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Standard Demographic Classification

A System of International
Socio-Economic Classification of
Respondents to Survey Research

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HARMONISATION OF SOCIO-DEMOGRAPHICS: THE DEVELOPMENT OF THE ESOMAR EUROPEAN SOCIAL GRADE

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FOREWORD

Marketing research now serves the needs of manufacturing and service industries right across the world. As the techniques of research have been introduced to new markets they have been adapted to suit local needs and this is as it should be. However, over the years the marketing of manufacturing and service industries has become more and more international and this has led to an increasing demand for market research information which is more directly comparable from one country to another.

With the increasing economic integration of the countries of the European Union, this need has become particularly acute in this region.

In responding to this need, ESOMAR has sought ways to help standardise some of the procedures used in market research surveys. This does not in any way imply that we are seeking to treat Europe or any other part of the world as single homogeneous markets. On the contrary, our aim is to look for ways in which the tools we use in research can be made more comparable from one country to another so that the true diversity of the market place can be more readily identified.

The present report is the result of work carried out over a number of years. It represents an attempt to develop a common system for assessing the social and economic standing of the populations in the various countries of Europe.

We believe that this report will be of very real value to research suppliers and buyers who carry out and make use of multi-country research. It is a system designed for Europe, but we believe that it may also have applications in other parts of the world, either as it stands or in a modified form.

Finally, I would like to express the gratitude of ESOMAR to all those who have contributed to the Working Parties engaged in this project and I commend the proposed system to all those concerned with international research. I believe it will prove to be a significant and lasting contribution to the develop of international marketing research.

Mario van Hamersveld

President

1 Introduction

1.1 Background and objectives

Interest in the harmonisation of socio-economic and demographic variables within the European market has been in evidence for several decades. With the growing importance of pan-European research and the prospect of a single European market, interest developed during the 1980s in the idea that an attempt should be made to improve the comparability of socio-demographic data across countries.

In recent years there has been a rapid growth in the market for international research. Many researchers now involved in international research are continually confronted with the problems of coordinating and interpreting multi-country research. One important element of any market research study is the sample on which the fieldwork is based. For a multinational survey, particular attention needs to be paid to exactly how the samples are drawn in each country. The sample designs used need to be comparable across countries, yet retain relevance to the individual markets concerned. Until now most emphasis has been placed on defining national samples according to each local market's standard socio-economic or socio-demographic classification. For the international researcher this inevitably presents two problems of comparability:

- how to ensure the sub-sample in each market is comparable with all others;
- how to analyse the total sample effectively if the background variables on which sub-groups are to be formed differ from country to country.

The ideal solution is to work with a socio-economic/-demographic classification relevant to all countries. With this purpose in mind ESOMAR took the initiative of stimulating the development of what was eventually termed the ESOMAR 'Social Grade'. The objective of this initiative was to provide researchers with a more practical basis for conducting and interpreting multinational research, more specifically in terms of improving comparability across countries and facilitating analysis of valid sub-groups within the total sample.

The objective of this guideline is therefore to aid researchers and research users in the field of international research. It endeavours to provide a pragmatic guide and advice to those wishing to apply the ESOMAR Social Grade in everyday research and forms a common source of reference for researchers not only in Europe but throughout the world.

1.2 Previous activities

In 1980 ESOMAR set up the **first working party** to investigate the possibility of producing a harmonised system of classifying social demographics. It included **Nils Rohme** (Vilstrup Research, Denmark), **Tjarko Veldman** (NSS, Netherlands) and **Peter Sampson** (Burke, UK). This working party succeeded in defining and constructing the Social Grade Matrix which continues to form the basis of the current ESOMAR Social Grade variable that is described in detail in this report.

A **second working party** was formed in 1988, chaired by **Yves Marbeau** (CALOR, France) and also including **Jean Fabre** (Peugeot, France), **Hendrik Krijger** (Philips, Netherlands), **Rudolf Leibiger** (GfK, Germany), **Karlheinz Reif** (EC-Eurobarometer, Belgium) and **John**

Swift (Consultant, UK). They refined the original Social Grade Matrix and developed the Economic Status Scale. Their organisations also contributed by funding the fieldwork and analysis essential to the further development of this project. GfK funded the preliminary work on the Economic Status Scale based on the Europanel Durables Ownership database; PSA and the EC Commission's Eurobarometer unit funded the insertion of the ESOMAR Social Grade variable's core questions in one wave (October 1990) of the Eurobarometer survey originally targeted at five major markets in the EC.

The working party was expanded in 1990 to include **Jean Quatresooz** and **Dominique Vancraeynest** (INRA-Europe, Belgium), responsible for the Eurobarometer research programme conducted on behalf of the EU Commission. Together with several national agencies within the INRA network, INRA-Europe also made a valuable contribution in terms of funding the extension of the ESOMAR Social Grade questionnaire through to all the EC countries (including East Germany) over a relatively prolonged period (1992-1995) and conducting extensive data analysis.

Further analysis of the Eurobarometer data was coordinated by ESOMAR in the period 1995-1996. This involved modifications to the construction of the ESOMAR Social Grade variable in the light of experience and resulted in a revised definition of the Social Grade categories by **Bryan Bates** (former Director General of ESOMAR) in 1997.

In preparing this new version of the ESOMAR Social Grade variable almost exactly the same original data was used from the Eurobarometer survey. The 'building blocks' remained identical (i.e. occupation groups according to occupation of the M.I.E. and the Terminal Education Age), but the way in which individual cells were grouped and aggregated to form the Social Grade categories, was substantially amended. The aim in this process was both to remove some of the anomalies found in earlier versions and to produce Social Grade categories closer in general concept to those with which most researchers are familiar.

1.3 Reporting

The report presented here follows the three progress reports issued in 1989, 1990 and 1991. The first two reports focus on explaining the development of the ESOMAR Social Grade composite variable. The last report provides a summary of the results obtained from the initial inclusion of the Social Grade questionnaire in one wave of the Eurobarometer survey (October 1990).

Since then the core questions for the Social Grade variable have been included in several waves of this pan-EU survey. In this way an extensive database has been compiled founded on the main socio-demographic sub-variables developed in the 1980's by the earlier working parties. INRA-Europe has provided ESOMAR with detailed cross-tabulations of the data gathered across a total of seven Eurobarometer waves, in the period September/October 1992 through to April/May 1995 (EB38.0 - EB41.0 and EB43.1).

The current report provides an analysis of the data made accessible to ESOMAR by INRA-Europe relating to the seven waves specified above.

Section 2 of this report explains how the revised ESOMAR Social Grade is compiled and describes the matrices and sub-variables determining the allocation of an individual respondent to the appropriate Social Grade category.

Section 3 discusses the results derived from the seven Eurobarometer waves and provides the resulting profiles for:

- the composite ESOMAR Social Grade;
- the sub-variables on which the Social Grade is based:
 - the occupation of the main income earner
 - the education level of the main income earner
 - the economic status of the household.

The data are analysed at both EU level and individual country level. Given the large sample sizes involved, the results can be interpreted as 'norms' at the level of both the EU (12 member states) and individual markets. An indication of the variance of the Social Grade variable and the two main sub-variables is included for the total EU (Appendix II).

Section 4 outlines the basis for applying the ESOMAR Social Grade and includes comments on possible future developments in the harmonisation of Eurodemographics.

The appendices provide reference material: the profile of the ESOMAR Social Grade variable analysed by the two main sub-variables (i: Occupation of M.I.E., ii: Terminal Education Age of M.I.E.), the variance of the Social Grade variable at EU (12) level, the questionnaires recommended by ESOMAR and a bibliography.

2. Composition of the ESOMAR Social Grade variable

2.1 Determining the appropriate Social Grade category

The ESOMAR Social Grade is a composite variable constructed from:

- the Occupation of the Main Income Earner in the household (the M.I.E.), based on the questions developed by the ESOMAR working parties;
- the Terminal Education Age (T.E.A.) of the M.I.E., adjusted to incorporate any further education or professional training completed by the M.I.E. following a period of employment;
- and in the case of non-active M.I.E.s, the Economic Status of the household, based on the household ownership level of ten selected consumer durables.

Further details on each of these variables are provided below in this section of the report. A full description of the Social Grade categories (A to E3) is presented in Section 2.2.

For all M.I.E.s in active employment the appropriate Social Grade category is determined using a two-dimensional matrix incorporating the sub-variables: Occupation and Terminal Education Age.

SOCIAL GRADE MATRIX FOR ACTIVELY EMPLOYED M.I.E.S

Occupation of the main income earner →

↓ Terminal Education Age of the main income earner

Base: active M.I.E.s	e 1+2	e 3+5	e 4,6+7	e 12	e 8+9	e 11+14	e 15
21+	A	A	B	B	C1	C1	D
17-20	A	B	C1	C1	C2	C2	D
15-16	B	C1	C2	D	D	D	E1
14	C1	D	D	E1	E1	E1	E3
13	D	D	D	E3	E2	E2	E3

For **all M.I.E.s not in active employment** an alternative two-dimensional matrix is used to allocate the respondents to the appropriate Social Grade category. In such cases the Occupation of the M.I.E. is replaced by the Economic Status of the household.

SOCIAL GRADE MATRIX FOR NON-ACTIVELY EMPLOYED M.I.E.S

Economic Status (no. of consumer durables owned) →

↓ Terminal Education Age of the main income earner

Base: non-active M.I.E.s	5+	4	3	2	1	0/NA
21 or older	A	A	B	C1	C1	D
17-20	A	B	B	C2	C2	D
15-16	B	C1	C1	E1	E1	E2
14	C1	C2	C2	E1	E2	E3
13 or younger	D	D	D	E2	E3	E3

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

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

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

The definition of each of the **M.I.E. Occupation** categories on which the matrix is based is as follows:

- e1 General management, director or top management with responsibility for 6 employees or more;
- e2 Self-employed professional;
- e3 Employed professional;
- e4 General management, director or top management with responsibility for 5 employees or less;
- e5 Middle management, other management with responsibility for 6 employees or more;
- e6 Middle management, other management with responsibility for 5 employees or less;
- e7 Business proprietor, owner (full/partner) of company OR owner of a shop, craftsman, other self employed person with responsibility for 6 employees or more;
- e8 Employed position, working mainly at a desk;
- e9 Business proprietor, owner (full/partner) of company OR owner of a shop, craftsman, other self employed person with responsibility for 5 employees or less;
- e10 Student;
- e11 Employed non-manual position, not at a desk but travelling or in a service job;
- e12 Farmer & Fisherman;
- e13 Responsible for ordinary shopping and looking after the home, housewife;
- e14 Supervisor & Skilled manual worker;
- e15 Other (unskilled) manual worker, servant;
- e16 Retired or unable to work through illness, unemployment or temporarily not working.

It should be noted that the **M.I.E.'s Terminal Education Age** takes into account any professional training or education undertaken by the respondent even after completion of the main period of education. Five categories are defined for the T.E.A.: 21 years or older, 17-20 years, 15-16 years, 14 years, 13 years or younger. Again a 'no answer' category is included for non-response.

The **Economic Status Scale** reflects the penetration of ownership of ten key consumer durable items at household level. The original objective in compiling the Economic Status Scale was to construct a variable capable of representing the **financial status** of the consumer, without the inevitable problems associated with asking sensitive questions about income and having to cope with high non-response rates. Instead of attempting to determine household income, the focus is placed on the ownership of key consumer durables selected to reflect the level of disposable income in the household.

However, it is recommended that the Economic Status Scale should only be used to assess a respondent's Social Grade when it is impossible to obtain details of the M.I.E.'s occupation. The Economic Status should not be regarded as an easy alternative method.

The ten products selected for inclusion in the scale are:

- a colour TV set
- a video recorder
- a video camera
- 2 or more cars
- a still camera
- a PC or home computer
- an electric drill
- an electric deep fat fryer
- a radio-clock
- a second home or a holiday home/flat.

It should be noted that this list may be subject to revision in the future in accordance with market developments. For instance if one of the items (e.g. a colour TV set) no longer differentiates effectively between markets due to increasing penetration and therefore high ownership levels throughout Europe, then it would be feasible to replace this with a new item differentiating better between countries

For the purposes of the Social Grade analysis six Economic Status Scale categories are defined: households possessing 5 or more of the durables, 4, 3, 2, 1 and zero/those not answering the question.

2.2 Description of the Social Grade categories

In order to provide researchers with more tangible insight into the types of individuals to be encountered in each of the Social Grade categories a brief description of each category has been compiled:

- A** **'well educated top managers and professionals'**: well educated top to middle level managers with responsibility for more extensive personnel; well educated independent or self-employed professional people;
- B** **'middle managers'**: well educated smaller middle level managers or slightly less well educated top managers with fewer personnel responsibilities;
- C1** **'well educated non-manual employees, skilled workers and business owners'**: smaller middle level managers; well educated non-manual employees, supervisors/skilled manual workers and small business owners; less well educated managers;
- C2** **'skilled workers and non-manual employees'**: better educated supervisors/skilled manual workers; moderately well educated non-manual employees and small business owners;
- D** **'skilled and unskilled manual workers and poorly educated people in non-manual/managerial positions'**: less well educated supervisors/skilled and unskilled manual workers and poorly educated non-manual workers; poorly educated top/middle managers or smaller business owners;
- E** **'less well educated skilled and unskilled manual workers, small business owners and farmers/fishermen'**:
 - E1 comprises mainly poorly educated supervisors/skilled manual workers and better educated unskilled workers, with some poorly educated non-office non-manual employees and small business owners;
 - E2 comprises mainly very poorly educated supervisors/skilled manual workers and small business owners plus very poorly educated non-office non-manual employees;
 - E3 comprises poorly educated unskilled manual workers and farmers/fishermen.

For the purposes of everyday research these eight Social Grade categories can be aggregated to provide a more practical four-category classification:

- AB 'managers and professionals';
- C1 'well educated non-manual and skilled workers';
- C2 'skilled workers and non-manual employees';
- DE 'unskilled manual workers and other less well educated workers/employees'.

Reference can also be made to the two summary tables included in Appendix I, showing the percentage breakdown of the individual Social Grade categories by Occupation categories and Terminal Education Age categories.

3. European and country profiles for the Social Grade and sub-variables

The data collected on behalf of the EU Commission in seven separate Eurobarometer waves conducted between September 1992 and May 1995 form the basis for this analysis. In view of the generally slow rate at which socio-demographic developments take place, these data can be regarded as providing the basis for relatively up-to-date profiles.

For the EU as a whole and for each of the 12 individual member states the data have been aggregated to form a composite database. Analysis of all seven waves together provides an average for each level of the different variables measured. Given reasonable stability across time, this average can be interpreted as a norm. As such it can be used for instance by both local and international researchers as the basis for reweighting the individual survey data collected to ensure comparability with the ESOMAR data.

In the sub-sections below attention is paid to the ESOMAR Social Grade variable and to the three sub-variables on which this is based. This analysis indicates the norms identified for the EU as a whole and for each of the 12 individual member states. The figures shown in the summary tables for the EU as a whole relate to the individual country data weighted according to population size. These data therefore provide a valid basis for comparing the EU as a whole with non-EU countries and other regions.

It should be noted that although the data relate to a period of less than three years some developments will inevitably have been taking place during this time and since. As stated above the analysis assumes 'reasonable stability' across time and this is generally evident: no marked changes in the distribution across the Social Grades are evident for individual countries.

3.1 ESOMAR Social Grade

Table 1 summarises the ESOMAR Social Grade profile for each of the 12 EU countries. At EU level the distribution across the eight Social Grade categories reflects the importance of the lower-middle Social Grade category, with the highest proportion (23%) of the total sample in category C2 'skilled workers/non-manual employees'. The aggregated category DE 'unskilled workers and other less well educated workers/employees' accounts for as much as 40% of the total EU population.

The overall non-response level for the EU amounts to 3%, particularly reflecting the degree of non-response encountered in countries such as the United Kingdom (10%) and Portugal (7%).

TABLE 1: ESOMAR Social Grade - Summary for EU 12 countries ¹⁾

Sample base:	EU12 (89,600) %	B (7,000) %	DK (7,000) %	D (14,000) %	E (7,000) %	F (7,000) %	GR (7,000) %	IRL (7,000) %	I (7,000) %	L (3,500) %	NL (7,000) %	P (7,000) %	UK (9,100) %
A	9.2	8.7	13.6	10.7	5.5	8.0	7.5	5.9	9.4	11.1	13.6	4.0	10.1
B	9.3	6.4	13.9	11.5	5.5	13.1	5.8	6.0	7.5	12.1	11.8	4.4	8.8
AB	18.5	15.1	27.5	22.2	11.0	20.1	13.3	11.9	16.9	23.1	25.3	8.4	18.9
C1	15.2	19.8	31.9	19.7	10.0	16.9	12.9	12.1	11.1	18.0	22.8	6.2	12.4
C2	23.1	30.4	15.6	30.3	15.2	27.7	20.7	21.8	20.9	23.2	24.4	10.0	17.3
D	15.3	11.3	11.1	13.4	14.0	16.4	11.5	21.7	11.6	17.3	12.5	12.4	23.8
E1	10.7	10.7	5.5	7.3	19.1	12.0	3.2	16.9	9.5	9.9	5.2	7.1	13.4
E2	7.6	1.8	0.2	0.6	18.1	3.9	21.7	1.5	17.9	1.3	2.0	34.9	0.9
E3	6.3	5.6	3.6	2.8	12.0	2.5	16.6	8.5	12.2	3.0	2.6	14.1	3.3
DE	39.8	29.5	20.4	24.1	63.1	34.8	53.0	48.6	51.2	31.5	22.3	68.5	41.4
NA	3.4	5.3	4.7	3.7	0.7	0.5	0.1	5.6	0.0	4.1	5.2	6.9	9.9

1) For definitions of the Social Grades see pages 7-8.

3.2 Occupation of the Main Income Earner

In Table 2 the Occupation of M.I.E. norms are summarised for each of the 12 EU countries and for the EU overall. The importance of the e14 occupation category 'supervisor/skilled manual worker' is evident for the EU overall (24%).

The non-response levels are relatively low for the Occupation of M.I.E. variable, averaging at 1% for the EU. The only apparent problems encountered here are in the United Kingdom, where 5% non-response is recorded.

TABLE 2: Occupation of M.I.E. - Summary for EU 12 countries

Sample base:	EU12 (89,600) %	B (7,000) %	DK (7,000) %	D (14,000) %	E (7,000) %	F (7,000) %	GR (7,000) %	IRL (7,000) %	I (7,000) %	L (3,500) %	NL (7,000) %	P (7,000) %	UK (9,100) %
e1	2.7	2.6	3.2	3.6	0.5	3.5	1.4	1.8	2.4	4.1	4.3	0.8	2.6
e2	3.0	3.1	2.3	2.5	2.0	2.4	3.2	2.0	5.4	2.9	2.9	1.3	2.6
e3	2.5	1.3	2.4	1.6	2.9	1.6	2.7	2.3	1.6	1.9	2.6	1.9	5.8
e4	1.6	1.7	1.1	1.0	0.4	4.1	0.6	0.9	1.8	3.9	1.6	0.5	1.1
e5	4.2	2.0	6.6	6.3	2.3	3.2	1.8	2.2	1.5	4.6	6.5	2.3	6.3
e6	9.4	4.9	9.2	13.1	5.5	11.9	5.4	6.0	8.7	12.9	8.4	5.3	7.2
e7	1.7	1.3	1.5	2.0	2.1	1.1	2.0	1.5	1.8	2.3	2.0	2.0	1.6
e8	10.3	14.2	9.7	8.5	8.4	9.7	8.4	6.6	14.9	9.7	15.5	6.7	9.0
e9	9.8	12.3	4.5	5.1	14.2	6.7	22.4	6.8	18.0	4.1	4.7	14.2	7.5
e10	1.0	0.7	2.5	1.8	0.1	1.3	0.3	0.4	0.0	0.2	4.3	0.4	0.8
e11	12.6	17.7	17.3	12.3	12.7	13.7	13.9	8.1	11.6	9.8	18.3	11.7	10.2
e12	3.8	1.5	3.2	1.5	6.6	5.3	18.9	15.4	3.9	3.6	1.9	11.4	0.5
e13	1.1	2.1	0.3	1.1	1.0	0.7	1.2	2.0	0.8	2.9	1.4	1.7	1.3
e14	24.2	19.9	17.4	30.2	28.3	29.2	13.2	21.8	14.5	24.1	17.6	30.9	21.7
e15	9.0	11.6	15.9	8.4	10.0	4.2	3.1	21.1	10.2	10.8	4.5	8.8	13.1
e16	2.0	2.8	1.7	1.1	2.7	1.3	1.5	0.7	2.7	0.5	1.2	0.2	3.5
NA	1.1	0.4	1.2	0.1	0.3	0.0	0.0	0.4	0.0	1.6	2.4	0.0	5.3

1) For definitions of the Occupation categories see page 6.

3.3 Terminal Education Age of the Main Income Earner's Education

Table 3 summarises the Terminal Education Age for the M.I.E. for each of the 12 EU countries and for the EU overall. N.B. Incorporated in this 'terminal age' is any additional training or education completed after the respondent's main period of education.

TABLE 3: Terminal Education Age of M.I.E. - Summary for EU 12 countries

Sample base:	EU12 (89,600) %	B (7,000) %	DK (7,000) %	D (14,000) %	E (7,000) %	F (7,000) %	GR (7,000) %	IRL (7,000) %	I (7,000) %	L (3,500) %	NL (7,000) %	P (7,000) %	UK (9,100) %
21+	23.7	28.3	59.3	31.5	15.7	24.1	18.9	12.9	18.2	27.0	39.2	9.5	18.5
17-20	32.2	37.9	24.3	41.3	19.0	39.4	27.9	35.9	30.0	36.8	33.2	15.2	25.7
15-16	17.4	12.1	5.3	14.7	13.5	17.2	10.3	26.5	10.9	22.8	13.5	10.2	35.4
14	11.6	13.4	6.7	8.1	22.0	13.0	3.0	15.5	11.0	7.2	5.7	7.2	12.7
13-	12.3	3.2	0.3	0.8	29.2	5.8	39.9	3.9	29.9	2.8	4.0	51.0	0.8
NA	2.8	5.1	4.1	3.6	0.7	0.5	0.1	5.2	0.0	3.4	4.4	6.9	7.0

This indicates that for the EU overall the majority of M.I.E.s (56%) completed education at an age of 17 years or older.

The non-response for the T.E.A. as a whole is higher at 3% than for the Occupation variable. Problems in identifying the age of the M.I.E. on termination of his/her education are particularly encountered in the United Kingdom and Portugal (each 7%) and to a lesser extent in Ireland and Belgium (each 5%). In fact the main source of non-response for the ESOMAR Social Grade sub-variable is the T.E.A. variable rather than the Occupation sub-variable. Experience shows that a degree of ignorance about the M.I.E.'s age on completing his/her education (including possible later training) is inevitable if other household members are interviewed.

3.4 Economic Status Scale

The third sub-variable measured in the ESOMAR Social Grade questionnaire concerns the penetration level of household ownership of ten consumer durables carefully selected on the grounds that they differentiate between varying levels of economic prosperity. This variable is used to determine the appropriate ESOMAR Social Grade in cases where the M.I.E. has a non-active occupation: e10 'student', e13 'housewife' or e16 'retired, unemployed, ill/disabled'. The ownership level for the ten durables is combined in a matrix with the education level of the M.I.E. in order to identify the appropriate Social Grade cell.

TABLE 4: Economic Status Scale/Household ownership level of selected durables - Summary for EU 12 countries

Sample base:	EU12 (89,600) %	B (7,000) %	DK (7,000) %	D (14,000) %	E (7,000) %	F (7,000) %	GR (7,000) %	IRL (7,000) %	I (7,000) %	L (3,500) %	NL (7,000) %	P (7,000) %	UK (9,100) %
5+	56.2	71.2	54.1	54.4	49.0	57.0	26.6	47.1	57.3	78.4	61.5	37.6	66.3
4	15.3	11.8	18.8	17.6	15.6	16.0	15.1	15.1	14.8	10.2	13.6	13.9	12.8
3	12.3	7.9	13.4	13.9	13.8	12.5	18.3	13.3	11.6	5.5	11.2	13.4	9.4
2	8.9	5.2	8.8	8.7	11.3	8.5	18.5	12.2	8.6	3.5	8.1	13.4	6.8
1	6.4	3.2	4.4	5.0	9.6	5.5	17.2	11.2	7.3	1.9	4.8	16.5	4.0
NA	0.8	0.7	0.4	0.4	0.8	0.5	4.3	1.0	0.5	0.6	0.9	5.2	0.8

3.5 Variance at EU level

In the table in Appendix II an indication is provided of the variance in the EU level data encountered across the seven Eurobarometer waves. The standard deviations for most of the Social Grade categories are low at EU level, underlining the stability of the classification based on a large sample size.

4. Application of the ESOMAR Social Grade

4.1 Sample

The Eurobarometer surveys are based on a relatively large national random sample per country, with the basic sample size per wave generally being 1,000. A random sample often forms the ideal basis for large-scale quantitative research and the norms identified above (see Table 1) can be used for weighting purposes to eliminate any minor deviations in the individual countries.

Where a random sample is not required or not feasible, the ESOMAR Social Grade norms could also be applied for instance in reweighting data obtained from a non-random sample.

4.2 Questionnaire

The question format used to allocate respondents to the individual ESOMAR Social Grade categories should be as close as possible to the questionnaire developed by ESOMAR to ensure maximum comparability with the defined norms. The questionnaire is currently available in three languages (English, German and French) and it should be feasible for many users to simply incorporate the existing question format into their own questionnaires. Where translation into different languages is required it is important to avoid deviations from the English version. Ideally a standard version should be agreed upon within each market (see Section 4.3).

In view of the likely need for researchers to continue to collect socio-demographic data on the existing basis, the problem of partial overlap with existing questions may arise. This is a matter for individual attention, not only varying per country but also for individual research companies and clients. Ideally where two sets of questions need to be asked researchers will be prepared to invest the marginally higher costs and time involved to collect and analyse the data in tandem.

4.3 Analysis

Included in Appendix IV is a practical guideline explaining how each individual respondent can be allocated to their appropriate ESOMAR Social Grade category based on the question format detailed in the questionnaire in Appendix III.

Since the variety of programmes used throughout Europe for data processing and analysis is extensive, it is not feasible to provide any standardised analysis programme here. However, the guideline in Appendix IV defines the logical steps to be incorporated in any analysis programme. It should therefore be a relatively simple matter to modify the existing programmes in use to generate the new ESOMAR Social Grade analysis.

4.4 Future developments

This report is intended to inform researchers and research users of the progress made in developing the ESOMAR Social Grade, with the intention that it will be applied in practice in forthcoming surveys both nationally and internationally.

Hopefully in the course of time the ESOMAR Social Grade will increase in familiarity and researchers and research users will gain confidence in using it, possibly with the result that the existing socio-demographic classification system in each country can be replaced.

It is also to be hoped that within each country researchers will consult each other to ensure that the practical application of the Social Grade is as standardised as possible. The translation into local languages for instance would ideally take place under the auspices of the national market research associations or equivalent body, rather than being carried out independently by different research institutes.

The uses to which the Social Grade classification could be put in addition to providing straightforward socio-demographic information for survey analysis may also be extended in the future. For instance in these times of high-tech interviewing, with CAPI and CATI, it might well be feasible even to use the Social Grade classification in setting quotas.

Inevitably practical experience in applying the ESOMAR Social Grade using the guidelines provided here will lead to different opinions among users: many problems will hopefully be solved, but new ones may well arise.

Any feedback to ESOMAR from researchers applying the Social Grade in the near future would be welcome. This would provide ESOMAR with valuable information for instance concerning issues such as:

- obtaining further validation of the classification;
- highlighting any operational problems in the question format or analysis;
- investigating the relationship between the ESOMAR Social Grade and the socio-demographic classification system currently operated in individual countries;
- evaluating the validity of the selection of consumer durables in the light of increasing ownership levels through time.

Correspondence on any of these matters should be addressed to Kathy Joe at the ESOMAR Secretariat.

APPENDIX I

i: Profile of the individual Social Grade categories - Social Grade by Occupation of M.I.E.

OCCUPATION of M.I.E.	Total (89 600) %	A (8 207) %	B (8 342) %	C1 (13 647) %	C2 (20 691) %	D (13 665) %	E1 (9 550) %	E2 (6 839) %	E3 (5 605) %	NA (3 054) %
e1	2.7	26.0	2.4	0.2	0.0	0.2	0.0	0.0	0.0	1.9
e2	3.0	28.8	1.6	0.3	0.0	0.4	0.0	0.0	0.0	1.8
e3	2.5	19.2	5.0	1.1	0.0	0.4	0.0	0.0	0.0	2.6
e4	1.6	0.0	10.1	3.0	0.4	0.3	0.0	0.0	0.0	1.6
e5	4.2	19.4	16.2	3.6	0.0	1.5	0.0	0.0	0.0	3.5
e6	9.4	0.0	49.9	21.2	4.1	2.2	0.0	0.0	0.0	6.0
e7	1.7	0.0	5.0	4.1	1.3	2.0	0.0	0.0	0.0	0.9
e8	10.3	0.0	0.0	16.0	21.2	10.5	6.4	6.1	0.0	4.8
e9	9.8	0.0	0.0	9.0	13.7	11.3	12.4	26.9	0.0	6.0
e10	1.0	3.0	2.9	1.8	0.5	0.1	0.0	0.0	0.0	2.7
e11	12.6	0.0	0.0	15.2	21.1	15.4	13.6	17.9	0.0	6.5
e12	3.8	0.0	2.8	4.7	0.0	3.6	5.8	0.0	25.7	2.3
e13	1.1	0.9	1.5	0.9	0.6	0.6	1.9	1.9	1.7	0.4
e14	24.2	0.0	0.0	16.9	35.9	36.4	35.3	44.0	0.0	18.7
e15	9.0	0.0	0.0	0.0	0.0	13.8	22.6	0.0	68.1	7.6
e16	2.0	2.6	2.7	1.9	1.2	1.3	2.0	3.2	4.4	1.0
NA	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	31.6

ii: Profile of the individual Social Grade categories - Social Grade by Education Level of M.I.E.

T.E.A. of M.I.E.	Total (89 600) %	A (8 207) %	B (8 342) %	C1 (13 647) %	C2 (20 691) %	D (13 665) %	E1 (9 550) %	E2 (6 839) %	E3 (5 605) %	NA (3 054) %
21+ years	23.7	81.6	69.9	59.3	0.0	3.7	0.0	0.0	0.0	2.9
17-20 years	32.2	18.4	24.5	33.0	93.2	10.2	0.0	0.0	0.0	3.3
15-16 years	17.4	0.0	5.6	6.2	5.8	77.3	24.6	0.2	0.0	5.6
14 years	11.6	0.0	0.0	1.5	1.0	3.9	75.4	2.7	33.9	4.5
13- years	12.3	0.0	0.0	0.0	0.0	4.8	0.0	97.2	66.1	0.3
NA	2.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	83.5

APPENDIX II: Summary Table - EU 12 Norms and Variance

EU 12				Base: 89,600 = 7 waves of 12,800			
ESOMAR SOCIAL GRADE				NORM (%)	VARIANCE	LOWEST/HIGHEST VALUES	
A				9.2	0.4	8.7 / 10.0	
B				9.3	0.4	8.7 / 9.6	
C1				15.2	0.5	14.5 / 15.7	
C2				23.1	0.7	22.2 / 23.9	
D				15.3	0.2	15.0 / 15.6	
E1				10.7	0.5	10.2 / 11.8	
E2				7.6	0.3	7.3 / 8.1	
E3				6.3	0.3	5.8 / 6.6	
N.A.				3.4	0.3	3.1 / 3.8	
OCCUPATION OF M.I.E.				NORM(%)	VARIANCE	LOWEST/HIGHEST VALUES	
e1	2.7	0.4	2.1 /	3.2			
e2	3.0	0.1	2.8 /	3.1			
e3	2.5	0.2	2.2 /	2.8			
e4	1.6	0.2	1.4 /	2.0			
e5	4.2	0.4	3.8 /	4.9			
e6	9.4	0.7	8.5 /	10.4			
e7	1.7	0.3	1.3 /	2.2			
e8	10.3	0.5	9.7 /	10.9			
e9	9.8	0.2	9.5 /	10.2			
e10	1.0	0.2	0.8 /	1.3			
e11	12.6	0.4	11.9 /	13.2			
e12	3.9	0.2	3.6 /	4.1			
e13	1.1	0.2	0.8 /	1.4			
e14	24.2	0.6	23.1 /	24.9			
e15	9.0	0.6	7.7 /	9.6			
e16	2.0	0.4	1.5 /	2.5			
N.A.	1.1	0.4	0.6 /	1.7			
T.E.A. OF M.I.E				NORM (%)	VARIANCE	LOWEST/HIGHEST VALUES	
21 +				23.7	0.4	23.1 / 24.1	
17-20				32.2	0.8	31.1 / 33.3	
15-16				17.4	0.2	17.1 / 17.7	
14				11.6	0.6	10.9 / 12.7	
13-				12.3	0.5	11.8 / 13.2	
N.A.				2.8	0.3	2.5 / 3.3	

APPENDIX III: ESOMAR Social Grade questionnaires

Shown on the following pages is the set of questions developed for the ESOMAR Social Grade classification, in English, French and German. The occupation and education questions relate solely to the M.I.E., i.e. the person contributing most to the income of the household. The Economic Status Scale relates to the respondent's household and is therefore not specifically related to the head of household.

ESOMAR RECOMMENDED QUESTIONNAIRE

ENGLISH VERSION

Q.1 INT. RECORD SEX: male female

Q.2 What is your age? — years

Q.3 How many people live in your household including yourself?

Q.4 How many children under 16 are there?

Q.5A Are you, in your household the person who contributes most to the household income? yes no

Q.5B Are you, in your household the person mainly responsible for ordinary shopping and looking after the home? yes no

Q.6 Are you. . .

- married / living together
- single
- separated / divorced / widowed

INT.: IF RESP. ANSWERS 'No' AT Q.5A, REPHRASE Q'S 7-12 IN THE THIRD PERSON ('He'/'She') AND ASK ABOUT THE MAIN INCOME EARNER (M.I.E.)

Q.7 At what age did you finish full-time education? — years

- M.I.E. is still studying (e10) GO TO Q.13

Q.8 Any time after that, did you...

- resume general education at a later stage in your life? yes GO TO Q.9
 no CONTINUE...
- take any apprenticeship/professional training for your job? yes GO TO Q.9
 no GO TO Q.10A

Q.9 How many months did your (further education/ professional training) last in total? — months

- Q.10A At present, are you...?
- self-employed GO TO Q.11A
 - in paid employment GO TO Q.11B
 - temporarily not working
(unemployed, illness) GO TO Q.10B
 - retired GO TO Q.10B
 - not working/responsible for ordinary
shopping and looking after the home (e13) GO TO Q.13

- Q.10B And formerly, have you been...?
- self-employed GO TO Q.13
 - in paid employment GO TO Q.11B
 - no former employment GO TO Q.13

Q.11A SELF-EMPLOYED:

What kind of work do you do? (What position do you hold?)

- PROFESSIONAL (e.g. Doctor, Lawyer,
Accountant, Architect) (e2) GO TO Q.12
- BUSINESS PROPRIETOR, OWNER OF
COMPANY/SHOP, CRAFTSMAN,
OTHER SELF-EMPLOYED PERSON:
How many employees do you have?
 - 0-5 (e9) GO TO Q.12
 - 6 or more (e7) GO TO Q.12
- FARMER/FISHERMAN (e12) GO TO Q.12

Q.11B IN PAID EMPLOYMENT:

What position do you hold? (What kind of work do you do?)

- PROFESSIONAL (in actual profession) (e3) GO TO Q.12
- GENERAL MANAGEMENT
(Exec./M.D., Officer, Mgr.) CONTINUE...
 - How many employees are you responsible for?
 - 0-5 (e4) GO TO Q.12
 - 6 or more (e1) GO TO Q.12
- MIDDLE MANAGEMENT
(Dept./Branch Head, Junior Mgr.)
 - How many employees are you responsible for?
 - 0-5 (e6) GO TO Q.12
 - 6 or more (e5) GO TO Q.11
- OTHER NON-MANUAL EMPLOYEE
 - Do you work mainly in an office?
 - yes (e8) GO TO Q.12
 - no (e11) GO TO Q.12
- MANUAL WORKER
 - Do you work as a foreman or in a supervisory
capacity?
 - yes (e14) GO TO Q.12
 - no CONTINUE...
 - Have you received any formal training to
acquire specific skills in the work you do?
 - yes (e14) GO TO Q.12
 - no (e15) GO TO Q.12

Q.12 How many hours per week do you normally work? _____

Q.13 Do you or does anyone else in your household, own...?

- | | | |
|---------------------------------------|------------------------------|-----------------------------|
| • a colour TV set | <input type="checkbox"/> yes | <input type="checkbox"/> no |
| • a video recorder | <input type="checkbox"/> yes | <input type="checkbox"/> no |
| • a radio-clock | <input type="checkbox"/> yes | <input type="checkbox"/> no |
| • a video camera/Camcorder | <input type="checkbox"/> yes | <input type="checkbox"/> no |
| • a PC/home computer | <input type="checkbox"/> yes | <input type="checkbox"/> no |
| • an electric deep fryer | <input type="checkbox"/> yes | <input type="checkbox"/> no |
| • an electric drill | <input type="checkbox"/> yes | <input type="checkbox"/> no |
| • a still camera | <input type="checkbox"/> yes | <input type="checkbox"/> no |
| • at least two cars | <input type="checkbox"/> yes | <input type="checkbox"/> no |
| • a second home or holiday house/flat | <input type="checkbox"/> yes | <input type="checkbox"/> no |

Q.14 Your main home: do you...?

- | | |
|-------------|--------------------------|
| • rent it | <input type="checkbox"/> |
| • or own it | <input type="checkbox"/> |

Q.15 Which foreign languages do you understand well enough to read a newspaper or listen to radio news?

- | |
|-------------------------------------|
| <input type="checkbox"/> Danish |
| <input type="checkbox"/> Dutch |
| <input type="checkbox"/> English |
| <input type="checkbox"/> French |
| <input type="checkbox"/> German |
| <input type="checkbox"/> Greek |
| <input type="checkbox"/> Italian |
| <input type="checkbox"/> Portuguese |
| <input type="checkbox"/> Spanish |
| <input type="checkbox"/> Swedish |
| <input type="checkbox"/> other |

INT.: NOTE ADDRESS

Q.16 Region*

Q.17 Size of town*

* Based on address using the usual, local categories
(as documented in available statistics on universe)

APPENDIX IV: Analysis Guideline

Step 1: Determine the M.I.E. Occupation category as follows:

Category:

1.	IF Q.11B is <i>Employed General Management, responsible for 6 or more employees</i>	e1
2.	IF Q.11A is <i>Self-employed Professional</i>	e2
3.	IF Q.11B is <i>Employed Professional</i>	e3
4.	IF Q.11B is <i>Employed General Management, responsible for 5 employees or less</i>	e4
5.	IF Q.11B is <i>Employed Middle Management, responsible for 6 employees or more</i>	e5
6.	IF Q.11B is <i>Employed Middle Management, responsible for 5 employees or less</i>	e6
7.	IF Q.11A is <i>Self-employed Business Proprietor, owner of a company/shop, craftsman, other self-employed person, responsible for 6 employees or more</i>	e7
8.	IF Q.11B is <i>Employed Other Non-manual position, working mainly in an office</i>	e8
9.	IF Q.11A is <i>Self-employed Business Proprietor, owner of a company/shop, craftsman, other self-employed person, responsible for 5 employees or less</i>	e9
10.	IF Q.7 is <i>Non-active: Still studying</i>	e10
11.	IF Q.11B is <i>Employed Other Non-manual position, not working mainly in an office (e.g. travelling or in a service job)</i>	e11
12.	IF Q.11A is <i>Self-employed Farmer or Fisherman</i>	e12
13.	IF Q.10A is <i>Non-active: responsible for ordinary shopping and looking after the home, housewife</i>	e13
14.	IF Q.11B is <i>Employed Manual Worker: Supervisor or Skilled Manual worker</i>	e14
15.	IF Q.11B is <i>Employed Other (Unskilled) Manual worker, servant</i>	e15
16.	IF Q.10A is <i>Non-active: retired or unable to work through illness, unemployed or temporarily not working</i>	e16
	IF <i>don't know</i> OR <i>no answer</i> the Occupation variable is replaced by the Economic Status variable (see Step 3)	

Step 2: Determine the M.I.E. Terminal Education Age category as follows:

1.	CONVERT all figures in months at Q.9 to years (rounding to whole numbers)	
2.	SUM Q.7 + Q.9 'summed T.E.A.'	Category:
3.	IF summed T.E.A. is > 20	21+
4.	IF summed T.E.A. is 17, 18, 19 OR 20	17-20
5.	IF summed T.E.A. is 15 OR 16	15-16
6.	IF summed T.E.A. is 14	14
7.	IF summed T.E.A. is < 14	13-
8.	IF <i>don't know</i> OR <i>no answer</i>	N.A.
9.	IF Q.7 is ' <i>Still studying</i> '	N.A.

Step 3: Determine the ESOMAR Social Grade category as follows:

1. IF the Occupation of the M.I.E. category is NOT e10 or e13 or e16 or *don't know* or *no answer*, determine the ESOMAR Social Grade category on the basis of the following matrix:

Occupation of the Main Income Earner →

↓ Terminal Education Age of the Main Income Earner

Base: active M.I.E.s	e 1+2	e 3+5	e 4,6+7	e 12	e 8+9	e 11+14	e 15
21+	A	A	B	B	C1	C1	D
17-20	A	B	C1	C1	C2	C2	D
15-16	B	C1	C2	D	D	D	E1
14	C1	D	D	E1	E1	E1	E3
13	D	D	D	E3	E2	E2	E3

2. IF the Occupation of the M.I.E. category IS e10 or e13 or e16 or *don't know* or *no answer*, determine the **Economic Status** category as follows:
 - SUM number of durables ownedinteger : max. 10 - min. 1
 - IF *don't know* OR *no answer*N.A.
 - determine the ESOMAR Social Grade category on the basis of the following matrix:

Economic Status (no. of consumer durables owned) →

↓ Terminal Education Age of the main income earner

Base: non-active M.I.E.s	5+	4	3	2	1	0/NA
21 or older	A	A	B	C1	C1	D
17-20	A	B	B	C2	C2	D
15-16	B	C1	C1	E1	E1	E2
14	C1	C2	C2	E1	E2	E3
13 or younger	D	D	D	E2	E3	E3

3. IF Q.10A/B AND Q.11A/B is *don't know* OR *no answer* AND Q.13 is *don't know* OR *no answer*, code Social Grade as no answer
4. IF SUMMED T.E.A. is *don't know* OR *no answer*, code Social Grade as *no answer*.

APPENDIX V: Bibliography

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