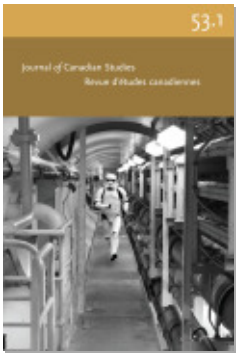
Canada's Early Developments in the Public Opinion Research Industry



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Canada's Early Developments in the Public Opinion Research Industry

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Abstract: Provided is an overview of early developments relating to the public opinion research industry in Canada prior to the arrival of the American pollster George Gallup's Gallup Poll, which first began appearing in Canadian newspapers in 1941. In particular, this article puts forward (1) an overview of the early use in Canada of survey research techniques, (2) how government agencies and academics were involved in collecting and processing quantitative data relating to Canadian attitudes and behaviours, and (3) how the private sector, including advertising agencies and market research firms, were developing ways to conduct public opinion research relating to consumers and media, including print media and radio. Together, these activities provided a foundation for what would become a fully developed marketing and public opinion research industry in Canada.

Keywords: public opinion, polling, market research, survey research, media research, audience measurement, Canadian Census

Résumé : Cet article offre un survol des débuts de l'industrie de la recherche sur l'opinion publique au Canada, et ce, avant l'arrivée des sondages Gallup du sondeur américain George Gallup, lesquels firent leur apparition dans les journaux canadiens en 1941. Plus particulièrement, cet article met de l'avant (1) un survol des premières utilisations des techniques d'études de sondage au Canada; (2) la manière dont les agences gouvernementales et universitaires étaient impliquées dans la collecte et le traitement des données quantitatives sur les attitudes et les comportements des Canadiens; et (3) comment le secteur privé, notamment les agences de publicité et les firmes d'études de marché, développait des moyens pour effectuer des études de l'opinion du public sur les consommateurs et les médias, y compris les médias imprimés et la radio. Ensemble, ces activités ont fourni une base pour ce qui allait devenir une industrie de la recherche sur l'opinion publique et du marketing pleinement développée au Canada.

Mots clés : opinion publique, sondages, étude de marché, étude de sondages, étude des médias, cote d'écoute, recensement canadien

Introduction

A new era began in the Canadian polling industry on 29 November 1941, when results from the first Canadian Gallup Poll were released in 27 newspapers across Canada. Readers of such dailies as the *Toronto Star*, *La Presse*, and the *Winnipeg Tribune* learned that Canadians believed that the top problems facing the country revolved around conscription and the need to increase Canada's war efforts (*Winnipeg Tribune* 1941). Producing results in a regular syndicated column titled Canada Speaks, the Canadian Gallup Poll was produced regularly for its media clients by the newly created Canadian Institute of Public Opinion

(CIPO), the northern counterpart to the American Institute of Public Opinion (AIPO) (Adams 2015, 358–59). Using the public opinion poll, deemed at the time by George Gallup as "this new instrument," the AIPO had previously produced content for a regular column titled America Speaks for newspapers across the USA (Gallup and Rae 1940, vi–vii; Van Allen 2001, 2). Using what were then considered modern sampling and survey techniques with relatively small samples, Gallup, the founder of AIPO, along with Elmo Roper, who was polling for *Fortune*, and Archibald Crossley, who was working for the Hearst newspaper chain (Field 1983, 198–99), surprised Americans by correctly predicting the outcome of the 1936 presidential election. The surprise was that they beat out the more established and well-regarded *Literary Digest*, which used massive samples exceeding 2 million to predict incorrectly an Alf Langdon victory over Franklin Delano Roosevelt.

The term *poll* is derived from the earlier English word *polle*, which means the top of a person's head, hence the expression "counting heads" and acts of governments to collect a *poll tax* (Safire 1978, 550). With regard to surveys, the American political scientist Theodore Lowi defines *public opinion polling* as "asking questions of samples of people in order to determine the estimated opinions of larger populations" (1981, 159). At the same time, William Safire ties polling to the electoral process by defining a *pollster* as someone "who measures public opinion, especially with an eye to predicting election results" (1978, 550). Because polling is aimed at gathering systematic data to provide what political scientist Stephen Brooks describes as "a mirror on public opinion" (2009, 397), a better term is *public opinion research* (POR), which, as defined by Canadian political scientist Andrea Rounce, "includes a wide range of activities for a wide range of purposes. Policy research, market research, communications and advertising research, program evaluation, client/customer satisfaction studies, omnibus or syndicated studies, and product development research" (2006, 140).

While both the AIPO and its Canadian affiliate, the CIPO, broke new ground in their respective countries by providing regular polling results on major social and political issues, in this article I show that prior to 1941 the Canadian government, academics, media organizations, and private sector companies were highly active in gathering survey data and other forms of market research. Indeed, contrary to what some have written (Hnatyshyn 1986, 312; Hoy 1989, 17; Adams 2010, 151), the art of polling the Canadian public did not begin with the American imported Gallup Poll; rather, the Canadian public opinion research industry's roots had been planted in prior years. This includes the development of interview techniques, such as those involving face-to-face and telephone interviewing, advances in questionnaire design, and, to a limited extent, the implementation of effective methodologies relating to sample design.

This article is organized as follows. First, I discuss early developments in the use of surveys to capture social information in both Europe and the USA. This is followed by a description of how the Canadian Census, and the methodologies that were implemented to gather population data, required an extensive amount of planning, human resources, and

technology as the nation's society evolved from pre-Confederation years into the twentieth century. From this, I then show how a small but growing marketing research industry developed alongside growing government activity in the 1920s and 1930s, and how the use of survey-based studies came to be increasingly relied upon to understand Canadian attitudes and behaviours, especially those relating to media usage and other consumer behaviours. These business-related activities laid the groundwork for later developments in the Canadian public opinion research industry.

The Social Survey and Early Uses of Questionnaires

It is common today to use the terms *questionnaire* and *survey* interchangeably. In many ways the public opinion survey has its roots in nineteenth century developments. Jean Converse, in her comprehensive history of survey research, writes that the term *social survey* evolved from the idea of doing a "survey" of society in the same way as one might do a geological survey, or a land survey, and that it was "social" to the extent that it was a survey of people (1987, 11). In France, Frédéric Le Play produced in 1855 the first edition of his study titled *Les Ouvriers Européens*, which was based on a series of intensive case studies involving systematic observation techniques and interviews with 36 families, and 57 families in a subsequent edition (Converse 1987, 19). The information gathered included income, expenditures, religion, health, and other topics relating to the social life of the families.

Later in the same century, Charles Booth conducted the first large-scale quantitative study of social conditions in England, with the first volume of his study, *Life and Labour of the People*, published in 1889 (Converse 1987, 11). As did Le Play, Booth used structured observation and survey techniques, including interviews of social workers, direct participant observation, measurements of residential dwellings, and so forth. He was able to demonstrate that one-third of Londoners lived in poverty, a social condition that he deemed caused by certain factors other than immoral behaviours, findings that ran counter to the moralistic mainstream thinking of Victorian England (11, 15, 18–19). In his history of Victorian England, A.N. Wilson writes, "Thanks in part to the surveys of Charles Booth ... we know in profound detail about the lives of the poorest of the poor in the capital of the richest city of the world" (2002, 512). Booth's legacy, according to Jean Converse, is that a social "survey ... counted cases ... *many* cases, enough to provide a view of the whole. This, then, is the Booth tradition of surveys" (1987, 19).

An early example of how questionnaires were used in the United States to answer specific social questions dates back to 1885. At that time, the State of New York established an investigative committee to study the merits of alternative forms of capital punishment as a replacement for the current practice of hanging. To this end, the commissioners with their staff of nine researchers, after studying secondary sources on the use of the guillotine, lethal injections, electricity, and other ways by which criminals could be put to death,

conducted a survey of professionals. According to Linda Simon's account, in her history of the uses of electricity in the United States, the commissioners distributed a questionnaire to hundreds of New York's elite, including judges, lawyers, and physicians. Based on 200 responses, the commission submitted its report, stating that 40% of respondents recommended no changes to the current practice; that the use of the gallows is appropriate for punishing murderers. Others favoured the guillotine because of its merciful speed, yet others found it repulsive because of "the fatal chop, the raw neck, the spouting blood" and unpleasant associations with the French Revolution and its aftermath. In the end, the commission recommended the use of electrocution to replace hanging (Simon 2004, 221–25).

The first use of non-government studies based on questionnaires to be used in the United States specifically for marketing research purposes can be traced back to 1879, when the firm N.W. Ayer and Son needed to develop an advertising strategy for the Nichols and Shepard Company, a major national agricultural machinery producer. To this end, telegrams were sent across the country to state officials and publishers requesting information about what they were expecting for harvests in their regions. "As a result," according to one account, "the agency was able to construct a crude but formal market survey by states and counties" (Lockley 1974, 4).[1] Whether conducted by governments or private agencies, we can now say that by the late 1800s surveys were increasingly accepted as a reliable tool for studying social questions. Jean Converse writes that it is at this stage of development that the following characteristics had emerged:

- Data collection was now described as "fieldwork";
- The scope was now comprehensive to the topic under study;
- Findings were now based on quantitative data comprising numerous "cases"; and
- The usual unit of analysis was the individual person (1987, 21).

A sign of widespread acceptance for survey-based public opinion research became apparent in the early 1900s, when Americans were increasingly turning to social surveys to understand social change in rural America; to understand urban problems including poverty, crime, and drunkenness; and to uncover unsavoury conditions in city factories. For example, President Theodore Roosevelt established the Country Life Commission, which began operating in 1907 with Liberty Hyde Bailey as its chairman. Bailey, a dean at Cornell University's New York State College of Agriculture, held hearings across the country. The commission issued a questionnaire, which it termed a "circular," to 550,000 residents, with questions pertaining to perceptions about rural life. One of which was "Are the farm homes in your neighbourhood as good as they should be under existing conditions?" Approximately 100,000 responses were received. Because of the topics covered, and because the results were focused on the perceptions of respondents rather than hard facts, as reported in a census, this survey is deemed by social historians to be the first quality-of-life (QOL) survey ever conducted (Converse 1987, 26–27).

Clearly, survey-based research was increasingly accepted as a standard and reliable tool for doing social research in the United States and elsewhere. According to one tally, by the beginning of 1928, it was estimated that 2,775 different studies based on social surveys had appeared worldwide, a number considered by the social historian Jean Converse to be an underestimate (1987, 35–36). In Canada, in the early 1900s, surveys and other forms of data collection to measure social conditions, particularly among the urban poor, came to be used by government departments and social agencies. Using one province as an example, J.S. Woodsworth (at the time the superintendent of the All Peoples' Mission and then, later, the founding leader of the Cooperative Commonwealth Federation), joined with others to conduct a social survey of households on two streets, one in Winnipeg and the other in Regina (McNaught 1959, 44). In 1916, Woodsworth subsequently was appointed to serve as the director of the Bureau of Social Research, an organization jointly established by the governments of Alberta, Saskatchewan, and Manitoba. At the time of its launch, and as reported in the *Manitoba Free Press*, "one of its duties ... [is] to secure such data as will form the basis for sound and progressive legislation" (*Manitoba Free Press* 1916a, 9). One project organized by this new organization involved the use of questionnaires to gather information from 500 households in Ukrainian settlements across the three provinces. A second project, as reported in the *Manitoba Free Press*, involved what the bureau called "a preliminary survey" regarding "mental defectives" across the prairie region (1916b, 9). In a subsequent *Manitoba Free Press* article produced by the bureau, there are specific references to the use of questionnaires to gather social data (1916c, 9).

The Canadian Government and Early Forms of Information Gathering

When looking at the origins of Canada's public opinion research industry, the implementation of national censuses is often overlooked. Perhaps this is because a *census* by its very nature is "an accounting of the complete population" (Burns and Bush 2010, 339). It therefore does not require the implementation of the types of sampling techniques used by those involved in public opinion research, with the exception being the use of modern techniques by governments to implement systematic sampling for "long-form" surveys for some but not all householders, or to reach difficult-to-reach populations. Yet there are three elements that are essential for conducting a national census that are also essential to conducting proper polls or other forms of public opinion research: (1) the use of interviews, either through face-to-face encounters or through other means, to gather information; (2) designing forms by which information is gathered in a standardized way, such as through a questionnaire; and (3) having the means by which the gathered information can be transformed into meaningful results, including data tables and written reports. Because the national census was a precursor to later developments for survey research, it warrants some discussion here.

By the mid-1800s, governments in both Europe and North America increasingly recognized the importance for gathering reliable statistics relating to their national populations for both social and economic purposes. Such data were needed for economic planning and assessing the social and health-related needs of its people.[2] Canada was no exception and within its founding document, the *British North America Act* (now titled the *Constitution Act*), section 8 stipulated that the first census was to be taken in 1871, and every 10 years afterwards. However, the census in Canada predates Confederation by more than two centuries, with the first one conducted in 1666 by the intendant of New France, Jean Talon,[3] in which 3,215 inhabitants were counted (Downey 2003, 5). Subsequent censuses were conducted irregularly in the regions that would later become part of Canada.[4]

In his history of the Dominion Bureau of Statistics, David Worton identifies the roots of the modern day Canadian census in the pre-Confederation enactments of 1847 and 1852 in the Province of Canada, these authorized the censuses of 1851–52 and 1861. "The legislation was recognizably a precursor of the statistics acts that followed Confederation, and it also established the administrative arrangements that were carried over intact into the Dominion of Canada" (Worton 1998, xii). However, in terms of methodologies used, Bruce Curtis in his historical survey of Canada's censuses writes that what differentiated these censuses from those that came afterwards was that they "did not mobilize consistent observational protocols or coherent observational practices" (2002, 17). In contrast, the 1871 census was deemed at the time as one of the most advanced and sophisticated censuses in the world (22). It included a total of 211 questions on age, sex, race, religion, education, and occupation, as well as information gathering regarding agriculture, forestry, mining, fishing, and manufacturing (Hillman 1992, ix–x). Machinery designed by Herman Hollerith, and used previously for processing the 1890 US census, was first used in Canada in the 1891 census (Worton 1998, 20–21).[5]

For the 1901 census, enumerators carried 13 different forms, and had from 31 March to 3 May to complete all their interviews in the census district to which they were assigned (*Winnipeg Daily Tribune* 1901b). On the official day of the census, which was declared to be 31 March, citizens were advised about the following on 30 March in the *Winnipeg Daily Tribune* (1901a):

> It is the duty of the enumerator to enter the house of each citizen in his division; to act with civility and state his business in a few words; to ask the necessary questions; to make proper inquiries and to leave the premises as soon as his business is transacted. His conduct must be judicious. Persons refusing to answer the questions or to give the required information may have legal proceedings taken against them.

Rather than just being a national census, the 1901 census served also as the Canadian component of a broader census that reportedly was covering much of the British Empire (*Winnipeg Daily Tribune* 1901a; Williamson 1931, 2:293).[6]

Originally within the purview of the Department of Agriculture, in 1912, the national census became the responsibility of the Department of Trade and Commerce, then the Dominion Bureau of Statistics, which was created six years later (Downey 2003, 6; Worton 1998, xiv). According to the *Statistics Act* of 1918, the Bureau's mandate was "to collect, abstract, compile and publish statistical information relative to commercial, industrial, social, economic and general activities and condition of the people" (Vital Statistics Council for Canada n.d.). By 1921, the Canadian Census involved an estimated 12,000 interviewers who were paid five cents for each person captured by an interview. The information was written down by pencil on blue printed forms. Police officers, missionaries and Hudson's Bay workers were also involved in reaching out to far-flung northern populations. The census was mandatory, with a possible prison sentence of three months for those who failed to comply. The interviews were conducted during three weeks in June 1921, and the forms were processed during the summer. A total of 350 individuals were reported to be involved with this processing, which involved coders, clerks, and machine operators to manage the Hollerith sorters and tabulators. By August the bureau was able to begin issuing preliminary results from the national survey (Thompson and Seager 1985, 1).

The Dominion Bureau of Statistics was also involved in other forms of information gathering based on survey research techniques. In 1924, the bureau began collecting national retailing data for its 1923 Census of Wholesale and Retail Trades by mailing surveys to establishments that had been identified by interviewers across Canada during the 1921 census (Worton 1998, 103). However, the response rate was deemed too poor for the results to be used (Moyer 1983, 23; Robinson 1999, 13). A better effort was made for the second version of this survey in the form of the Census of Merchandising and Service Establishments that had a sample frame based on retailer-related information gathered alongside the 1931 census. The methodology involved having the door-to-door census interviewers compile lists of the wholesale and retail establishments in their assigned areas. This information was subsequently used by the bureau to send questionnaires to the enumerated establishments. These lists were augmented using business and association lists and directories (Moyer 1983).[7]

Other federal government entities were also launching survey-based studies. For example, in 1927 the Department of Agriculture distributed approximately 350 surveys to prairie farmers, of which 115 were returned.[8] The results allowed the government to conclude, among many other things, that the "average reduction in the number of horses kept after the purchase of the tractor, taking the increased acreage subsequently handled into consideration, was about four horses per farm" (*Lethbridge Herald* 1927, 15). Provincial governments were likewise using surveys to meet their informational needs. For example, in 1925 the Manitoba Department of Education established an advisory board to look into how science should be taught in schools, and as part of its work it distributed a questionnaire asking teachers about what they thought were the best ways to teach

students, including science-related instruction and hands-on laboratory work (*Manitoba Free Press* 1925). Crown agencies were also involved in survey research. For example, a major national survey was implemented in 1940 when the CBC commissioned a study of over 2,000 respondents in Ontario and Quebec on issues relating to public broadcasting (Peers 2006, 30).

Not all social data were derived from survey research. Advertisers and market research consultants found that they could use government-collected data when serving their clients. For example, in a 1924 article for *Marketing* titled "A Statistical Picture of the Average Canadian Consumer," Bertram Brooker revealed how taxation data could be combined with census data to estimate individual consumer behaviour. According to Russell Johnston, Brooker and others who accessed these sources of government information during the 1920s were able to create market estimates regarding many areas of interest. An intriguing example was the use of taxation data to generate statistics regarding the national cigarette market. Assuming that the majority of smokers were men over the age of 15, Brooker divided the taxed products by the adult male population, thereby producing a per capita consumption figure. Manufacturers could then use their own sales figures and calculate their share of the market (Johnston 2001, 207).

One individual who used aggregate trade-related data to serve his clients was William A. Lydiatt, a Canadian who, after spending much of his professional life in the United States with the well-established firm N.W. Ayer and Son, as well as other agencies, began providing services to his Toronto clients in the form of statistics and marketing advice. In 1914, he published *Lydiatt's Book: What's What in Canadian Advertising*, which was largely based on census data. With updates each year, in the sixth edition of his book, Lydiatt asserted, "Advertisers are coming to appreciate the importance of statistics to the success of their advertising plans. The most successful advertisers ... have learned to base their selection of media on a careful analysis of the statistics relating to markets" (quoted in Johnston 2001, 204).

Another firm that relied on statistical data for market research purposes was the Canadian Business Research Bureau (CBRB), which was doing business for such clients as the City of Guelph as early as 1926 (Nash-Chambers 2009). The CBRB chiefly based its studies on economic, business, retail, and population statistics, with one example being work it did for the *Hamilton Spectator* that involved a submitted report consisting of four pages of detailed market-related information, with no interviews or opinion surveys involved in the methodology (CBRB 1930). There are some indications, however, that the firm may also have conducted survey-based studies. In a 1929 advertisement, the firm claimed it had "interviewed thousands of users of [a manufacturer's] products and learned what users actually think and know about the goods." Also, for "a world famous firm we made a survey of cross-sections of English and French speaking dealers to determine future sales policies" (reproduced in Blankenship, Chakrapani, and Poole 1985, 21).[9] Before

moving into a detailed discussion of how new forms of public opinion research began to be used by various market research agencies and the media, the following section discusses how research techniques were beginning to be adopted in the academy, especially in the field of psychology and by academics who were finding their ways into the private sector to provide for-profit research services to clients.

Academia and Social Research—a Growing Interest in New Techniques

Turning now to what was occurring during the 1920s in the universities, what Canadian universities were offering in courses relating to survey-based public opinion research lagged behind what was happening in government. This is discernible by examining the changing nature of university psychology departments. It was not until the mid-1920s that psychology departments in Canada's major universities were able to break away from the confines of philosophy departments; this occurred at McGill University in 1924 (Ferguson 1982, 13), followed by the University of Toronto in 1926 (Myers 1982, 82). Unfortunately, the new fertile ground for "practical psychology," did not appear elsewhere in Canada for years to come. In their history of psychology within Canadian universities, Mary Wright and Roger Myers assert that the examples of McGill and the University of Toronto in disengaging psychology from philosophy bore fruit elsewhere only from the 1940s and onward (1982, 13). Russell Johnston also writes that there is neither evidence to show specifically that public opinion or consumer-related studies in psychology were being conducted in Canadian universities (2001, 163–64) nor that psychology was serving as a stepping-stone at the time for those seeking to enter careers in marketing research, whether with advertising agencies or other forms of business firms.[10]

While psychology departments were on the cusp of change, what were business schools in Canada doing in the meantime during the 1920s and 1930s with regard to teaching modern forms of marketing research and consumer studies? While little has been written on the topic regarding Canada, we do know that the first known American academic survey-based marketing research study was executed in 1895 by Harlow Gale of the University of Minnesota, who is now recognized as having established one of the first experimental psychology laboratories in the country (Eighmey and Sar 2007, 147). In Lawrence Lockley's historical examination of the American research industry, "History and Development of Marketing Research" (1974), the author examines university textbooks from the past to understand how the study of market research techniques was unfolding. The first known American textbooks on the topic of marketing research were C.S. Duncan's *Commercial Research*, published in 1919, and J. George Frederick's *Business Research and Statistics*, published in 1920. Z. Clark Dickinson's *Industrial and Commercial Research* and Percival White's widely used *Market Analysis* (with numerous subsequent editions) were both published in 1921. While these works were not focused on the use of survey

research techniques for understanding consumer behaviours, they led Lockley to observe that "marketing research was infrequently presented in business schools before 1930 and infrequently omitted after 1937" (12–13).

Of the very few academics in Canada who easily moved from the academy to marketing research during this era was W.W. Goforth, an economics professor from McGill who was hired in 1928 by the advertising agency Cockfield, Brown to head the firm's research division (Robinson 1997, 195). His time at the agency was short due to a career change in order to manage a trade association. However, one of his hires was Henry King, an Oxford-educated classicist who had been previously with National Publicity, a firm that was part of the merger to form Cockfield, Brown (Blankenship, Chakrapani, and Poole 1985, 19; King 1968, 20–21). Once in place, King recruited a large number of well-educated individuals to work on marketing and consumer research projects. According to Russell Johnston, this included a McGill law student, two graduates from Harvard's MBA program, an Oxford graduate who had been with National Publicity, and three civil servants from the federal Tariff Board (2001, 222).

By the end of the 1930s, other advertising agencies and consultancies were seeking similarly well-trained experts, and, as H.R. Cockfield of Cockfield, Brown stated at the time, "modern agencies ... [are seeking] economists, statisticians, marketing experts, and even engineers, cost accountants, and lawyers" (quoted in Johnston 2001, 223). Before examining many of the firms that would make up an early form of the national research industry, the discussion turns to an earlier form of marketing research called *circulation research* that helped clients to determine how to spend their advertising dollars to target specific segments of the Canadian population.

Circulation Research—Marketing Research and Advertising

Because of their central role as brokers who helped companies purchase media space, as far back as the late 1800s the larger Canadian advertising agencies employed individuals whose task was to investigate the market penetration and circulation of newspapers and periodicals. The results were to confirm for the "space buyers" that the advertising was reaching specific demographics and that it actually appeared in accordance to what had been negotiated at the time of purchase (Johnston 2001, 38–39). In 1881, the McKim agency began publishing its annual *Canadian Newspaper Directory* and continued to do so until 1942 (Blankenship, Chakrapani, and Poole 1985, 15). McKim employed staff to conduct circulation research regarding religious magazines, large urban dailies, farmer weeklies, and so on, and the type of readers each publication attracted (Johnston 2001, 20). The fact that this work reaches back to the late nineteenth century in Canada certainly gives lie to claims made that the "marketing research industry" was born in the United States in 1911. This was a claim, made by some, that it originated with two firms, one being

the Curtis Publishing Company, producer of the *Saturday Evening Post* and *Ladies Home Journal*, establishing in 1911 its Commercial Research Division, a section of the company specifically devoted to collecting information about its own readers. In this same year, J. George Frederick founded the research firm titled the Business Bourse (Lockley 1974, 7). The growing use of research for planning advertising strategies was also used by the Canadian-based firm, Norris-Patterson, which advertised its own services in the 15 February 1921 edition of *Marketing* with the following assertion: "Waste in advertising can be easily averted by calling in a reliable agent at the inception of a new product. The agency should cooperate with the manufacturer from the choosing of the name to the determining of the selling policy." Also, among the services they were offering were "market investigations and research work" (quoted in Johnston 2001, 209).

In contrast to later decades when quantitative research would be coordinated by well-educated (and often well-paid) social scientists (Adams 2010), circulation and other forms of reader-related research was treated by the agencies as "routine clerical work" (somewhat comparable to the work done in more modern telephone field centres) and was performed by women whose work was often undervalued. On rare occasions, however, women were able to hold managerial positions in the industry, with one example being Margaret Pennell who, in 1927, formed Margaret Pennell Advertising, a Toronto-based agency specializing in advertising services for companies seeking to reach female consumers (Johnston 2001, 74, 77). Another example is Ethel Fulford who formed Canadian Facts, a firm that is discussed later in this article.[11]

By the end of the 1920s, the Canadian newspaper and magazine industry, which was annually producing goods worth $140 million, had become heavily dependent upon advertising, with Canadian figures reaching $50 million (Rutherford 1978, 38). Up to this point, the media's use of questionnaires to understand their readers was usually based on primitive methodologies with a reliance on having respondents clipping and sending in completed questionnaires. For example, in the August 1912 issue of *Canadian Home Journal*, readers were asked to fill out a questionnaire and return it by mail to the publisher for a small incentive. With a response rate of only 4%, the survey results were used by the publisher to demonstrate to advertisers the purchasing power of its readership (Robinson 1999, 31). Another example, drawn from the 19 November 1922 Winnipeg edition of the *Manitoba Free Press*, is a poorly constructed "prize questionnaire" instructing readers, "Tear out this form and mail it to 'Honk' c/o Winnipeg Free Press." Without screening respondents regarding whether or not they owned or managed a vehicle, questions included "How much have you spent for accessories ... since [your] purchase?" and "What car do you prefer in the $2,000 to $3,000 class?"

The questionable reliability of using mail-in surveys with contests to understand readers was raised by marketing expert Bertram Brooker in his 1924 article titled "Millions of Dollars to Unearth," written for *Marketing and Business Management*. Brooker observed that

reader surveys had unpredictable response rates and that respondents were probably adjusting their responses to what they thought publishers wanted to hear so that they could increase their chances of winning a prize (Johnston 2001, 207). A change in approach was clearly occurring by the late 1920s when *Maclean's*, in 1928, launched the largest Canadian readership survey ever conducted up to that time. This involved a mail-out survey of 1,694 subscribers with results compiled for an industry report titled *Maclean's 1928: Detailed Analysis of Distribution*. Its results, according to Russell Johnston (247), were used to help sell advertising space, and revealed such things as that on average each printed copy of the magazine was read by four people, half of whom were women.

Tough Economic Times, the Growth of Radio, and Consumer Research

Discussed in this section are two conflicting forces relating to the market research industry: first, a constricting economy resulting in a decline in consumer spending and print advertising, and, second, the new and exponential growth in radio audiences, which opened a growing need for audience research based on survey interviews. Regarding the first of these forces, in contrast to the "roaring" 1920s in which Canadians enjoyed an expanding economy and appeared willing to invest in their own businesses, farms, and other enterprises, the subsequent decade was marked by the worst economic downturn the country had ever faced. This was indicated by the drop in Canada's economic output of 30% between 1929 and 1933, with output not returning to 1929 levels until 1939. Of course, a depressed national economy had a direct impact on the sale of goods. As economic historians Kenneth Norrie and Douglas Owram write about the 1930s, "only electric refrigerators and gold ... resisted the tendency to decline" (1996, 293, 357). On the prairies, farmers who had invested heavily in land and equipment were now facing sharp drops in grain prices. As an aggregate, farm income across the Prairie provinces was actually a loss of $3.1 million in 1932, compared to collective earnings of $363 million in 1928. At the same time, urban populations across Canada were deeply affected. For example, in 1933, 60% of Toronto's carpenters and 55% of labourers were unemployed (357,359).

An indication of how a depressed economy was affecting the Canadian print media was that in 1931 the Southam national news organization saw its book value of investments drop from over $1.3 million to a market value of $320,000 (Bruce 1968, 199). However, according to Paul Rutherford (1978) in his history of the Canadian news media, in 1931 the press continued to communicate with virtually every Canadian citizen. By linking circulation numbers with Canadian Census data, one could calculate that on average four periodicals and newspapers were printed for every household in the country (38). Here we now turn to the second force that was influencing the research industry. A major new development and a challenge to those studying media consumption was that circulation research was inadequate for studying radio audiences. In 1919, XWA (later to become

CFCF) began transmitting in Montreal (McNeil and Wolfe 1982, 11), and by the 1930s most Canadians were listening to radio. New methodologies were needed to reach into households and interview individuals about how they were interacting with these radio broadcasts in their daily lives. An example of how radio audiences were studied using surveys is captured on page 1 of the May 1934 issue of *General Motors Hockey Broadcast News* in which the Montreal market was studied to assess the extent to which families were listening to a National Hockey League (NHL) broadcast:

> Naturally there was much curiosity concerning the size of our new audience. Consequently a telephone test was made in Montreal on February 3rd. Twelve girls with twelve telephones rang number after number in quick succession for the full hour-and-a-half of the broadcast. And this is what they learned: Of the people who were at home, and using their radio sets, 74 per cent were listening to General Motors Hockey Broadcasts—only 26 per cent to all other programmes combined! (quoted in McNeil and Wolfe 1982, 84)

What follows is a discussion of two significant players who were seeking to fill the void by conducting household surveys based on comparatively more reliable methods: Canadian Facts and Elliott-Haynes.

Canadian Facts

To address the need to better measure how certain programs and advertisements were reaching households, one of the first firms to be involved in conducting survey research of radio audiences was Canadian Facts. The firm was born through the efforts of Cockfield, Brown's research department, which was seeking a reliable way to measure Canadian radio audiences. To that end, in 1932 they recruited a Bell Telephone "senior staff operator," Ethel Fulford, to open Ethel Fulford and Associates. In 1937 Fulford renamed her firm "Canadian Facts," which is now considered the first firm in Canada to specialize in marketing research services. This firm used telephone interviewers to conduct survey interviews, which would allow the firm to produce what is now considered the country's first radio program rating service. It did so by what was termed the "coincidental telephone method," by which respondents were asked to identify the programs to which their radios were tuned. Early clients included Procter and Gamble and Lever Brothers, which heavily sponsored daytime "soap opera" broadcasts (Blankenship, Chakrapani, and Poole 1985, 22).

The leadership of the firm, which was also serving such clients as Ford, Imperial Oil, and *Maclean's* (Robinson 1997, 203–4), passed from Ethel Fulford to John Graydon, who would serve the firm for 25 years. Having become friends with Fulford, who—because of marriage—was now Ethel Colwell, in 1940 John Graydon joined Canadian Facts as its new president. A graduate of Dartmouth University in New Hampshire, Graydon brought to the firm 14 years of experience working with what was at the time the largest advertising

firm in the United States, N.W. Ayer and Son. In 1934, the agency had moved him to Canada to open its Montreal office, which served the Ford Motor Company as its primary client (Blankenship, Chakrapani, and Poole 1985, 31). By the time of his appointment to Canadian Facts, the firm employed a national network of interviewers in over 60 markets across Canada, and was heavily involved in a wide range of market research activities, including advertising testing, retail studies, "pantry counts" (i.e., conducting inventories of household kitchens), and readership polls (Robinson 1997, 203–4).[12]

Elliott-Haynes Limited

Elliott-Haynes Limited was established in Montreal in 1936. Walter Elliott had been a credit analyst and insurance investigator, while Paul Haynes was a hockey player who played in the NHL from 1930 to 1941 for the Montreal Maroons, the Montreal Canadians, and briefly the Boston Bruins.[13] Their early research services included "service reporting," in which undercover visits were made to various establishments. These were hardly large-scale studies, in that the business owners performed the client services for each project, as well as the field work, while also writing and presenting the report. By 1939, the firm was hired by Pepsi-Cola to conduct a study involving 6,000 soft-drink dealers in Toronto, thereby necessitating a quick expansion of capacity. To that end, the firm opened up its second office in Toronto with Myles Leckie as its director. Leckie, who had worked previously as the "chief tabulator" for Canadian Facts, hired a hundred interviewers from a Simpson's department store list of job applicants and part-time employees. Interviewers were tasked with counting the soft drink signs for each outlet, both inside and outside, conducting inventory counts for each brand in the outlet's coolers, and interviewing the dealers regarding the product brands and their sales, frequency in which suppliers made contact, and how helpful the suppliers were when interacting with the dealers (Blankenship, Chakrapani, and Poole 1985, 31–33).

Elliott-Haynes' work in specifically providing syndicated research with regular reports on program ratings preceded the establishment of the Bureau of Broadcast Measurement (BBM) that occurred in 1944 (Rotenberg 1988, 166). Leckie was sent in 1940 to study how radio audiences were being measured south of the border. Afterwards, the firm established its Radio Research Division, which conducted surveys of Canadians using the coincidental telephone method to produce reports that initially covered the Montreal, Toronto, Winnipeg, and Vancouver markets (Eamon 1994, 51). In a front-page interview for the *Canadian Broadcaster*, Walter Elliott claimed that up until that time "a total of 2,000,000 personal interviews were completed with Canadian radio listeners," based on telephone calls. Ross Eamon, in his history of the CBC and audience research, found that in the early 1940s the Elliott-Haynes surveys "were conducted during two weeks of each month, one week being used for daytime periods and the other for evenings. A certain number of calls were made in each market for each time period," with additional surveys conducted to supplement

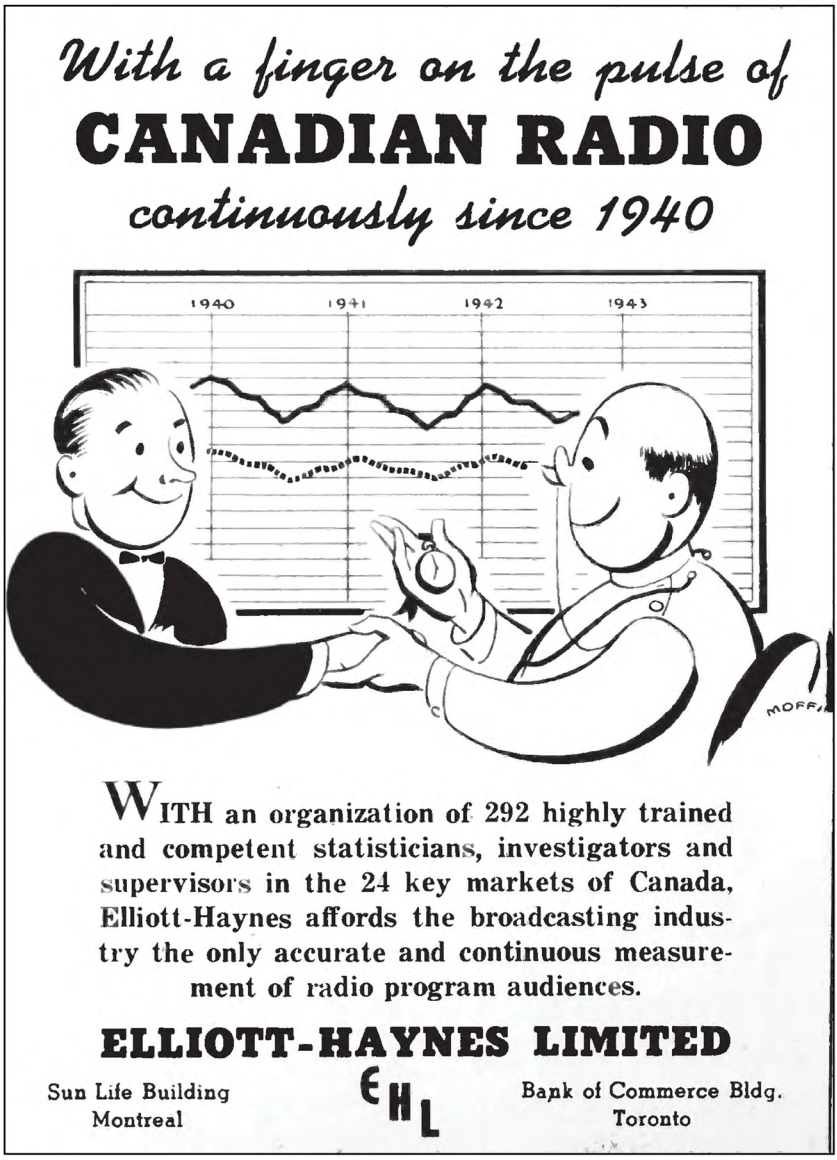

Fig. 1. Elliot-Haynes Limited. Advertisement.

Source: *Canadian Broadcaster* (1943).

the coincidental method by asking respondents to recall their recent listening behaviours (51). The results were used to provide to clients what was termed a "Sets-In-Use Index" as well as program ratings for key regions of the country (*Canadian Broadcaster* 1942).

By 1943, in an advertisement in the March issue of the *Canadian Broadcaster* (see fig. 1), the firm was boasting a network of "292 highly trained and competent statisticians, investigators and supervisors in the 24 key markets of Canada."

There were concerns raised about the reliability of the research methods employed by Elliott-Haynes. Ross Eamon points out that Elliott-Haynes overly relied on urban markets and the use of telephones, thereby leaving much of the country outside the sample frame. Furthermore, its reliance on telephone-based interviewing to measure national audiences was problematic. In 1941, only 40% of Canadian households were equipped with landline telephones, and even 10 years later, in 1951, only one-third of Canadian homes with radios were equipped with a telephone. Elliott-Haynes did little to respond to these concerns. Few details were given by the firm in its public releases regarding how calls were distributed within each targeted region, and what procedures were used, if any, regarding demographic quotas and statistical weighting to the raw data. In 1948, and in response to requests by the CBC, the firm refused to disclose its methodological procedures (Eamon 1994, 53, 70).

J. Walter Thompson

A third and important player among major firms using survey methods in Canada was the American agency J. Walter Thompson (JWT), which re-entered the Canadian market research industry in 1929 after closing its Canadian office in 1916. JWT involvement in conducting marketing research studies in the United States dates as far back as 1912, when it began publishing its reports titled *Population and Its Distribution*. These focused on segmenting the American population according to region and socio-economic characteristics. Robert J. Flood, a transplanted American, re-established the firm's Canadian operations in Montreal, which included a dedicated research department to focus on Canadian clients (Johnston 2001, 221).

In December 1929, JWT launched what is now considered Canada's first major national commercial survey of consumers. With a field window spanning two months, the study was conducted for Standard Brands. It pertained to usage and attitudes regarding seven food products. While the methodological details were not reported, JWT was able to tell its client that "three out of every four women" were consumers of Magic Baking Powder, and that one out of four women continued to use pots rather than percolators when making coffee (quoted in Robinson 1999, 24). Data derived from such efforts helped JWT serve such major clients as Fleischmann's and the Canadian Marconi Company. The success of the Montreal office in conducting consumer studies was followed by the opening of a second JWT office in Toronto, in which the agency included at the top of its list of services "market research" in the November 1930 issue of *Canadian Advertising Data* (Johnston 2001, 221). Another indication of the firm's growing role in the Canadian marketplace was a nation-wide survey of 1,688 urban consumers regarding magazine

readership. Again, with few details regarding the study's methodology, including how the interviews were conducted, JWT felt confident in reporting that 58% of Canadians regularly read American magazines, while 51% read Canadian magazines, and 38% read publications from both countries (Robinson 1999, 24).

Along with Cockfield, Brown, according to Daniel Robinson, JWT was one of the most active marketing research firms in the country during the 1930s. Following its first national survey of women consumers completed for Standard Brands in early 1930 and a national survey of 1,688 Canadians regarding magazine readership, JWT also conducted a survey of "1,040 housewives in 21 representative cities across Canada" regarding ammonia usage in the household, and a survey regarding baking powder of 832 women in Toronto, Kingston, Montreal, and Sherbrooke in 1933 (Robinson 1999, 24). The fact that the firm was still feeling its way in applying different methodologies, and that standardized methods had yet to be adopted, was demonstrated by a 1938 newspaper readership survey of 495 Toronto youth aged 8 to 16 to understand the consumption of newspapers by this age group. JWT based it study on samples drawn from Sunday schools, settlement houses for the urban poor, and Boy Scout meetings. JWT used the results to report that close to three-quarters of children were able to recall comic strip content while only 39% recalled the front page headline in the previous day's newspaper. JWT also served the needs of Lever Brothers by conducting two large-scale surveys in 1938 and 1939. In the first study, surveys were conducted in Ontario and Quebec with 2,776 women on topics such as the use of soaps, creams, and cosmetics. With a large sample such as this, and with efforts to fill specific socio-economic quotas, including age, region, and income categories, JWT was able to conduct cross-tabular and simple correlational analysis. JWT reported that 95% of Ontario women, compared to 73% of Quebec women, washed their faces each morning, and that farm women were slightly less frequent washers compared to employed women. Negative correlations were found unexpectedly when both age as well as income groups were cross-tabulated with the frequency of soap use (Robinson 1999, 24–26).

The second study conducted by JWT for Lever Brothers was based on its American annual General Soap Survey and consisted of 5,162 Canadian housewives. Now considered the largest consumer sample conducted in Canada during the 1930s, the survey included questions regarding laundry, bathing, radio listening, and newspaper and magazine reading. Interviewers conducted half-hour doorstep interviews, with results to show the connection between media consumption patterns and soap use, which provided Lever Brothers with strategically useful data for its marketing campaigns. The results revealed that families with incomes above the median made up two-thirds of the market for fine-fabric laundry soaps, 63% of *Canadian Home Journal* and *Maclean's* buyers, and only 43% of those who read religious publications. JWT was able to provide its clients with strategically useful cross-tabulations showing the results broken out by region, income, sex, age, media consumption, and soap use (Robinson 1999, 27–28).

Conclusion

Provided here has been an overview of the early developments of the modern Canadian public opinion research industry. The tools of the trade for the Canadian Census, including interviewing techniques, the development of standardized forms and questionnaires, and systems for data processing were adopted by the beginning of the twentieth century. Furthermore, this article has shown that an industry focused on collecting consumer research had also developed well before the advent of the Gallup Poll's arrival in Canada in 1941. A major driver for industry developments was the need to assess the extent to which advertising and other forms of media content, including radio programming, were reaching their intended audiences. It was during the 1930s that a number of firms were able to use new methods for personal interviewing and telephone polling techniques to reach into households to assess their usage and attitudes for specific products as well as consumption of radio broadcast content.

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NOTES

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1. Lawrence C. Lockley (1974), reports that, at the same time, firms were developing their own marketing information systems (MIS) in order to exploit internal data to help develop marketing strategies. In 1902, for example, Du Pont's Trade Analysis Division required that its 65 salespersons provide regular reports about their current and prospective customers. They were then to conduct a systematic analysis of the marketing research data to produce a regular "Trade Report" (4–5). Unfortunately, it is beyond the scope of this paper to discuss this aspect of marketing research in any detail.
2. In his history regarding the development of social statistics by national governments, Bernard Cohen writes that in the 1700s the term *statistics* referred to questions pertaining to "matters of state" and, secondly, measures of happiness (2005, 103). Regarding how international trends relating to statistics and the implementation of national censuses influenced Canada in the nineteenth century, see Bruce Curtis (2002, 21–2).
3. Those who visit the head office building of Statistics Canada in Ottawa will see that it is named after Jean Talon.
4. For example, Nova Scotia held a census in 1811, 1817, 1827, and 1838. A census was conducted in Lower Canada (Quebec) in 1825 and 1831, and censuses were conducted in Upper Canada

(Ontario) from the late 1700s onwards, and by 1851, according to Thomas Hillman, "the pattern of decennial census taking had been established"(1987, viii).

5. In David Worton's book, see also the photograph of the sorting and tabulating machinery used by the bureau from 1911 to 1941 (1998, ix). For a technical description of how the Hollerith machine operated using punch cards to sort and perform basic calculations see Paul E. Ceruzzi (2012, 6–7).
6. To see the 1901 census form that was used by enumerators, see http://data2.collectionscanada.gc.ca/1901/z/z003/z000142025.pdf. In 1905, the *Census and Statistics Act* fixed the month of June for the decennial census (Downey 2003, 6).
7. A sample Dominion Bureau of Statistics report created from the collected data is available online (Dominion Bureau of Statistics 1933).
8. The precise number of surveys is unfortunately difficult to ascertain because of the poor quality of the archived item. The number reported in the newspaper article is either 335 or 385.
9. This advertisement is reproduced by Blankenship, Chakrapani, and Poole (1985), from an uncited periodical published in 1929. Upon examination of the advertisement, it is not clear if the first of the two examples I have cited regarding CBRB pertain to interview-based studies that were actually conducted in Canada or elsewhere where the firm may have been involved. However, because of the bilingual nature of the second study, it is safe to assume that at least this one was Canadian. Blankenship, Chakrapani, and Poole speculate that this firm was a branch of an American firm that included credit and insurance investigative work (20).
10. Another area requiring future study, in addition to practical psychology and business schools, is the extent to which modern research techniques were taught in Canadian departments of sociology. To use one example, an examination of the 1944 University of Manitoba *General Calendar* reveals that only two sociology courses were offered, both through the Department of Political Economy and Political Science. Neither of the two course descriptions mentions the use of quantitative methodologies or survey research techniques (109–10). Of course, further research is warranted regarding other universities in Canada.
11. Readers might be interested in listening to a radio broadcast regarding women who achieved success in the early days of the advertising industry. See the CBC 26 March 2011 episode of *The Age of Persuasion* (O'Reilly 2011).
12. The firm now operates as TNS Canada, and is a subsidiary of the international firm Kantar TNS. While the ownership and name of the firm has changed, it still recognizes its historical connection to Canadian Facts (Kantar TNS 2018).
13. See Internet Hockey Database (n.d.). As Frederick Evans wrote for *Maclean's* in 1928, hockey players played and attended practices on a seasonal basis, with each player having five months off "to do as he pleases."

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