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HARMONISATION OF DEMOGRAPHICS IN THE NEW EUROPE

SYNOPSIS

The paper reviews the work done over the past 10 years by ESOMAR leading up to the launch of the recommended procedure.

1. Working party chaired by Nils Rohme from 1980 to 1986
 - Work confined to Europe
 - Object was not to replace existing systems but to add a set of standard questions to facilitate cross border comparisons
 - Only limited success achieved
2. New Working Party chaired by Yves Marbeau set up in 1988
 - Interest in project re-vitalised by move to 1992 Common Market
 - European Commission Involved
 - Object now more ambitious and is to devise a set of questions which will **replace** existing systems to both harmonise and standardise procedures across Europe
 - Revised system virtually complete and due to be launched September 1990

The paper then goes on to describe briefly how the ESOMAR system works; exactly what questions have to be asked and how the data are analysed. A detailed treatment is given to the central problem of devising a standard system of socio-economic classification of respondents. A description is also given of how other segmentation procedures such as Sagacity could be adapted to work from the new ESOMAR demographics system.

So far ESOMAR's work has centred on Western Europe but interest has arisen in other parts of the world, for example:-

- (i) Global Marketing Committee of the American Marketing Association. They are interested in harmonising demographics in both product and media surveys around the world in the interests of the truly multinational marketing companies.
- (ii) The Middle East Research Forum (MERF) has begun work on the problem of devising a set of demographic questions which can be used throughout the Arab world.
- (iii) The Indian Market Research Society is working on the problem of standardising demographics across the Indian sub-continent where they have many similar problems to those experienced in Europe in terms of a multitude of languages and cultures.

The paper ends with a brief discussion of the future prospects for the international standardisation of demographics:-

- (a) In Europe
- (b) Across the Developed World
- (c) Worldwide to include the Developing Nations

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There is nothing new about the concept of standardisation of measurement systems in Europe. Napoleon took Europe a long way along this route nearly 200 years ago and ever since then there has been continuous pressure to standardise many aspects of business and everyday activities. The list is very long indeed and includes such things as a standard track width for railways; a standard voltage for domestic electricity supplies; standard paper sizes in typing and printing - and so on. In recent years the growing momentum of the move towards a true economic union in Western Europe has added a great deal of impetus to this trend. Perhaps those of us brought up in Great Britain are more conscious of this than those from elsewhere in Europe - mainly because Great Britain had farther to travel to catch up with the rest of Europe. The move to decimal currency in Britain occurred within the last twenty years and the translation to the metric measurement system has yet to be completed.

Given that market research is a relatively new business activity, and given that it developed a strong international presence in Europe soon after the end of the second World War, it is perhaps surprising that at least within Europe we did not develop any standardised or harmonised systems of research from the very beginning. Even though ESOMAR provided a framework for exchange and consultation at an international level from the earliest days after the war, it was still the norm for researchers in individual countries to develop their own systems for sampling, questionnaire design and respondent classification. From the earliest time there were multi-national marketing organisations and international research agencies supplying data to clients from many different markets. However, despite these factors the dominant trend was towards the development of research systems designed to reflect and take account of the national idiosyncrasies of each of the countries in Western Europe.

In the last few years this situation has begun to change. Research suppliers have become more international in their outlook and research buyers have certainly become far more concerned with the comparability of data between markets than was formerly the case.

The situation in relation to press readership in many ways reflects the trends in market research in general. In Europe, press readership surveys have been funded and developed primarily by media owners who require data to help sell advertising space in magazines and newspapers selling almost entirely within national boundaries. The number of truly international press titles circulating in Europe has been quite small in comparison with the number of titles within national boundaries. Surveys are conducted around Europe on a regular basis to provide truly comparable data for these titles but the impact of these surveys on the general trend in readership research has been quite small.

For many years, the organisers of the individual national readership surveys in Europe have met once a year to compare notes and report experiments they have conducted in individual countries. This has sometimes resulted in ideas adopted in one country being tried out in another. Despite this the actual degrees of harmonisation or standardisation achieved has been slight. If the harmonisation of readership surveys is a desirable goal, there are a number of severe obstacles to be overcome. Perhaps the most important of these is the actual definition of a reader and the question sequence that is used in each survey. Harmonisation of the readership questions themselves will not be easily achieved and it can be argued that until you can achieve that, there is little point in tinkering with the surveys in an attempt to bring them closer into line on other issues such as sampling procedures and demographics. However, ESOMAR took the view some years ago that the concept of harmonisation is a sound one and, even though full standardisation of research techniques may never be feasible, we should still take what steps we can to move in that direction.

ESOMAR's interest in harmonisation of research procedures across Europe dates back to 1980 when a working party was set up under the chairmanship of Nils Rohme of the OBSERVA research agency in Copenhagen. At that time, the prime aim of the working party was to attempt to introduce a standard form of demographics which could be used by clients commissioning multi-country

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surveys across Europe so that results would be more directly comparable from one country to another.

A great deal of work was done over the next five or six years and progress reports were produced including draft questionnaires which were felt to be capable of being applied in most European countries. After 1986 the work virtually ceased and was then revitalised by the gathering momentum brought about by the move towards the new Europe in 1992. At that stage it appeared that the number of clients who would be interested in being able to use standard research formats across Europe would increase considerably and we also found that the authorities in Brussels had a keen interest in the development of any aspects of business which helped towards the harmonisation of business practices throughout the Community.

In 1988 Yves Marbeau was appointed as the Chairman and a new working party was set up with representatives from France, The Netherlands, Great Britain, Germany and, most importantly, from the European Community itself. Over the next two years this working party progressed the project to the stage where they were able to draw up a recommended questionnaire which is believed to be practical and capable of being used in every Western Europe country. It covers fifteen major areas which are normally included in most questionnaire classification sections such as age, number of people in the household, number of children under 15 and so on. It has been translated into three major European languages - English, French and German. All ESOMAR members have received copies (Chart 1).

For some of the topics covered in the standard version of the questionnaire it was relatively easy to reach agreement. For example, there was not a great deal of argument about how one might code respondents' sex. But on most issues there were considerable variations from country to country (for instance, the definition of a child varies from one part of Europe to another) and each one was subject to considerable discussion and some compromise before a final version could be agreed. In other cases, such as recording respondents' age, one of the difficulties was that the age groups into which respondents are coded vary considerably. The solution to this particular problem was to recommend that respondents' actual ages should be recorded as two digit numbers so that, at the analysis stage, age groups can be specified according to the interest of the data user. Although most all the issues required a considerable amount of discussion, the major stumbling block was how to record information which would permit respondents to be classified according to some kind of social grading system.

Social class grading of respondents is most commonly used in the United Kingdom and is a standard form of analysis on almost all consumer research surveys. In other countries social class as the British know it is not used at all although classifications according to occupation or income levels are used. Much of the work put into this project was concerned with devising a series of questions which would record sufficient detail about respondents' or main income earners' occupations to permit social class to be coded in a way which would be comprehensible and useable in every European country, even though it may not conform precisely to what is the current practice in any one country.

Chart 2 shows how the ESOMAR classification system of occupations for main income earners in household works and the specific occupation groups into which respondents are coded. Another question in the standard classification section relates to the age at which the respondent completed full-time education, including whether or not they attended a university. It is through a combination of current occupation and education level that a system has been devised which permits a classification of respondents to be made into socio-economic groups anywhere in Europe.

Chart 3 shows an example of the application of the ESOMAR system to a survey conducted in Spain where results were analysed from a study involving interviews with a total sample of 10,000 adults. The chart shows the allocation of respondents to a sixty-cell matrix crossing five education levels

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with twelve different occupational grades. The actual number shown in the chart relates to the number of respondents per 1,000 interviewed. After this allocation to the sixty-cell matrix had been made it was possible to examine each cell and to assess how people in that particular cell would normally have been classified according to the social class coding system commonly used in market research in Spain. This was done across all of the cells included in the study and it was then possible to add together cells containing respondents who would normally be classified as A, B, C or D and arrive at a profile, (also shown on the chart), which indicated that 8% of respondents were in social class AB, 23% in social class C and 42% in social class D. The remaining 27% were classified as social class E and are akin to respondents who would be classified as E in the United Kingdom such as those unemployed or retired and living on a State Pension.

The point about this particular analysis was that not only did it illustrate how respondents could be classified successfully according to the ESOMAR occupation coding system, but it also allowed respondents in the sixty-cell matrix to be combined together in a manner which closely matched the system of socio-economic grading commonly used and understood in Spain.

Similar experiments have been conducted in other countries and there seems no real difficulty in correlating the ESOMAR system with those commonly in use across Europe. This means that if the ESOMAR system is used in every country one can analyse the results in a variety of ways according to one's preference. For example, it would be possible to reproduce a social class profile akin to that which is commonly used at present in the country in question. Alternatively it would be possible to specify a classification system which would then be applied right across Europe. This could result in the number of AB respondents, for example, varying from, say, 8% in Spain to 15% in France to, perhaps, 20% in Germany, but one would have the advantage that in every country, although the proportion of ABs might vary, one would know precisely how they are defined in terms of occupation and education level. Or again, it would be possible to set a standard such that one might decide to delineate the top 10% in every country, regardless of their actual status in terms of occupation and education.

The important aspect of the system is its flexibility. Because respondents are analysed into a matrix of occupations crossed with education, the result is that one can achieve a variety of profiles of the population according to one's wishes from the same survey results. An international marketing company wishing to compare results from a five-country survey, where initially the results are analysed according to social class profiles familiar to people working in that country, will be able to re-analyse the study using some other definition of social class which is common to every country covered in the survey.

Apart from the problem of finding a standard system of social grading which can be used across Europe, another issue that the working party has addressed has been concerned with providing some indication of economic wealth. In some countries questions are asked about respondents' income and when this data can be obtained, it directly answers the question. However, as Chart 4 shows it is a common experience that many respondents refuse to divulge either their own or their household income and in most countries the percentage of refusals is directly correlated with the level of income of the respondents - AB's have a much higher refusal rate for this question than DE's.

One possible solution to this problem is to examine whether or not there are indicators of economic status which can be derived from the ownership of durables, or a specific number of durables. A consider amount of work on this point has been done through data supplied by Europanel¹ for Great Britain.

¹ Europanel is the co-ordinating body for the main consumer panel companies in Europe such as AGB (UK): GFK (Germany): SECODIP (France): DYMPANEL (Spain): etc.

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These data showed that ownership of consumer durables varies considerably from one country to another. For example, in Chart 5 it can be seen that across five major markets in Europe the number of households that have at least one car ranges from as little as 64% in one country to 83% in another, with all others falling within this range.

From this initial list of 24 durables, further analysis was done using a candidate list of 15, refined at a later stage to a list of just eight. The work done so far has suggested that the number of durables owned out of the list of eight correlates quite well with household income. For instance, of the eight durables listed, those who possess any two of them are at a level of economic wealth which is rather below those who possess any three of them which in turn is below those who possess any four of them and so on. A simple scoring system for each respondent's household according to the total number of durables owned from the list shown can then be used to allocate respondents to different economic groups as desired by the data user.

The aim in this work has been to find a limited number of durables which are common to all countries in Europe and where the numbers owned does in fact correlate with other data showing the economic wealth of the family unit. It is believed that the list of ten that is now included in the standard questionnaire will work well across Europe, although further examples are required where it has been utilised and results analysed against other information to help validate the recommendation.

Much of the work done by the working party has been concerned with devising a questionnaire which will permit analyses to be carried out in a standard form across Europe, and which is understandable to research users in every country. Inevitably a lot of this work is related to commonly used variables, such as socio-economic status, but the committee is also mindful of the fact that survey research is often analysed in other ways and attempts have been made to see to what extent data collected using the ESOMAR classification system is adequate to permit respondents to be allocated or segmented according to other commonly used systems. For example, the Sagacity life-cycle segmentation system introduced originally by Research Services Limited and based on classification data collected on the National Readership Survey in Great Britain has been replicated in a survey conducted in Italy where the definition of each group within the life-cycle is slightly different from the original. The outcome is very similar and would provide a perfectly acceptable and useable form of analysis for this particular system of respondent segmentation (Charts 6 & 7).

Experiments have now been conducted in Britain, Germany, Italy, Spain and France using the ESOMAR harmonised classification system. Further work is required to permit minor adjustments to be made so that the system can be further refined, but we are now at a stage where we feel that the system can be publicised and launched across Europe with as many organisations as possible being persuaded to use it. In promoting the system there are four target groups who are particularly important to us. The first, and most obvious, are multi-national advertisers who for many years have shown an interest in obtaining research information in different markets which is more directly comparable than is possible today. If such major research buyers can be persuaded to specify in their research contract briefs that they wish the results to be capable of analysis according to the ESOMAR system, then research agencies will begin to apply it and it will gain currency in the market place. Following a presentation to senior management, a decision has been made by Procter & Gamble to experiment with the ESOMAR system on a number of surveys planned in a variety of different countries. Provided the experiments are satisfactory, the plan is then to introduce the system as standard practice on all surveys commissioned by Procter & Gamble. In addition ESOMAR is funding a series of presentations to be made by Yves Marbeau (Chairman of the ESOMAR Working Party) around Europe to a target list of key companies with a view to persuading them to adopt a similar policy.

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Another positive development has been the recent decision by the European Association of Advertising Agencies (EAAA) to recommend to all their members across Europe that they should specify the ESOMAR classification system on all surveys they commission.

The second important target group are the international research agency chains and groups such as Research International, INRA, Gallup, Europanel, etc. All of these organisations provide multi-country research data to their customers and very often are able to supply data analysed to a common format. We hope to persuade them to adopt the ESOMAR classification system so that there will be a true harmonisation of research procedures across the whole of Europe.

A third important target group are the media research surveys (especially the press readership surveys) conducted in all major European countries. Harmonisation of demographics is important to any advertiser or advertising agency wishing to plan advertising across Europe. In addition, it is the case that in almost every country the national readership surveys provide important basic marketing research information commonly used by other research suppliers in setting quotas or in measuring the accuracy of surveys conducted on an ad-hoc basis for their clients. If suppliers of the standard industry readership surveys in Europe can be persuaded to adopt the ESOMAR system, then it will undoubtedly begin to percolate through to the whole of the research industry as time goes by. Of course at this stage, no one is suggesting that the current national readership surveys should drop their existing classification systems and switch straight to the ESOMAR version. All that we wish to achieve is that where there are topics on the standard ESOMAR questionnaire which are not being covered within any one country then these items should be included in future surveys. Results could then continue to be analysed according to the standards to which people have become accustomed, but at the same time further analysis could be provided according to the ESOMAR system.

A fourth target group is the European Community itself. For some time officials in Brussels have been showing a considerable interest in the work being done by ESOMAR towards the production of a standard classification system in market research. The European Community is an important buyer of research in its own right and publishes some of the results. One step we hope to be able to achieve is to persuade the European Community to incorporate the ESOMAR classification system into their specifications for all survey research they commission.

Through all of these approaches we anticipate that over the next two or three years, the system will gain currency and a great deal more data will be available from which minor improvements to the content or wording can be made. If that is achieved successfully, then we hope to be able to move to a stage where the ESOMAR classification system becomes the norm used by all research agencies in every country in Europe.

Our ambition extends even further, since in other parts of the world similar problems exist. In India, for example, there is a great deal of variation in the way research is conducted from one region to another and a working party has been in existence for the last year or two looking at ways in which a standardised system may be introduced there. In the Middle East, a group of research buyers called the Middle East Research Forum who commission a great deal of research across the whole of the region, have found that research practice varies from one country to another and they have established a working party to see if it is possible to standardise and harmonise classification systems in use throughout the Middle East. The American Marketing Association has a sub-committee representing the interests of multi-national corporations who are very concerned to see a greater degree of harmonisation and standardisation of demographic classification systems right around the world.

Whether or not the ESOMAR system will prove to be sufficiently robust to meet all of these demands remains to be seen. We have completed more work and moved further forward across Europe to our stated aim than has been achieved elsewhere and if we can successfully move towards the

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adoption of the ESOMAR system over the course of the next few years, then there must be a genuine prospect that a closer standardisation of research practices and procedures will be achievable throughout the developed world in the years ahead.

References:-

- "Harmonising Demographics: Can We Afford Not To?", ESOMAR - August 1989
- "Getting Ready for Single European Sample Surveys", ESOMAR - June 1990

ESOMAR WORKING PARTY ON 'HARMONISATION OF DEMOGRAPHICS'
RECOMMENDED QUESTIONNAIRE (1990)

ENGLISH

I

1 - SEX: M F

2 - What is your age ?

3 - How many people live in your household, including yourself ?

4 - How many children under 15 are there ?

5 - Are you, in your household...
 • the person who contributes most to the household income ?
 YES NO
 • the person mainly responsible for ordinary shopping and looking after the home ?
 YES NO

6 - Are you... ?
 • married / living together
 • single
 • separated/divorced/widowed

7 - At what age did you finish full-time education ?
 Still studying (E10) q.13

8 - Any time after that, did you...
 • resume general education at a later stage in your life ?
 YES q.9 NO q.9
 • take any apprenticeship / professional training for your job ?
 YES q.9 NO q.10

9 - How many months did your ... (further education/prof. training) last in total ?

II

10 A - At present, are you... ?
 • self-employed q11A
 • in a paid employment q11B
 • temporarily not working B
 • retired B
 • not working / responsible for ordinary shopping and looking after the home (E13) q13
 B - And formely, have you been... ?

11 - What kind of work do you do ? (What position do you hold ?)
A = SELF-EMPLOYED :
 • PROFESSIONAL (Doctor, Lawyer, Accountant, Architect)(E2) q12
 • OWNER OF SHOP/COMPANY
 How many employees do you have ? 0-5 (E9) q12
 6 or + (E7) q12
 • FARMER (E12) q12
B = IN PAID EMPLOYMENT :
 • PROFESSIONAL (E3) q12 (in actual profession)
 • GENERAL MANAGEMENT (Exec./Manag. Dir., Officer, Mgr)
 • MIDDLE MANAGEMENT (Dmt/Branch Head, Junior Mgr)
 - How many employees are you responsible for (heading) ?
 GM MM
 0-5 : (E4) (E6) q12
 6 or + : (E1) (E5) q12
 • OTHER EMPLOYEE Do you work mainly in an office ?
 YES (E8) q12 NO q12
 - In your job, do you spend much of your time writing or working with figures ?
 YES (E11) NO (E14)

III

12 - How many hours per week do you normally work ?

13 - Do you, or anyone else in your household, own ... ?
 • a colour TV set Y N
 • a video recorder Y N
 • a radio-clock Y N
 • a video camera/Camcorder Y N
 • a PC/home computer Y N
 • an elec. deep fryer Y N
 • an electric drill Y N
 • a still camera Y N
 • at least 2 cars Y N
 • a second home or a vacation house/flat Y N

14 - Your main home : do you ... ?
 • rent it
 • or own it

15 - Which foreign languages do you understand well enough to read a newspaper or listen at radio news ?
 Danish Greek
 Dutch Italian
 English Portuguese
 French Spanish
 German Swedish
 Other

FULL ADDRESS
 ↓ ↓

16 • REGION
 17 • SIZE OF TOWN

USING THE LOCAL, USUAL CATEGORIES
 (AS DOCUMENTED IN AVAILABLE STATISTICS ON UNIVERSE)

1986 ESOMAR CLASSIFICATION OF OCCUPATIONS FOR MIE (MAIN INCOME EARNER IN HOUSEHOLD)

1- At present moment, is MIE mainly... ?

• NOT DOING PAID WORK

↳ 2- Is MIE... ?

- HOUSEWIFE.....E14
- STUDENT.....E10
- RETIRED
- TEMPORARILY NOT WORKING

↳ 3- Was MIE formerly...?

- SELF-EMPLOYED
- AN EMPLOYEE

• SELF-EMPLOYED (IS/WAS)

↳ 4- What kind of job?

- PROFESSIONAL.....E2
- OWNER OF SHOP/COMPANY

↳ 5- How many employees ?

- 0-5.....E9
- 6+.....E7

•FARMER

↳ 6- How many hectares ?

- 0-19.....E13
- 20+.....E12

• IN AN EMPLOYED POSITION (IS/WAS)

↳ 4'- What kind of job ?

- PROFESSIONAL.....E3
- MANAGERIAL/SENIOR
- MIDDLE MANAGEMENT

↳ 5'- How many reportees ?

- 0-5.....E4/E6
- 6+.....E1/E5

•OTHER EMPLOYEE

↳ 7- Mainly office-based ?

- YES.....E8
- NO

↳ 8- Much time writing/figures ?

- YES.....E11
- NO.....E15

- E1 GEN. MANAGERS/6+
- E2 PROFESSIONALS/SELF.
- E3 PROFESSIONALS/EMP.
- E4 GEN. MANAGERS/5-
- E5 MIDDLE MGNT./6+
- E6 MIDDLE MGNT./5-
- E7 BUSINESS/6+
- E8 OTHER OFFICE WORKERS
- E9 BUSINESS/5-
- E10 STUDENTS
- E11 NON-OFFICE WORKERS /NON-MANUAL
- E12 FARMERS/20H.+
- E13 FARMERS/19H.-
- E14 HOUSEWIVES
- E15 NON-OFFICE WORKERS/MANUAL

ADAPTATION OF THE ESOMAR MATRIX IN SPAIN BY

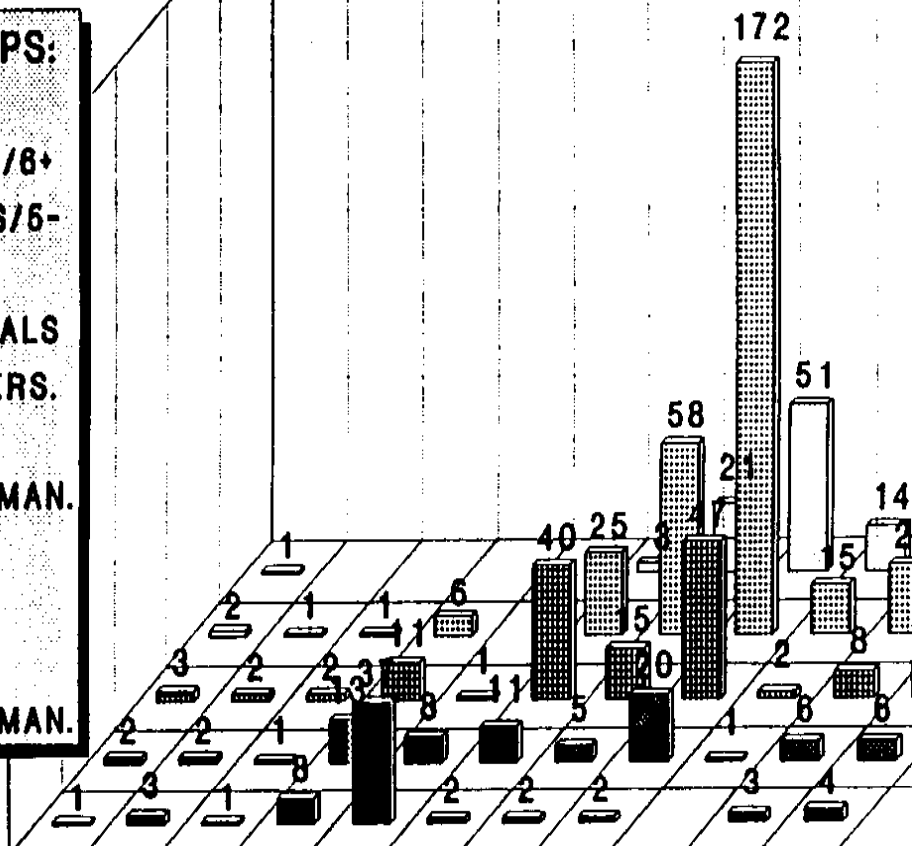
- DISTRIBUTION OF POPULATION IN A 60 CELL MATRIX
- SOCIAL CLASS SCALE BASED ON MULTIPLE OCCUPATION GROUPS

SOURCE: DATA FROM 5 MERGED OMNIBUS, CARRIED OUT BETWEEN FEB. & OCT. 1983. TOTAL SAMPLE = 10,000 ADULTS (ASKED ABOUT THE MAIN INCOME EARNER).

INCIDENCE OF

OCCUPATION GROUPS:

- E7 : BUSINESS/8+
- E1 : GEN. MANAGERS/8+
- E4 : GEN. MANAGERS/6-
- E5,E6 : MID. MGMT
- E2,E3 : PROFESSIONALS
- E8 : OTHER OFF. WKRS.
- E9 : BUSINESS/5-
- E11 : N-OFF. WKS/N-MAN.
- E12 : FARMERS
- E10 : UNEMPLOYED
- E13 : RETIRED
- E14 : N-OFF. WRKS./MAN.

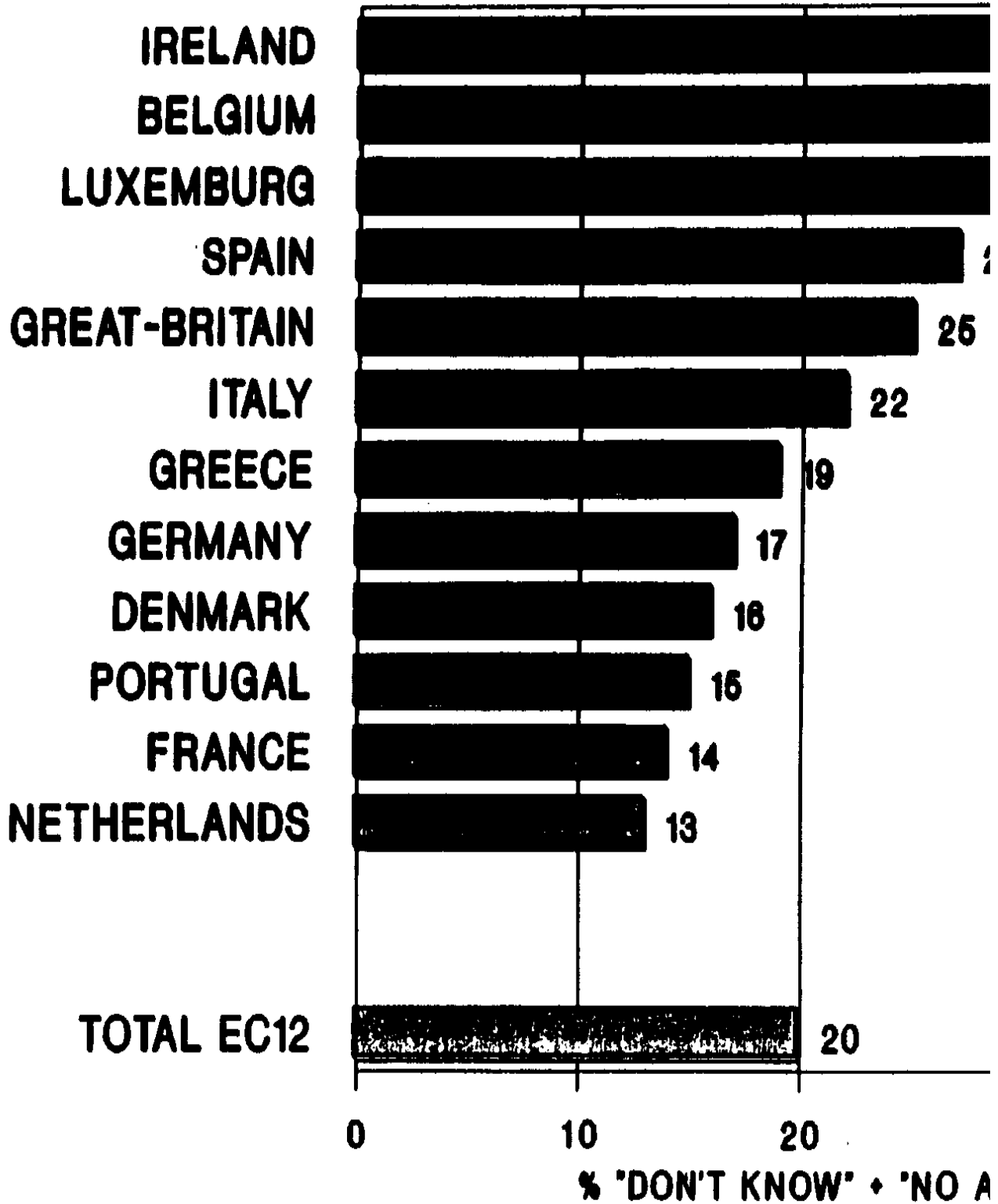


EDUCATION

	E7	E1	E4	E5,E6	E2,E3	E8	E9	E11	E12	E10	E13	E14
NO EDUC./NO EXAM.	C	C	C	D	D	D	D	D	D	E	E	E
TILL 14-15/PRIMARY	B	C	C	C	C	C	D	D	C	D	D	E
TILL 16-19/SECOND.	A	B	B	C	C	C	C	C	C	D	D	D
OVER 19/TECHN.	A	A	B	B	C	C	C	C	C	C	C	D
UNIVERSITY DEGREE	A	A	A	B	B	B	B	C	C	C	C	C

THE "D.K./N.A." RATES TO THE QUE HOUSEHOLD INCOME, IN EUROPE

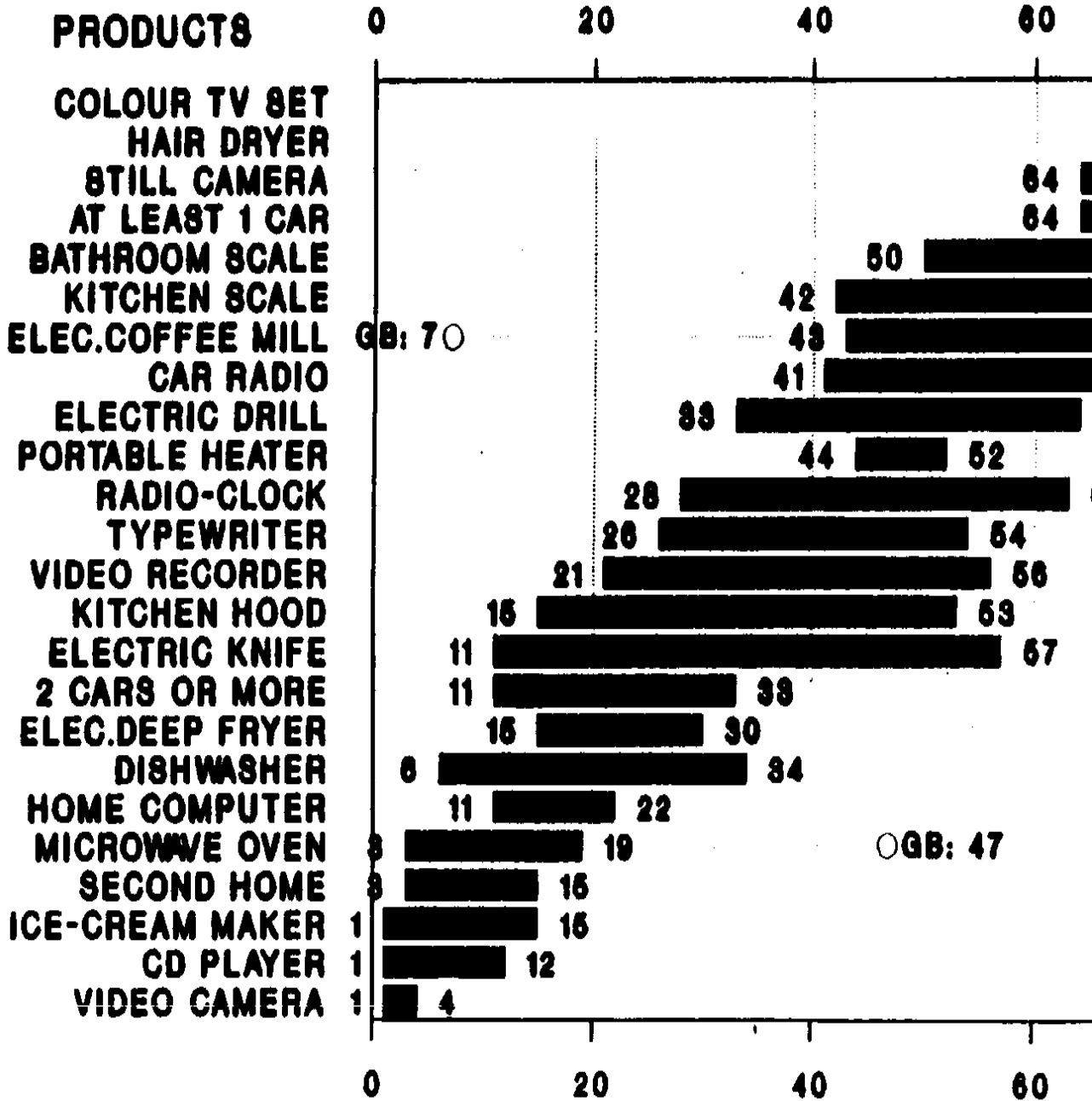
SOURCE: 3 WAVES OF EUROBAROMETER, SPRING/SUMMER 1994
TOTAL SAMPLE SIZE = 46,696 ADULTS



THE FIRST 24 PRODUCTS CONSIDERED PENETRATION RANGES IN 5 MAJOR C

SOURCE: EUROPANEL DATA ('EOACD' 1989) IN GB/France/GERMANY//

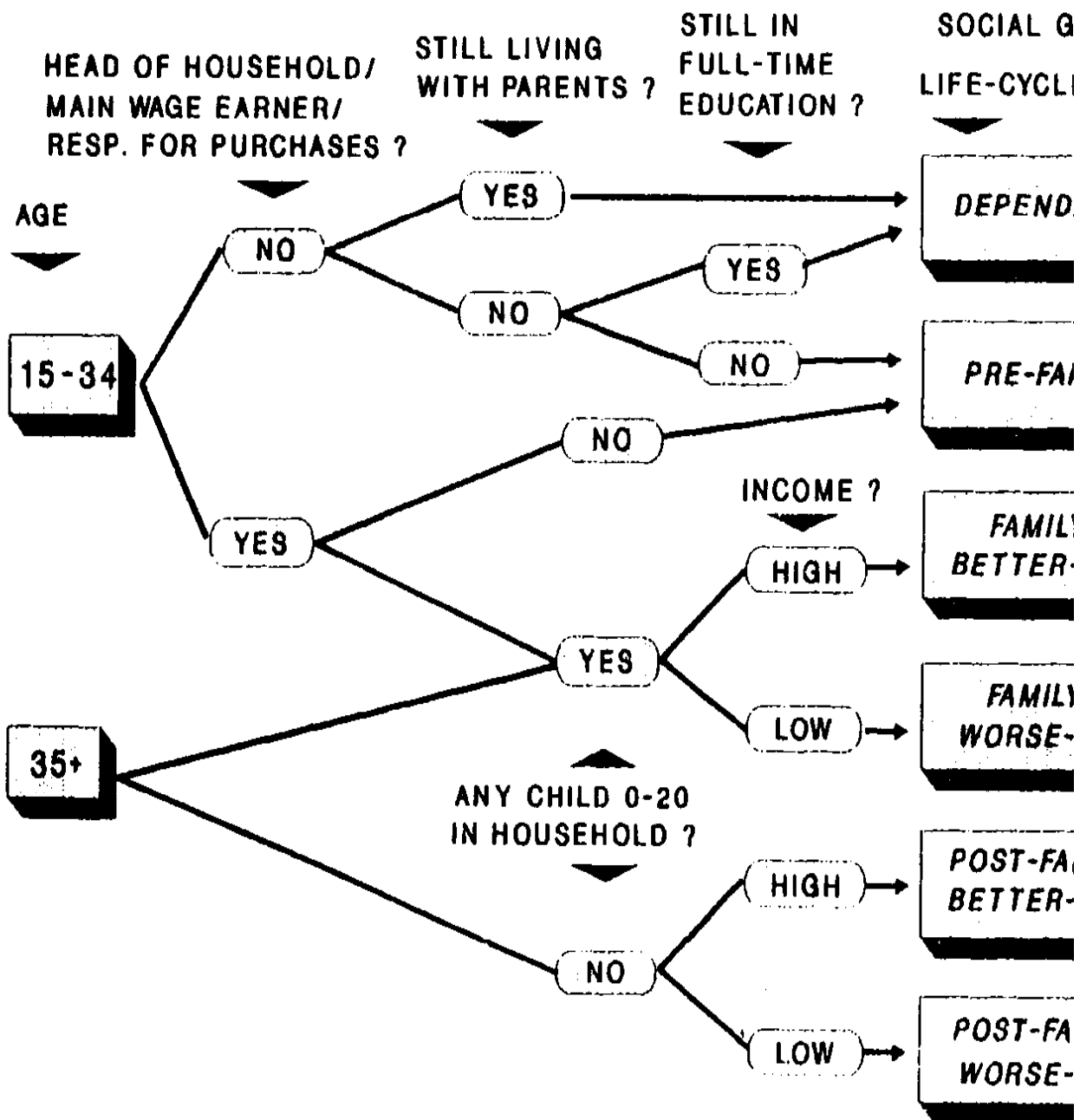
LOWEST / HIGHEST HOUSEHOLD



NOTE: SOME PRODUCTS WITH WIDE RANGE (EG: MWO & COFFEE MILL) WERE KEPT IN
WERE ONLY THE FACT OF ONE COUNTRY (EG: GB). WITH BALANCING EFFECT BI

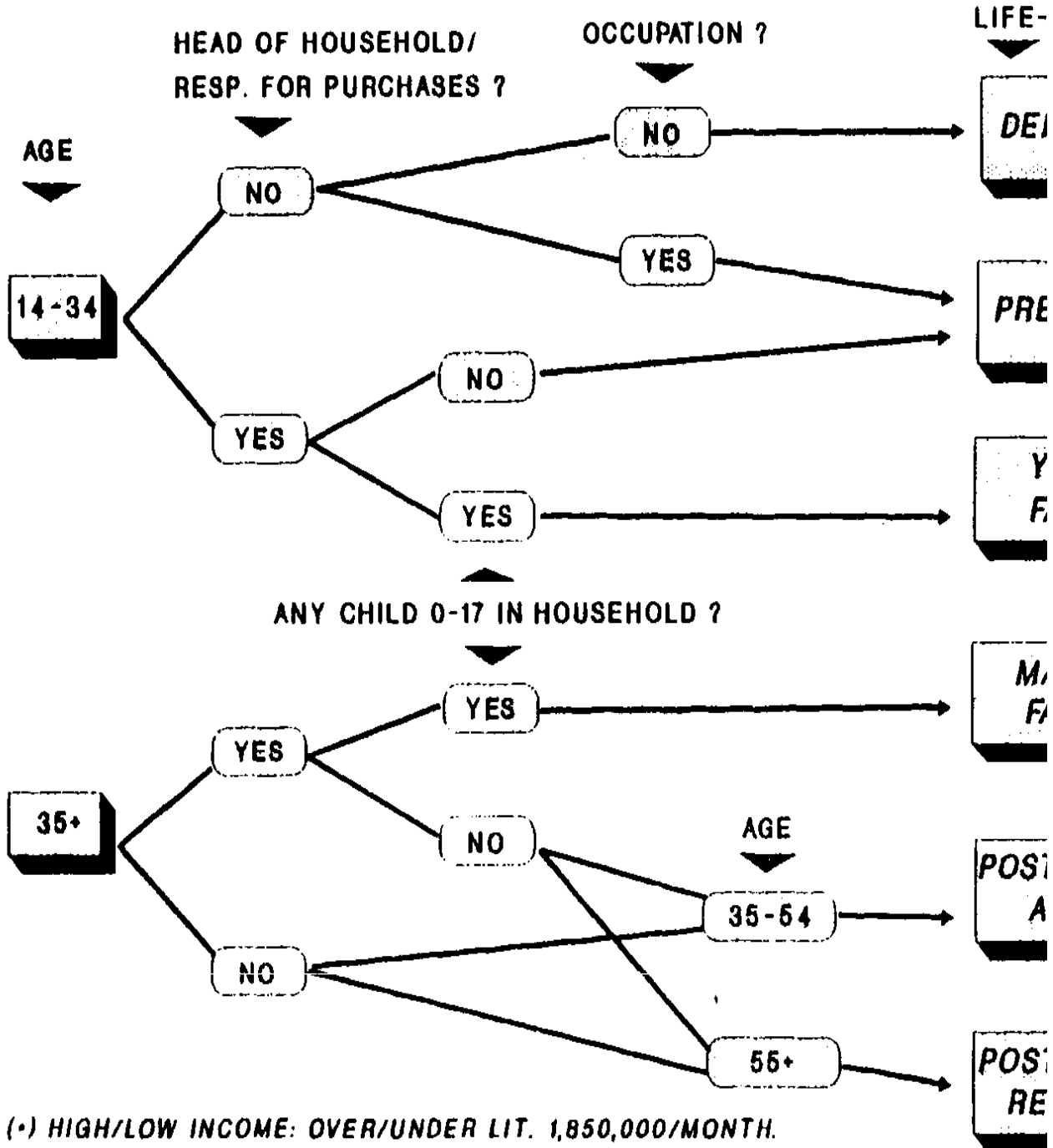
Y. M. - APRIL 1990

"SAGACITY" AS DEVELOPPED IN THE U.K. A LIFE-CYCLE/INCOME/SOCIAL GRADE C



SOURCE: RSL "SAGACITY" BOOKLET, 1981.
 BASED ON DATA FROM NATIONAL READERSHIP SURVEY 1980.
 HIGH/LOW INCOME: DIFFERENT CUTTING-POINTS BY SOCIAL GRADES.

APPLICATION OF "SAGACITY" IN ITALY, ISI LIFE-CYCLE & INCOME CLASSIFICATION IN



(*) HIGH/LOW INCOME: OVER/UNDER LIT. 1,850,000/MONTH.
 SOURCE: 'ISPI PRESS 88/2' SURVEY, REPORTED APRIL 1989.
 SAMPLE OF 24,540 'ADULTS' 14+ (UNIVERSE = 47 MIOS)