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Résumé de l'article

Les enquêtes par sondage sur la consommation, précuseurs des sondages d'opinion publique, apparurent vers la fin des années 1920 en réponse aux problèmes de marketing posés par la faiblesse de la demande et par l'inefficacité de la distribution. Menées conjointement avec le programme des données de mise en marché du Bureau fédéral de la statistique, les enquêtes auprès des consommateurs furent conçues et soutenues pour documenter la demande du marché, un corollaire de la rationalisation des méthodes de fabrication manufacturière. En mesurant quantitativement les comportements et les besoins de l'acheteur, ces études permettaient d'améliorer le rendement et l'efficacité de la publicité, haussant ainsi le total des dépenses des consommateurs. Parmi les premiers et les plus importants promoteurs et utilisateurs d'enquêtes par sondage se trouvent les agences de publicité, les maisons d'études de marché, les journaux et les éditeurs de magazines. Bien que quelques historiens américains spécialistes du marketing de masse aient caractérisé le phénomène de « niveleur » démocratique de la consommation, on ne peut pas appliquer ce raisonnement aux consommateurs canadiens qui, selon les études de marché, n'étaient pas représentatifs de l'ensemble de la population. D'une façon disproportionnée, ces consommateurs étaient des couples, des femmes, des anglophones et des citadins presque tous issus des classes moyennes et supérieures.

Polling Consumers: The Rise of Market Research Surveys in Canada, 1929-1941

DANIEL J. ROBINSON

CONSUMER SURVEYS, THE PROGENITOR OF PUBLIC OPINION POLLING WHICH began in Canada in 1941, appeared in the late 1920s as a response to the perceived business "problem" of marketing.[1] Production methods, assisted by business statistics and scientific techniques, were significantly more rationalized and efficient by the 1920s, especially among large manufacturers. But comparable improvements in the marketing of goods were largely absent. Consumer sample surveys offered a means of gauging and anticipating consumer wants, thus enabling better production planning. More importantly, they were a powerful tool for advertisers to penetrate the desires and behaviour of Canada's "market segments," securing data to improve the effectiveness and reliability of advertising itself. Two main groups spearheaded the development of this commercial technique: advertising agencies and market research firms, and magazine and newspaper owners seeking reader demographic profiles to showcase their publications' advertising potential.

By the late 1930s, market researchers had acquired the capacity to conduct national representative sample surveys, but rarely did such polls mirror the composition of the general population. Conceived and conducted not as a democratic or egalitarian undertaking, consumer survey research targeted specific socio-economic groups thought most likely to purchase the product in question. Accordingly, most, though not all, surveys overrepresented middle- and upper-income earners, city dwellers and married women. Such surveys, indicative as

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1 This paper is an abridged version of the first chapter of my PhD dissertation, "Polling Consumers and Citizens: Opinion Sample Surveys and the Rise of the Canadian Marketing Polity, 1928-1945," York University, 1996. The thesis examines the rise of public opinion polling, and argues, among other points, that opinion polling developed conceptually and methodologically as an adjunct of consumer surveying.

they were of advertiser and manufacturer depictions of preferred or "typical" consumers, call into question historical accounts of mass marketing emphasising broad-based popular participation. Daniel Boorstin, for example, argues that a salutary feature of American consumerism was manufacturer and advertiser efforts to "democratiz[e] the market by inventing ways for the consumer to vote his preferences," which encompassed a "new science for sampling the suffrage of consumers."[2] More recently, Richard Tedlow praised the emergence of American mass marketing for "making products available to the masses all over the nation," in essence "democratizing consumption."[3] From the standpoint of interwar Canadian marketers, however, "mass" consumption constituted less a universal phenomenon than a variable and stratified one.

Canada's economy experienced massive quantitative and qualitative changes in the two decades preceding the Great War. The GNP grew 112 per cent from 1900 to 1910, from $1.06 billion to $2.24 billion, making the early years of "Canada's century," on an aggregate level, decidedly prosperous ones.[4] Staple products – wheat, wood, minerals and other natural resources – fuelled much of this economic "Great Boom," but there were also important structural changes in manufacturing, the result of concomitant industrial and managerial innovations beginning in the 1890s. In some industrial sectors, the drive to lower costs through longer, more efficient production runs gave rise to large, multi-unit enterprises, many horizontically or vertically integrated, and where hierarchies of salaried managers over time supplanted individual entrepreneurs in the office and on the shop floor. Operations were centralised, manufacturing methods standardised, and national and international markets replaced local ones. Such Canadian and foreign-owned companies as Algoma Steel, Canadian General Electric, Canadian Westinghouse, Ford of Canada and Canada Foundries typified this "Second Industrial Revolution."[5]

2 Daniel J. Boorstin, T*he Americans: The Democratic Experience* (New York, 1973), 148.

3 Richard S. Tedlow, *New and Improved: The Story of Mass Marketing in America* (New York, 1990), 16.

4 M.C. Urquhart and K.A.H. Buckley, eds., *Historical Statistics of Canada* (Toronto, 1965), 141.

5 Robert Bothwell, Ian Drummond and John English, *Canada 1900-1945* (Toronto, 1987), 74; Graham D. Taylor and Peter A. Baskerville, *A Concise History of Business in Canada* (Toronto, 1994), 309-12, 336-38; Graham S. Lowe, *Women in the Administrative Revolution: The Feminization of Clerical Work* (Oxford, 1987), 37-46. For examples of scientific management methods used by Canadian firms, see Craig Heron and Bryan D. Palmer, "Through the Prism of the Strike: Industrial Conflict in Southern Ontario, 1901-14," *Canadian Historical Review* 58 (December 1977): 430-4. Michael Bliss, however, downplays the importance of scientific management in early 1900s business organization. *Northern Enterprise: Five Centuries of Canadian Business* (Toronto, 1987), 606, and *A Living Profit: Studies in the Social History of*

One consequence of the drive to rationalise production was corporate consolidation; between 1909 and 1913 some 220 firms with assets exceeding $200 million merged, and total capitalisation of Dominion chartered corporations rose from $12.9 million in 1900 to $490 million in 1911.[6] Small and medium-size businesses were by no means eradicated; nearly 70 per cent of manufacturing in 1911 remained in the hands of firms with annual sales under $1,000,000,[7] and most of these remained untouched by scientific management practices. But in large-scale enterprises there was a significant increase in administrative personnel, prompting Paul Craven to conclude that while the "fact of scientific management and 'efficiency' penetrated to only a small, if very important, group of industries" from 1901 to 1911, the "ideology of those movements was far more widely diffused."[8]

An emergent feature of the ideology and operation of economies-of-scale manufacturing was the use of business statistics, most of which were supplied by Ottawa. The 1901 census of manufacturers was "improved immeasurably" from earlier versions, containing broader classifications of industries and inaugural and comprehensive figures on material costs, wages and miscellaneous expenses.[9] In 1905 the Census and Statistics Office was established – the first semipermanent federal statistics agency.[10] Reflecting the growing importance of commercial statistics, the office was transferred from the ministry of agriculture to trade and commerce in 1912. Most significantly, the first annual census

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Canadian Business, 1883-1911 (Toronto, 1974), 11. On the counterproductive impact of scientific management at the Hudson's Bay Company in the 1920s, see David Monod, "Bay Days: The Managerial Revolution and Hudson's Bay Company Department Stores, 1912-1939," *Historical Papers* (1986): 173-96. On the founding of Canada's first management consulting firm, see Edward Bruce Mellett, *From Stopwatch to Strategy: A History of the First Twenty-five Years of the Canadian Association of Management Consultants* (Toronto, 1988), 2-4. For the American context, see the exemplary works of Alfred D. Chandler, Jr., *The Visible Hand: The Managerial Revolution in American Business* (Cambridge, MA, 1977), and *Scale and Scope: The Dynamics of Industrial Enterprise* (Cambridge, MA, 1990).

6 Robert Craig Brown and Ramsay Cook, *Canada 1896-1921: A Nation Transformed* (Toronto, 1974), 91-2.

7 Tom Traves, *The State and Enterprise: Canadian Manufacturers and the Federal Government* (Toronto, 1979), 5.

8 Paul Craven, *"An Impartial Umpire": Industrial Relations and the Canadian State 1900-1911* (Toronto, 1980), 380 [original emphasis]. Craven examined managerial growth in 161 industries from 1901 to 1911. In 102 industries the ratio of administrative to production employees (A/P ratio) stayed constant or actually fell ten years later. However, because administrative overhead increased significantly in the remaining, mostly large-scale, industries, there was a 14 per cent mean increase in the A/P ratio for all industries, a figure consistent with that of other western economies.

9 M.C. Urquhart, "Three Builders of Canada's Statistical System," *Canadian Historical Review* 68 (September 1987): 423.

10 Canada. *Dominion Bureau of Statistics: History, Function, Organization* (Ottawa, 1952), 9.

of production was conducted in the midst of the Great War in 1917, which provided detailed data on a wide range of economic activity in the manufacturing, construction, fisheries, forestry and mining sectors. When established in 1918, the Dominion Bureau of Statistics' mandate underscored the growing interconnection of state-sponsored statistics and the marketplace, seen as especially crucial for wartime industrial mobilisation. The Bureau's purpose was to "collect, abstract, compile and publish statistical information relative to the commercial, industrial, social, economic, and general activities and condition of the people."[11] Indeed, Dominion Statistician R.H. Coats, while discussing the DBS publication, *Monthly Review of Business Statistics*, launched in 1926, championed such sources as "barometric statistics," enabling a "scientific gauging" of business conditions and production techniques. To neglect these statistical indices risked incurring the fate of the "ship that drifts away from the main battle fleet – he is apt to get pounced on."[12] Similarly, Graham Lowe, in his study of early twentieth-century corporate administrative growth in Canada, describes how managerial and production statistics became a "highly valued resource for the professional managers who took the reins of corporate capitalism." In this schema, head offices served as "organisational nerve centres" that "collected, processed, stored and communicated mountains of facts and figures indispensable for managerial decision making."[13]

While, by the 1920s, statistical knowledge of production processes was well advanced, far less was known about the product's passage from factory gate to purchasing consumer.[14] As one advertiser underlined in 1928: "Distribution is the most important problem of modern business."[15] General content with efficient, scientifically engineered production systems was tempered by the perceived haphazard and costly methods besetting marketing. The problem was accentuated by Canada's geographic expanse and small population.[16] In 1924,

11 *Dominion Bureau of Statistics*, 10; Urquhart and Buckley, *Historical Statistics of Canada*, 454; Urquhart, "Three Builders," 428; R.H. Coats, "Beginnings in Canadian Statistics," *Canadian Historical Review* 27 (June 1946): 127-9.

12 R.H. Coats, "Vital Statistics for National Advertisers," *Canadian Advertising Data* (December 1928): 74; *Canada. Dominion Bureau of Statistics: Its Origins, Constitution and Organization* (Ottawa, 1935), 19.

13 Lowe, *Women in the Administrative Revolution*, 24. See also, Barry Ferguson, *Remaking Liberalism: The Intellectual Legacy of Adam Shortt, O.D. Skelton, W.C. Clark, and W.A. Mackintosh, 1890-1925* (Montreal/Kingston, 1993), 214-215.

14 Few historical works examine marketing in Canada. On retail chains, see Joy L. Santink, *Timothy Eaton and the Rise of His Department Store* (Toronto, 1990). See also, David Monod, "Bay Days," and especially his *Store Wars: Shopkeepers and the Culture of Mass Marketing, 1890-1939* (Toronto, 1996), 102-8.

15 Ian H. Macdonald, "U.S.A. Makes Census of Distribution," *Canadian Advertising Data* (February 1930): 78.

16 See Walter A. Thompson, "Tendencies Toward a More Rational Approach to Marketing," *Quarterly Review of Commerce* 3 (Autumn 1936): 22-7.

the DBS sought to ameliorate the situation by conducting a small-scale census of distribution. But the project proved unsuccessful; too many wholesalers and retailers were missed and those who were covered furnished incomplete information.[17] There were scant or non-existent statistical data in most marketing fields, including wholesale and retail practices, product packaging, sales methods, advertising and consumer behaviour. As a Royal Bank of Canada circular put it in 1930: "The last half century has witnessed the growth of large scale production and remarkable improvements in productive efficiency, but relatively speaking, distribution has escaped attention." Furthermore, there were "no comprehensive statistics" in the marketing field, a problem judged "most acute."[18] When American officials moved to combine a census of distribution with the 1930 decennial census, Canadian businessmen – including manufacturers, advertisers, board of trade members, and bankers – seized on this precedent and lobbied for a similar Canadian venture to be part of the 1931 census. Ottawa consented, and a census of wholesaling and retailing, according to one DBS official, was launched "with the blessings of representative bodies in the business world."[19]

A watershed in Canadian marketing history, the Census of Merchandising and Service Establishments represented the first extensive and systematic overview of wholesale and retail operations in Canada and was a vital source of market research information from the early 1930s on. Lists of wholesale, retail and service establishments were compiled by population enumerators and from other sources. These businesses were then mailed questionnaires soliciting such information as the commodities they handled, sales totals, employee wages and supply channels. In total, 125,003 retailers, 13,140 wholesalers, and 42,223 service and amusement establishments were enumerated, along with 4,958 hotel operations;[20] only 5 per cent of eligible businesses were missed, the DBS estimated. In 1933, the Bureau began an annual survey of wholesale and retail operations, employing a sampling method that used the 1931 decennial census figures as a benchmark. As well, using smaller samples, monthly surveys of department stores, chain stores, and some independent retailers were initiated.[21]

17 *Dominion Bureau of Statistics*, 19.

18 "Distribution Statistics in Canada," *Canadian Advertising Data* (July 1930): 13. See also H.E. Mihell, "Basing Advertising on Facts," *Canadian Advertising Data* (July 1928): 83-4; Charles F. Abbott, "Market Analysis a First Requisite," *Industrial Canada* (October 1931): 42-4; *Canada Year Book 1932* (Ottawa, 1932), 527.

19 Herbert Marshall, "The Statistical Basis of Marketing Policy," in *Canadian Marketing Problems*. H.R. Kemp, ed. (Toronto, 1939), 13; "The Reasons for Taking Census of Merchandising in Canada," *Canadian Advertising Data* (July 1931): 8.

20 Dominion Bureau of Statistics, 20, 47.

21 Canada. *Census of Canada, 1931*, Vol. X, *Merchandising and Services, Part 1* and Vol. XI, *Merchandising and Services, Part 2* (Ottawa, 1934); Marshall, "The Statistical Basis of Marketing Policy," 13-20; Urquhart and Buckley, eds., *Historical Statistics*, 562-3.

Flowing from these investigations were numerous studies illuminating merchandising practices. Among monthly DBS publications launched were: *Wholesale Trade* (1935-), *Price Movements* (1935-), *Monthly Indexes of Country General Store Sales* (1936-) and *Department Store Sales and Stocks* (1938-). Annual publications included, *Price Movements* (1931-), *Retail Trade* (1933-), *New Motor Vehicle Sales and Motor Vehicle Financing* (1935-) and *Advertising Agencies* (1941-).[22] The cumulative result by the late 1930s was a radically improved statistical basis of marketing activities that enabled manufacturers to track the movement of goods through distribution channels and pin point those areas and retailers where their products sold best. Retailing trends could be monitored, sales quotas recast, transportation systems rationalised. In the Depression-ravaged economy, the promise of tighter control and enhanced efficiency of distribution activities resounded loudly, and DBS merchandising data were consumed eagerly by manufacturers and advertisers.[23] As one commentator underscored in 1935 with respect to marketing in a flaccid economy, advertisers could no longer afford "to spend money blindly" and needed above all to "eliminate much of the waste so prevalent in the past."[24]

Government marketing statistics were a powerful, and for many, indispensable tool for navigating the vast and unpredictable empire of merchandising. But for marketers seeking greater control and profitability of product distribution and sales, DBS figures were only a partial solution, for they revealed little about the consumer purchasing process. Questions that had long preoccupied business planners lacked definitive answers: who bought the product – young or old, male or female, rich or poor? Why did they buy it, and from where did they get the idea? Were they likely to keep on buying it? What kinds of appeals could get them to buy more of it? In providing answers, sales figures and price trend data were of limited use; rather, one had to ask consumers directly. And commencing in earnest in the late 1920s, a variety of interests began doing just that: conducting interviews with consumers, usually employing a sampling method, that probed the meanings and associated behaviour of mass consumption. Two groups were closely associated with this project to har-

22 Canada. *Canada Year Book*, 1933, (Ottawa, 1934), 627-41. For other DBS merchandising publications, see Canada. *Historical Catalogue of Dominion Bureau of Statistics Publications 1918-1960* (Ottawa, 1966), 115-37. See also, *Consumer Market Data, 1931* (Ottawa, 1940), and *Consumer Market Data, 1941* (Ottawa, 1945). Wholesale and retail annual surveys were halted during World War II, except for the complete annual survey of retail chain stores. Urquhart and Buckley, eds., *Historical Statistics*, 563.

23 Marshall, "Statistical Basis of Marketing Policy," 19-20; Thompson, "Tendencies Toward a More Rational Approach to Marketing," 25. On the vagaries of Depression-era retailing, see Monod, *Store Wars*, 290-301.

24 Stuart Peabody, "Research Big Development in Advertising," *Canadian Advertising* (December 1935): 15-16.

ness consumer opinions for commercial ends: advertising agencies and market research firms who hoped to enhance the effectiveness and "scientific" authority of advertising; and magazine and newspaper owners wanting socio-economic profiles of reader audiences to furnish advertisers in their publications. By the early 1940s, this branch of market research – interview-based consumer research – was well developed, both methodologically and conceptually, evolving into a "mass feedback technology"[25] that functioned to anticipate, rationalise, and ultimately increase consumer purchasing. It was, in part, the demand-side corollary of mass-production techniques long underway.

Credited as Canada's first full-time market researcher when hired in 1929 by the advertising firm, Cockfield, Brown & Company, Henry King attributed his appointment to vice-president Warren Brown's interest in American market research, which he viewed as "the coming thing" to Canada.[26] And indeed Americans were well advanced in consumer research by the late 1920s. The first systematic market research operation was started by Charles Coolidge Parlin in 1911 when he took charge of the newly formed research department at the Curtis Publishing Company, publisher of the *Saturday Evening Post* and *Ladies' Home Journal*. His 1912 four-volume study, *Department Store Lines*, was a seminal work in the new marketing "science." Parlin conducted 1,121 interviews and logged 37,000 miles visiting America's largest 100 cities to compile the most detailed report of merchandising in department, dry goods and men's ready-to-wear stores. The study, coupled with another three years later which in part analysed consumer attitudes towards automobiles, was an early example of consumer feedback techniques: information gleaned from consumer surveys was fed back to producers and designers planning future products and simultaneously fed forward to copywriters devising ads for current goods.[27] By 1916, the *Chicago Tribune* was conducting house-to-house interviewing to determine the socio-economic composition, buying habits and newspaper reading traits of Chicago consumers, and, in 1922, the *Milwaukee Journal* undertook a similar survey, repeated annually, for the Milwaukee area.[28]

25 James R. Beniger, *The Control Revolution: Technological and Economic Origins of the Information Society* (Cambridge, MA, 1986), 20.

26 Henry King, "The Beginning of Marketing Research in Canada," in *Marketing Research in Canada*. W.H. Mahatoo, ed. (Toronto, 1968), 20-2. See also, A.B. Blankenship, Chuck Chakrapani, and W. Harold Poole, *A History of Marketing Research in Canada* (Toronto, 1985), 28.

27 Charles Parlin, *The Merchandising of Automobiles, An Address to Retailers* (Philadelphia, 1915); Douglas B. Ward, "Tracking the Culture of Consumption: Curtis Publishing Company, Charles Coolidge Parlin, and the Origins of Market Research, 1911-1930," PhD thesis, University of Maryland, 1996; Beniger, *The Control Revolution*; Jean Converse, *Survey Research in the United States: Roots and Emergence 1890-1960* (Berkeley, 1987), 89; Robert Bartels, *The Development of Marketing Thought* (Homewood, Il, 1962), 109.

28 Lawrence C. Lockley, "Notes on the History of Market Research," *Journal of Marketing* 14 (April 1950): 735; Converse, *Survey Research*, 90.

Such studies were used to convince consumer goods manufacturers of newspaper advertising's efficiency – it could target specific reading "publics" or consumer markets – and effectiveness: it could employ the most persuasive selling techniques. Total advertising volume in the United States increased dramatically in the early twentieth century, rising from $256 million in 1900 to nearly $3 billion in 1929.[29] To ensure these advertising dollars targeted likely buyers and that ads used the most compelling sales appeals, questionnaire surveys on consumer preference and the purchasing decision-making process took on increased importance.

In light of advertising's close links to market research, it is not surprising that advertising agencies developed extensive expertise in this materializing field. The most notable example was the advertising colossus, J. Walter Thompson, particularly after 1916 when Stanley Resor became president. Resor, a disciple of nineteenth-century positivist philosopher Thomas Buckle who proclaimed that aggregate human behaviour was observable and predictable only by statistical laws, insisted that advertising be empirically grounded. Soon after assuming office, he created a market research department, and in 1920 added the renowned behavioural psychologist John B. Watson to the company payroll. By the early 1920s, Resor had recast JWT into a "university of advertising," with its intensive consumer research and employee training programmes based on social scientific methods. The company also produced the most exhaustive publication on consumer spending. First appearing in 1912, *Population and Its Distribution* reformulated census data to compile more detailed demographic breakdowns of mostly urban consumer markets. Subsequent editions in 1918, 1921 and 1926 offered additional information on consumer goods retailers and corresponding distribution channels.[30] Another prominent advertiser, Young & Rubicam, conducted regular consumer research under the direction, after 1932, of George Gallup, a recent psychology PhD and leading authority on testing advertising copy.

As noted earlier, Cockfield, Brown & Company was the first Canadian advertising agency to acquire a market research capacity. The Montreal firm was formed in early 1929 when Warren Brown of National Publicity merged operations with Harry Cockfield's Advertising Service. In the late 1920s, Brown became concerned about the paucity of available statistics for advertising research. Most DBS data dealt with manufacturing and population demographics,

29 Daniel Pope, *The Making of Modern Advertising* (New York, 1983), 26.

30 Harwell Wells, "Charting Consumer America: J. Walter Thompson and the Rise of Market Research," p.6, paper presented at Business History Conference, Ft. Lauderdale, 19 March 1995; Pope, *The Making of Modern Advertising*, 142-3; Susan Strasser, *Satisfaction Guaranteed: The Making of the American Mass Market* (New York, 1989), 153; and Peggy Jean Kreshel, "Toward a Cultural History of Advertising Research: A Case Study of J. Walter Thompson, 1908-1925," PhD thesis, University of Illinois at Urbana-Champaign, 1989.

and Brown championed the need for a "self-contained operation," capable not only of analysing data, but collecting them too.[31] In late 1928, just before the merger, he hired William Goforth of McGill's Economics and Political Science Department as a part-time advisor on "commercial research." As Goforth was not available on a full-time basis until the end of the 1928-29 academic year, Henry King, an Oxford-educated classicist with prior advertising experience, was hired in January 1929 to oversee the firm's research operations. Soon after, other university-trained professionals appeared on the company payroll. Hubert Kemp, a marketing professor in the Political Economy Department at the University of Toronto, worked in the Montreal office during teaching breaks. Other economists offering their consulting services included Gilbert Jackson of the University of Toronto, Burton Hurd of the University of Manitoba, and McGill's John Culliton. Of the four full-time staff members of the recently formed Commercial Research and Economic Investigation Department in 1930, outside of King and Goforth, two were Harvard MBA graduates and another had an MA in economics. By 1930, the department was conducting a wide range of market studies for advertising clients.[32]

The extent of this research work is revealed in a June 1930 memo from Goforth to Cockfield, Brown executive H.E. Kidd.[33] The recently formed commercial research department functioned "to transform advertising from a haphazard adjunct of high-pressure salesmanship into a scientific and essential function of modern business." Along with its in-house employees, it oversaw an external organisation of 83 "research representatives" from British Columbia to Nova Scotia. The "core" of this group were 15 professional economists and statisticians, "selected for youth, and progressive and aggressive thinking." The remainder were "men of professional, economic training," prominent in their local business communities. Their contractual relationship with Cockfield, Brown was not spelled out, but they were presumably paid on a per job basis. The department's research process combined elements of "desk" and "field" work and included any number of the following steps with each assignment. Initially, the commissioning firm's executives and key clients were interviewed to determine the exact nature of the problem. A cost accounting analysis of production and sales systems was performed to isolate any "waste and inefficiency." Next, questionnaires for "all classes to be interviewed," including consumers, retailers and wholesalers, were prepared and then administered by research representatives in the field. The survey results were combined with extant studies and theses to draft a final report listing recommendations.

31 Blankenship, Chakrapani, and Poole, *History of Marketing Research*, 18-19.

32 W.H. Poole, "Marketing Research in Canada," *Commerce Journal* (Feb. 1957), 21; King, "Beginnings of Marketing Research," 21.

33 National Archives of Canada (NA), MG 32 G9, H.E. Kidd Papers, Vol. 26, Goforth to Kidd, 17 June 1930.

Judging by the rapid growth of research clientele, Cockfield, Brown had struck a resonant chord in the business community. In 1929, the firm conducted six major and 80 minor research assignments; during the first six months of 1930 alone it contracted for 30 major research commissions.[34] A cumulative list of completed market research studies, circa 1936, lists 68 major surveys spanning a broad range of fields, including such titles as "Canadian Market for Surgical Dressings and Kindred Products," "Rubber Footwear and Tire Market," "Canadian Market for Canned Soup, Beans and Spaghetti," and "Canadian Market for Swimming Suits and Other Knit Goods." Such firms as the Campbell Soup Company, Molson's Brewery, Kenwood Mills, Imperial Oil and the Dominion Rubber Company counted among the many research clients of Cockfield, Brown.[35] One of its most thorough studies was done in 1932 for the soda maker, Orange Crush. It investigated potential retail outlets by analysing local business and weather conditions, and included a consumer sample survey of beverage preferences and drinking habits. Unfortunately, the latter's methodology was not discussed.[36] Cockfield, Brown's extensive research programme, broadening the advertiser's traditional role beyond that of space buyer and copywriter, was championed by Harry Cockfield as early as 1931 as a "highly important and even essential factor in effective agency work." Relying on "pretty pictures and clever copy" at the expense of research was a "fundamentally unsound" advertising practice.[37] In 1939, Henry King, now Director of Research at Cockfield, Brown, reinforced this message: "What the advertisers and the agencies are crying out for today is FACTS [sic]. Bright ideas, hunches, and smart selling schemes by themselves are not enough; if you make a recommendation, you must be able to give a scientific reason (or as scientific as you can) for it."[38]

Unfortunately, none of Cockfield, Brown's market research reports survive, as the firm's records were lost when it became insolvent in 1983.[39] Hence, information on detailed survey methods and corresponding costs are not avail-

34 Ibid.

35 Kidd Papers, Vol. 25, File 14, "Partial List of Market Surveys." In spite of his firm's prolific outpouring of market research studies, Henry King still lamented in 1940 that Canada lagged far behind the United States in this regard. "The Need for More Market Knowledge in Canada," *Quarterly Review of Commerce* 7 (Spring 1940): 124-9.

36 "Orange Crush Base Campaign on Nation-Wide Survey," *Canadian Advertising Data* (May 1932): 3.

37 H.R. Cockfield, "Trend in Advertising Agency Practice (Part II)," *Canadian Advertising Data* (January 1931): 19.

38 Henry King, "New Problems in Advertising and Steps Towards their Solution," in *Canadian Marketing Problems*, 73.

39 Blankenship, et al., *History of Marketing Research*, 18.

able.[40] The company conducted both desk and field research, maintaining a far-flung contingent of "research representatives," which relied on campus-based or university-trained experts to conduct and coordinate research in multiple, distant locales to provide the capacity for "national" research. While such specialised research programmes were touted by Cockfield, Brown executives as the sine qua non of modern advertising, there was no guarantee that research clients would become advertising ones. Many firms listed among Cockfield, Brown's market research patrons were absent from the company's advertising clientele list. The point was sorely brought home in 1936 with a market survey done for the British Columbia Tree Fruit Board. While appreciative of the survey, which "must have cost you considerably more than the amount charged us," the Board, nonetheless, awarded its advertising account to another firm.[41]

In contrast to Cockfield, Brown, many consumer research survey reports done in the 1930s by J. Walter Thompson's Canadian office have been preserved. From yeast cake to ammonia use, from garment tag reading to newspaper browsing, the ad firm's consumer surveys probed intently the thoughts and behaviour of the buying public. Taken together, they provide the most concerted and systematic Canadian effort to penetrate and harness consumer opinions for advertising purposes. In the late autumn of 1929, New York-based JWT opened an office in Montreal. Office manager Robert Flood, during a briefing of branch operations to JWT executives in New York, described how the firm had conducted "the first Dominion-wide market survey" for the food manufacturer Standard Brands in December 1929 and January 1930. Although few methodological details were revealed, the survey covered seven food products sold in 29 cities and some 12,000 retail outlets. Flood reported that "three out of every four women" bought Magic brand baking powder, and subsequent advertising had increased its sales by 5 per cent. As well, one of four "housewives" made coffee in "old-fashioned" pots, the rest in percolators. Sample size, survey method and field interview systems were not discussed.[42]

While the above survey, probably JWT's first, was only mentioned, more than a dozen consumer surveys exist in the company's archives, documenting

40 For Cockfield, Brown and other firms discussed below, very little is known about the sums charged clients for such services. While many marketing reports survive, related correspondence and financial records unfortunately do not. As well, many consumer surveys were not conducted for specific clients; instead, they were used by ad agencies and publishers to promote advertising's merits to a wide range of potential advertisers.

41 Kidd Papers, Vol. 25, File 14, "Partial List of Clients, Cockfield, Brown & Company Limited," "Partial List of Market Surveys prepared by Cockfield, Brown & Company Limited," both circa 1936; G.A. Barrat to Cockfield, Brown, 17 June 1936.

42 Duke University, Special Collections Library, J. Walter Thompson Papers [JWT], Box 2, Minutes of Representatives Meetings, 14 May 1930; "Montreal Office Growing Rapidly" *J.W.T. News* (June 1930): 3.

the range and increasing sophistication of the firm's research programme.[43] A December 1930 report on magazine readership was based on a nation-wide sample survey of 1,688 people, comprising a "representative cross-section of the urban population."[44] Interviews were "divided among families of different economic classes in relation to the estimated proportion of population in each class." The report did not disclose sex distribution, how class stratification was determined, or how interviewing was conducted, but it did reveal a tidy amount about Canadians' magazine tastes and reading habits. Fifty-eight per cent read American magazines regularly, 7 per cent more than read Canadian magazines, with *Maclean's* and *Canadian Home Journal* being the two most popular. Thirty-eight per cent read both Canadian and American publications, and reader "duplication" rates for Canadian magazines were highlighted, information that could help advertisers more efficiently target reader-consumer markets.

Again, with a January 1931 report on household ammonia use by "1,040 housewives in 21 representative cities across Canada," there was little reporting of survey operation. "Proportionate numbers from all economic classes" were said to comprise the sample, and in Quebec both English and French speakers were "given adequate representation."[45] The focus here, as with the earlier Standard Brands survey, on urban, married women was typical of many JWT consumer surveys and those of other organisations. During the 1920s and 1930s, women were thought to control 80 per cent or more of consumer spending; wives were typically considered by marketers and advertisers as the family's "purchasing agent."[46] City dwellers on average were more affluent than town or rural residents, who were also more expensive to interview owing to greater travel time. The result was a polled preponderance of urban, married women and the oftentimes conflation of homemaker, consumer, and respondent.

Accompanying this bias towards urban wives was a class one. The first JWT report to provide class breakdown figures was a 1933 survey for Standard Brands on baking-powder use by Toronto, Kingston, Montreal and Sherbrooke housewives. The sample was divided into three economic groups, of which the upper- and middle-income sections constituted 81 per cent of the 832 respondents.[47] A

43 In addition to the Canadian surveys discussed below, the following are available in Duke's JWT collection. Reel 224, "Survey Among Gillex Users in Montreal and Toronto," November 1933; Reel 223, "Consumer Survey on Cameras and Films," November 1933; Reel 224, "Survey on Use of Yeast Cakes among Housewives in Rural Canada," August 1934; Reel 233, "Garment Tag Survey" September 1936.

44 JWT Papers, Reel 223, "Facts on Canadian Media," December 1930.

45 JWT Papers, Reel 223, "Survey of the Canadian Market For Household Ammonia," January 1931.

46 Roland Marchand, *Advertising the American Dream: Making Way for Modernity* (Berkeley, 1985), 66.

47 JWT Papers, Reel 224, "Survey of the Baking Powder Market in 4 Canadian Cities," June 1933.

more pronounced class bias was found with a 1938 survey of breakfast- cereal use in Ontario and Quebec. A JWT analysis of occupational statistics indicated that in a survey divided into four income groups, the top two – "A" and "B" – should not exceed 30 per cent of the sample. However, "to permit an adequate upper class sample for tabulation," it was decided to use the following income quotas: 10 per cent for the "A" homes (annual income above $5,000); 25 per cent for B ($3,500 to $5,000); 50 per cent for C ($1,500 to $3,500); and 15 per cent for D (under $1,500). These categories, however, grossly inflated Canada's income distribution. Listed below are the average annual salaries by occupation group for 1931, the most recent census year: labourer ($480); semi-skilled ($791); skilled ($1,042); clerical-commercial-financial ($1,192); professional ($1,924); and managerial ($2,468).[48] Without significant sources of secondary income, none of these average wage-earning families even came close to the "B" range. All but professionals and managers would fall in the "D" group, which comprised just 15 per cent of the survey. Presumably, only plutocrats filled the "A" quota.[49] Of course, breakfast cereal consumption, like that for many other commodities, was not a democratic phenomenon; "A" cupboards on average contained three times the cereal as "D" ones. Understandably, market researchers here and on other occasions targeted consumer markets or "universes" with disproportionate numbers of the "buying" public, while simultaneously underrepresenting other groups among the "general" public.[50]

Witness the unorthodox 1938 survey of adolescent newspaper reading habits which deliberately oversampled upper-income children. Some 495 Toronto youths aged 8 to 16 were given questionnaires to complete in small groups at Sunday Schools, Settlement Houses and Boy Scout meetings. Boys and girls, at 54 and 46 per cent respectively, were included in near proportionate numbers. But the sampling framework fixed the A-B group ("those whose fathers earn $3,000 a year or over") at 30 per cent, even though JWT officials estimated "that only 15% of the population [came] under the AB classification." Class determination was "judged by the neighbourhood in which the interviews took place." Two-thirds of respondents were 12 years or older which "correspond[ed] roughly to the potential appeal advertising can make on the adolescent," since older children were thought more receptive to advertising. The

48 Urquhart and Buckley, eds., *Historical Statistics*, 96.

49 JWT Papers, Reel 232, "A Consumer Survey of the Canadian Market for Ready-to-Eat Cereals," August 1938.

50 This is significant since subsequent public opinion polling, often conducted by market researchers, adopted a similar differentiated sampling design. As consumer researchers deemed one's propensity to purchase as a principal factor in gaining sampled inclusion, opinion pollsters privileged one's proclivity to vote as the benchmark for accessing the polled citizenry. In Canada and the United States, women, ethnic minorities, and low socio-economic groups were systematically and deliberately undersampled in Gallup polling during the 1930s and 1940s. See Robinson, "Polling Consumers and Citizens," 77-200.

25-question survey probed reading interests and routines for various Toronto daily and weekly newspapers. Part of the questionnaire adopted a fact-quiz format for comic-strip, editorial, and advertising items, including questions like, "Where did Donald Duck try to take a bath in last Sunday's *Telegram*?" and "What product in the *Star* was advertised by an umbrella and the headline 'Under the Weather?'" Comic strips proved the hands down reading favourite; nearly three-quarters of children could recall and describe the plot of interviewer-selected strips in their previous day's paper. Only 39 per cent remembered the front page headline. While just 15 per cent recognised prominently displayed ads from yesterday's paper, a remarkable 59 per cent identified products promoted by comic-strip advertising.[51] The implications of such findings for youth- directed advertising were obvious.[52]

JWT's most far-reaching and methodologically advanced consumer surveys were two done in 1938 and 1939 for the soap manufacturer Lever Brothers. The first, a 2,776-person sample of Ontario and Quebec women, included age, geographic, and socio-economic quotas. The same A-B-C-D income divisions seen above were used, although the A-B pool was limited to 15 per cent of the sample and not 30. Notably, "working women" comprised 21 per cent of respondents, and rural residents 28 per cent. The large sample size allowed for statistically reliable demographic breakdowns, and dozens of pages of cross-tabulations illuminated the relationship between the above-cited variables and soap, creme and cosmetics use, along with general washing habits. Ninety-five per cent of Ontario women regularly washed their faces in the morning, while 73 per cent of Quebec women did so; 66 per cent in Ontario, but only 31 per cent in Quebec used soap twice or more daily. Employed women were slightly more frequent washers than homemakers. There was a negative correlation between age and soap use, and rural women lathered less often than their urban counterparts. Surprisingly, in what may account for the sample's pared down A-B quota, "lower income groups in Ontario and Quebec appear[ed] to use soap more frequently than the higher brackets. . ."[53] Here, seemingly, was the unusual case in which consumption related inversely to income.

Perhaps reflecting soap consumption's more democratic nature, JWT's follow-up survey a year later contained a radically revamped income quota structure. Where before "A" income homes had an annual income above $5,000, the starting point was now $3,000, and this group constituted only 6 per cent of the sample. The following "downgraded" income categories, with sample

51 JWT Papers, Reel 224, "Survey of Newspaper Reading Habits of Adolescents," July 1938.

52 On comic strips and advertising, see "Boom in Comics," *Canadian Advertising* (March 1935): 27-8; Spalding Black, "Adapting Colored Comics to Advertising," *Canadian Advertising* (April 1937): 11-12; and "Even the Politicians Go for the Strip," *Canadian Advertising* (October 1937): 22.

53 JWT Papers, Reels 232 and 233, "Face Washing Survey: Ontario and Quebec," April 1938.

percentages in parentheses, far more closely mirrored Canadian society: "B," $1,850 to $3,000 (17 per cent); "C," $1,150 to $1,850 (25 per cent); "D," $700 to $1,150 (28 per cent); and "E," under $700 (23 per cent). This survey, conducted in the fall of 1939, was a milestone, both methodologically and conceptually, of consumer research in Canada. More than any other, it was a testimonial to the market research doctrine of scientific empiricism – centred increasingly on the representative sample survey –[54] as the most effective means to forecast consumer demand, formulate advertising and, ultimately, boost sales.[55] The Dominion-wide survey of 5,162 housewives (the largest sample of any 1930s surveys) examined families' laundry and bathing habits, along with their newspaper and magazine reading and radio listening. Patterned on the Lever Brothers' "General Soap Survey" done annually in the United States, field workers, supervised by JWT New York and Montreal staff, conducted half-hour "searching discussion" interviews on representative doorsteps across the country. Significantly, 29 per cent of respondents were on farms, 25 per cent were French speakers, and all regions of Canada – including the Maritimes, the area with the lowest per-capita income – were proportionately sampled.[56]

As important as the survey's methodological rigour were its conceptual underpinnings. The study's purpose was to provide a "basic fund of information" about soap use and media interaction "to serve as a guide in advertising and marketing plans and to serve as a base from which trends could be determined through future consumer surveys." The following section from the report underscores its positivist and behaviourist design:

> Surveys showing only the percentage of families using a product give an incomplete picture of the market since two users of the same brand have widely different consumption rates. In this survey, therefore, a list of 18 representative items covering the regular wash and fine things was made the basis of careful quantitative analysis in each home. A current week's washing of each item was reconstructed by the housewife giving the number of pieces washed by or for all members of the family, the method and frequency of washing and the soap used. These detailed week's case histories secured from over 5,000 families covered the laundry requirements of approximately 23,000 persons and supplied data on 284,057 pieces of clothing or household items laundered during the week. . . . The value of users secured in different income groups or different city size groups could be measured and this information could be related to media coverage.

54 Blankenship, et al., *History of Marketing Research*, 28.

55 See Frank R. Coutant, "Profitable Marketing Through Scientifically Planned Advertising," *Quarterly Review of Commerce* 6 (Autumn 1938): 15-19; J.L. Dampier, "Advertising Research," *Quarterly Review of Commerce* 6 (Spring 1939): 109-117; and H.A. Innis, "The Necessity of Research in Marketing," *The Commerce Journal* (March 1940): 12-14.

56 JWT Papers, Reel 338, "General Soap and Market Survey -1939," May 1940.

In similar fashion, "the number of baths per week by each member of the family was secured to measure the relative importance of different users of bath soaps." Urban English-speaking women bathed on average 3.3 times weekly, compared to only 1.1 times for rural French-speaking women. Just three per cent of all housewives took "shower baths." Of course, such figures pointed to a bathing soap market in urban, English Canada potentially three times as lucrative as rural Quebec. Lux and Palmolive were the most popular toilet soaps, with "good for skin or complexion" being the most-cited reason for their appeal. Information gleaned from newspaper and magazine reading coupled with radio-listening routines could be matched against soap usage to determine the most effective advertising venues. (A slogan like "good for skin or complexion" might very well anchor an ad campaign.) For example, two-thirds of the market for fine fabric laundry soaps resided with families in the top half of income earners. These families also formed 76 per cent of *Le Film* readers and 63 per cent of *Canadian Home Journal* and *Maclean's* buyers, but only 43 per cent of the readers of agricultural and religious publications, the obvious least appealing advertising vehicles for fine fabric cleaners. The report contained dozens of cross-tabulations highlighting the relationship between class, region, sex, age, mass-media consumption and soap use, providing an unlimited range of information for future marketing campaigns.[57] Maritime sales quotas might be readjusted, an advertising blitz promoting bathing in rural Quebec could be considered, recommendations to production staff about changing the fragrance of toilet or laundry soaps might be made. The high-water mark of 1930s consumer research, the survey illustrated graphically (literally so) the marketer's scientific impulse to control and rationalise consumption and enhance the effectiveness of corresponding advertising.[58]

Along with J. Walter Thompson and Cockfield, Brown, another firm assumed prominence in the consumer surveying field. Founded in 1932, Canadian Facts was not an advertising agency, but a "research house" which performed specialised market research services for corporate, and later government, clients. Still operating today, it endures as Canada's oldest market research firm. Its origins date back to a 1932 meeting between Cockfield, Brown executive Frank Ryan and Ethel Fulford, a Bell Telephone operator supervisor. Ryan sought a telephone-based survey method to measure the size and composition of radio programme audiences in order to develop advertising strategies for this new medium. Fulford recruited some of her operators into a newly formed business which conducted telephone surveys of Toronto residents to gauge their radio listening. Known as the "coincidental telephone method," respondents were asked to which if any station they were tuned when called. Demographic

57 Ibid.

58 On this note, see Innis, "The Necessity of Research in Marketing," 12-14.

information was also solicited. Canada's pioneer radio "ratings" service (or "audience research,"[59] as it later was known), it counted Procter & Gamble and Lever Brothers among its early clients, both major sponsors of day-time radio "soap" operas.[60]

The firm's early operations focussed on radio audiences, but by the late 1930s it had moved into other areas of market research. A December 1938 company advertisement proclaimed the firm's research capacity in retail distribution, consumer interviewing, advertising copy testing, radio listening, and even pantry counts – in which researchers visited homes and recorded numbers of stocked brands. The company claimed, somewhat unrealistically, an interviewing force of 1200 part-time "trained investigators" in 65 markets countrywide.[61] To "eliminate guesswork" it was necessary to "get the facts" quickly and economically, another ad boasted.[62] In a 1939 sales pitch to a prospective client, Canadian Facts boasted an even broader research network. Ninety-nine "regional supervisors" oversaw a national field force of 2,000 interviewers, "each one a trained field psychologist, capable of interviewing a banker or a ditch-digger with equal facility." Among its list of clients were Lever Brothers, Imperial Oil, Ford Motor Company, Kellogg Company of Canada, Bell Telephone Company and Imperial Tobacco.[63] Unfortunately, since none of Canadian Facts' financial records from the 1930s survive, it is difficult to validate these claims.

The earliest consumer survey in the company's holdings is a 1939 report on parent and non-parent attitudes towards children's radio programmes in a half-dozen cities in Eastern Canada. The 203 respondents, divided into A-B-C-D classes (the A-B pool totalled 38 per cent, though no corresponding dollar figures were provided), were queried about children's programming and breakfast-cereal use. Views were solicited on the suitability for children of shows like "Dick Tracy" and "Howie Wing." Three-quarters thought all the selected programmes were fine for kids' listening, but for dissenters "The Shadow" and "Speed Gibson" were thought the least beneficial for young minds. As well, respondents disclosed cereal preferences and if these purchases resulted from broadcast advertising. Breakfast food advertisers were no doubt pleased to learn that "no families. . . reported discontinuing a cereal because of

59 On this subject, see Ross A. Eaman, *Channels of Influence: CBC Audience Research and the Canadian Public* (Toronto, 1994).

60 Canadian Facts (Toronto) company records, "Canadian Facts at Fifty," circa 1982. Blankenship, et al., *History of Marketing Research*, 22; Eaman, *Channels of Influence*, 50.

61 "Mr. Manufacturer: Meet your Market" (ad), *Marketing* (24 December 1938): 8.

62 "FACTS are Your Stepping Stones to PROFITS," (ad) *Canadian Advertising* (January 1939): 21.

63 Archives of Ontario (AO), Maclean-Hunter Papers, Vol. 403, File "Surveys, Opinion-General," Colwell to Irwin, 21 June 1939.

broadcasting." The interviewer also made an in-home pantry count of cereals.[64] Here again was another illustration of the youth market's perceived importance to advertisers, highlighting children's influence on the decision-making process for cereal buying. Studies like this when "properly conducted" by trained professionals, asserted Canadian Facts General Manager N.P. Colwell, could handle "any given problem in the marketing of any product or service from the time it is available for sale until its ultimate use by the consumer."[65]

Of extant Canadian Facts surveys, the most ambitious was a December 1940 readership poll for *Maclean's* magazine.[66] A 1,438-person sample of magazine readers were shown two recent issues and asked to select editorial items they had read. Interviewing was restricted to cities and, significantly, targeted upscale readers: "No attempt was made to match proportionate income levels in the various cities, calls being concentrated primarily in middle and high income areas. . . . " The A-B income group ($1,800 and up) formed 60 per cent of the sample. Among occupational categories, executives and professionals totalled 40 per cent, unskilled labourers just three per cent. The survey was highly unusual in one respect: men comprised 53 per cent of the sample, one of the few instances in which adult males outnumbered women. A public affairs magazine with a sizeable male readership, the *Maclean's* survey conferred "consumer" status and sampled inclusion to this characteristically (and ironically) underrepresented group. Indeed, many of the survey's findings highlighted male-female reading differences. Of the 46 editorial items listed, men on average read (or claimed to have read) 18.2, women 15.3. Men preferred articles and editorials over fiction, women generally the reverse; more women than men tackled crossword puzzles. Both groups judged "topical subjects" as better cover photos than "pretty girls." A surprise finding, no doubt reassuring to *Maclean's* officials, was the higher-than-thought average number of readers – 4.03 – for each copy sold. The report included 100-plus pages of cross-tabulations by age, sex, class, region, city and item reading. Such data, according to *Maclean's* associate editor Arthur Irwin, could serve as a guidepost to "market demand, i.e. the interest and tastes of our reader constituency," and "the

64 Canadian Facts Company, Survey Report, "An Analysis of Listening Habits and Opinions of Children's Radio Programs Conducted in Selected Markets," January 1939.

65 N.P. Colwell, "Avoiding Pitfalls in Marketing Research," *Canadian Advertising* (Fourth Quarter, 1940): 10.

66 AO, Maclean-Hunter Papers, Vol. 403, File "Surveys," Canadian Facts Survey, "Report of a Readership Study on Maclean's Magazine in Twenty-three Canadian Cities," December 1940; Irwin memo, "Notes on Survey of Reader Reaction to Maclean's Magazine, December 1940," n.d. Since the early 1930s, *Maclean's* had conducted or sponsored small-scale, *ad hoc* surveys of its readers. Blankenship, et al., *History of Marketing Research*, 23.

degree to which our editorial contents meet that demand." While editorial decisions could not be made "solely on the basis of a chart," survey data could be "extremely useful to a good editor."[67]

It was also "extremely useful" for advertisers to learn of survey findings revealing greater-than-expected readership rates, especially among upper-income audiences. On 15 April, 1941, the Maclean Publishing Company hosted a reception for advertising executives, during which presentations were made on the Canadian Facts survey. *Maclean's* editor H. Napier Moore called it the first time that a "publication [had] revealed the result of a factual test showing each and every [editorial] item" and corresponding reader interest. The data, Moore stated, were "going to be a guide to us in our editorial planning and they either confirm or revise our editorial judgement." Irwin, who had earlier corresponded with American magazine publishers about their reader survey experiences,[68] was more lukewarm to this numerative standard: surveys allowed "scientific methods" to become a planning feature of the editorial process, but the editor's job still remained more an art than a systematic technique. But advertisers, who for over a decade had been exposed to the research doctrine of statistics and scientific investigation,[69] were perhaps more receptive to president Horace Hunter's concluding comments: survey research should function as an "external audit" of business or marketing practices, mirroring the "intelligence departments of any army" seeking to "get at the real facts."[70] Besieged

67 Ibid. Irwin memo, "Notes on Survey of Reader Reaction. . . " On journalists' complaints in the early 1980s about the use of marketing surveys to determine editorial content – derided as "Pablum Canada" by one reporter – see Canada. *Report of the Royal Commission on Newspapers* (Ottawa, 1981), 172.

68 Maclean-Hunter Papers, Vol. 402, File "W.A. Irwin – correspondence, 1941," Irwin to McLaughlin, 5 April 1941; Irwin to Robinson, 5 April 1941; McLaughlin to Irwin, 8 April 1941.

69 For examples of market research articles, see "General Motors Ask the Buyer for Opinions," *Canadian Advertising Data* (November 1932): 14, 25; Henry G. Weaver, "Educating the Consumer," *Canadian Business* (February 1937): 30-3; "These Seven Steps in Market Research Simplify Task and Ensure Accuracy," *Marketing* (29 July 1939): 3; Henry King, "The Need for More Market Knowledge in Canada," *Quarterly Review of Commerce* 7 (Spring 1940): 124-129; G. Walter Brown, "Information, Please!" *Canadian Business* (November 1940): 20-4; and Philip Spencer, "Pardon Me, Madam, how often do you take a bath?" *Canadian Forum* 20 (December 1940): 274-6.

70 Maclean-Hunter Papers, Vol 402, File "W.A. Irwin – notes, drafts," "Special Conference – Royal York Hotel, Reader Survey of *Chatelaine* and *Maclean's*," 15 April 1941.

by advertising competition from American magazines and radio, the company promoted the survey's findings to win back lost advertising dollars.[71] Throughout the war years, Canadian Facts continued to poll *Maclean's* and *Chatelaine* readers annually,[72] and in 1943 Maclean Publishing established its own research department.[73]

Canadian newspaper owners similarly strove to take the pulse of reader-consumers to bolster advertising revenue, which by the 1930s had become the financial cornerstone of the daily press. Mirroring related trends in other industries, newspaper publishing was transformed by mergers and economies-of-scale production, beginning in the 1910s. The number of Canadian dailies peaked at 138 in 1913, but by 1931 this had dropped to 111, and by 1941 only 90 remained. Meanwhile, average circulation rates rose from 5,000 in 1901 to over 25,000 in 1940. In the same period, spurred on by higher rates of literacy and urbanisation, total daily newspaper circulation grew from 600,000 to 2,165,000.[74] By the late 1930s, two newspaper chains, Southam and Sifton, controlled nearly 20 per cent of the Canadian market. Whereas Victorian-era newspaper publishers required moderate financial outlays and derived much of their revenue from subscriptions or political patronage, the typical postwar daily was a heavily capitalized, advertising-dependent operation. Subscription and newsstand revenues lagged well behind the large sums needed to meet burgeoning payrolls or operate the photo-engraving plants and faster presses of the

71 When a 1931 tariff on US magazines was lifted in 1936, the value of American magazines shot up from $2,625,000 in 1936 to $5,900,000 in 1937. Isaiah Litvak and Christopher Maule, *Cultural Sovereignty: The Time and Reader's Digest Case in Canada* (New York, 1974), 28. See too Mary Vipond, *The Mass Media in Canada, 2nd edition* (Toronto, 1992), 29; Paul Rutherford, *The Making of the Canadian Media* (Toronto, 1978), 45-8; Phillis Axford, "Marketing Canadian Magazines," *Commerce Journal* (March 1939): 24-30; and Noel Robert Barbour, *Those Amazing People!: The Story of the Canadian Magazine Industry 1778-1967* (Toronto, 1982), 104. For a popular history of magazine publishing, see Fraser Sutherland, *The Monthly Epic: A History of Canadian Magazines 1789-1989* (Markham, 1989).

72 Maclean-Hunter Papers, Vol. 402, File "Surveys – Chatelaine," "Second Readership Study of Editorial Items in Chatelaine, October-November 1941," December 1941; "Report of Item-by-Item Study of Readership of Two Consecutive Issues of Chatelaine," 17 January 1944. Vol. 404, File "Maclean's Readership Survey 1941-42," "Study of Readership on an Item-by-item Basis of Two Consecutive Issues of Maclean's Magazine," 24 December 1942; "Survey of M.M. Readership, 1944," n.d.; File, "Survey Audience 1944," "Report of Results of Study of Canadian Publication Audiences," 6 June 1945.

73 Floyd S. Chalmers, "Canada A New Market," *The Commerce Journal* (April 1944): 54. Since 1925, Maclean Publishing had produced the annual, *Financial Post Business Year Book, Canada & Newfoundland*, which compiled manufacturing and marketing statistics for business audiences.

74 H.R. Kesterton, *A History of Journalism in Canada* (Toronto, 1967), 71; Carlton McNaught, *Canada Gets the News* (Toronto, 1940), 9-10, 24; Rutherford, *Making of the Canadian Media*, 48-9; Canada. *Report of the Royal Commission on Publications* (Ottawa, 1961), 245; *Report of the Royal Commission on Newspapers*, 65.

"mass" dailies. By 1918, most profitable newspapers required 60 to 65 per cent of their space to be filled by advertising.[75] A key consequence of "the industrialization of the press and its dependence upon advertising," according to Carlton McNaught, was the emphasis on broadening circulation, "not primarily to enlarge a newspaper's influence upon the minds of its public, but to enhance the value of its space to advertisers,"[76] without whom accelerating production costs could not be met.

The earliest known newspaper reader survey was a *Toronto Star*-commissioned survey in 1930, the results of which were trumpeted in a *Star* promotional. The poll, done by a little-known organisation, the Library Bureau of Canada, comprised a cross section of the "newspaper reading habits" of members of Toronto homes. Sample size and survey methodology were not disclosed. Claiming the *Star* was read in 50,110 Toronto homes (and disproportionately so among home and car owners), the survey constituted "proof" of the *Star*'s advertising superiority over the *Telegram* and the *Mail and Empire*: "The mass of buying in Toronto is done by families of the kind who were found to be readers of the *Star*."[77] Its publishers would later claim in 1934 that "repeated surveys" had confirmed the *Star*'s widespread penetration of "the homes of people of means, or those able to buy the produce or service advertised."[78] In 1938, the *Winnipeg Free Press* released the results of its "Independent Survey of the Winnipeg Market." According to the advertising trade magazine *Marketing*, the questionnaire survey revealed not only the number of *Free Press* readers, but "how many of these families [had] automobiles, radios, electric refrigerators," and owned homes. Copies of the report were distributed among consumer goods advertisers and ad agencies.[79]

A more centralised and systematic program of newspaper market research was launched in the mid-1930s by the Canadian Daily Newspapers Association (CDNA). Here again, the primary objective was to augment advertising revenue, which the Depression and magazine and radio competition had rendered more tenuous. In 1936, the CDNA established a Research Committee, which worked closely with the Dominion Bureau of Statistics to compile data on

75 Vipond, *Mass Media in Canada*, 17.

76 McNaught, *Canada Gets the News*, 19; See also, Harold Innis, *The Press: A Neglected Factor in the Economic History of the Twentieth Century* (London, 1949), 12; Rutherford, *Making of the Canadian Media*, 50-2; and Minko Michael Sotiron, "From Politics to Profit: The Commercialization of Canadian English-Language Daily Newspapers 1890 to 1920," PhD thesis, Concordia University, 1990, 4-12.

77 "Star Strength in Toronto," (ad) *Canadian Advertising Data* 3 (March 1930): 47.

78 "Still Bigger value for your advertising dollar" (ad) *Marketing* (4 August 1934): 5. For similar promotional ads by the *Montreal Daily Star* propounding reader purchasing power, see "Logic!," *Marketing* (10 February 1934): 3; and "Are You Keeping Step With This Market?" *Marketing* (29 May 1937): 3.

79 "Survey of Buying Power," *Marketing* (10 December 1938): 9.

newspaper buying and consumer markets. The following year the committee released *The Canadian Market*, a compilation of census and marketing statistics elucidating consumer purchasing power in regional and local markets served by newspapers. Its promotional campaign stressed the strengths of the daily newspaper as an advertising vehicle. As well, the committee conducted a study of the food industry, a sector making up one quarter of total retail sales and a heavy print advertiser.[80] In 1939, CDNA researchers published *The Consumer Survey*, a statistical overview of consumer brand buying in newspaper markets, based on the results of questionnaires printed in 70 CDNA member dailies. Respondents who completed and mailed back the surveys were eligible for gifts and prize money, and some 20,000 questionnaires were reportedly returned. National advertisers and ad agencies were also involved with the project.[81]

While none of this research incorporated sample survey interviews, this would change with the activities of the Bureau of Advertising, which succeeded the Research Committee in late 1938. Possessing a larger budget and broader mandate than its predecessor, the Bureau also benefited from formal affiliation with an American partner, the Bureau of Advertising of the American Newspaper Publishers Association (ANPA). Ties to the American Bureau, CDNA officials asserted, would grant Canadian publishers access to American head-office executives who made advertising decisions for their Canadian branches. As well, since 1935, the ANPA had been spearheading a "United Front" campaign among newspaper owners seeking to win back advertising lost to radio, magazine and billboard advertising.[82]

Consumer and advertising research figured prominently in the United Front campaign, best exemplified by "The Continuing Study of Newspaper Reading." Launched in July 1939 in cooperation with the Association of National Advertisers and the American Association of Advertising Agencies, the Continuing Study encompassed a series of newspaper reader surveys conducted by the Publication Research Service, formerly the Gallup Research

80 Canadian Daily Newspapers Association (CDNA), Toronto, "Report of Nineteenth Annual Meeting of the Canadian Daily Newspaper Association," 22 April 1938, 37-9; W. A. Craick, *A History of Canadian Journalism, vol. II* (Toronto, 1959), 210-12; "Canadian Markets Shown in Volume of Vivid Charts, *Canadian Advertising* (October 1937): 23. See too CDNA, *The Canadian Market: 1938 Supplement; A Graphic Summary of Canadian Statistics, and an Analysis of Retail Trade* (Toronto, 1938).

81 CDNA, "Report of the Twenty-First Annual Meeting of the Canadian Daily Newspapers Association," 30-31 May 1940, p. 40; "CDNA Market Study Ready in September," *Marketing* (22 July 1939): 8. Canadian data on newspaper markets were available in the American trade publications *Editor and Publisher: Market Guide* and *Editor and Publisher: The Fourth Estate.* Also noteworthy was the annual, *Lydiatt's Book of Canadian Market and Advertising Data.*

82 CDNA, "Report of Nineteenth Annual Meeting of the Canadian Daily Newspaper Association," 22 April 1938, p. 42; Craick, *History of Canadian Journalism*, 213.

Service. The supervisor of field operations was Harold Anderson, a partner of George Gallup and co-founder of the American Institute of Public Opinion. The survey method used was pioneered by Gallup in the 1920s and was known among market researchers as the "Gallup method." Selected samples of individuals were presented copies of the previous day's newspaper and asked to mark editorial, advertising, and other items they had read. By 1941, such surveys had been done for some two dozen American newspapers, and, in Canada, *Hamilton Spectator*, *Windsor Star* and *Montreal Star* readers were similarly polled.[83] The combined survey results revealed that 75 per cent of men and 93 per cent of women read advertisements, excluding the classifieds. Countering conventional wisdom, left-page ads were read more often than right-page ones. Local ads registered more with readers than national ones, a fact which privileged newspaper advertising, as one speaker at the 1940 CDNA annual meeting highlighted: "Each individual man or woman is most interested in the things that immediately concern him, his neighbour, his town, his county. . . the newspaper is the only medium which is hand-tailored to fit exactly this interest in every market."[84]

Though the study's composite data were mostly American, CDNA officials actively publicised its findings to Canadian advertisers. In 1940 and 1941, the Advertising Bureau gave presentations on Continuing Study results to 19 different groups of advertisers and ad agency executives. Firms like General Foods, Campbell Soup Company, Kellogg and Pepsi-Cola were supplied with survey results. Large companies seen as underemploying newspaper advertising, or those which had recently curtailed print advertising, were specifically targeted. Indeed, promotional work for the Continuing Study was deemed the Bureau's "foremost activity" in 1941.[85] The research programme, in the words of Bureau executive Duncan MacInnes, worked to foster a "new and more constructive concept of media." Newspapers could now advance beyond a preoccupation with circulation figures and concentrate on "the potentialities of the markets reached. . . [and] the manner in which people read."[86] Such research provided fact-based assessments of reader-consumer habits and functioned, asserted one newspaper market researcher in 1940, to "make the newspaper an adviser, friend, and counsellor to [ad] agencies and manufacturers, rather than the space-chaser it largely is today."[87]

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83 Duncan MacInnes, "What of Newspaper Advertising?" *Quarterly Review of Commerce* 8 (Spring 1941): 230-9.

84 CDNA, "Report of the Twenty-First Annual Meeting of the Canadian Daily Newspapers Association," 30-31 May 1940, pp. 52-3. Wilder Breckenridge was the speaker.

85 Ibid., 46-47; "Report of the Twenty-Second Annual Meeting," 7 March 1941, pp. 8-9.

86 MacInnes, "What of Newspaper Advertising?" 230-1.

87 Elmer P. Resseguie, "Newspapers and Market Research," in *Marketing Organization and Technique*. Jane McKee, ed. (Toronto, 1940), 68.

No doubt, some corporate advertisers and ad firm executives cast sceptical glances on newspaper-sponsored surveys trumpeting the merits of daily press advertising. Any claims of "objectivity" were obviously compromised by economic self-interest. But the significance of the CDNA research programme lies less in its impartial credibility than in its very presence. Aware that magazine publishers and radio owners were using sample surveys to shore up advertising revenue, newspaper publishers followed suit, believing quantitative analyses were necessary to maintain or boost ad dollars – the *sine qua non* of the modern daily. By 1941, the Advertising Bureau's research activities had grown considerably from their mid-1930s origins; procuring newspaper advertising and conducting market research were increasingly coterminous.

By 1941, consumer surveys were a familiar, if not ubiquitous, feature of Canadian marketing and advertising. The advance of this commercial technique was a manifestation of a deeper drive for rationalisation and efficiency characterising large-scale manufacturing in Canada. Since the early 1900s, census manufacturing statistics had helped facilitate economies-of-scale production systems. The Census of Merchandising and Service Establishments of 1931, along with other DBS marketing data, were conceived and championed as statistical tools to replicate this feat for distribution and sales. Such data, however, fell short of procuring "facts" about consumer attitudes and the purchasing decision-making process. Consequently, firms like Cockfield, Brown, J. Walter Thompson, and Canadian Facts turned to quota sample surveys in order, in the words of one contemporary, to determine "the *what* of manufacturing, the *where* of advertising and the *how* of selling."[88] The market researcher's frequent invocation of "science" to distinguish the consumer survey from rule-of-thumb practices served more as an appropriation of an authoritative symbol than as a bona fide display of experimentally derived predictive "proof." But market research polling by the early 1940s, nonetheless, had become a powerful and singular technique for quantifying and correlating consumer opinions, tastes, and behaviours, a fact supported by the willing adoption of consumer surveys by advertising-dependent newspaper and magazine publishers.

It is useful to reiterate James Beniger's by now self-evident point that specific business interests were the impetus and locomotion for early market research surveys, which were definitely not the result of "consumers looking for new ways to 'speak their minds.'"[89] "Enfranchising" consumers or expand-

88 Douglas J. Wilson, "Psychological Aspects of Market Research," *Quarterly Review of Commerce* 3 (Winter 1936): 67.

89 James R. Beniger, "The Popular Symbolic Repertoire and Mass Communication," *Public Opinion Quarterly* 47 (Winter 1983): 482.

ing "consumer sovereignty" via opinion surveys did not factor into the market researcher's schema.[90] The goal was to penetrate and exploit for profit consumer worries, fancies and longings. But not necessarily all consumers. While, as Susan Strasser observes, "twentieth-century rhetoric has conflated democracy with an abundance of consumer goods," business decision making operated mainly on a "one dollar-one vote basis." The poor were and are effectively disenfranchised.[91] Converse similarly underscores that early American market research samples were disproportionately "cross sections of the prosperous."[92] The JWT soap surveys notwithstanding, the same was also true for most Canadian consumer polls before 1941. As the poor went mostly undetected, so too did men. "Woman is a shopper," pioneer marketer Charles Parlin proclaimed in 1912,[93] and in interwar Canadian consumer surveys so she largely remained, most likely married, a city dweller, and drawn from middle-to-upper-income ranks.

90 See also Sally Clarke, "Consumer Negotiations," *Business and Economic History* 26 (Fall 1997): 109.

91 Strasser, *Satisfaction Guaranteed*, 288.

92 Converse, *Survey Research*, 92, 445 fn 35.

93 Cited in Boorstin, *The Americans*, 152. On this point, see also William R. Leach, "Transformation in a Culture of Consumption: Women and Department Stores, 1890-1925," *Journal of American History* 71 (September 1984): 319-42; and Marchand, *Advertising the American Dream*, 66-9.