difference between the services rendered by consultancy and research firms. For her, consultancy firms look at the data that a company already owns, such as annual

performances, working conditions, reports about the employee performances; then they add their own interpretation, as an outsider, on the existing knowledge. A research agency, however, provides what a company does not possess; and the agency, as an outsider, gives interpretation to what it has found out for the company through the research. Though it is not clear whether consulting firms are regarded as a threat or not for the research industry, what is plain is that the ability to process information and to deliver an action-oriented strategic view/insight weighs more than to provide it by the researchers. Among 77 companies presented in the Yearbook 2004, 24 of them use the term “consultancy” in their title along with the term “research” in communicating what kind of a business they are doing (Yearbook 2004). This fact is also compatible with the first strategy, considering market research as an expertise. Nevertheless, to provide data is still a part of research job. Unless researchers have accurate and reliable data from which they will distill insights and on which they will build their expertise to generate strategic recommendations, market research would have problems to justify itself as a distinct discipline or a business. Hence, fieldworks are indeed as important as later processing of information. As Ataman rightly noted, if the fieldwork is not well organized the research would be nonsense. Then, there is an ambivalence within the industry and an inter-sectoral conflict is observable. Turkish market research industry is made up of mainly two kinds of firms, one the independent market research firms or agencies, the other the field firms. Because I have dealt with the organization of the structural map, here I will not go into detail about the differences. What I want to focus here is to understand the nature of the conflict between them. There is not an obvious utterance of this conflict among the interviewees. Yet, there is a constant undervaluation and

lack of confidence towards field firms in the industry. For instance, Özler defined field firms as “those whose single peculiarity is collecting data” while Mutaf accused field firms of carrying out the fieldwork in a sloppy manner (yalap salap yapıyorlar). Özler and Danış informed that just a few field firms are trusty to be outsourced for the fieldwork. Nevertheless, many research organizations are outsourcing somehow their fieldwork to the field firms, though some organize it totally in-house. In any case, in almost each city there is at least one field firm or organization, which is basically “made up of a table and a chair” informed Bora. At this juncture, independent research firms try to strictly control all the fieldwork processes. For instance, almost all what Özler defines as the *intellectual phase* is carried out either by the field or project departments of market research firms. That is, the identification of the information need for the client company, the identification of questions, the modeling and the design of the survey are organized by the research agency itself and solely the data collection phase is left to the field firm. If I use the Özler’s terms, market research firms are *outsourcing the drudgery to the field firms*. (isin hammaliyesini deverdiorlar) Besides, the surveyors, even the supervisors of field firms, are mainly trained by the people from market research firms that are those responsible for the intellectual phase.

I observed an example of the hierarchical relationship between people from field firms and market research firms during my internship. There was a nationwide survey and there were about 20 people from different parts of Turkey, among them were both novice surveyors as well as supervisors of a certain research field, even an owner of a local field firm. These supervisors were basically not surveyors but responsible for the healthy implementation of the fieldwork in their respective

regions. The training was given by a member of the project team of HTP Exclusive which has done most of the intellectual phase of this survey. Though many people there were very familiar to such kind of trainings, they were generally so silent while they were listening to the instructions which were, indeed, uttered in a non-cute way. Sometimes, the instructor did not hesitate to warn some of them in a very manifest manner. The trainees seemed to me to be pretty conforming. Besides, the control mechanisms during and after the fieldwork are highly hierarchical: surveyors are controlled by the supervisors of the field firms, the supervisors by the supervisors of the research firm or project members and the last ones by the project managers. According to ESOMAR rules, at least 10 percent of the surveys should be “back-checked” through calling back the interviewees and comparing the answers given in both situations. In some firms, or in some projects, this percentage may rise up to 35%.

Fieldwork is a dispensable but a troublesome process. Bora (interview) stated that “it is the fieldwork that is hard to implement and of which everyone accuses”. What I observed is the tendency of independent market research firms to differentiate themselves from the field firms. Up to 2004, in the yearbooks of the Association, there was a blurred classification of the firms within the sector as *research organizations* and *research services*. The former usually referred to the independent market research firms while the latter to the field firms. But as I said, the distinction was not so clear. Alyanak explains the reason that, in the industry, to organize and to carry out the fieldwork as an in-house work is considered as a competence by the research firms and they do not want to disclose the fact that they are outsourcing most of the fieldworks. On the other hand, in order to be seen more prestigious, field firms

are declaring that they are able to carry out a wide variety of research methods. (see Table 3 on page 49) The consequence was a blurred situation which simultaneously reflecting “the lack of division of labor within the sector” (interviews with Mutaf and Alyanak) However, with the new management in the Association, the field firms are separated from the research firms under distinct categories in the yearbook. According to the Yearbook 2005, there are 39 “marketing and public opinion research companies” and 13 “field companies”. For Alyanak, the reason for such a categorization is not due “to the need of the (research) market” but due “to give an order to the field firms”. Hence, the Association tries to organize the industry in such a way that the firms that are processing information and giving consultancy would be differentiated from those that do only data collection. There is no doubt that both field firms and market research companies make up together the backbone of the Turkish market research industry. However, I argue that the ambivalent attitude of researchers between consultancy and fieldwork, the conflictual and hierarchical relationships between two kinds of firms within the industry, and the attempts for differentiation based on the nature of intellectual complexity of their jobs can be considered the attempts of market researcher to set and protect their boundedness, which in turn contributes to the separation process.

#### **B.2.1.5 Market research as a profession:**

Another important strategy or mechanism to define and protect the boundedness of market research knowledge is the attempts to regard it as a profession. My some informants see the development of the industry and the emergence of market research as a profession as parallel processes (interviews with Özler, Alyanak, Mutaf). Özler stated that once they had been embarrassed when

offering some positions as researchers to people since they did not regard to be a researcher as a job. But now, he continued, they are able to attract graduates of top universities to the research firms. Five of the seven middle-level managers with whom I made interviews, for instance, were Bogazici University graduates. Nevertheless, Alyanak reproachfully stated that in order to be a researcher one does not have to have a special education, even any education. Hence, the criterion to be a researcher is more associated with some ethical considerations rather than the type of job one does. This is why it is important, for him, to strengthen some control mechanisms in Turkish research industry in which both the professionalism and the control mechanisms are underdeveloped. My informants agree, particularly the top managers, that the professionalism in the sector should be emphasized so that to be a researcher would be a prestigious job. Given the fact that the majority of the people employed in the sector are part-time surveyors whom are contracted on project base and they are, by and large, trained before each project according to the specifications of that project, what top managers pay attention about the professionalism is that of the full-time researchers employed mainly by research firms rather than field firms. Hence, to take market research as a profession contributes to the separatedness of the industry, among others, in which the boundedness of consumption knowledge is reproduced and maintained. The Association is organizing in every month at least x training programs about a variety of research subjects given by the experienced researchers from different market research firms operating in the industry.

#### **B.2.1.6. Market research as benefit provider for everyone:**

Last but not the least strategy, that I have observed, employed to the process of separation is the claim that the benefits of market research are not solely limited to

the marketing people within a company. At the very beginning of the Association's Yearbook 2005 , the president quotes the following sentences and expresses that they are all obvious to the researchers and that he hardly recall the number of times he has repeated them:

“Market research is essential at every stage of marketing from investment decisions to manufacturing, from product development to distribution, price and brand building strategy, where knowledge becomes the headlight showing the path of sound decision making. In this regard, research provides benefit to each and every circle along with the chain between manufacturer and consumer. Investor utilizes the resources efficiently by rational decisions, marketing professional promotes the right product, sales professional distributes and places the most appropriate products and the consumer meets with the best suitable product/service need. In short, through enabling the right decision making, the research provides competitive advantage at the company level, but also serves prosperity of the community by saving resources on a larger scale”.

(CRMpro January 2005, quoted in the Yearbook 2005:187)

Ali Daniş, before he was elected as the president, had also stated to me more or less the above sentences during the interview. His basic argument was that “the market research is beneficial to everyone along with the chain from production to consumption” After he had given me some examples about what kind of benefits were available through market research, which were very similar to those mentioned above, he said that “information increases the quality of life from producer to consumer and it is the market research that processes and analyzes this information in the right way to make it usable; and this is the story” Similarly, the former president Gundogmus, while referring to the importance of research summits organized

annually by the Association, pointed out that through the intellectual platform of the summit(s), the Association is evolving from being just an occupational organization to a democratic civil one. Moreover, as an elitist perspective, Gundogmus expressed that “for about a quarter century, the sector has been leading decision-makers through marketing and public opinion research, and hence, has been fulfilling its social responsibility” He continued: “the sector functionally contributes to both the business world and the society. Research is not solely ‘counting’; it comprises, at the same time, ‘creating’. Alongside producing data, we do not forget, more importantly, the fact that we are now at the phase of producing knowledge. We should accompany the decision-making mechanisms. We have the sufficient knowledge and technical infrastructure to do so. In other words, considering the characteristics of the business we do, we are candidates to be the mind of society –“toplumun akli olmaya adayiz”

On the other hand, both Örüng and Akman, as moderators in qualitative research projects, noted that the people who participate in focus groups or in-depth interviews have the opportunity to freely transmit their opinions, ideas or perspectives about a product/service to the producer, hence they know that they will benefit in the long-term since their needs would be more directly satisfied.

### **B.3. Concluding Remarks: the tension within the double-edge function**

As seen, the researchers are, on the one hand, trying to position market research as a prestigious profession, mainly targeting the ones within the sector, on the other hand, they are trying to position it as an organization that has social responsibilities and provides benefit not only to business but also to the whole

community, including public decision-making. I argue that such a positioning can also be read as an attempt to define and maintain the separatedness and boundedness of the market research industry among others.

The mediative function between consumer and producer is the most salient characteristics of market research accepted not only by the researchers themselves but also by the users of what these researchers produce as a decision-making support system. However, as mentioned above, market research firms/agencies as intermediary translators are not merely functional assistants in the effort of aligning the interests of producers with those of consumers; they are also producers of a distinct kind of knowledge which is highly commodified. This commodification presupposes a separation of spheres that the intermediary translators themselves provide the ‘evidence’ to sustain. In this separation process, market researchers do not solely protect the boundedness of the knowledge they generate since this assumes an already separation. However, through a variety of strategies, market researchers first try to *define* then *protect* their boundedness, both within and outside the industry. I observed that the processes of both definition and protection of the boundedness go hand in hand.

On the other hand, the double process of both mediation and separation is not, yet, straightforward; it bears, at the same time, some tensions. The most observable tension, I argue, lies in researchers’ claim “to be strategic partners” of their client companies. The tension is between being a marketing function on the one hand and a separate industry on the other hand. In previous pages, I told about a shift in the

industry from data collection to consultancy which comprises in it to better understand the customer to foresee its future and/or unarticulated needs and to develop actionable strategic projections accordingly. Today, in talking about their profile, the marketing research companies are more emphasizing “strategic partnership” with their clients. The followings are some quotations used by some market research companies in defining their company profile which also implies the tension:

“ACNielsen focuses on being a “business partner” who helps his clients make better marketing decisions so that they can grow their brands and their business” (ACNielsen)

“Alfa Research aims to create a close and intensive cooperation with the clients to develop ideal solutions or them” (Alfa Research)

“The main principle of Bilesim International.....is being its clients’ “partner in research”” (Bilesim International)

“This (to be highly skilled in marketing solution) gives us the flexibility to form partnership with our customers.” (Method Research)

“Our mission is to help our clients build profitable brands and services through research based consultancy” (Millward Brown)

“Stratejik Fokus is dedicated to meeting the key information needs of institutions and becomes solution partner of its clients ..... “ (Stratejik Fokus Research)

The research firms, as separate economic entities, try to convince their potential customers about their ability to collaborate with them. Given the fact that, let us say, two competitive manufacturers in the same industry may have a collaboration, or *strategic partnership*, with the same research agency, it becomes

clear how difficult it is to convince them for such a partnership. In such a partnership, the company and research firm should consider both the collaborative and competitive dimensions of their cooperation. As a marketing function, market research is positioned as a vital component of strategic planning of production in which the researcher becomes effectively and fully integrated within the client company, or in other words, in which the research agency becomes a part of its client's marketing team. On the other hand, market as a distinct business, market research evidences itself to sustain its separatedness and boundedness in which a researcher has a different kind of expertise which can be commoditized. Hence, there is an ambivalent positioning. Market researchers have ebb and flows between being a member of the marketing team of the client company and being a member of his own research company.

**CHAPTER THREE**  
**LIFESTYLES**  
**AND**  
**MARKET RESERCAH**  
**IN TURKEY**

## **Introduction**

Up to now, I have tried to analyze the emergence, development and organization of market research industry in Turkey. In so doing, I first looked at the historical context, both domestic and global, in which this industry has emerged as a noticeable market force. Later, I focused more on the industry itself in order to understand how it was segmented within it. By drawing out cartography of Turkish market research industry, I tried to explore the actors and the interactions among them along with inherent institutional and social tensions. Then I turned my attention to knowledge production processes since market research industry is fundamentally a knowledge industry. After tackling some approaches to the changing role of knowledge parallel to global restructuring, I focused on the role of specialized knowledge in this industry and on the attempts to construct market research as a separate field in which a kind of bounded knowledge about consumption is generated. Therefore, up to this point, I have attempted to understand the knowledge generation process in market research industry. What I would like to do now then is to focus more on the products of this process rather than the process itself. I argue that scrutinizing these products would in turn give us the ability to acknowledge the capacity of market research in engineering, though indirectly, the consumption sphere. In any case, examining how consumption activities and patterns are perceived by market researchers would, at the end, influence the perceptions of business and marketing people who are manipulating and molding the consumption sphere.

Among the products generated by market researchers, lifestyle studies are of crucial importance since they are taken as self-evident in tackling with the rise of consumerism, particularly, during the last two decades. Besides, based on my

observations on secondary literature, a shift is claimed to be observable in the way consumers are involved with products, brands and consumption activities. This reminded me the postmodern sociological approaches to identity. The scholarly studies in this field focus mainly on how consumption activities are symbolically articulated to form more coherent selves for today's individuals who are assumed to have free-floating and fragmented identities. Parallel to this, there is a considerable yet growing literature on lifestyles and identity formation focusing on a changing trend towards a *lifestyle marketing* in which mainstream stratification parameters, such as class, gender, income, age, are taken as less significant in handling present-day consumers. The consumers today are believed to more value individual or group-based identities which in turn give rise to differentiated and fragmented lifestyles. I am curious about such a shift and try to understand whether such a shift does really exist; and if so, in what ways it is operating. At this point, to look at lifestyle studies undertaken by market researchers would be illuminating in deciphering the nature of this shift. However, my observations during my research have revealed that though there are some attempts for lifestyle marketing, conventional sociological parameters are still persistent in market research studies. In other words, the claimed inadequacy of existing social categorizations, particularly of socio-economic status, gender and age, remains at the more discursive rather than practical level in Turkish market research industry.

Therefore, in the following, first I will give a review of sociological approaches to the concept of *lifestyle*. To do so, I will initially present these approaches beginning from late 20<sup>th</sup> century up to 1980s. Then I will deal with the so-called postmodern conceptualizations of lifestyle during 1980s and 90s. Later, I will

focus on some critiques of these postmodern theories of symbolic consumption, identity-formation and lifestyles. Finally, I will try to give a detailed analysis of my observations about the lifestyle research studies and categorizations developed in Turkish market research industry.

## **A. Review of Sociological Approaches to the Concept of Lifestyle**

### **A.1. From Nineteenth Century up to 1980s**

Lifestyle is rather a complex and difficult concept to deal with. Over the decades, interest in the notion of lifestyle has fluctuated; definitions of the concept of lifestyle have been many and varied. Although the notion of lifestyle is often associated with the market research and consumer behaviors, it has also strong roots in sociological theory. In classical sociology, the notion of lifestyle is connected with the Weberian distinction between social class and status groups. According to Weber, while the term ‘social class’ refers to a large number of persons with similar, economically determined living conditions and life experiences, ‘status groups’ refer to group of persons determined by the assessments of social honor and esteem. Status distinctions are often linked with class distinctions in classical theories, yet social status is normally expressed in the form a specific style of life. Income and property as such are not always acknowledged as qualifications for status. Weber states that:

With some over-simplification, one might thus say that ‘classes’ are stratified according to the reproduction and acquisitions of goods; whereas ‘status groups’ are stratified according to the principles of their consumption of goods and represented by special ‘styles of life’ (Weber, 1922/1968: 193)

Therefore, through the consumption of goods and the creation of specific and distinguished lifestyles aiming at making noticeable the wealth owned (rather than solely possessing it), status groups and social hierarchies are made visible. After Weber, T. Veblen and G. Simmel both tried to analyze the changing patterns of consumption during late nineteenth and early twentieth-century capitalism (Simmel 1904/1971, Veblen 1899/1979). Their works provided analyses of newly emerging life-styles at the turn of century – a *metropolitan*, or *nouveau riche*, lifestyle in which the consumption of such things as clothes, personal adornments and expensive pleasurable pursuits were becoming central. Moreover, such patterns of living were spreading increasingly among other less affluent groups, as the twentieth century developed (Bocock 1993:19). Veblen and Simmel inferred that as soon as the lower classes succeed in imitating the lifestyle of the higher classes by means of mass produced, cheap copies of former aristocratic status symbols, new symbols are appropriated and made into status symbols (ibid). Therefore, for the classical scholars, the creation and manipulation of lifestyles were regarded as a part of perpetual conflict between different classes and status groups rather than an extension of individual endeavors for self-realization. In other words, the differentiation and conflictual interaction within social stratification were reflected in the emergence and manipulation of various lifestyles, including a symbolic level.

After WWII, with the advent of welfare states, working class began to be more affluent and formed mainly the middle class. Meanwhile, mass production of Fordism extensively targeted those who were in the middle class. Hence, mass production triggered the mass consumption till late 1970s. The mass market was addressed by the advertising media as mainly working class. Meanwhile, the notion

of 'way of life' started to be widely used as linked to the occupational classes. Bocoock argues that such a concept is more than just the common-sense idea that different classes have different ways of living which will affect their consumption patterns. Rather, he suggests, the notion of "way of life", implies a link between the daily work routines, the household chores, leisure activities and the moral values, beliefs and ways of articulating emotions of members of households.(1993:24) Though there was a major change from 1920s and 1930s that consumers were now to be found mainly in the middle class, Bocoock, nevertheless, still calls the Fordist era as "modern" since consumer classificatory system was still based on "occupational class" (1993:26). Producers and marketers were believing that different consumption patterns were indeed a reflection of different social classes which had different ways of living. "Ways of life", within modern capitalistic social formations, have been seen as formed, shaped, if not completely determined, by occupation (ibid).

## **A.2. The Concept of Lifestyle during 1980s and 1990s**

When we come to 1980s, however, some argued that parallel to the transformations beginning with early 1970s, occupation has begun to be less significant in understanding and describing consumption patterns. In this period, market researchers and advertising campaign managers began to use new categorizations of the population instead of the ones used in 1950s up to 1980s which were based on occupation of male head of the household. Bocoock asserts that this reflected an increasing perception that occupational class had become less significant than it had been in the past in affecting consumption patterns. Hence, during 1980s, for him, we have moved toward a society in which social classes have effectively disappeared as determinants of new patterns of consumption. At this juncture, the

notion of “lifestyle” has become more crucial in understanding and describing market segments and consumption patterns. Bocoock claims that this is a crucial move since it attempts to describe market segments not from an “objective” point of view, but from the point of view of the consumer. (1993:28) This crucial move at the same time marks for many scholars the transition from modern to so-called postmodern era in which differentiation of consumption patterns as well as of lifestyles take place beyond, even regardless of, differentiation in social stratification.

Furthermore, during 1980s, we have also witnessed a renewed interest in questions concerning lifestyle and self-identity (Featherstone, 1987, Giddens 1991, Baumann, 1990, Johansson and Miegel 1992). During the past decade or so, postmodern theories of identity have emphasized that with the abandonment of the most traditional determinants on the one hand, and with the increasing diversity of possibilities and choices on the other hand, individuals are today have free-floating, fragmented and less coherent identities. They argue that the expression and maintenance of individual identities in a more coherent way is operated through consumption practices and lifestyles of consumers. Therefore, the lifestyles today seem to be flexible and fluid and people can easily play with them. The core assumption, hence, is the individual's consciousness of these styles, whereby identity formation is also a conscious process. However, there are counter-arguments against this kind of individualism both at the theoretical and practical level. Such arguments give mainly emphasis that identities and lifestyles seem to be steadily framed by certain demographic and social structures and material conditions (Johansson and Miegel 1992, Wilska 2002). My observations during my research also support these counter arguments in the sense that socio-economic and demographic factors, such as

socio-economic status, gender, age, class position continued to have a strong effect on identifying most lifestyles by market researchers. Before dealing with these counter arguments, it should be better to have glance at postmodern theories of lifestyles, symbolic consumption and identity problem.

### **A.2.1. Symbolic Consumption and Lifestyles**

Many scholars have argued that (post) modern consumerism relies not only on the production of goods and services, but also entails the production of a specific set of cultural symbols, images and values (Featherstone 1991, Baudrillard 1988, Bocoock 1993 and Campbell 1995). Consumption is not simply an economic process but also a social and cultural one. Baudrillard argues that all consumption is always the consumption of symbolic signs (1988) On the one hand, people are symbol-producing and symbol-creating creatures; on the other hand, consumption involves a symbolic element as a primary characteristic. Hence, the process of consumption is a form of social, cultural and symbolic activity. It cannot be reduced to a simple economic process nor is it just the satisfaction of material needs. Similarly, Bocoock also emphasizes the symbolic character of consumption in theorizing it. He suggests that becoming a consumer is a process which depends upon cultural symbols, and is not merely a mechanical or biological response to signs (1993: 85). Moreover, he argues, desires appear as in a state of flux; they are fluid and they flow in unanticipated directions. Desires are, thus, not formed by consumption but created and elicited at the symbolic level. What is desired in post-modern consumerism is not the 'real' chocolate, the 'real' car or house and furniture, which is consumed. Rather, these 'real' things are substitutes; the desires they purport to satisfy are symbolic desires,

not biologically given needs unmediated by cultural symbolism. (1993: 114-115). Bocoock observes that in the affluent social formations of modern Western capitalism, consumption is to be seen as a process governed by the play of symbols, not by the satisfactions of material needs (1993:75). However, in order goods and services to be sold in the market, a sufficient group of people should accept and comprehend the symbols, values and images set and manipulated by the producers. In Bocoock's words, "these symbols cannot be simply imposed upon customers by capitalist companies advertising their products; they have to tune in with the potential customers' own ways of life if they are to be effective" (1993: 55) Through various media, commodities furnished with extra-material qualities are differentiated in the eyes of consumers so that they can appeal the desires of them and they can be harmonized with their own ways of life. Haug seeks to capture this process with the concept of "commodity aesthetics" (Haug 1986) and Slater states that "advertising, packaging, shop display, point-of-sale material and product design" are some of the predominant means of the creation of this commodity aesthetics (1997:31). The extensive use and manipulation of commodity aesthetics have, however, consequences reaching beyond the realm of consumption. The overproduction of signs and reproduction of images and simulations have led to a loss of stable meaning, and *aestheticization* of reality. Featherstone, at this point, argues that the rise of commodity aesthetics as the principal axis of the re-ordering of material culture has led to the "aestheticization of everyday life", the most important consequence of which has been the blurring of the distinction between high and mass culture(1991:25).

As a matter of fact, a general theme in postmodern theories of culture and

society is an emphasis upon the effacement of the boundary between art and everyday culture and the collapse of the distinction between high culture and mass/popular culture (Johansson 1994:267) In this process, style and fashion have become important for the individuals who can try to construct what and whom they want to become through an infinite number of symbols and images supplied by the market. At this juncture, style functions as a “generator of illusory transcendence of class” (ibid). Stuart Ewen calls this process as *symbolic democratization*. (1988). With this concept Ewen tries to grasp the increasing effacement of boundaries between high and mass culture through the increasingly equal distribution of power symbols. However, such a distribution does not indicate a real distribution of power and real power is still in the hands of certain groups. Hence, lifestyle characteristics which are made visible through mainly symbolic consumption do not reflect everyday culture and material conditions. One should not disregard these conditions of daily life. Besides, Johansson mentions that the process of symbolic democratization is intimately interwoven with the process of individualization and youth culture. For him, in late modernity, people often refuse to be labeled in terms of traditional categories such as class, status, gender and race. (1994:272) Nevertheless, these categories are still there and they are more real than the heuristically defined lifestyle categorizations. Moreover, they are still relevant in framing the real consumption practices contrary to what postmodernists argue. I will turn to the critiques of postmodern theories in following pages. Before, I would like to focus my lenses more on the relation between lifestyles and identity formation handled in postmodern theories so that the role of symbolic consumption in developing lifestyles would be clearer. In any case, in postmodern approaches, the lifestyles are assumed to be articulated to identity

formation via symbolic consumption.

### **A.2.2. Identity and Lifestyles**

Most sociological theories of self-identity and identity-formation are rather fragmented and easily appear obscure (Wilska 2002:1). Recent writings on identity have usually been connected with more fundamental philosophical and ontological discussions concerning subjectivity, societal and cultural change and the meaning of life, particularly in the so-called postmodern era. To examine such kind of sociological theories is surely beyond the scope of this work. Rather, following Wilska, I should say that the tangled boundaries between self-identity, consumption and lifestyles have been analyzed from many different angles. ‘Selfhood’, ‘subjectivity’, ‘individualization’, ‘socialization’, ‘identification’, and ‘reflexivity’ are concepts commonly used with theories of identity. The first three concepts refer to identity as a ‘self’, an individual psycho-history, whereas the remaining three treat identity more as a social construction, a reflection of the social collectivities that one belongs to (Wilska. 2002).

Lifestyle is an important concept in the definition of identity, yet the terms ‘lifestyle’ and ‘identity’ are currently in vogue (Featherstone, 1987). In post-traditional societies or in late modernity, “lifestyle has become an issue for most people; and the more post-traditional the settings in which an individual moves, the more lifestyle concerns the very core of self identity”. (Johansson 1994:265)

Giddens (1991) defines lifestyle as ‘the routinised practices, the routines incorporated into habits of dress, eating, modes acting and favored milieux for encountering others’. The routines are, however, reflexively open to change in the light of the mobile nature of self-identity. For Giddens, in a post-traditional order the

self becomes a reflexive project since the norms and rules of traditional social categories (such as class, family, and so on) are of little help in late modernity. All individuals, he suggests, should develop a framework of ontological security based on routines, habits and cognitive and emotional ways of interpreting the world and the life itself. In other words, they should provide the maintenance of self-identity, or maintain a coherent narrative of the self. Such a task demands that complex choices continuously be made under all manner of circumstances; and that all social choices are decisions not only about how to act but what to be (1991:80–81) Therefore, self-identity is intimately related to the development of lifestyles given the fact that lifestyle, through a more or less integrated set of values, attitudes and routinised habits, has a certain unity important to continuing sense of ontological security.

Beck (1992) and Bauman (1987; 1988; 1990) also write about individualization in reflexive modernization: the receding importance of traditional social categories forces individuals to choose among different lifestyles and identities by themselves. The result is that every choice contains a risk of failure for the individual. For Beck, this situation generates insecurity in daily life, as well as a high degree of dependence upon ‘secondary agencies and institutions’, such as the market and the mass media, economic cycles, social policy, and so forth (Beck: 128–131). Similarly, for Bauman, insecurity and anxiety are the reverse side of freedom for the *consumer*, who is individually responsible for his/her choices. Besides, Bauman argues that belonging to social categories is still important for the consumer. These relevant social categories are, however, not the ones based on traditional socio-economic divisions, rather they are neo-tribal’ lifestyle groups and belonging to them depends entirely upon the individual’s ‘appropriate’ consumption style (Bauman

1990:205–207). Moreover, these neo-tribal lifestyles are not stable and they allow the consumer to play with the styles and symbols and to move freely between different social groups, styles and culture.

Baudrillard (1988) goes a step further and asserts that consumers do not purchase items of clothing, food, body decoration, furniture or a style of entertainment, for instance, in order to express an already existing sense of who they are. Rather, people create a sense of who they are through what they consume. In his approach, consumption is conceptualized as “a process in which a purchaser of an item is actively engaged in trying to create and maintain a sense of identity through the display of purchased goods”. In agree with Baudrillard, Bocoock conceptualizes consumption as an active process involving “the symbolic construction of a sense of both collective and individual identities” (1993:67)

Although social scientists disagree on describing and naming the contemporary culture and society, they agree that the formation of self-identity and lifestyle has turned into a complicated issue for the modern humanity (Johansson 1994:272). Recent sociological theories of consumption and lifestyles usually argue that consumption plays an essential role in the creation and maintenance of personal identities. For the consumers, the identity sustaining process operates through playing with the lifestyles that are fragmented, flexible and fluid. Identity-formation becomes a reflexive “life-long project” that requires endless reconstruction and re-evaluation. The self consequently becomes an object of deliberate attention and thorough examination while. Lifestyles are regarded as structures that people very consciously choose. Besides, they are believed to be instable and non-static. The identity seeking individuals are assumed to be free-floating among various lifestyles, that lifestyles

themselves are also not fixed and can be played through manipulation of styles and symbols. Contemporary accounts of lifestyles and identity have provided various perspectives and are, indeed fascinating in the sense of dealing with the fragmentation, affirmative ephemerality, fluidity and uncertainty of postmodern era. However, Johansson states that it is appropriate to speak about an individualistic turn within lifestyle research since researchers within this area have frequently showed a tendency to put too much emphasis on the sole individual (1994:287) He warns that individuality is never developed in a vacuum, it is always developed in a cultural and social context. Hence, when analyzing late modern culture, he cautions, one should not fall into the “postmodern trap”, losing sight of everyday culture and material conditions (1994:272). Similarly, Wilska states that socio-economic and demographic factors, particularly gender, age, class position and income had also a strong effect on consumption and lifestyles. (Wilska 2002)

In the following pages I will have a brief look at some critiques (both theoretical and empirical) of contemporary, mainly post-modern, theories of lifestyle, identity and consumption which notice the continuing relevance of conventional social stratification and hierarchies in explaining the relation among consumption practices, lifestyles and identity formation. Then, I will have a closer look at the Turkish market research industry and try to examine the admissibility of these critiques with some empirical findings of my research process.

### **A.3. Critiques and the Relevance of Conventional Categories**

It is well acknowledged in both psychology and sociology that the individual ‘self’ or ‘personal identity’ can only be formed in a social context, in the presence

and with the aid of other individuals. Clearly, when constructing their identities, people are always influenced by social collectivities. The social dimension becomes ever more important, especially when talking about the identity of a consumer. The consumption of goods and services has an important role to play in processes of lifestyle formation since lifestyles are usually understood as the material expressions of people's identities (i.e. Miles 2000, Giddens 1991, Sobel 1981, Chaney 1996). However, Miegel for instance, pays attention to the fact that “lifestyles are developed and maintained in the intersection between a) social and cultural structures, and b) the individual’s own initiatives and actions” (1994:244). Similarly, Rosengren informs that lifestyles may analytically, be observed as the relationship between, on the one hand, individual characteristics such as values, attitudes, tastes, etc., and on the other hand patterns of action, after control for relevant structural and positional variables (1994:9). What is often ignored in lifestyle studies is the influence of material aspects of culture and socio-economic structures. There is an overemphasis on the consciousness of individuals in their identity formation which is mainly assumed to be articulated by conscious consumption practices. However, it is obvious that neither the influence of the collectivities, nor the lifestyles are always conscious. Most postmodernists overlook this aspect. Giddens, for instance, refers vaguely to ‘socio-economic circumstances’ that ‘have influence’ on identity-formation (1991:82). Warde states that only Bauman analyses the reverse side of the consumer's freedom in depth, although his attitude to consumerism and the market in general is relatively positive (Warde 1994). Bauman calls those in the consumer society who cannot freely decide upon their consumption owing to economic restraints, ‘the repressed’ (1987), ‘the excluded’, ‘the failed consumers’ (1988), or ‘the new poor’ (1998).

Wilska, on the other hand, points out that many empirical studies of consumption also indicate that social status and income still have a strong effect on the choices and everyday practices of consumers (e.g. Warde 1997; Toivonen 1994; 1997; Wilska 1999).

A good combination of two aforementioned dimensions about lifestyles might be the Bourdieu's perspective in his work *Distinction* (1984). Bourdieu argues that there is a constant struggle for power and status not only between but also within different classes in a given society. This struggle takes place along with the amount of, and access to, the different forms of capital: economic, social, cultural, even symbolic. Bourdieu is much more interested in the dominant classes and the class fractions for they struggle not only for economic, but also for cultural dominance. For him, classes and class fractions within a given society try to promote their cultural preferences and lifestyles in the struggle for power so that they could become legitimate and predominating. "The struggle for dominance between these social collectivities leads to a continual changes in lifestyles. Hence, the social space of lifestyles is structured according to the rules of power. Consequently, the most powerful classes and class fractions are setting the lifestyle agenda" (Johansson 1994:277) To put it simply, Bourdieu aimed to combine the concept of social status, and the use that status groups make of specific patterns of consumption, as a way of marking off one way of life from another, with the idea that consumption involves signs, symbols, ideas and values (Bocock 1993:64)

Bourdieu has engaged more in the demystifying and unveiling power structure and power relations. He tries to comprehend the notion of lifestyle within a fairly closed social space since, for him, lifestyles are embraced either in order to signify

people's status and as a means of recognition, or as a means of the creation of self-images and identities that are merely symbolic illusions (Johansson 1994:279) Furthermore, he was criticized on several accounts including lack of empirical relevance, theoretical obscurity, determinism (i.e. DiMaggio 1979; Fenster 1991; Fiske1987) Even, Wilska criticizes Bourdieu, with other structuralists since they "overemphasize immaterial aspects of culture and cultural capital and overlook the importance of economic capital in consumer cultures" (2002:3).

On the other hand, Johansson and Miegel attempt to construct an integrated theory of lifestyle (1992). They argue that one can distinguish three different but interrelated levels at which it is possible to study aspects of living, in a way relevant to a discussion of lifestyle: a *structural*, a *positional* and an *individual* level. Structural level involves the patterns of action determined by societal structure while positional level involves the patterns of action determined primarily by positions in social structure. At the individual level, on the other hand, we come across the patterns of action determined primarily by individual agencies. Miegel, thus, describes lifestyle as the expressions of individuals' ambitions to create their own specific personal, cultural and social identities within the historically determined structural and positional framework of their society. So, the term lifestyle is defined as "a structurally, positionally and individually determined phenomenon, (1994:208) Besides, Johansson states that the lifestyle phenomenon can be studied on three conceptually different levels: the value level, the attitude level and the action level.

The value level consists of the individual's general and abstract conceptions about material, aesthetic, ethical and metaphysical conditions and qualities. These conceptions are made concrete by the individual on the attitude level. The attitudes of an individual involve his or her outlook on specific objects, phenomena and conditions of reality. On the action level the individual, finally, manifests his or her attitudes in the form of different actions. The values and attitudes of an individual become visible and observable when they manifest themselves in action. (Miegel 1994, Johansson 1994)

In sum, the theory of Johansson and Miegel tries to show the several determination levels of lifestyles which can be examined at three conceptually different levels. In so doing, it tries to grasp the *duality of lifestyle*, that is the parallel and continuous processes of individualization and social and cultural integration. As a matter of fact, they argue that lifestyle and identities are articulated and constructed within a multidimensional setting (Johansson 1994:282) The lifestyle research studies in Turkish market research industry, too, reflect such a multidimensionality along with its tensions. I will focus on them in the following pages.

Finally, I would like to talk about a study made by Wilska (2002) who has empirically examined the importance of consumption for identity-formation for the Finnish consumers. Wilska's analyses are based on the examination of a data set derived from a nationwide survey 'Finland 1999 — Consumption and Way of Life at the Turn of the New Millennium'. The survey, Wilska informs, which was carried out as a postal questionnaire during the spring of 1999, was based upon a random sample of 18–75-year-old Finnish speakers in Finland. I will go into further details of this study. What I would like to do is to share some results of this survey in order to show

the persistence of the conventional sociological stratification parameters in understanding lifestyles, even in the very so-called post-modern times. In any case, Wilska tries to question the postmodern accounts of dealing with relations among lifestyles, identity formation and consumption practices that mainly suggest that the identity sustaining process operates through playing with the lifestyles that are fragmented, flexible and fluid.

Based on the empirical findings, Wilska (2002) states that most Finnish consumers may not consciously consider consumption to be a major part of their identities. Although some materialist and hedonist lifestyles were found, many consumption styles were also characterized by modest and rational spending patterns. She also pointed that in the creation of the consumer's lifestyles and identities the less conscious aspects of lifestyles, such as attitudes and desires, are at least as important as fully conscious acts of actual consumption. Hence, she criticizes the core assumption of postmodern theories focusing on the individual's consciousness of their (life) styles, whereby identity formation is also a conscious process. As a matter of fact, on the basis of her findings, she argues that “the consumer in today's Finland seems to be less omnipotent (and exciting) than recent post-modern theories concerning the consumer suggest” She also notes that “because lifestyles are likely to be complicated mixtures of different kinds of consumption and conscious and unconscious attitudes and values, perceived lifestyles need to be examined in more detail and explained by background variables”. In this sense, Wilska’s findings are compatible with the multidimensional perspective of Johansson and Miegel, which suggests the relevance, even necessity of structural and positional circumstances in analyzing lifestyles.

Furthermore, by examining the factors used in the study to create lifestyle collectivities, Wilska has founded that socio-economic and demographic determinants, particularly gender, age, class position and income, (still) have an impact on lifestyles and consumer identities. Among the most interesting features to be revealed by her analysis, she mentions, was the “finding that perceived class identity seemed to be a more significant determinant of lifestyles than any objective socio-economic factors, such as education”. Besides, “economic restraints, social regulation, conventions, routines, socialization in peer groups are (still) likely to restrict the freedom of the consumer”. She, at the end, concludes that her analyses suggest that “identities and lifestyles are clearly not totally free-floating and fragmented, although the importance of the most traditional determinants has decreased. However, identities and lifestyles seem to be steadily framed by certain demographic and social structures and material conditions”

Now I am going to have a closer look at Turkish research industry and the discussions about lifestyles and the relevance of conventional categorizations.

## **B. Turkish Market Research Industry and Lifestyles**

### **B.1.Engineering Consumption and Lifestyle Studies in Turkey**

Turkish research industry is relatively a new industry. As clearly stated in chapter one, the real boom in the industry took place in post-1980 period in parallel to the rise of neo-liberal economic policies resulted from the accelerated articulation of

Turkey to the global capitalist restructuring. Again as stated earlier, the boom in industry went hand in hand with the unprecedented growth of market forces in general and with the advent of MNCs in particular in engineering the consumption sphere. The growing penetration of market forces of formerly state-regulated fields of consumption brought itself the freeing-up of the previously static and relatively fixed spatial and temporal dimensions of social life. Into the field left by the state as an arena ready to be exploited by new social forces market institutions moved in “to create new types of consumerism, introduce novel products and promote these as the symbols of cosmopolitan life styles to be adopted by urban middle classes” (Yenal 2000:159). As a matter of fact, Yenal argues that the increasing variety and sophistication of market research can be seen as a sign of the growing repertoire and capacity of market forces for “engineering” consumption practices.(ibid) Consequently, numerous qualitative and quantitative surveys have been conducted by market research firms since the 1980s. These surveys aimed at establishing general consumer attitudes towards, and demand patterns for, certain brands and products and to determine the structure of the consumer market in terms of competition, retailing channels and the socio-economic characteristics of the consumers (ibid). In other words, many brands, products and their consumers were put under scrutiny by market research firms to determine which groups buy what kinds of products for what reasons and in what ways. In so doing, market researchers have begun to divide the population into several categories and they have used some kind of classificatory categories. At this juncture, Yenal talks about the “life-style marketing perspective” started to be employed by Turkish market research firms to challenge the existing classifications largely based on demographics due to their inadequacies in identifying

the target markets. It is important to note, mentions Yenil, that “the increasing need for knowing the market using modern marketing techniques was, in the first place, a response to the fragmentation of the consumer market which was largely a by-product of the internationalization of the Turkish economy and worsening income distribution in the 1980s”. What he suggests here is that “information about consumer markets supplied by market researchers helped producers to further segment the market for their own ends” (2000:171-172). Besides, he states that such a move is “in line with similar developments in the field of market research in the West since 1980s” (2000:173).

It is true that, particularly for the last decade, there has been a growing tendency among Turkish researchers to more segment the consumer markets. In a well-known monthly advertising and communications magazine, *MediaCat* (May 2004), some lifestyle categorizations of Turkish consumers were handled. It was stated that there have been significant developments in Turkey, particularly in the last decade, in identifying the “cultural portrait of Turkish consumers” mainly through different lifestyle categorizations. According to the magazine, this is mainly due to the fact that, for about a few decades, the market conditions have rapidly changed due to the increased differentiation and availability of consumer goods. It was inferred that now then classical categorizations based on socio-economic status, geography and demographics are not sufficient for the identification of the complex consumer structure of Turkey. The magazine dealt with chiefly with three lifestyle categorizations developed by three leading market research firms: “Lifestyles Research” by DAP, “Target Group Index” by AGB, and “Life Trends and Brands” by

HTP, among which focusing on the last one since it is the most recent categorization based on a relatively larger sample. In any case, there is a consensus in the industry that demographics and classical categorizations are no more sufficient in order to better understand and segment the consumer market in Turkey. The existing categorizations are accused to be less explanatory in comprehending the current situation. In this sense, I agree with Yenal that the information provided by market research firms about the consumers and the consumption sphere help producers to further differentiation of consumer segments for their own (capitalist) ends. In any case, market research industry as a market force is, to a great extent, not directly engineering the consumption sphere and practices, but it is providing the logistics, let us say, for other market forces, mainly for the MNCs and for advertising agents in our case, to do so. In other words, the research industry is indirectly engineering the consumption practices. However, what I argue here is that the claim for the inadequacy of existing social categorizations, particularly of socio-economic status, gender and age, remains at the more discursive rather than practical level. In practice they are still relevant for the researchers as well as for marketers and producers in identifying and/or developing lifestyles in Turkey. At least, classical sociological stratification parameters such as class, socio-economic status, gender, age, geography are still important along with the assumed free-floating, fragmented consumer preferences. Besides, unlike the postmodern claims, for the Turkish market researchers, consumers are still not fully conscious individuals. The less conscious aspects of lifestyles, such as attitudes and desires, as Wilska argues, are at least as important as fully conscious acts of actual consumption. Turkish market researchers are employing many psychological approaches in order to reveal the unconscious

aspects of consumer behaviors. In the following I will give some examples that I have observed during my research to support my argument.

## **B.2. Observations about the Persistence of Conventional Parameters**

My observations will be three fold: the first set of observations will be on general discussions about SES (socio-economic status) within the industry which reveal the relevance of this parameter in the eyes of Turkish market researchers. My second set of observations will aim at showing that for Turkish market researchers, the consumers are not considered as fully conscious individuals like postmodernists argue. Rather, they tend to regard unconscious behaviors as persistent factors in understanding consumer behaviors. Finally, I would like to remark some observations on two particular lifestyle studies so that I can present more concrete examples at the practical level to support my argument.

### **B.2.1. Discussions on SES (socio-economic status)**

My first set of observations is about the discussions on the socio-economic status. Socio-economic status (SES) group index is the most widely used variable deployed to identify the consumer segments in Turkey though there is no consensus among market researchers on how to define this index. Arzu Eder, head of SES Project coordinated by the Association, informs that there are various SES indices employed in the industry, even “there are as many as the number of research firms though some are used more widely than others” This situation is problematic since there is not a standard index according to which all researchers as well as producers can refer to. Eder states that while talking a segment measured by SES index, let us

say C1 or C2, different parties (marketers of a client company, a producer or two researchers from two different research agents) are referring to different realities. The most widely used two SES indices are the one that once developed by ZetNielsen and the one used by BIAK, TIAK, RIAK and AGB.

They are basically determined on the basis of education, occupation and ownership of consumer durables. In order to make a consensus, the Association initiated a SES Project in April 2004. The workshop consists of not only researchers but also members from Unilever and P&G (the MNCs that are operating in Turkey especially in FMCG product category and that pay the most for research and advertising) as well as academicians including a sociologist. The project is carried out in four steps. In the first step, approximately 70,000 surveys already conducted to determine the demographics and consumption patterns for media research (mainly conducted by media research agencies such as BIAK, TIAK, RIAK) have been re-analyzed. Secondly, about 120 households, members of either AGB Media panel or HTP Household Panel, were visited and observed in terms of their consumption patterns and durables owned. They were also surveyed based on new questions. Thirdly, a new questionnaire format will be designed. Eder informs that this questionnaire will include as many as 150-200 questions so that they can have a rich battery in order to better explain the differentiation within the segments. Finally about 80.000 people, a pretty much great figure for market researchers, will be surveyed based on this questionnaire. This project is supposed to finish in fall 2005. At the end of the day, a new SES categorization will be determined and be accepted as a reference point within the industry. Daniş also notes that “in this new categorization we may come

across a further segmentation, in let us say, B SES group". Such a project is really a big one, not only in terms of financing but also of scope. What is interesting here is the fact, the Association tries to modify or update the socio-economic status index which is a very conventional parameter rather than carrying out a new project of, let us say, lifestyle categorization on which researchers may have agree. Moreover, in explaining the SES project for another Turkish advertising magazine, namely Marketing Turkiye, Arzu Eder states that though lifestyles may be used for detailed analyses and though new SES index will not be a cure for all illnesses, the aim is to increase the explanatory power of this index as much as possible. This may point out the fact that SES is still a relevant category which market researchers do not want to give up, but to adjust to increase its explanatory power.

On the other hand, during my internship, I had the chance to examine some reports and/or briefs of different research projects conducted (or about to be conducted) for a variety of products ranging shampoos to packed bread, to vinegar, to depilatory machines. What I observed is that in determining the sampling plan for a given research, the most employed classificatory variables are SES groupings, gender, age and, to a great extent, geography (in terms of either urban/rural or big versus small cities ). Similarly, in HTP's Consumer Behaviors and Spending 2004, an annual report produced based on its household panel, SES and geography are two noticeable breakdowns according to which the findings are analyzed (see Appendix 1). As known, sampling plans are an important part of a research project. At the very beginning of a project, after the identification of the research problem, the sampling plans are usually proposed by the market research firm and then, they are discussed

and agreed upon by both the client company and the research firm. At this point I have observed a paradoxical approach by market researchers to the variables used in research projects. On the one hand, they complain about the marketers of client companies since they tend to segment the consumers according to conventional parameters such as demographics, socio-economic status and geography. The marketers, hence, are believed to “use the variables that are less able to explain the sophisticated and cosmopolitan nature of the consumers”. On the other hand, in research briefs they are these researchers themselves that are proposing the sampling plans determined by these conventional variables. During the internship, I asked this paradox to E. Akman, an experienced freelance moderator. Her answer was that though there is no consensus on the definition of SES indices in the sector, they are still the ones that are the most accepted and widely used parameters by the researchers. Researchers agree more on the conventional parameters than on the unconventional ones. This may lead us to the conclusion that although the importance of the traditional determinants has decreased, consumption practices or patterns are still framed by certain demographic and social structures and material conditions.

A final observation about the discussions on SES is about the ones that took place in 8<sup>th</sup> Research Summit held in November 2003. In the second day of the summit, Sinan Kurmus from HTP gave a lecture titled “Lifestyles and Understanding Turkey” He is at the same time an instructor in Istanbul Bilgi University, giving a course about life trends and lifestyles. In his lecture in the summit, he presented his CMA (Context, Method, Aim) model which would be used in HTP’s lifestyles project of “Life Trends and Brands” he identified three types of lifestyle research: those of journalists (i.e. Bobo’s, Bagdat Caddesi Anneleri); of academicians

(i.e. Punk, East End Gangs) and of market researchers (i.e. Low Rise Pensioners, Cilgin Orta Yas, Cabalayanlar) For him, though the market researchers' lifestyles analyses are comparable and analyzable, they are based on mid-quality models or easily accessible data, produced by cluster analyses of many questions about activities, attitudes and values. He described them at the same time as "boring and not action-oriented". After he explained his ideal lifestyle research he concluded that it is at least theoretically impossible to develop a model that would let us understand the whole country. Instead he suggested that the job of marketers should not be to understand Turkey but their target consumers. Then he told about the assumptions of his CMA model which became later the basis of HTP's lifestyle project. After his presentation, Pervin Olgun from Barem RI, a former academician and an experienced researcher who is currently the representative of Turkey in ESOMAR, disagreed with him and said "without understanding Turkey target consumer cannot be understood". She also mentioned that as market researchers they have a social responsibility and they should not only be motivated by profit-seeking forces. After formal lectures finished, when researchers were talking informally about the topic of the next summit, Olgun again raised her hand and, referring to the discussions after Kurmus' presentation, she asked: "what do we do with SES?" (Bu SES'i ne yapacagiz?) This discussion may be read, indeed, as a sign of the tension within the industry about the explanatory power of SES in *understanding Turkish consumer*. While some are in support of holding conventional social stratification parameters and are keen on understanding more or less the general socio-economic structure shaping the consumer practices, some are questioning these variables and looking for new ones to better segment the consumers in Turkey according to the needs (or benefits) of

market. By looking at the discussion I touched above, one may claim, here, that this is indeed a good indicator to show the fact that Turkish consumers are already somehow a fragmented entity and in future it will differentiate more. Concomitantly, in such a situation, the conventional social stratification parameters, such as SES, class, income, occupation, will be regarded to be no longer sufficient and the Turkish market researchers will use more the unconventional parameters in identifying the differentiation among various social collectivities. However, I argue that this is not the right way of looking. I am aware of the fact that Turkish consumers today are more differentiated than were in the past. But what I argue here is that consumption patterns are still framed in certain demographic and material conditions and conventional parameters are still relevant along with the attempts of market forces to further differentiate the consumer segments. Socio-economic and demographic determinants, still have an impact on lifestyles and consumption practices. For instance, Özler, in his Consumer Insight of April 2005, draws the portrait of Turkish consumers as “survivors”. He states that “first and foremost, consumer is an individual and she or he is supposed to be deciding on their own in the marketplace”. Beyond this, however, he notes, “consumer is a member of a closely knitted bunch called family, or household, in technical terms. It is hardly conceivable an individual consumer highly independent of the members of the household”. After giving some facts and figures to show how Turkish consumer is a “dependent” individual, he concludes that “it is sad to see that we are no “sovereigns” of our own consumption; but lucky as well that we are no pleasure bubbles driven by instincts alone” (for the whole passage see Appendix 2) Such an insight is largely compatible with what Warde argues: “..social networks are likely to be far more influential for a consumer

than the notions of appropriate consumption that are mediated by mass marketing and the media”(Warde 1994).

### **B.2.2. Unconscious Consumer Behaviors**

My second set of observations is about the consideration of unconscious dimension(s) of consumers by market researchers in analyzing the consumption practices and patterns..... Wilska reminds us the fact that consumption studies conducted by marketing reserachers put accent on the unconscious part of consumer behavior and criticizes the postmodern theorist:

“For post-modernists, lifestyles are structures that people very consciously choose. However, consumer studies in other academic research fields, such as marketing, usually emphasize the unconscious part of consumer behavior. Instead of analyzing the direct relationship between social categories and consumption, marketing research today aggregates various social and demographic categories with values, attitudes and other psychological factors into larger collectivities (that are also called lifestyle clusters). What makes these studies different from most sociological accounts of lifestyle-formation is the assumption that the choice of these collectivities and lifestyle clusters is not necessarily conscious. Collectivities can operate separately from the members' self-understanding, i.e. unconsciously” (Wilska 2002: 4)

This observation is also valid for the Turkish case. Kurmus, for instance, while talking about his CMA model he defined lifestyle as a “set of consumer preferences expressing his or her interest fields”. He, then, noted that how these interests could be expressed can change according to economic, demographic and psychographic variables. In any case his CMA model is basically based upon a psychological assumption that *real self* is transformed to an *ideal self* (or a social self)

through consumer trends and personality characteristics. Hence in developing HTP's Life Trends and Brands, people are asked, first, "how they define themselves" and, second, "how they define an ideal person" by choosing answers from a set of statements given in the survey. In this way, they try to understand the subconscious aspects of their personality which in turn affect their consumption practices. Likewise, as I mentioned in the previous chapter, while talking about the separation strategy of considering market research as an expertise, most market researchers, mainly those, expectedly, who engage more in qualitative research, express their expertise in "better understanding the black box, that is the consumer"; in "reading between the lines"; and in "grasping what a consumer wishes to say beyond what she or he expresses". These kinds of *expertise* indeed show the significance of unconscious dimension in analyzing consumption practices.

### **B.2.3. Two Lifestyle Researches and Observations**

Finally, I would like to make some remarks about the lifestyle research studies conducted by some (leading) market research firms in Turkey. As I noted above, such kind of research is in fact relatively new and various firms are conducting some lifestyle-related research varying in their scope. (see note 1). Nevertheless some are more remarkable due to their wider scope. In the following I will examine two of them.

The first study is that of HTP, "Life Trends and Brands Study". It is the most recent one and based on a large-scale sample. This is why it is claimed to "to be the first of such kind of a lifestyle research in Turkey". It is approximately based on 10 thousand face-to-face interviews in 27 provinces. HTP evaluates lifestyles as follows:

"... lifestyles are determined by their values and beliefs, the trends they

follow, the vision they have of life, their expectations, habits, education, family and the immediate and larger society they live in. Lifestyle is who we are and what we do. It refers to a consumption pattern reflecting a person's choices of how he or she spends time and money”

In introducing this study, HTP informs us that:

“HTP Turkish Life Trends & Brands Study is a full scale lifestyle study which covers lifestyles of the Turkish consumer incorporating data on shopping behavior, leisure time activities, media and use of financial instruments and other aspects of consumer behavior and associates the information with product and brand consumption. For this study, HTP conducted over 10 thousand face-to-face interviews in 27 provinces.”

HTP released the first report of this study in 2004. For the company, this study is believed to “fulfill the need to understand how and why each consumer segment behaves the way they do in the market beyond demographics” The study aims to “holistically understand the Turkish consumers”. In so doing, the company have developed a set of data about demographics, the brands and products purchased and consumed, the channels used to purchase these products, media preferences, consumer psychology and personality, activities and finally life trends” (from presentation given in November 2004, at 8<sup>th</sup> Research Summit, Istanbul). Life trends play a crucial role in this study. The consumer trends in this study are, HTP informs, “largely inspired by Faith Popcorn, acclaimed trend expert and founder and chairman of BrainReserve, a marketing consultancy o Fortune 500” For HTP, the trends proposed by Faith popcorn are adapted to Turkish consumers via “focus groups and some additional specifically Turkish trends”. In the end, HTP has 20 consumer

trends. Besides 14 contradictory personality traits are tested in a bi-polar model in order to measure the interaction between one's self-image and his notion of ideal person. To summarize, the lifestyle project of HTP is based on a variety of dimensions: "demographics, real and ideal personality, trends, psychology, shopping, finance and media" At the end of the day, HTP has determined 9 lifestyles in Turkey.

HTP's lifestyle study is indeed based largely on the face-to-face interviews with the individuals of the households that are the members of the household panel of HTP. HTP is indeed operating Household Panel and it is the single company in Turkey that is running this panel. There are about 5000 households in this panel representing the whole Turkey. What is interesting about the lifestyle project is the fact that what HTP has done is, indeed, to re-segment the consumers which have already been segmented for the household panel research. HTP's panel sample has been determined in terms of urban and semi-urban settlements, SES, household size, primary shopper age and employment status. In other words, the lifestyles determined by HTP are based on another segmentation which has been mainly determined by more conventional parameters, such as SES, age, occupation, geography. Hence, the most recent lifestyle project in Turkey is somehow a modification of an earlier sample determined by certain socio-economic and demographic determinants. This situation is certainly not an inadequacy for HTP. There is nothing wrong with the study in terms of its design and implementation. I am not here criticizing anything about the theoretical assumptions or statistical methods employed. I am sure that it was a product of a committed research team that is sufficiently talent to design and implement such a large scale nationwide project. What I want to say is that when we observe such a large scale and remarkable lifestyle project in Turkey we still witness

the relevance of social stratification parameters that have been traditionally deployed.

My second example is that of Veri Arastirma, namely VERI SGT (Statu, Gelir, Tuketim) Research. Veri Arastirma does not indeed name its study as a lifestyle study. Veri SGT is a multifaceted analysis of urban population of Turkey. The study is carried out in every two years with approximately 2.000 households and 5,000 individuals in them; that is similar to that of HTP. This study releases periodic reports about the urban social stratification, income distribution, consumption tendencies, brand perceptions and other consumer attitudes and behaviors. Related to this study, Veri Arastirma also develops a SES index, namely VERI S.E.S.I (socio-economic status index). This index is determined, Veri Arastirma informs, according to i) average education level of household individuals, ii) their occupations iii) ownership of household durables and iv) the district lived and house ownership. Veri Arastirma states “through the research based on Veri SGT and SESI, it is possible for researchers both to identify the lifestyles -and their changes- of household individuals and to identify the mobility patterns of households and individuals among the strata” This case clearly show the fact that in today’s Turkey some researchers still believe that a very classical social stratification model can be a base for determining lifestyles. In any case, Hande Diker from Veri Arastirma gave a lecture in 7<sup>th</sup> Research Summit titled “The Effects of Social Stratification on the Lifestyles of Urban Women in Turkey”. In her presentation, a variety of attitudes or activities related to Turkish urban women lifestyles (such as, vacation habits, ownership of cellular phones, credit cards, tendency for lottery, shopping attitudes, marriage types, computer usage, etc.) were all analyzed based on the VERI SGT social stratification model. I argue that this may point out the fact that in Turkey, socio-economic status,

gender, age, income and class position still matter in dealing with lifestyles and consumption activities.

### **B.3. Concluding Remarks**

Lifestyle is rather a complex and difficult concept to deal with though it is not a new one since it has had strong roots in sociological theories. Over the decades, interest in the notion of lifestyle has fluctuated; definitions of the concept of lifestyle have been many and varied. Classical sociologists tended to take it as intimately connected to distinctions between social class and status in which lifestyle referred to the distinguished expressions of status distinctions through then consumption of goods. Up to 1980, lifestyles were more or less associated with the ‘modern’ classificatory systems which were mainly based upon socio-economic status, occupational class, gender, age, race and geography. During 1980s, due to the global-scale transformations in the organization of industrial capitalism, there was a tendency to use new categorizations in segmenting the population of a given society. Occupational classes were considered to becoming less sufficient in explaining the differentiation within a given society. In any case, some argued that, in this global transformation, the workers have transformed into (post)modern consumers in a global market-place, which may well have been the greatest change since industrialization (Langman 1992). Meanwhile, during the last two decades or so, there has been a renewed interest in the concept, at the same time its definition has become more associated with the conscious role of the individual as the builder of his or her own identity. “The development of lifestyle repertoires has become intimately related to fundamental existential issues, such as the reflexively organized

construction and reconstruction of self-identity and life story, the creation of meaning in life and the development of a sense of ontological security” (Johansson, 1994:268). In this process, symbolic consumption has been considered to be of crucial importance in the articulation of consumption practices to the fragmented and free-floating identity. The lifestyles, at this point, were believed to be consciously developed by individuals to anchor these non-stable identities into safer social belongings. Meanwhile, in segmenting the consumer market, the increased use of different categorizations by market researchers, in the concomitancy of so-called *stylization of consumption* (Lury 1996) and *lifestyle marketing* (Yenal 2000), was taken as self-evident to prove this postmodern transformation. Certain socio-economic, demographic and material conditions have been claimed to have less explanatory power in such categorizations. Even, some scholars foretold that “we are moving toward a society in which fixed “status groups”; or “social class” in market researchers’ terminology have effectively disappeared as the determinants of new patterns of consumption” (Bocock 1993:31) However, my research about the Turkish market research industry proved the contrary, at least in Turkish context. The examples that I have examined above indicate that the conventional stratification determinants are still persistent in market researcher’s terminology. Moreover, certain socio-economic and demographic indicators are still considered to be relevant, even indispensable in some cases, in analyzing lifestyles, life trends and consumption practices of consumers in the present day Turkey. Market researchers (though there are discussions) continue to see identities and lifestyles as steadily framed by certain demographic and social structures and material conditions. Socio-economic and demographic factors, particularly socio-economic status, gender, age, occupation and

geography continue to have a strong effect on identifying most lifestyles by market researchers. Besides, unlike postmodern theorists argue, Turkish consumer is not considered as fully conscious of their consumption activities and still an unconscious dimension is at work in explaining the consumption activities.

## Conclusion

In this study I aimed at analyzing the emergence, development and organization of market research industry in Turkey from a sociological perspective. This was an attempt to comprehend the development and institutionalization of market research as a new social force assisting to the organization and manipulation of consumption sphere in Turkey since 1980s. Rather than a direct manipulation, market research industry, through its capacity to understand, explore and track changes in the consumption sphere, is providing *logistics* to other market forces that are directly manipulating and altering this sphere. Hence, this study can be considered as a contribution to the attempts aimed at analyzing the transformations taken place in consumption sphere in Turkey for the last few decades from a different angle; an angle which has been overlooked by scholars despite of its sociological relevance. In so doing, I tried to contextualize, both historically and structurally, the development of market research industry; to examine this industry as a knowledge industry in which a *specialized knowledge on consumption* is generated and traded as a commodity; and finally to explore the products of this generation process and their functions in understanding the consumers. Each chapter respectively aimed at achieving these ends.

Although the early research activities in Turkey can be traced back to the 1950s, market research industry has flourished after 1980s with the adoption of a neo-liberal paradigm shift parallel to the articulation of the country to the global capitalist restructuring. The development of this industry in Turkey coincides with a specific combination of both global and domestic transformations which entailed both a transition to new flexible accumulation and the deregulation and liberalization of

economy. These transformations, however, have not been restricted to only economic sphere but have had further implications on social and cultural fields. They undoubtedly contributed to the deepening and widening of capitalist logic across almost all tempo-spatial fields of the society. Market research industry as a new market force contributing to the further commodification of various aspects of daily life has benefited from this process both at material and non-material levels. An important observation in this historical context is the fact that the demand for market research in Turkey has always been a *stimulated demand* by, to a great extent, foreign corporations who have been looking for new opportunities in the lucrative Turkish market(s). In other words, it would not be wrong to suggest that market research industry in Turkey first appeared and then developed due to the demand stimulated by foreign (mainly multinational) business actors. Furthermore, what we observe today in the Turkish market research industry is the concentration of power in the hands of a few multinational firms. This concentration certainly has economic, business-oriented as well as social implications for the Turkish market research industry and gives rise to some tensions within it. Such a situation is not peculiar to Turkey however.

Market research industry is a knowledge industry. Knowledge emerges as a central concept in market research since what this industry as an industry produces is *specialized knowledge on consumption*. The increased importance of specialized knowledge as a highly valuable intangible asset is certainly connected both to the new mode in which global capitalism is operating and the rise of knowledge as a new source of wealth creation in late 20<sup>th</sup> century. One of the main arguments in this study related to this connection is that in order to better understand the crucial role of

knowledge generation in our so-called *information age*, we should also take into account the processes of knowledge generation on consumption, not only at the global level but also in local contexts. Up to now the scholarly interest has focused more on the knowledge generation in production processes and overlooked the social mediations taking place in this generation at lower levels. In this study, I targeted to look at the “other side” of knowledge generation process in a more local context; that is, the production of knowledge on consumption in Turkey through market research. In so doing, I tried to explain the role of specialized knowledge in market research.

Specialized knowledge in this industry mainly functions “to reduce uncertainty” which rises from a perceived gap between what is known and what ought to be known about the consumer. For almost all marketing people, the knowledge about the consumer is never complete and market research is believed to provide particular knowledge to narrow this gap. However, what I argue after my observations is that though market research aims at reducing uncertainty through narrowing this gap what is known and what ought to be known about the consumer, paradoxically it contributes to widening of it. Market researchers widens this gap through their attempts to turn consumers into more “known” entities with the help of more and more analyses generated by the “operations” and “analysis” departments of market research firms. I further suggest that this paradox may also be regarded as a crucial way of sustaining the inevitability of market research as a knowledge provider. What this paradox reveals is that rather than reducing the uncertainty about consumers and narrowing the knowledge gap about them, market researchers indeed *shape the uncertainty* so that a constant tension about what is known and what ought to be known about the consumer remains. Such a tension in turn contributes to the

existence and inevitability of market research as an institutional way of providing specialized knowledge on consumption. A closer look at the operation of market research industry in shaping uncertainty, the other legitimating mechanisms involved in this process and its implications should be the subjects of further studies.

In this study, I also tried to explain the double-edge function of specialized knowledge in market research industry both as a mediative translation and as a separation process. I paid more attention to the latter in order to reveal the strategies employed by the market researchers to construct market research as a separate field in which a bounded knowledge is being produced. The six strategies that I have examined in second chapter can be considered as the ways to institutionalize the market research as an economic profession. As I mentioned in section B.2.1, the process in which market research has emerged and developed as a new social force in Turkey comprises in itself also the process of institutionalization of market research as a profession. The strategies market researchers in Turkey employ to open a space for market research as a bounded, independent and autonomous field within which also an internal hierarchy functions in discerning the specializations among its members resemble the attempts once used by others who are now a member of a “profession”. Though I examined the development of market research industry, I did not strictly deal with this professionalization process as such since my aim here is more about exploring how specialized knowledge- which has emerged as an inevitable competitive advantage along with flexible accumulation- functions in Turkish market research industry. Nevertheless, to analyze this process should be an interesting topic for other studies.

A final observation related to the market research as a knowledge industry is

that as the global competition becomes fiercer, this specialized knowledge on consumption turns into a key commodity to be produced and sold to the highest bidder, under conditions that are themselves increasingly organized on a competitive basis. We come across an interesting situation in this process: market research contributes to the deepening of capitalist logic through assisting the commodification of various aspects of everyday life day by day. As market research industry generates more knowledge about the consumption activities and as it turns consumers into more “known” entities, it makes them more governable for market forces who are seeking a capitalist mentality. On the other hand, the industry itself tends to commodify the very (consumption) knowledge that is produced for further commodification of daily life.

My final concern in this study was to have a closer look at the products of the knowledge generation process of market research industry. Among the products, I specifically paid attention to lifestyle studies undertaken by market researchers, for they are usually associated with the rise of consumerism and the postmodern approaches to identity building process which are believed to be significant in manipulating the consumption activities. My observations have revealed that mainstream stratification parameters, particularly socio-economic status and gender, are still persistent in understanding consumers and their activities in Turkish market research industry. Such an observation does not deny indeed some attempts in the industry to use new, unconventional categorizations to better segment the consumers. There is even a tendency to see classical parameters as less explanatory in dealing with today’s consumers. However, what I have found is that the claim for the inadequacy of these parameters remains at the more discursive rather than practical

level. As seen on discussions on SES, market researchers still tend to hold SES in better segmenting the consumer market and try to update it rather than giving up and replacing it with new categorizations. I should state that my observations are limited to the Turkish case and I cannot know the situation in different countries. For a better discussion about this inadequacy we should look at other contexts and take into account the considerations of other market researchers in other countries. Nevertheless, the Turkish case, I argue, can be regarded as a challenge to the approaches that believe in the less explanatory power of conventional stratification parameters for the present day consumers.

This study aimed at analyzing the emergence and development of market research industry in Turkey up to now and its operation today. I attempted to understand, from a sociological perspective, the current transformations in the consumption sphere and deciphering the organic linkages and tensions between different social fields in contemporary Turkey. The future of this industry and its prospective social implications should be studied in further studies.

## Appendix 1

### The Content of the *Consumption Behaviours and Spending 2004 Report* by HTP

#### TÜKETİM DAVRANIŞLARI VE HARCAMALARI, 2004

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## Appendix 2

Consumer Insight April 2005 by Dr.Güntaç ÖZLER www.htp.com.tr

### PORTRAIT OF TURKISH CONSUMER AS SURVIVORS

First and foremost, consumer is an individual. She or he is supposed to be deciding on their own in the marketplace. Their tastes, expectations, incomes, assets, cultural and regional backgrounds and whole host of other considerations affect their consumption decisions. Beyond these however, consumer is a member of a closely knitted bunch called family, or household, in technical terms. It is hardly conceivable an individual consumer highly independent of the members of the household. This is why when we speak about consumers, we unknowingly think about the whole family. This is more so in Turkey than any other part of the world, especially developed world. The reasons for this are very strong in Turkey. I will try to tell you some of these.

If one looks into the composition of private consumption expenditures, we find that more than two thirds of these expenditures relate to food, shelter and fuel, which are common and basic consumption items. We consume them jointly within the family.

Turkey has a very young population. There are approximately 23 million young people below the age of 15. Although a very small portion of these may be producers, they are currently our dependent population. Some part of the elderly population are also in the dependent category. There are at least 7 million elderly people with no retirement payments or any other official income, however small.

Think of the adult consumers as producers of some sort. In this sense, they are wage/salary earners, employers/entrepreneurs, producers of goods and services. If we look into the surrounding conditions, we can easily call Turkish Consumers as survivors:

- Not all of them are gainfully employed. Official statistics put the rate of unemployment to % 10.3. Rate of idle labor force is higher with %14.4.
- Most of them are not regular employees. Out of approximately 22 million persons making up the civilian labor force, %50.6 are regular and casual employees, % 29.6 are self-employed or employer and nearly % 20 are unpaid family members.

- Roughly 11 million of 22 million are insured. 6.1 million persons are paying dues to Social Security Administration, 2.4 million to Retirement Fund (Emekli Sandığı) and 2.5 million to Bagkur. If you consider approximately 3.5 million as unemployed, we end up with 7.5 million people without any social security coverage in the civilian labor force.
- Social Security coverage of elderly consumers are deficient. There are 6.8 million pensioners under the umbrella of three social security institutions. Not all of them are old but some are widows and orphans as well as disabled pensioners. There are 13 million elderly people in Turkey today. It is easily seen more than half of them have no income whatsoever.

What make us tick through the rough channels of livelihood is the strength of the Turkish family as an institution. “Dependency” or better termed as “solidarity” sort of repairs the handicaps of each of us as individual consumers. It is sad to see that we are no “sovereigns” of our own consumption; but lucky as well that we are no pleasure bubbles driven by instincts alone.

### Interviews (chronological)

Güntaç Özler (HTP), interview on 16<sup>th</sup> February 2003, Istanbul, Erenköy

Ali Danış, (ACNielsen), interview on 19<sup>th</sup> January 2004, Istanbul, Kavacık

Yılmaz Alkan (Barem Research International), interview on 29<sup>th</sup> January 2004, Istanbul, Okmeydani

Akın Alyanak, (DAP), interview on 7<sup>th</sup> June 2004, Istanbul, Levent

Sezgin Tüzün, (Veri Arastirma), interview on 15<sup>th</sup> June 2004, Istanbul, Beylerbeyi

Cağla Bakış, (ACNielsen), interview on 23<sup>rd</sup> June. 2004, Istanbul, Kavacık

Isilay Pekedis, (ACNielsen), interview on 24<sup>th</sup>.June. 2004, Istanbul,  
Kavacik

Sabiha Örüng, (ACNielsen), interview on 5<sup>th</sup> July. 2004, Istanbul, Kavacik

Ayse Mutaf, (Alfa Research), interview on 6<sup>th</sup> July Istanbul, Cihangir

Arda Özkan,(Barem Research International), interview on 30<sup>th</sup> June.2004,  
Istanbul, Okmeydani

Özlem Bora, (HTP Exclusive), interview on 1<sup>st</sup> September, 2004, Istanbul,  
Erenköy

Ela Akman (free lance), interview on 13<sup>th</sup> July. 2005, Istanbul, Erenköy

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