

- (a) One analysis he had undertaken showed that Rejectors were substantially less likely to recall TV advertising accurately, and that the effect was greater than would have been expected merely by their level of viewing, in other words as he put it "there is some kind of multiplier effect taking place".
- (b) Bond is Deputy Head of Research at the Central Office of Information, which handles the UK Government's advertising. In relation to Government advertising he commented on the Rejectors that "They are likely to react negatively to all the wilder creative fancies, from whatever source - but **all the more** so if it is the Government". He concluded that, as the Government has to reach **all** segments, it should be recognised that the creative and media strategy that is right for one segment may not be right for others.
- (c) He demonstrated fairly conclusively that Rejectors are under-represented in group discussions. The four statements were administered to a sample of over 600 group attendees, and, remembering that Rejectors should be about one-third of all of them, he found that they were always under-represented, the extent of under-representation depending on subject matter of the group. On an index where representation in the correct proportion would be 1.0 he found representation at 0.8 for non-marketing groups, and 0.6 for marketing groups excluding advertising groups; and for groups related to TV advertising he found **not one Rejector** in his sample. Obviously, to some extent this may be a recruiter effect as well as a respondent effect, but it is a critical finding.

There are obviously many implications of the Bond and Griggs findings. The most important in the present context, is to examine the hypothesis that this group of Rejectors of TV advertising may be better reached by press media, and that certain types of advertisement, in certain types of publication would be more persuasive and effective for this group than advertising on television. This would provide an important argument for mixed media campaigns.

A second question arises should this first hypothesis be substantiated, namely, to what extent are this group of TV advertising Rejectors worth bothering about from the marketing point of view. Apart from the size of the group, of what sorts of products are they heavy consumers, what is their spending potential, etc.?

It was to shed light on these issues that the authors embarked on a programme of research of which the first results are presented in this paper.

## 2. The Research Programme

The key issues facing the researchers were:

- Are the Bond clusters replicable in other surveys?
- If so, what are the demographic, attitudinal, media consumption and product consumption characteristics of the "Rejectors"?

In order to answer these questions, the four attitude statements were added to the 1995-96 TGI, which will have approximately 25,000 respondents, a vast amount of media information, extensive attitudinal data, and product usage information for 500 product fields and 4,000 brands. Unfortunately, fieldwork for this survey is not completed until the end of March 1996, though six months data on half the sample will be available in February 1996.

Impatient to get going faster than this, two other sources of data collection were employed:

- (a) A large-scale usage and attitude survey of 1,100 adults in Britain, on an unrelated topic but containing basic press readership data, was about to go into the field and the client very kindly allowed us to add the four statements relating to attitudes to TV advertising into the attitude battery.
- (b) The TGI Gold survey was also about to go into the field. This is a self-completion survey of over 4,000 respondents aged 50-75. The questionnaire comprises 35 pages of questions about products of interest to this age-group, together with 93 attitudinal and lifestyle statements. The respondents had all previously completed the main TGI questionnaire so we have all the original data as well. The four attitude to TV advertising statements were added to this survey.

Obviously neither of these data sources is ideal for our purposes. In the case of the U and A, with a sample size of 1,100 the subgroup of Rejectors (if we replicate them) will be relatively small. In addition the media questions are more limited and for reasons of confidentiality we cannot disclose or analyse any of the data other than the press questions and demographics. In the case of TGI Gold, all of the data is there and the sample size is substantial, but of course it only relates to people aged 50-75, and results will not be generalisable to the population as a whole.

Despite these drawbacks, we believe these data sources are enough to advance our knowledge substantially and to help our audience here to decide whether we are on to something really important. So, let us now look at what we have discovered, examining first how far we have been able to replicate the Bond and Griggs clusters and then to focus on the Rejectors, to see who they are, in demographic terms, what their press readership patterns are, and to make some assessment of their importance as a target group for advertising and the importance or otherwise of press in reaching them.

### 3. How far can we replicate the Bond and Griggs clusters?

There are two surveys conducted by Bond and Griggs in November 1989 and September 1994. Geoff Bond has also kindly given us data from a third source - a face to face survey conducted in April 1995 for the COI on which the questions were added at the end of a long interview about crime prevention and publicity. Thus we have five data sources which differ markedly in their methodology.

	Date	Sample Size	Universe	Data Collection Method
1. Bond & Griggs '89	Nov 89	1031	Adults in GB	Telephone omnibus
2. Bond & Griggs '94	Sep 94	1974	Adults in GB	Telephone omnibus
3. COI	Apr 95	1150	Adults in GB	Face to face
4. U&A	Apr 95	1073	Adults in UK	Face to face
5. TGI Gold May 95	Mar-	4158	People aged 50-75 in GB	Self-completion following telephone contact with previous face to face contact & self-completion

More importantly they also differed in question style and question context, as follows:

**"Bond and Griggs 89 and 94":** Four statements asked consecutively, within omnibus, statements rotated. Four point scale: Agree strongly, Agree slightly, Disagree slightly, Disagree strongly.

**"COI":** Four statements asked consecutively at the end of an interview. Four point scale: Agree strongly, Agree slightly, Disagree slightly, Disagree strongly.

**"U&A":** Statements put into 2 other attitude batteries (2 in each) at different points within a 45 minute interview. Shuffle pack technique using a four point scale: Definitely agree, Tend to agree, Tend to disagree, Definitely disagree.

**"TGI Gold":** Statements put into 2 other attitude batteries (2 in each) at different points within a 35 page self-completion questionnaire. A five point scale running from negative to positive was used: Definitely disagree, Tend to disagree, Neither agree nor disagree, Tend to agree, Definitely agree.

In the authors view the different questioning techniques and the different question contexts are likely to be of far greater consequence than the differences in methodology. However, we had no control over this. We were piggy-backing our research on other people's surveys and could not change the questioning technique to suit our ends.

The table below shows the results from each of the surveys for the four attitude statements.

**Table 1: Basic Data on the Attitudinal Statements**

		Strong agree- ment %	Weak agree- ment %	Middle position %	Weak disagree- ment %	Strong disagree- ment %	Don't know %	Combined Agree- ment %
I find TV advertising interesting and quite often it gives me something to talk about	1. B&G '89	14	36	-	23	24	3	40
	2. B&G '94	12	30	-	27	29	2	42
	3. COI	11	38	-	21	28	2	39
	4. U&A	7	24	-	42	25	1	31
	5. GOLD	4	29	26	24	14	4	45
Nearly all TV advertising annoys me	1. B&G '89	15	18	-	39	25	2	33
	2. B&G '94	13	15	-	41	29	2	28
	3. COI	17	22	-	38	21	3	39
	4. U&A	11	24	-	44	19	2	35
	5. GOLD	9	17	36	29	6	3	41
I find some TV advertising is OK, but I think quite a lot of it is devious	1. B&G '89	31	37	-	18	10	4	68
	2. B&G '94	29	33	-	23	12	3	62
	3. COI	23	46	-	18	6	6	68
	4. U&A	13	48	-	27	10	1	61
	5. GOLD	19	45	24	7	2	3	85
Quite often I find TV advertising more entertaining than the programmes	1. B&G '89	24	33	-	15	25	3	57
	2. B&G '94	26	33	-	15	24	2	59
	3. COI	17	37	-	18	26	2	54
	4. U&A	13	31	-	34	21	2	44
	5. GOLD	4	26	22	28	16	5	39

In the last column for swiftness of comparison we have given a combined 'agree at all' figure. In the case of TGI Gold we have allocated those who chose the middle option either to 'agree' or 'disagree' in the same proportion as those who actually chose the other four positions.

Overall we see only a very broad similarity between the five data sources. Clearly the methodological differences have yielded different results. The TGI Gold figures are the most out of line with the others, but it is here that we have the greatest methodological differences: a five point scale, with a neutral mid-point that has been used by a quarter of the sample, restriction of the sample to 50-75 year olds and the use of self-completion.

It is not our purpose here to enquire further into which of the many methodological differences is the driving force behind these results; or indeed whether it is not methodology but the inherent instability of the attitudes themselves that is being demonstrated. Clearly, however, if the line of argument of the main thesis of this paper is thought worth pursuing, a lot more work will need to be done on developing robust measures.

For the present, despite the differences in distributions on the scale it might still be possible to replicate the clusters in broad terms, so cluster analyses were undertaken on each of the U&A and TGI Gold datasets to compare with the Bond and Griggs 94 analysis.

#### 4. Results of the Cluster Analyses

For the U&A, we scored the four positions 1, 2, 3, 4 and for TGI Gold we scored the four attitude positions 1, 2, 3, 4 and the mid-point 2.5. We also specified a four-cluster solution.

The results were in one way disappointing, in another not!

They were disappointing in that neither solution matched Bond's at all closely. Perhaps this is a result of the differences in methodology, or in questioning technique or questioning context which resulted in the very different distributions shown in Table 1. Perhaps it is also a comment on the instability of cluster analyses. For present purposes, it is not necessary to delve into why we were unable to replicate the full results, merely to note that this was the outcome, because in another respect the results were not disappointing at all.

What was extremely encouraging about the two new cluster analyses, was that each produced a cluster akin to Bond and Griggs' Rejector cluster. (They also produced a group favourable to advertising that seemed somewhat like their 'TV Generation' or 'Interactives', but the other two groups were not like Bond and Griggs at all.)

In the U&A the 'Rejectors' cluster comprised 18% of the sample and in the TGI Gold sample they are 11%. The two clusters share the characteristic that on all four statements members of the cluster have a markedly less favourable attitude than the sample as a whole. The deviations of the mean of the clusters from the mean for the total samples are shown below.

**Table 2: Deviations of the Rejectors Cluster from the Mean for the Total Sample**

	U&A (238)	TGI Gold (439)
Nearly all TV advertising annoys me	+ 1.24	+ 1.49
I find some TV advertising is OK, but I think a lot of it is devious	+ 0.61	+ 0.91
I find TV advertising interesting and quite often it gives me something to talk about	- 0.56	- 1.52
Quite often I find TV advertising more entertaining than the programmes	- 0.48	- 1.23

Both of the cluster analyses also produced another cluster showing the reverse signs to those in the above table (TV Generation or Interactives in Bond and Griggs terminology).

Obviously there has to be a caveat about the instability and replicability of these cluster analyses. Nevertheless the fact that **both these two and Bond's analyses** produced a 'Rejectors' cluster suggests that such a group of people does exist in reality, even if the precise parameters have yet to be definitively delineated.

We readily admit that a great deal more developmental work needs to be done on the methodology for deriving stable clusters into which the whole population can be grouped. Nevertheless for the purposes of "insights", which is our present task, we do believe we can accept that a 'Rejectors' cluster exists and that in these two data sources we have allocated people to this cluster broadly correctly. This enables us to go forward to the key issues of describing the sort of people they are in demographic terms, in attitudinal terms, and in terms of the print and other media and product consumption.

## 5. Who are the Rejectors?

It is important to examine the demographics of the Rejector group, so that we can determine whether any behavioural differences we discover may be simply the result of demographic differences. We do not have directly comparable data from the three surveys on many characteristics. The table below gives the sex, age and social grade profiles of the total sample and the Rejectors group in the Bond and Griggs and the U&A surveys, and the sex and social grade profiles only for the TGI Gold cluster (who were, it will be remembered, all aged 50-75).

**Table 3: Demographic Profiles**

		<b>Bond &amp; Griggs</b>		<b>U &amp; A</b>		<b>TGI Gold</b>	
		<b>Total</b>	<b>Rejectors</b>	<b>Total</b>	<b>Rejectors</b>	<b>Total</b>	<b>Rejectors</b>
		<b>Sample</b>	<b>Cluster</b>	<b>Sample</b>	<b>cluster</b>	<b>Sample</b>	<b>Cluster</b>
<b>Sex:</b>							
	Men	48	45	48	49	48	51
	Women	52	55	52	51	52	49
<b>Age:</b>							
	Under 25	17	17	13	12	-	-
	25 - 44	36	33	41	30	-	-
	45 - 64	26	24	30	34	-	-
	65 or over	20	27	17	23	-	-
<b>Social Grade:</b>							
	AB	18	20	20	28	23	32
	C1	24	24	27	28	25	25
	C2	27	25	24	18	22	19
	DE	31	30	29	25	30	24

Both the U&A and TGI Gold Rejectors group appear to be slightly more skewed than the Bond and Griggs sample. This is not, of course, surprising since they are a smaller proportion of the total sample compared with the one-third they constitute of all respondents in the Bond and Griggs sample. Tentatively we would say that Rejectors tend to be **slightly older** and **slightly more up-market** than the population as a whole. However it is important to stress that the key point is that Rejectors are found in all age-groups, in all social classes and among both sexes.

Another key area is, of course, the Rejector group's level of ITV viewing. The three surveys collected TV viewing data in different ways. However, they all point in the same direction, namely that the Rejectors group have **slightly lower levels** of commercial television viewing. In the Bond and Griggs 94 work 38% of the Rejectors group are classified as "light ITV viewers" (undefined) compared with 32% of the total sample. In the U&A, the Rejectors claimed on average two hours of commercial television viewing per day compared with two hours and ten minutes for the total sample. In the TGI Gold survey 29% of the Rejectors group claimed to watch ITV for one hour or less per day compared with 24% of the total population.

It seems unnecessary to go to great lengths to attempt to standardise these results to some common measure. They clearly indicate that Rejectors do have a somewhat lower exposure to TV advertising than other groups, which is all we need to know for present purposes.

Overall, the U&A and TGI Gold reinforce the conclusion that Bond came to in his spoken script at the MRS Conference "On balance they are lighter ITV viewers than the rest; they have an older age profile. But, again, they are to be found in *all* sectors including the young".

## 6. Rejectors consumption of print media

Rejectors view slightly less television but, much more importantly, it is likely that they will not be responsive to communications via TV advertising. The first task in establishing whether print media represent a suitable vehicle for addressing advertising to this group is to examine readership levels. Readership of daily and Sunday press was covered in both the U&A and TGI Gold. In the U&A, the concept was "regular" readership, defined as three out of four issues on average. In TGI Gold the concept is akin to the National Readership Survey's 'average issue readership' measure i.e. read in the last publication interval. In the table below we show the readership levels according to these definitions for "Rejectors" expressed as a TGI-style index where 100 would indicate a level equal to that of the population and the higher the score the more likely Rejectors are to read the publication than the population as a whole.

**Table 4: Readership Indices for Rejectors: Daily Newspapers**

Bases: U&amp;A 238 and 1073, TGI Gold 439 and 3838

Quality Dailies	U&A "Rejectors"	TGI Gold "Rejectors"
Financial Times		
Daily Telegraph	208	141
The Times	164	115
The Guardian	129	246
The Independent	94	201
<b>Mid-market Dailies</b>		
Daily Express	119	93
Daily Mail	107	83
Today	121	112
<b>Popular Dailies</b>		
Sun	92	72
Daily Star	87	91
Daily Mirror	81	65
Daily Record	65	55

Because of the small sample sizes in the Rejector groups we have to exercise some caution in looking at the detailed figures. The sample size, and of course the differences in universe may also account for some of the fluctuations between the two surveys. However, what is abundantly clear is that the quality press represent a **more cost-effective media buying opportunity** than the popular press. Of course this might have been predicted knowing that Rejectors are somewhat biased to upmarket people and to light ITV viewers; but this doesn't make this finding useless. Rather this is another 'multiplier' effect: not only does the quality press pick up the light viewer it also picks up the "TV advertising rejector"; or in other words this finding strengthens the case for quality press. However it also shows that if entry in the popular press is critical, Today provides a much enhanced media buying opportunity compared with the other tabloid newspapers.

The next table shows readership of Sunday press.

**Table 5: Readership Indices for Rejectors: Sunday Newspapers**

Bases: U&amp;A 238 and 1073, TGI Gold 439 and 3838

Quality Sundays	U&A "Rejectors"	TGI Gold "Rejectors"
Sunday Telegraph	181	154
Sunday Times	145	110
Observer	138	176
Independent on Sunday	73	103
<b>Mid-market Sundays</b>		
Sunday Express	120	112
Mail on Sunday	101	60
<b>Popular Sundays</b>		
People	88	85
Sunday Post	88	76
Sunday Mirror	74	78
Sunday Mail	63	64
News of the World	62	76

Again the pattern is extremely clear, Rejectors have above average readership levels for quality press and below average for popular press. Once more such a pattern would be observed if we looked at an index based on up-market people and light viewers, so the effect of the Rejectors is again to reinforce more strongly reasons for choosing to advertise in these papers.

There is no further print media data available from the U&A but TGI Gold covers a large number of magazines. Looking at the indices for these we can find potential buying opportunities within this category. We present here three examples. The first is Gardening Magazines, the indices for which are shown below:

Gardening Which?	194
BBC Gardeners World	155
Practical Gardening	91
The Garden (Journal of the Royal Horticultural Society)	75
Garden Answers	86
Garden News	55

Two magazines have very high indices, all the others are below average. So it is not that Rejectors are uninterested in gardening and therefore don't read such magazines; rather they are very selective in the choice of magazine. The Gardening Which? figure is also paralleled on the indices for the main Which? magazine (153), and Holiday Which? (240). It is not simply a function of the basic demographics of readers of these publications either; both BBC Gardeners World and Garden News have an older, upmarket bias, but completely different levels of success in reaching this group of Rejectors.

The next example is women's weekly magazines for which the indices are shown below:

Woman's Journal	124
Woman and Home	90
Woman's Weekly	72
Woman's Own	70
Woman	47
Woman's Realm	38

On the whole women's magazines are not therefore a good vehicle for reaching this group, but if an advertiser required some representation of women's magazines on the schedule, then Woman's Journal is the obvious winner. It is worth noting that Woman's Journal has a niche readership of less than 500,000, substantially below the other titles.

The third example is the television programme listing magazines, where we would perhaps expect below average indices all round because of the group's lighter viewing pattern. The indices are given below:

Radio Times	130
TV and Satellite Week	85
What's on TV	79
TV Quick	79
TV Times	60

Four out of five publications perform according to expectation, but the fifth, Radio Times, does not. Could it be that Rejectors are reading Radio Times for its **radio** rather than its television content? This would appear to be at least part of the story, since this group have the highest index, admittedly only 106, for listening to national radio in the past week. What is more they prefer the more serious stations as the indices below show:

#### Indices for Radio Station Listened to Most Often

Radio 3	200
Radio 4	135
Classic FM	126
Radio 2	95
Radio 5	85
Radio 1	70

Our general conclusion is that it is clear that this group of Rejectors do have a different print media consumption pattern from the population as a whole. We may now consider how they differ in terms of their attitudes and lifestyle.

## 7. How do Rejectors Differ in Terms of Attitudes and Lifestyle?

Evidence on this topic is currently only available from the TGI Gold survey. The TGI Gold survey has altogether 183 lifestyle and attitude statements of which 28 are broadly speaking media related. The respondents had all previously completed a main TGI survey so this gives us access to a further 207 lifestyle and attitude statements of which 30 are broadly speaking media-related. Let us consider the media attitudes before going on to the other aspects.

### (a) Media attitude statements

Undoubtedly the Rejectors do differ in their attitudes from the total population. On the TGI Gold statements the indices ranges from 639 to 0!! The range is much less on TGI, from 198 to 28. For the present we will show a selection of indices to make the key points. First this group **really are** rejectors. Beside the four statements on which they are defined, indices on several other statements reinforce our feeling that this is a cohesive group which is strongly rejecting of TV advertising. Below are the indices for the four defining statements and four others which reinforce the picture - in each case the index is for the proportion who 'definitely agree'.

Nearly all TV advertising annoys me (Gold)	639
I don't find many advertisements are relevant to me (Gold)	311
Some TV advertising is OK, but I think quite a lot is devious (Gold)	307
I switch channels on TV during a commercial break (Gold)	279
When watching a video of a TV programme I usually fast forward through the advertisements (TGI)	145
On television I enjoy the advertisements as much as the programmes (TGI)	28
Quite often I find TV advertising more entertaining than programmes (Gold)	7
I find TV advertising interesting and quite often it gives me something to talk about (Gold)	0

However Rejectors are not necessarily receptive to advertising in other media, witness these indices.

I rarely notice poster advertisements (TGI)	198
I rarely notice the advertisements in newspapers and magazines (TGI)	166
I rarely notice whether an event is sponsored or not (TGI)	161
I often try something new after seeing an advertisement (Gold)	64

What is clear is that Rejectors do want advertising to be informative rather than entertaining.

I prefer advertising to be informative rather than entertaining (Gold)	253
In advertisements ordinary people are more convincing than celebrities (Gold)	148
I expect advertising to be entertaining (TGI)	94

In this respect, press as a medium has a distinct advantage, in that it can take space to inform. A few statements also suggest that the press is valued by Rejectors.

I read the financial pages of my newspaper (TGI)	138
rely on newspapers to keep me informed (TGI)	118

though there are warning signs:

The extra sections in newspapers make them more interesting (TGI)	91
I think newspaper colour supplements are really worth having (TGI)	90

Overall then, this group are strongly rejecting of TV advertising, and as far as press is concerned they seem to be serious readers and this fits in with their desire for advertising to be informative. Clearly the creative aspects of framing advertising for this group are particularly important and likely to be extremely challenging.



**(b) General lifestyle and attitude statements**

With so many other statements covered on TGI and TGI Gold we can do no more than scratch the surface in this paper. However we can pick out a few consistent sets of indices that give a feeling for the type of people rejectors are. In doing this, it is worth noting that the indices are in general lower than those to do with their views on TV advertising i.e. this latter is something that **really does** define this group.

Rejectors are strong on independent holidays:

I would never think of taking a package holiday (TGI)	191
I prefer to take holidays off the beaten track (TGI)	182
I try to take more than one holiday abroad each year (TGI)	166
I enjoy eating foreign food (TGI)	146
I try to go somewhere different on holiday every time (TGI)	146
I would never consider a cruise holiday (Gold)	132

They are also health conscious:

I consider my diet very healthy (TGI)	150
I don't normally nibble between meals (TGI)	165
make sure I take regular exercise (TGI)	147
I do some form of sport or exercise at least once a week (TGI)	144
I make a point of keeping fit (Gold)	135

They are pro-European and relatively anti-monarchy:

A single European currency would be good for Britain (Gold)	154
The Royal Family no longer does a good job for Britain (Gold)	143
If Britain left the European Union its trade would suffer (Gold)	138

Finally, they feel financially secure and contented:

I am perfectly happy with my standard of living (TGI)	145
I feel secure financially (Gold)	133
Life's been good to me (Gold)	120

Having got some clue as to the sort of person they are we may now consider some aspects of their product usage and purchasing patterns.

**8. Two Examples of Products Rejectors are more likely to buy**

With the vast array of brand and product data available within the main TGI and TGI Gold, we will here take just a couple of examples of product fields where Rejectors exhibit a high index and where a substantial case can be made for press advertising, and in particular advertising in the quality press.

First, savings and investments. We have already seen that Rejectors are more likely than average to read the financial pages of newspapers. 11% of the group in TGI Gold have an income in excess of £30,000 p.a. which yields an index of 135. In terms of having £50,000 or more in savings and investment, the index rises to 140, with 19% of Rejectors achieving this level. In terms of actual financial holdings, the indices for "acquiring or selling" in the last twelve months are well above average for many products:

Non-privatisation stocks and shares	154
PEP's	144
Investments Trusts	139
Tessas	134
Privatisation Shares	125
Unit Trusts	115

Second, holidays. We have seen that Rejectors are keen holiday-takers but averse to package tours. They have an index of 114 for having taken an activity holiday or one related to a hobby on their last holiday, an index of 121 for taking 3 or more holidays in the past year, and an index of 126 for spending over £1,000 on their last holiday.

In both these respects it is therefore possible to make a very strong case indeed for quality press and this does indeed reflect where these investments and holiday opportunities are advertised.

**One final crucial finding is that Rejectors have an index of 139 for having “phoned for goods and services advertised in a newspaper” in the last three months!**

## 9. Implications

It is clear to us that we are on to something here. We feel convinced that there is a group of people who may be termed TV advertising Rejectors, even if we do not yet know enough about how to identify them. We are equally clear that potentially this group represents a major opportunity for press, in particular quality newspapers and also individual titles within magazine subject-categories. Again we do not yet know quantitatively the size or other parameters of this opportunity. All of this needs more research. Before setting out the sort of research that might be helpful, we would like to give a hint of how press media owners and other interested parties might proceed in the immediate short term.

### (a) Acting in the immediate short-term

Although we have isolated a Rejectors group in both of our cluster analyses, equivalent to that found by Bond and Griggs, the cluster analyses are typically relatively unstable, and the respective size of the Rejector group differed in the three surveys. This doesn't prevent immediate use of the findings of this paper in a qualitative way to stimulate marketing thinking (and sales pitches by press media owners); but much more needs to be done on the quantitative front to establish robust measurement tools before the concept can be used in schedule analysis, say. Until this is done, we have a proposal as to how the questions may be used short-term in both qualitative research recruitment and quantitative research.

For their 1994 survey, Bond and Griggs have developed a 'simple' scheme for allocating people to their four clusters. This involves inspecting the full pattern of a person's answers and then using a matrix to determine to which cluster they belong. They have 19 answer combinations based on the respondents agreeing or disagreeing with each of the four statements. This enables them to allocate 88% of the sample correctly to the cluster to which they actually belong. Whilst obviously fairly efficient in terms of correct allocation and relatively easy to apply in a quantitative survey with computer analysis, this is somewhat time-consuming and possibly prone to error for something like group discussion recruitment.

We have a much simpler system to propose, though to be fair to Bond and Griggs this relates only to identifying "Rejectors". It allocates people to quasi Rejector or Non-Rejector groups only, not the four clusters that they are attempting to work with.

What we propose is that for **operational purposes**, Rejectors are defined as people who agree with both of the statements which are negative to TV advertising ('annoying', and 'devious') and disagree with both of the statements which are positive to TV advertising ('interesting ... talk about', and 'more entertaining than programmes'). This is obviously very simple and could certainly be used in group discussion recruitment for advertising work or for a simple two-way allocation of respondents in a quantitative survey where the focus was on Rejectors e.g. in readership studies, advertising tracking, etc.

Having made our proposal we can investigate within the U&A and TGI Gold how far a group defined in this way overlaps with the Rejectors group derived from the cluster analysis. We could perhaps call a group defined in this way as "Committed Rejectors".

In the U&A, the Rejectors cluster was 23% of the sample, the Committed Rejectors group comprise 14% of the sample but importantly every one of them comes from the Rejectors cluster. The hard-core Committed Rejector group accounts for 60% of all the Rejectors cluster.

For TGI Gold the analysis is much less clear cut. The Rejector cluster was 11% of the total sample, whereas the Committed Rejectors are 15% of the sample. There is substantial overlap: 76% of the Rejectors cluster are Committed Rejectors. On the other hand only 55% of the Committed Rejectors fall into the Rejectors cluster, with most of the rest (37%) in one of the other three. Our belief is that we do not have to look far for an explanation of why TGI Gold does not perform in the same way as the U&A, on this analysis. It lies in the use of a mid-point in the TGI Gold attitude scale which muddies the cluster analysis.

Our point at the moment is merely that using the simple mechanism proposed, the Committed Rejector route provides a very quick way of defining Rejectors for operational purposes. However, before moving to our last comments, it seems appropriate to check out whether the observations we have made in the main body of this paper based on TGI Gold data would hold if we had used the Committed Rejector definition rather than the Rejector cluster. Below we give the results for these two groups on a number of the key variables on which we have shown that Rejectors differ from the total sample:

**Table 6: Comparison of TGI Gold Rejector Cluster with Committed Rejector Group**

	<b>Rejector Cluster 439</b>	<b>Committed Rejector Group 589</b>
<b>Base:</b>		
<b>Demographics</b>		
Men	51%	51%
AB's	32%	30%
<b>ITV Viewing</b>		
One hour or less per day	33%	33%
<b>Press Readership Indices</b>		
	<b>Index</b>	<b>Index</b>
Daily Telegraph	141	154
The Times	115	89
The Guardian	246	187
Independent	201	199
Sunday Telegraph	154	153
Sunday Times	110	104
Observer	176	188
Independent on Sunday	103	87
Gardening Which?	194	161
BBC Gardeners World	155	136
Woman's Journal	124	146
Radio Times	130	115
<b>Other</b>		
3 or more holidays in past year	121	119
Spent £1,000+ on last holiday	126	121
Activity/Hobby holiday for last holiday	114	122
Savings £50,000+	140	133
Income £30,000+	135	143
Phoned for goods/service advertised in newspapers	139	138

It is clear that the Committed Rejectors group and the Rejectors cluster exhibit very similar characteristics, and the lack of complete overlap between them does not call into question any of our earlier observations about their importance as a target market for some press media owners.

#### **(b) Further research**

We believe the importance of this paper is that it has lent substantial support to the work of Bond and Griggs. We can be quite sure that there is a sizeable group of people who are Rejectors of TV advertising. We also believe that one way of reaching them as a target market is via certain press media. The nature of the message needs to be informative rather than entertaining if it is to persuade them.

In addition we believe that the indications are that this group is an important target market, not only for government who must reach everyone on occasion, but for marketers of many products. Much more needs

to be done on this latter aspect; we have only scratched the surface in this paper relative to the Gold age-group. When the main TGI comes along, then media planners can let rip with their analyses.

We also believe that this is only one aspect of the importance of the idea Bond and Griggs have initiated. There are important implications for the conduct of survey research. For example this group of Rejectors can be hypothesised as more likely to refuse to co-operate in survey research (including the National Readership Survey!).

Therefore it is clear that there is major potential for much more fruitful research. Our belief is that because of the potential importance of what seems to be emerging, a research programme should go back to basics somewhat. The development of Bond and Griggs is based on qualitative work that is now ten years out of date. An appropriate research programme would start with group discussions to define the parameters of the subject, followed by quantification not only to find a robust set of clusters and a definitive way of defining them, but also to tell us a lot more about what advertising approaches might motivate Rejectors of TV advertising to be Acceptors of other forms of communication.

The potential use of such work is major, not only for the selling of press space, but it is not beyond possibility that an 'attitude to TV advertising' classification variable could become as important and as frequently used as the standard weight of ITV viewing measure both in quota control and data analysis for surveys. Could we, one day, even find ourselves weighting probability sample surveys (like the NRS) to ensure that Rejectors are sufficiently represented?

Will anyone fund the required research project?

### References

1. BOND G. and GRIGGS S. "Viewer as consumer - government as advertiser" Proceedings of MARKET RESEARCH SOCIETY CONFERENCE 1995 pp 259-272
2. GORDON W. and RYAN C. "How do consumers feel advertising works" Proceedings of MARKET RESEARCH SOCIETY CONFERENCE 1983, pp 465-478
3. GORDON W and RYAN C. "The ads are better than the programmes" ADMAP CONFERENCE 1984

### Acknowledgement

The authors would like to acknowledge the contribution of their colleagues Bess Kemp and Steve Harris, who undertook the analyses given in the paper.



## THE MEDIA EFFECTIVENESS STUDY (1995)

Ivor Wm. Thompson, Thompson Lightstone & Company Limited

---

### 1.0 Introduction, Background & Methodology

Since 1980, the Publishers Clearing House, in cooperation with the Magazine Publishers of America (MPA), has commissioned a series of studies to measure consumers' perceptions of advertising in various media. In particular, the studies have concentrated on the relative values of magazines and television. In the 1991 study, a total of 978 personal interviews were conducted. The questionnaire, which was between 45 minutes and one hour in length, covered magazines subscribed to, readership, qualitative readership questions, product purchase, and household demographics.

In addition, a series of questions covered a comparison of magazines, radio, television, and newspapers in terms of how well they provided information on seven selected product areas. The survey also compared reactions to advertising, and consumer responsiveness to magazines and television. The results were very favourable to magazines. In each of the seven selected product areas, magazines were rated as providing *the most personal knowledge and supplying the most usable ideas*.

In 1994, Magazines Canada approached PMB Print Measurement Bureau to look at replicating the MPA study in Canada. The main PMB study is based on slightly more than 10,000 personal in-home interviews (on average about one hour in length) followed by a self-completion booklet (approximately 60 pages in length) covering the purchase and use of a wide variety of products and services. Since 1994, PMB has allowed members to recontact those who completed the initial survey. These recontact surveys must take place after the release of the main PMB results. Therefore there is a period of least three to four months before a respondent is recontacted (and on average at least six months).

The PMB *Return-to-Sample* process appeared to be an ideal survey research vehicle for collecting comparable data. The MPA study is based on a fairly lengthy series of questions directly related to measuring magazine readership which are asked prior to the questions comparing the efficacy of advertising in the various media. One could argue that there is the potential for bias in combining such a series of questions.

The PMB *Return-to-Sample* avoids this potential bias. All of the media usage measurement questions are asked in the initial PMB survey and are available for use in analysing *Return-to-Sample* data. The *Return-to-Sample* surveys are asked approximately one year after the main PMB survey so there is less likelihood that the respondents will associate any single medium with a *Return-to-Sample* survey.

The Canadian survey was also extended to cover other media in addition to magazines, television, radio, and newspapers. Direct mail and billboards were added for most of the questions. Further, the comparison of the effectiveness and response to advertising in magazines and television was extended to cover the other four media -- radio, newspapers, direct mail, and billboards. Finally, a number of questions were added which also investigated consumers' general reactions to various media. The result was a 13 page questionnaire which was mailed to a random sample of respondents from the 1993 fieldwork component of the PMB '94 database.

A sample of 3,600 respondents was randomly selected from the PMB data file. Each respondent was sent a questionnaire together with a covering letter, a \$2.00 bill, and a postage-paid return envelope. Questionnaires were mailed in French to all those people on the PMB database who indicated that this was their language used most often.

Four different versions of the questionnaire were prepared in both English and French. The versions rotated the order in which questions related to magazines, television, radio, and newspapers were asked in the survey. All the questionnaires were mailed before the beginning of December, 1994. Approximately two weeks later, a reminder card was sent urging people who had not returned the questionnaire to complete and return the survey as soon as possible.

Of the 3,600 questionnaires which were mailed out, a total of 222 questionnaires were returned as undeliverable. Of the remainder, 1,194 had been completed, returned, and tabulated as of January 9th (the cutoff date for tabulations). At the time of preparing the initial report another 312 completed questionnaires had been received. This response translates to a net completion rate of 44.6%. As in many mail surveys, replies continue to be received; based on these later replies, the overall response is slightly less than 50%.