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"JUNIOR 1990 RESEARCH"
MEDIA EXPOSURE, GOODS CONSUMPTION AND INFLUENCE ON FAMILY
PURCHASING AMONG ITALIAN CHILDREN

SYNOPSIS

The JUNIOR '90 RESEARCH is a "single source" survey on a specialized collectivity: the children.

The decreasing number of children born every year has deeply reduced the universe of the "under fourteen". In each family, a lower number of babies share better conditions of life and higher resources. Children, therefore, have become a more interesting target-market for Marketing Managers.

The aim of this research is to demonstrate the strength of the specialized magazines for children in reaching this qualified target-group.

The estimate of readers for the 16 magazines (made according to the method of the national readership research) has pointed out the large coverage insured by these vehicles during a longer period of time, but also the relatively limited coverage in the recent period, due to the low frequency of reading measured. In any case, a few of these vehicles have an enlarged audience (Recent Readers), similar (or not so distant) from that of the main TV programmes for children.

From a qualitative point of view, the recent readers' profile dealt with a wealthier universe than the total profile of the collectivity and the profile of TV watchers.

In this research, a new method was also applied to estimate the average influence of children on decisions of their family.

The parents contribute to the opinions of their children a great deal of influence in choosing food, durables, ways of spending free-time (holidays, weekends etc.). The average score of influence given to the children represents approximately 80% of the influence acknowledged by respective spouses of the family.

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1 - WHICH COLLECTIVITY HAS BEEN STUDIED

Like in many other Western European Countries, in Italy children are becoming a less numerous target with each passing year.

Traditional Italian families had many children in the period between after the Second World War and till the Sixties. But afterwards, and mainly during the Eighties, the young couples - formed in a period of affluent economy - opted to have no more than one or two children each, in order not to loose certain freedoms they enjoyed before the childrens' births.

So, in the last two decades, the number of babies born alive in Italy decreased from 913.473 in 1969 to 568.291 in 1988 (-38%). (Graph.1)

Of course, the new babies are growing up with better living conditions compared with previous generations. They have better food, better clothes, more toys and more money to spend (without having to ask permission).

As a result, children have become, in the last 10 years perhaps, a more interesting target-market for an increasing number of Marketing Managers.

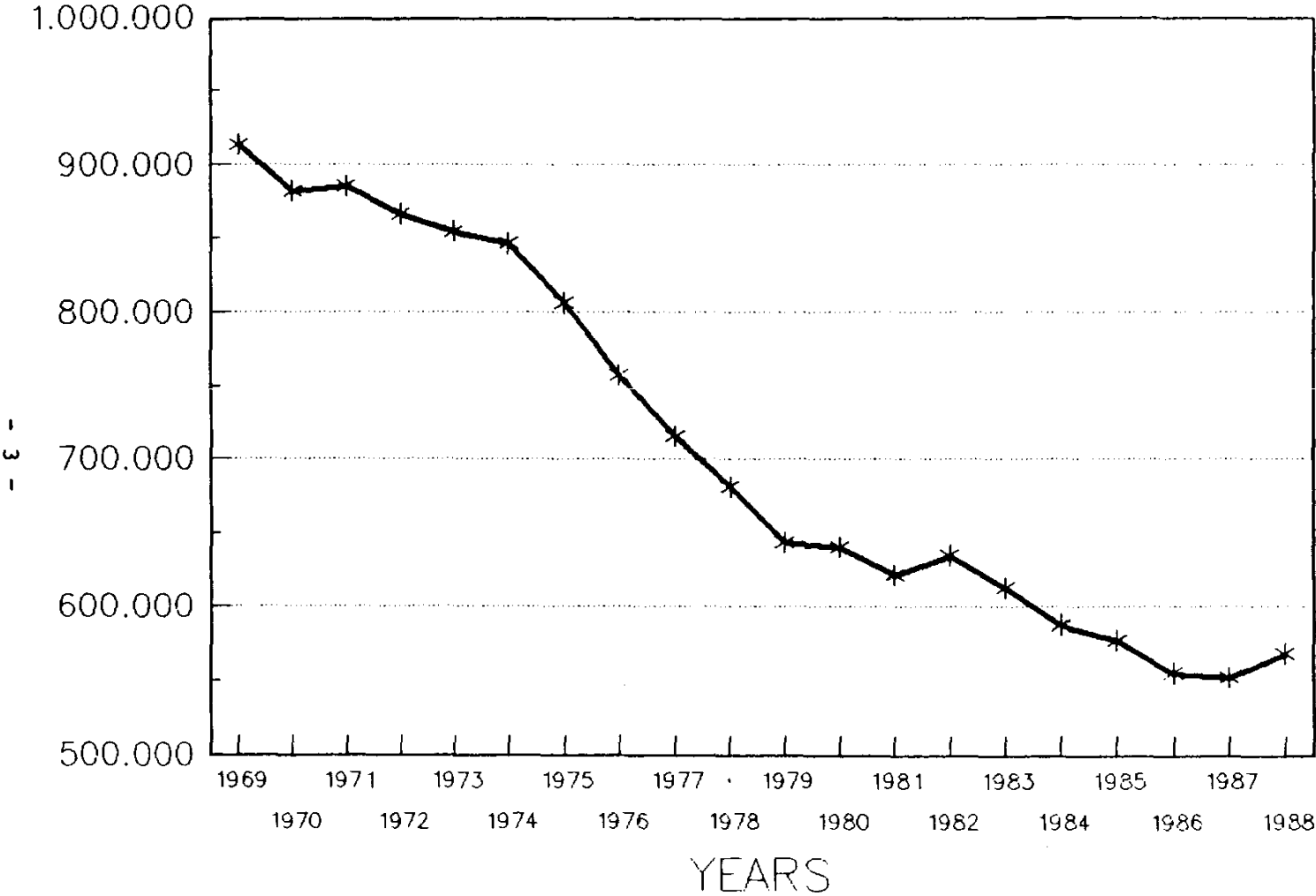
The goal of many advertising campaigns is to get in touch with these new subjects, which are heavy consumers and also exert a relevant influence on the decisions of the family.

The main publishers of magazines for children decided to commit to a media research to demonstrate the strenght of their titles in reaching a qualified target-group.

The JUNIOR '90 RESEARCH studied a collectivity estimated at 5.473.000 children aged from 6 to 13 years and living in all the regions of Italy.

The total number of adults (14 years and older), in the same year, was estimated to be 47.570.000; so, children between the ages 6-13 represent a segment of about 10% of the total population of 6 years and older.

NUMBER OF BABIES BORN IN ITALY



"JUNIOR 1990 RESEARCH"

Graph. 1

"JUNIOR 1990 RESEARCH"

2 - THE SURVEY METHOD

The survey was planned like a "single source" research. The questionnaire was divided into 3 sections:

- press and other media exposure
- purchase and consumption habits
- measure of the influence of children in family purchases.

Data were collected through personal interviews with children, assisted by one adult of their family (usually the mother). The representative sample of about 3000 families with children aged from 6 to 13 was selected using screening questions put in previous Omnibus Surveys. In each family only one child was interviewed, chosen according to a random key (based on the first letter of the first name).

Press exposure

We measured the readership of 16 magazines for children (7 weeklies and 9 monthlies), showing cards with printed mastheads in black and white. We used the recent reading technique and the reading definitions were similar to those of the adults' National Readership Research, that is:

- readers in a larger period (3 months for weeklies, 6 months for monthlies)
- readers in recent reading period (7 days for weeklies, 4 weeks for monthlies)
- reading frequency measurement.

TV and cinema exposure

We measured the exposure to 14 television programmes for children, both of State and commercial broadcastings. We used, as prompts, the printed credits at the beginning of the programmes. The exposure definitions were the following:

- TV viewers in last 3 months/ i.e. children having watched at least one showing of the programme in last 3 months/7 days
- TV viewers in recent period, i.e. children having watched the showing of the programme "yesterday" (for dailes programmes) or "in last 7 days" (for weekly programmes)
- TV viewing frequency measurement.

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To estimate the cinema exposure, we measured:

- cinema goers in last 3 months
- cinema going frequency.

Purchase and consumption habits

In this section we collected data on:

- toys possession and toys received last year
- books read last year (not for school)
- sport practice
- VCR possession and videocassettes purchase or rental
- recording possession and audiocassette purchase
- disc player possession and discs and compact discs purchase
- allowance available for personal use.

Measure of the influence in family purchases

The questions of this section were addressed to an adult of the family (frequently the mother). We showed a card with a 10 point scale and we asked to estimate which was the score of the influence in choosing different kinds (or brands) of consumable goods and of durables attributed to:

- the child interviewed
- the adult respondent
- another adult of the family.

3 - THE MAIN EXPOSURE RESULTS

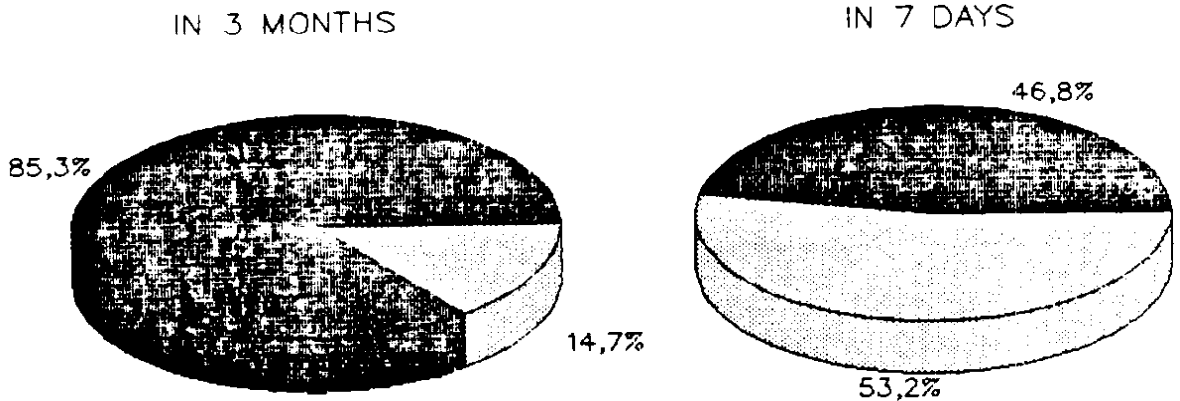
The 16 magazines for children considered in the survey could insure, globally, a good coverage of the target over a longer period of time. In fact, the big majority (almost 90%) of Italian boys and girls read at least one of these "specialized" magazines during the span of a few months.

But in the "recent" period (1 week for weeklies and 1 month for monthlies) the coverage of these print vehicles is "only" 57,6%. (Graph. 2 and 3)

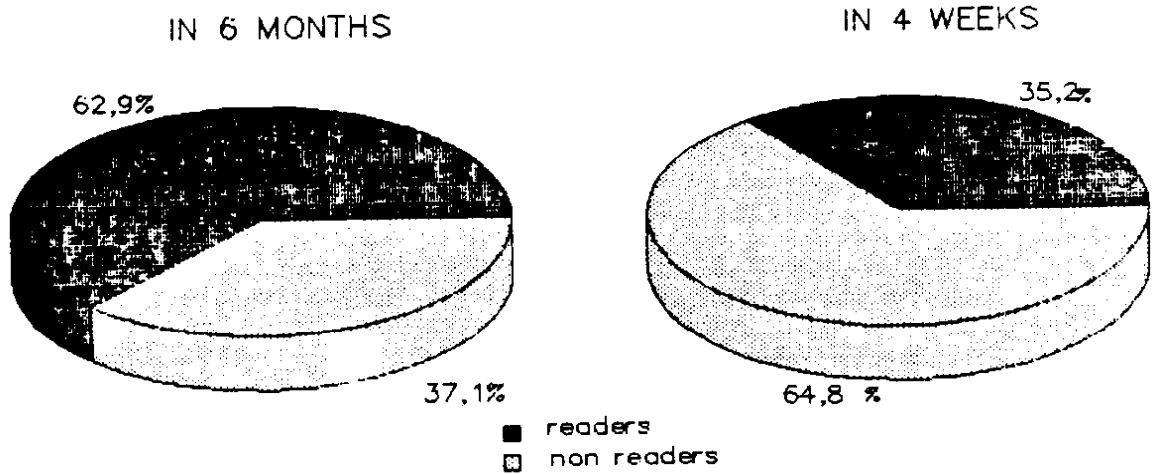
It is clear that the frequency of reading is not so high and you have to accumulate several issues over time, in order to get in touch with a larger collectivity. So even in the years of electronic media, press proves to be sufficiently popular among children, perhaps not for rapid communication, but for a sure and "reliable" one.

This is a good signal of the variety of interests of young people: they like sitcoms and cartoons and movies, but they also read amusing stories, fiction, real-life stories.

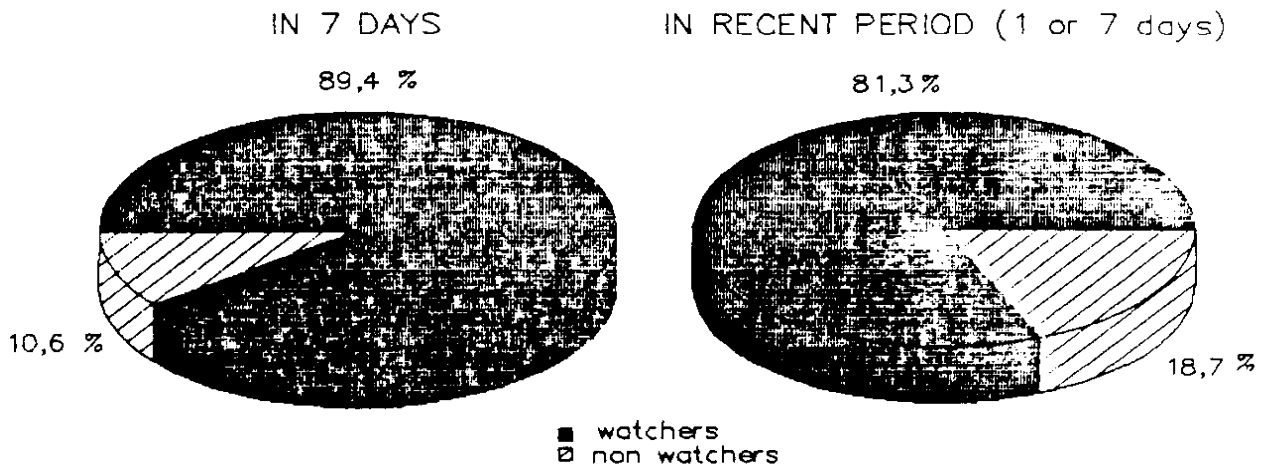
READERS OF 7 WEEKLIES



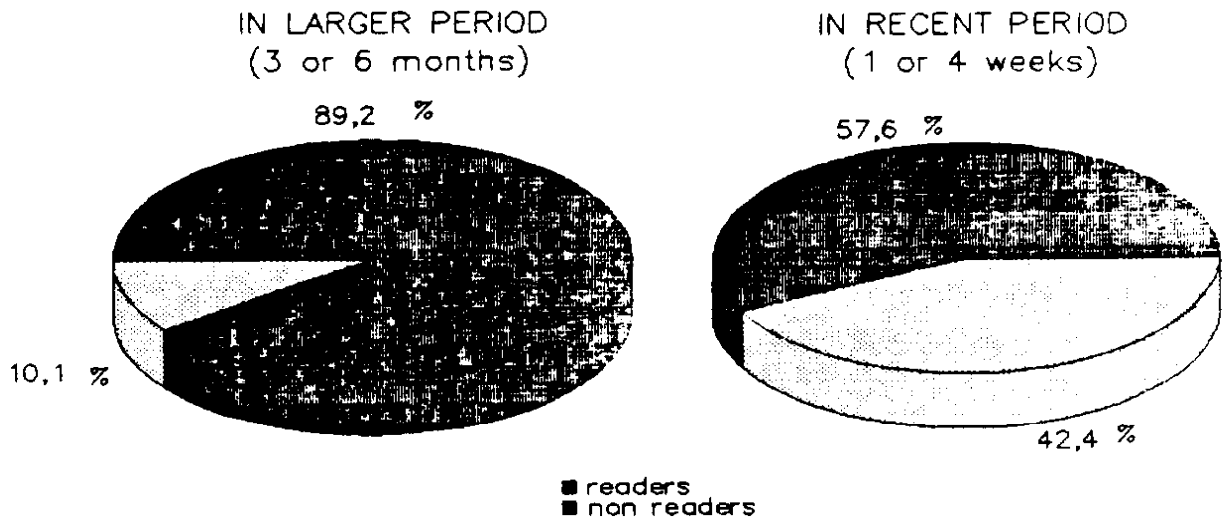
READERS OF 9 MONTHLIES



WATCHERS OF 14 TV PROGRAMMES



READERS OF 16 MAGAZINES



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The larger readerships are measured for weeklies and mainly for "Topolino" (Mickey Mouse), a Walt Disney magazine, with the main characters beloved by children. In an average week Topolino has 1.722.000 readers, that is rather 1 reader out of 3 children. (Graph. 4)

Considering the 14 main TV programmes, both for children and adults, broadcast in the afternoon, or in the first part of the evening prime-time, we can see that only a few of them have a larger audience (*) in an average day (2 programmes out of 14 and one of them is a cartoon)

In any case, in this target, a few magazines (like Topolino or others) have a good quantitative strength and can insure a large coverage of the target also in a recent period.

On a qualitative point of view, the recent readers of (at least) one magazine belong to the upper class and to families with a larger income more often than the average and more often than TV watchers. (Graph.5)

The audience of cinema among children is more reduced; about 1 child out of 4 has gone to the cinema in last 3 months and at a very low frequency. Only 1% of Italian children go to the cinema once a week.

4 - PURCHASE AND CONSUMPTION HABITS

Due to the better life conditions of families in the eighties, a large share of children have the possibility of buying or of receiving a considerable amount of toys, books, objects, electronical devices.

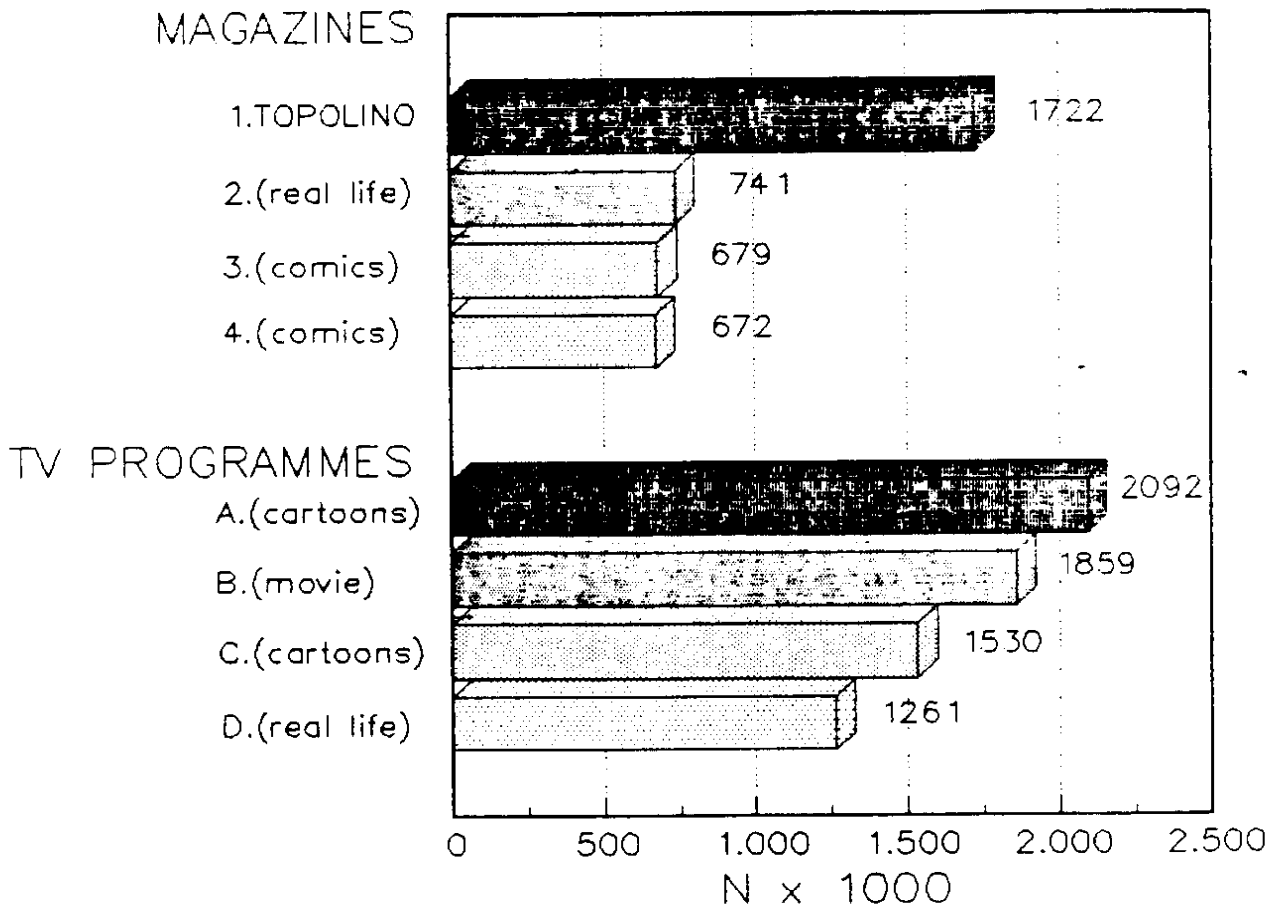
Of course, many purchase habits depend on the social class of the family and on the age of the children. The younger boys and girls have different tastes and different needs from the teens. So, children between 10-13 years read more books and buy audiocassettes more often (60% or more) than children between 6-9 years. On the other hand, children between 8-11 years possess more toys and buy recorded videocassettes more often (17%)

Children belonging to the upper class have more opportunities to receive toys and buy what they want.

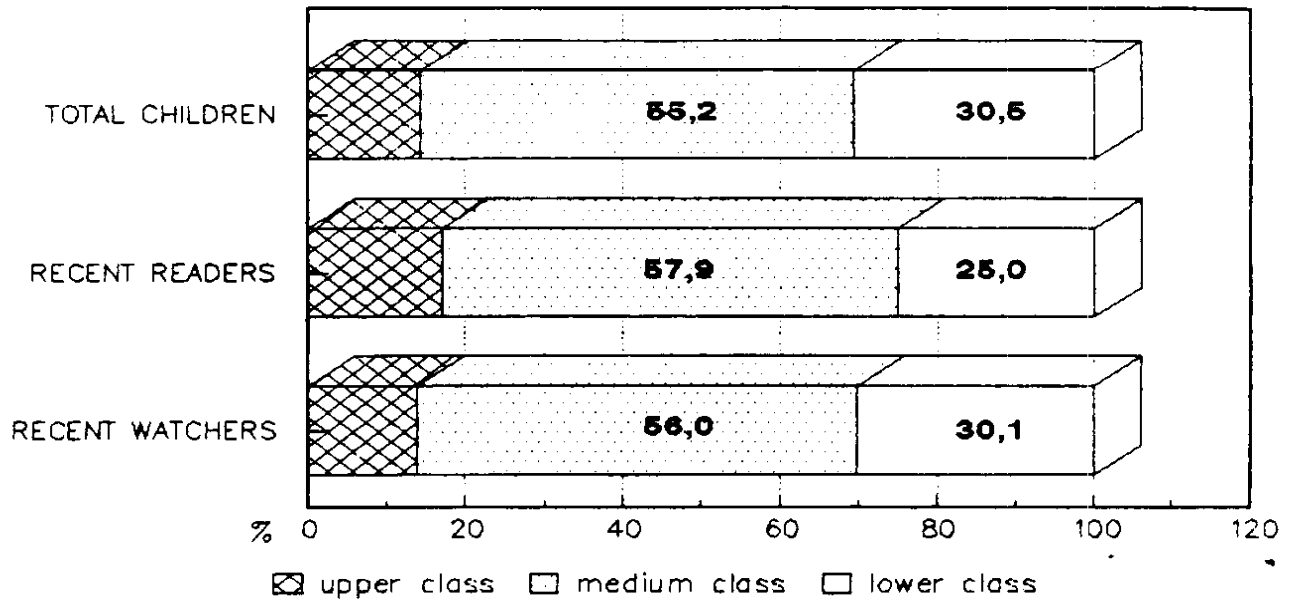
The readers of magazines seem to have a high degree of opportunities, as do the children of the medium-upper class. Perhaps, often the high level of income of the families' readers is combined with the personal interest of their children in determining the higher amount of purchases of books or audiocassettes. (tab. 1, 2, 3)

(*) Audience measured asking the programmes watched yesterday or in last 7 days.

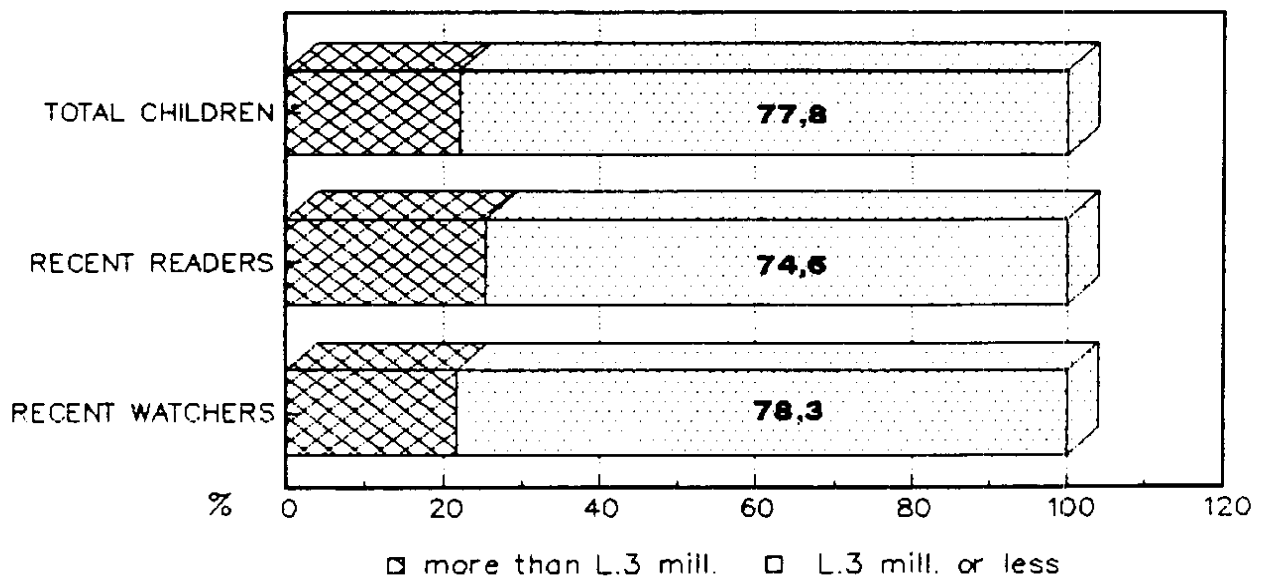
**AUDIENCE OF THE MAIN MAGAZINES
AND TV PROGRAMMES FOR CHILDREN
(recent period)**



**SOCIAL CLASS OF ITALIAN CHILDREN
MAGAZINE READERS AND TV WATCHERS**



**FAMILY MONTHLY INCOME OF ITALIAN CHILDREN
MAGAZINE READERS AND TV WATCHERS**



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Tab. 1 - Average number of toys possessed and received/bought in one year

	N° of toys	
	possessed	received in 1 year
- Total children	7,7	2,4
Age:		
- 6-7 years	7,4	2,7
- 8-9 years	8,1	2,7
- 10-11 years	8,1	2,6
- 12-13 years	7,2	1,9
Recent Readers:		
- Total recent readers ..	8,2	2,6
- Readers 6-9 years	8,3	2,9
- Readers 10-13 years ...	8,2	2,4
Social class:		
- upper	9,0	3,0
- medium	8,0	2,5
- lower	6,4	2,1

Tab. 2 - Average number of books read (not for school) in one year

	N° of books
- Total children	2,2
Age:	
- 6-7 years	1,5
- 8-9 years	2,2
- 10-11 years	2,4
- 12-13 years	2,7
Recent Readers:	
- Total recent readers ..	2,7
- Readers 6-9 years	2,4
- Readers 10-13 years ...	2,9
Social class:	
- upper	3,2
- medium	2,3
- lower	1,6

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Tab. 3 - Purchase of video/audiocassettes

	Buy videocassettes		Buy audiocassettes	
	recorded	non recorded	recorded	non recorded
- Total children	15,5	21,9	59,5	41,1
Age:				
- 6-7 years ...	15,9	17,1	51,8	20,4
- 8-9 years ...	17,2	23,3	55,6	32,7
- 10-11 years .	17,6	22,1	60,6	45,0
- 12-13 years .	11,6	24,5	68,1	61,9
Recent Readers:				
- Total recent readers	17,6	25,2	64,0	46,4
- Readers 6-9 years	18,6	22,9	58,6	29,9
- Readers 10-13 years	17,2	27,2	68,2	59,2
Social class:				
- upper	26,2	36,0	67,4	45,3
- medium	16,5	22,4	62,5	44,2
- lower	8,6	14,3	51,8	33,5

5 - ALLOWANCE AVAILABLE TO SPEND

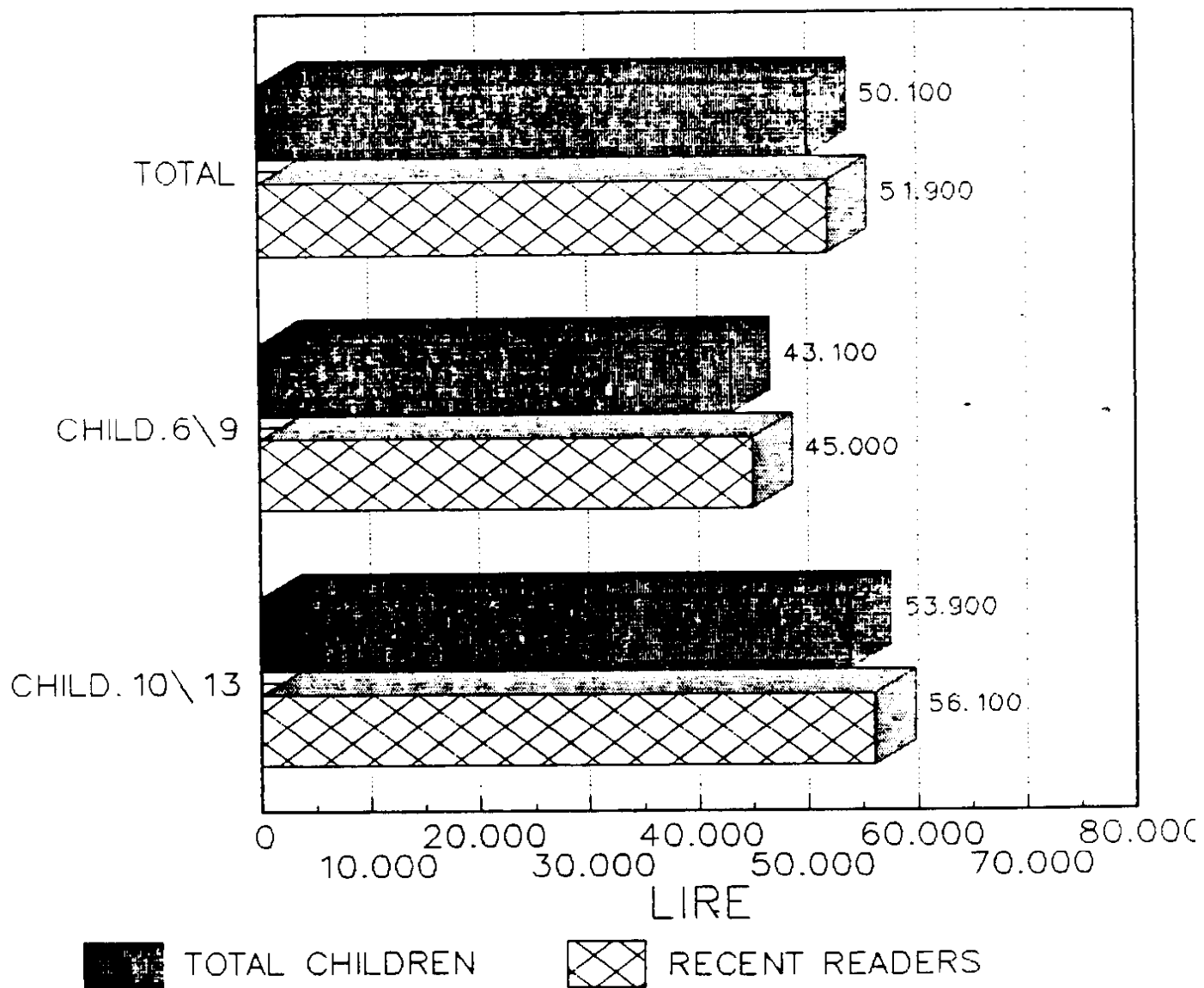
We asked both children and parents if an allowance was available for the child, at his disposal.

Italian children declare to have an average amount of approximately Lit. 50.000 at their disposal. The younger have less money than teen-agers.

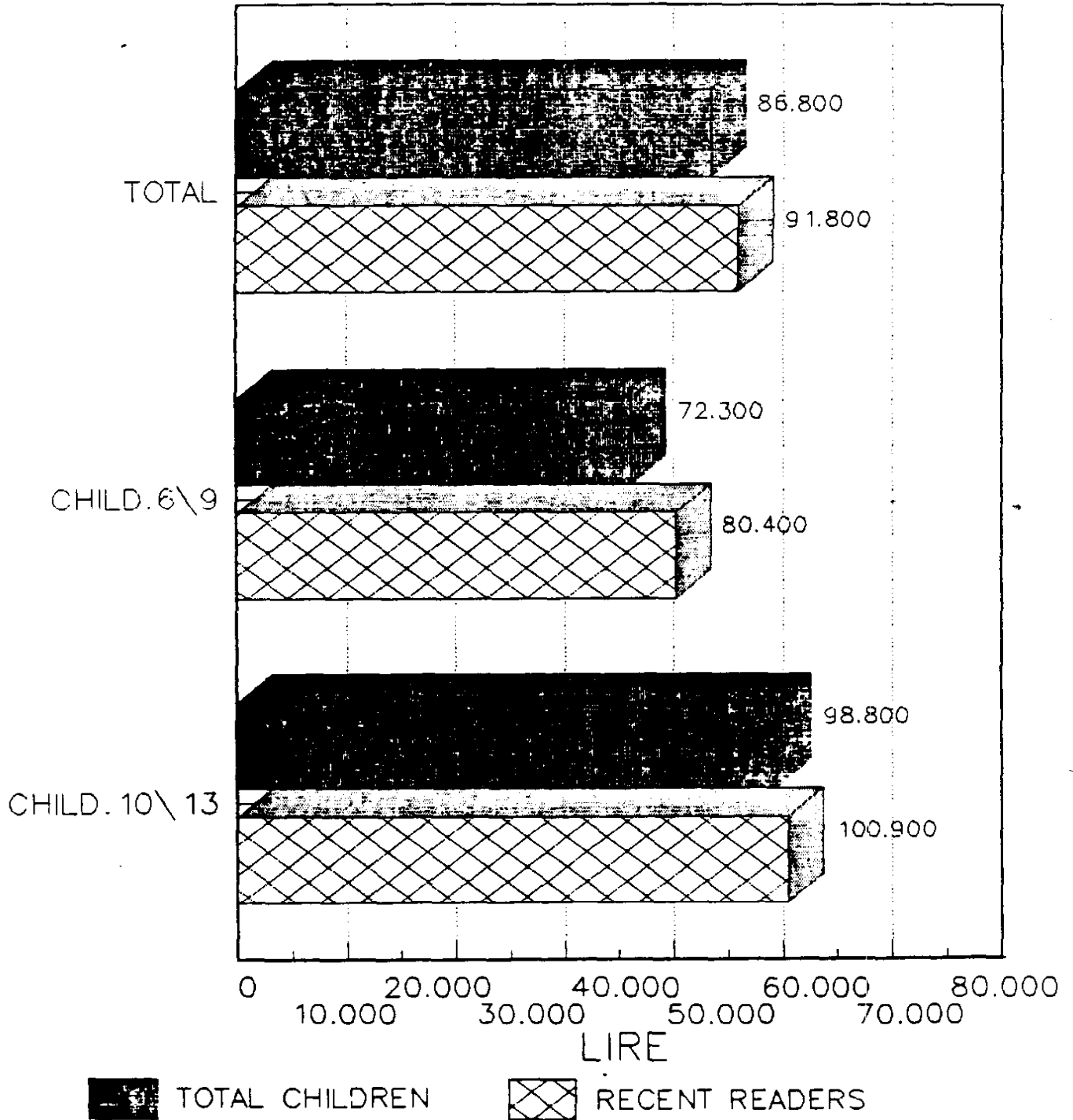
Constantly, the readers declare to possess a bit more money compared with the total collectivity of children. Therefore, it is confirmed that the readers have some more possibilities to buy the things they like, without asking permission. (Graph. 6)

To check this important point, a similar question was asked to the parents. They confirmed that children had received money in the last 3 months and the average allowance estimated in 3 months was Lit. 86.800. Also in this case, the amount of money given to the readers (according to the answers of their parents) was higher than the average (Lit. 91.800). Both for the youngest and the teen-agers the same phenomenon is confirmed. (Graph. 7)

MONEY AVAILABLE TO SPEND (declared by the children)



MONEY RECEIVED BY THE CHILDREN IN LAST 3 MONTHS (declared by the parents)



6 - THE INFLUENCE ON FAMILY DECISIONS

In the second part of the interview, we made an experiment in order to measure the amount of influence attributed by parents to the opinion of children in determining the decisions of the family.

We asked the parent present during the interview to answer to a few questions. We measured, at a first stage, the consumption and the purchase of different kinds of products: foods, toiletries, durables. Then, only to the consumers, we showed a 10 point scale and we asked them to give three scores, estimating:

- the level of influence of the child
- the level of influence of the two parents
(the respondent and the other one)

As, in the majority of cases, the parents present during the interview were the mothers: they attributed to themselves a score higher and quite distant from the score attributed to the fathers. In order to estimate the average influence of both parents, we have calculated the mean of the two scores attributed to the two parents. (Tab. 4 and 5)

We have followed the same procedure also for the activities spent in the free-time, as well. (Tab. 6)

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Tab. 4 - Consumption and influence in family decisions concerning foods and toiletries

	% Consumers	SCORE OF INFLUENCE (1 TO 10)			
		1 Attributed to the child	2 Declared by parent A (inter-viewed)	3 Attributed to parent B (not inter-viewed)	4 Average score of parents (2+3): 2
<u>FOOD</u>					
- Sodas	86	4,7	6,6	3,3	4,9
- Fruit juice	89	4,9	6,9	2,9	4,9
- Snacks	89	6,4	6,2	2,5	4,3
- Yogurt	85	5,1	6,9	2,5	4,7
- Cheese	64	4,2	7,0	2,5	4,7
- Frozen fish	65	2,3	7,6	3,0	5,3
- Cookies ...	94	4,9	7,1	2,7	4,9
- Instant drinks	68	4,3	6,9	2,3	4,6
- Laundry detergent .	99	1,0	8,4	1,7	5,0

Average influence .	-	4,2	6,4	2,6	4,8

<u>TOILETRIES</u>					
- Shampoo ...	100	2,8	7,9	3,4	5,6
- Bathfoam ..	91	2,6	7,8	3,2	5,5
- Toothpaste	99	3,5	7,8	3,5	5,6

Average influence .	-	3,0	7,8	3,4	5,6

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Tab. 5 - Purchase and influence in family decisions concerning durables and clothes

	% Purchase in 2 years	SCORE OF INFLUENCE (1 TO 10)			
		1 Attributed to the child	2 Declared by parent A (inter-viewed)	3 Attributed to parent B (not inter-viewed)	4 Average score of parents (2+3): 2
- Color television	45	2,3	5,7	7,7	6,7
- Video recorder ..	26	2,5	4,8	7,5	6,1
- Personal computer ..	17	4,5	4,0	6,5	5,2
- Car	46	2,0	5,3	8,1	6,7
- Motorcycles /scooter ..	13	2,0	3,1	6,8	5,0
- Cameras ...	27	2,4	4,7	6,7	5,7
- Athletics shoes (sneakers)	97	6,6	6,0	2,7	4,3
- Boys' Jeans	95	6,4	6,3	2,3	4,4
- Gym clothing ..	94	6,1	6,4	2,6	4,5
- Other shoes	98	6,3	6,6	3,3	5,0
- Shoulder bags, brief cases	93	7,2	5,7	2,6	4,1

Average influence .	-	4,4	5,3	5,2	5,2

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Tab. 6 - Influence in family decisions concerning the free-time

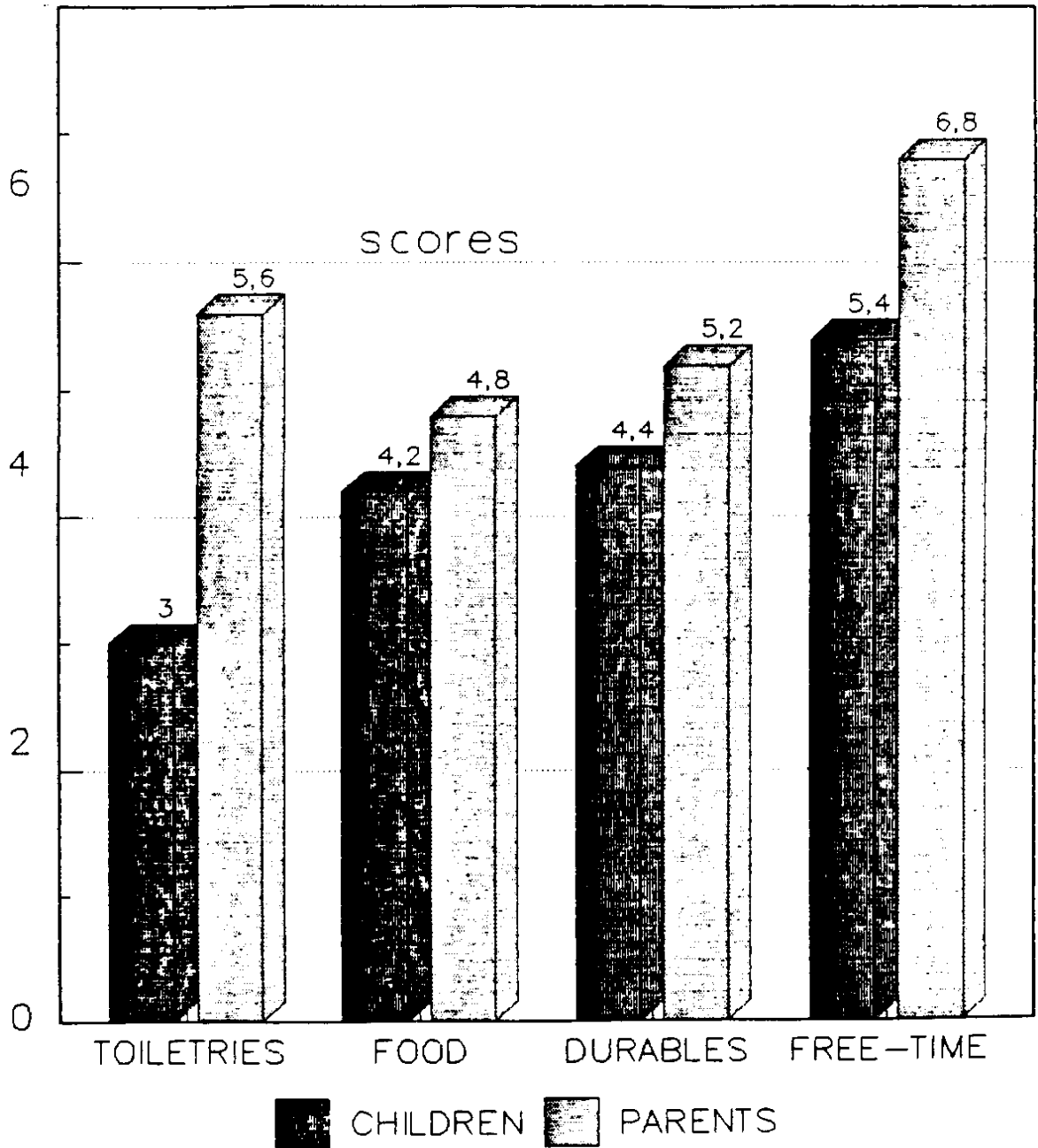
	% of decisions	SCORE OF INFLUENCE (1 TO 10)			
		1 Attributed to the child	2 Declared by parent A (inter-viewed)	3 Attributed to parent B (not inter-viewed)	4 Average score of parents (2+3): 2
- To go on vacation .	60	4,3	7,3	7,5	7,4
- To spend the weekend	39	4,4	7,1	7,6	7,3
- To go to the entertainment events ...	38	6,0	6,3	6,6	6,4
- To eat out	64	4,5	6,9	7,4	7,1
- Courses and private schools ..	34	5,5	7,2	6,7	7,0
- Sporting lessons .	50	7,4	6,0	5,8	5,9

Average influence .	-	5,4	6,8	6,9	6,8

We have left to the interviewees the possibility of giving the scores (from 1 to 10) they wanted to each person and for each product, without any boundaries. We notice that the scores given are higher for the more evocative services or interesting items.

The parents acknowledge more influence to the children in taking decisions for the free-time of the family and less influence in choosing products like toiletries or foods. (Graph. 8)

**INFLUENCE IN TAKING FAMILIAR DECISIONS
ATTRIBUTED TO CHILDREN AND PARENTS
(scores 1-10)**



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We have calculated the ratios between the scores attributed to children and the average scores attributed to parents.

	scores attributed to children	scores attributed to parents	ratios
- Toiletries	3,0	5,6	54%
- Food	4,2	4,8	88%
- Durables	4,4	5,2	85%
- Free-time services	5,4	6,8	79%

The average score of influence given to children represents approximately 80% of the influence acknowledged by respective spouses of the family.