

SHARPER OR SMOOTHER? SELECTIVE TARGETING THREE DECADES LATER

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Thirty years ago, in what were known in London as the "Swinging Sixties", the England football team held the World Cup, the Beatles were changing Western culture for good, and BMRB was planning the launch of the Target Group Index.

The Target Group Index, or TGI, was first published in 1969. Its main raison d'être remains to this day: to be a single-source survey, which combines the collection of product usage and media consumption behaviour from the same respondents. It wasn't the first survey of its type - Simmons for example were already active in this area in the US.

TGI was always intended to reflect the complementary nature of marketing, advertising and the advertising media as elements of a coherent larger commercial process. For media, BMRB's aim was to support a major step forward in UK media planning. Hitherto, buyers and sellers of media advertising had not been able to employ product-based targeting. Within the press market, the National Readership Survey had existed since the mid-1950s (although its fore-runners dated back to the 1930s) and of course ad hoc, or custom, product surveys were commonplace. For targeting purposes, planners were obliged to use demographic information based on assumptions about a brand's users, or at best on learning from ad hoc research. This was all relatively crude, and was certainly felt to be insufficient.

TGI's contribution to media planning was to add full product field and, crucially, brand information, collected from the same respondents whose media behaviour was being measured. Thus media planners and space sellers could now target product field users, or heavy volume users, or brand users.

In theory this approach would offer much greater media selectivity for product-based target audiences than would the use of a surrogate demographic target audience.

Chart 1 illustrates the advantages of the approach. A media planner targeting Building Society Account Holders would have assumed - or, possibly, known from an ad hoc study - that the target was skewed upmarket. The index for ABs was 125. Yet although this was true, only 2.5m of the 14.9m Account Holders were actually ABs. 12.4m were from other social grades. Thus a target of ABs would potentially leave out 83% of the market.

Chart 1 - Building Society Account Holders, 1969

| | <i> Holders </i> | <i> % </i> | <i> Index </i> |
|------------------------|------------------|------------|----------------|
| All Holders | 14.9m | 37.0 | 100 |
| Social Grade AB | 2.5m | 46.2 | 125 |
| C1 | 3.5m | 41.3 | 112 |
| C2 | 5.6m | 35.6 | 96 |
| DE | 3.3m | 30.6 | 83 |

Source: TGI 1969

Chart 2 uses TGI data from 1969 to compare the press media consumed by Building Society Account Holders (now directly targetable for the first time using the new TGI) and AB adults, which would probably have been the surrogate audience for media planning previously. A quite different set of candidate titles emerges, which reflects the reading patterns of Building Society Account Holders (our real target) much more accurately.

Chart 2 - Building Society Account Holders: Press Targets, 1969

| <i> Target : ABs </i> | <i> AIR % </i> | <i> Target: Account Holders </i> | <i> AIR % </i> |
|------------------------|----------------|----------------------------------|----------------|
| Radio Times | 44.6 | Daily Mirror | 34.8 |
| Sunday Express | 42.7 | The People | 33.3 |
| Drive | 35.3 | News of the World | 32.2 |
| Reader's Digest | 31.3 | Sunday Mirror | 32.0 |
| Daily Telegraph | 31.2 | Radio Times | 31.9 |
| Daily Express | 28.6 | Sunday Express | 30.8 |

Source: TGI 1969

Also introduced were the twin concepts of reach and profile for product usage. Chart 3 shows how, for the target of Holiday Takers in France, different sets of candidate titles were generated according to whether one was interested in large numbers (eg you could reach 38.9% with the Radio Times) or targeting efficiency with minimal wastage (eg over 10% of Queen and Punch readers were in the target).

Chart 3 - Holiday Takers in France: Press Targets, 1969

| <i>By Reach</i> | <i>%</i> | <i>By Profile</i> | <i>%</i> |
|-----------------|----------|-------------------|----------|
| Radio Times | 38.9 | Queen | 10.4 |
| Sunday Express | 36.6 | Punch | 10.2 |
| Daily Express | 34.0 | The Times | 9.9 |
| Reader's Digest | 31.6 | Nova | 9.8 |
| Drive | 29.7 | The Guardian | 9.5 |
| The People | 28.5 | National G'phic | 9.4 |

Source: TGI 1969

Almost thirty years later, with TGI well established in the UK and the concept being rapidly moved around the world, is its fundamental raison d'être still as strong ? This paper poses two questions:

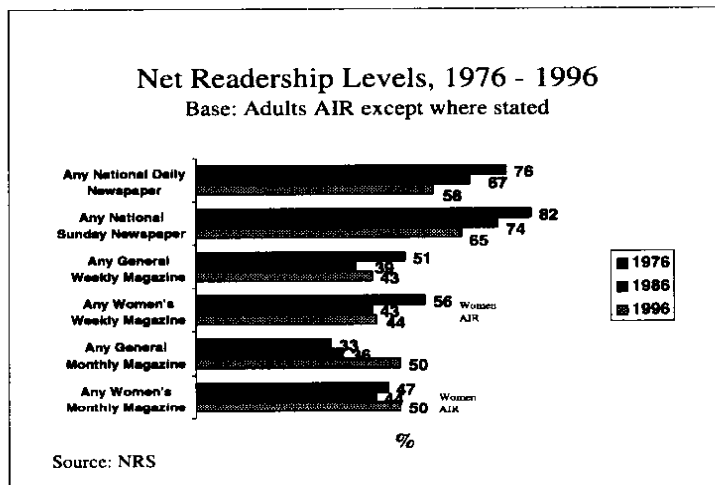
1. Comparing product fields and brand data, are user biases - and hence media selectivity - greater, similar to, or less than they were in 1969 ?
2. Does product and brand-based targeting still offer as many advantages over demographic targeting as in 1969 ?

There is little doubt that the effectiveness of targeting will have been affected by the interaction of three factors: press readership trends, market trends and demography.

Press Readership Trends

Overall readership levels in Britain are declining. (Chart 4). The National Readership Survey figures for 1976 and 1996 show that the net readership to any national daily morning newspaper dropped from 76% to 58% of adults across this 20-year period. This drop, of 18 percentage points in 20 years, equates to almost one percentage point per annum. Among 15-24 adults, the picture is even worse: a drop from 79% to 54%. Readership of national Sunday newspapers has suffered just as badly, falling from 82% to 65%. Magazine reading shows more of a mixed picture. Readership to general and women's weeklies is lower now than in 1976, but this decline occurred prior to 1986, since when there has been some growth. Readership of general and women's monthlies has grown, across the period. The significant growth has been among what are classified as "general monthlies" - a reflection of the trend in publishing for magazines to become more and more specialist in subject matter.

Chart 4



Allied to this, there have been big drops in readership for established titles. Mass audiences are a thing of the past. Chart 5 shows the top publications by readership in 1969 - the first year of TGI - and 1996. In 1969 eleven titles achieved an adult AIR higher than 20%. In 1996 only two titles achieved an adult AIR of over 20%, and the 10% mark was reached by only 11 titles. (NB This analysis, as with all others in the paper, omits the colour supplements which are published with many newspapers.)

Chart 5 - Highest-Readership Titles, 1969 and 1996
Adult AIR %

| 1969 | % | 1996 | % |
|--------------------------|----------|--------------------------|----------|
| Daily Mirror | 34.5 | News of the World | 26.4 |
| The People | 33.9 | The Sun | 22.6 |
| News of the World | 33.5 | Sunday Mirror | 16.4 |
| Sunday Mirror | 31.5 | Daily Mirror | 14.2 |
| Daily Express | 29.8 | Mail on Sunday | 12.9 |
| Sunday Express | 28.5 | Reader's Digest | 12.4 |
| Radio Times | 28.1 | Sky TV Guide | 12.1 |
| Woman | 26.5 | The People | 11.9 |
| TV Times | 26.2 | Take a Break | 11.1 |
| Woman's Own | 22.8 | Radio Times | 10.2 |
| Reader's Digest | 22.7 | Daily Mail | 10.0 |

Source: TGI 1969, 1996

The implication of this is that media buyers can not reach audiences as large as before in one single hit. This is well illustrated by examining the media selectivity for Courvoisier Brandy. In 1969, one advertisement in the Sunday Express would have reached over 40% of Courvoisier drinkers. In 1996 the largest possible audience achieved with one advertisement is in the News of the World, where under 24% would be reached in one hit. (Chart 6).

Chart 6 - Courvoisier Drinkers: Media Selectivity, 1969 and 1996
Adult AIR %

| 1969 Reach | % | 1996 Reach | % |
|---------------------------|----------|---------------------------|----------|
| Universe 2,561,000 | | Universe 2,834,000 | |
| Sunday Express | 40.6 | News of the World | 23.6 |
| Radio Times | 38.1 | The Sun | 20.2 |
| Daily Express | 36.3 | Readers Digest | 18.0 |
| Reader's Digest | 30.9 | Mail on Sunday | 16.2 |
| News of the World | 29.8 | Sunday Mirror | 14.8 |
| Daily Mirror | 29.6 | M&S Magazine | 13.4 |

Source: TGI 1969, 1996

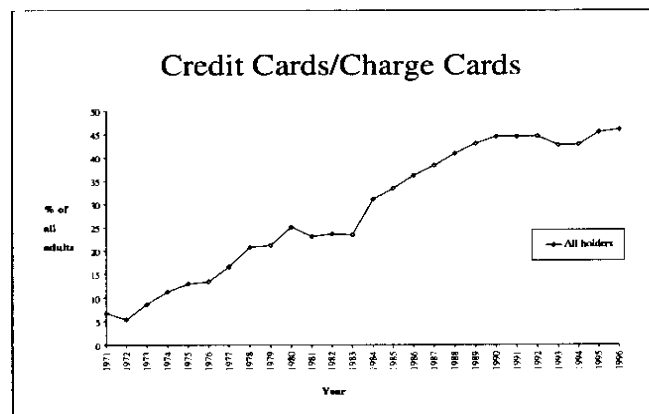
Of course this problem does not only affect the planning of press schedules. Media planners face equivalent issues in other media too - not least television. In the UK in 1983, the average spot GRP across all broadcast airtime was 11.5; in 1995 the average in homes with cable or satellite was 4.9. Media planning in all media has become significantly more complex due to media fragmentation, and will continue to do so.

Market Trends

With 28 years worth of data to explore, it is inevitable that some markets covered by TGI will overall have grown, some will be down, some will be cyclical and some static. Here are a few examples (not all with 28 years of data, since some are newer markets and others have been redefined during the period):

Within the Financial sphere, the usage of credit and charge cards has increased many times over. 5% of adults held these in the early 1970s, whereas the figure is now 45%. (Chart 7).

Chart 7



A still more dramatic increase was experienced in the holding of stocks and shares in the mid-1980s. A series of government privatisations saw stock ownership leap from 7% in 1985, to 22% just three years later, in 1988. (Chart 8). After that point, however, the former governments declared aim of widening the base of shareholders in Britain failed, and for the last five years more people have been selling than buying stocks.

Chart 8

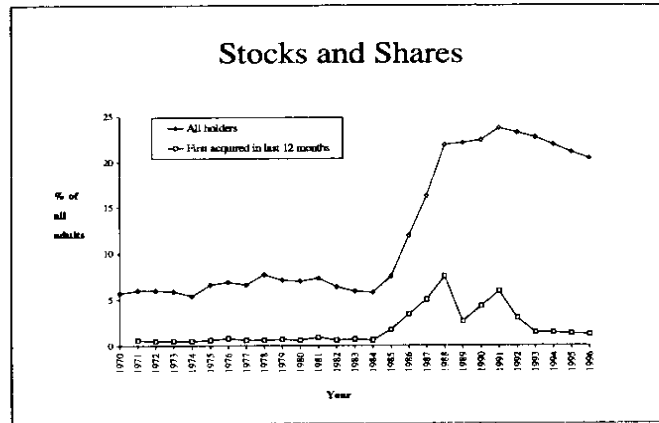
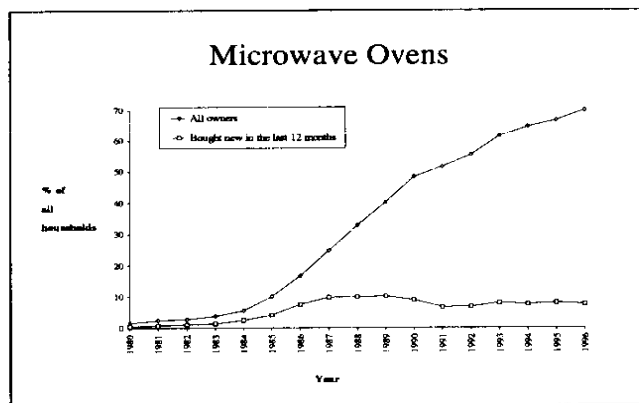


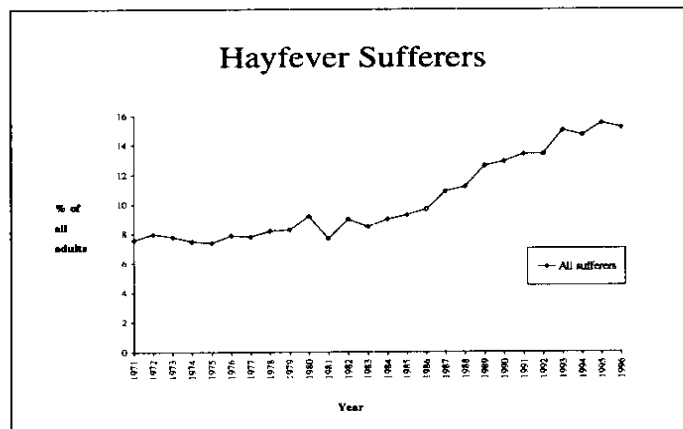
Chart 9 shows another market which has enjoyed dynamic growth: the ownership of microwave ovens, which ran at a very low level until 1984, has now shot up to 70% of households.

Chart 9



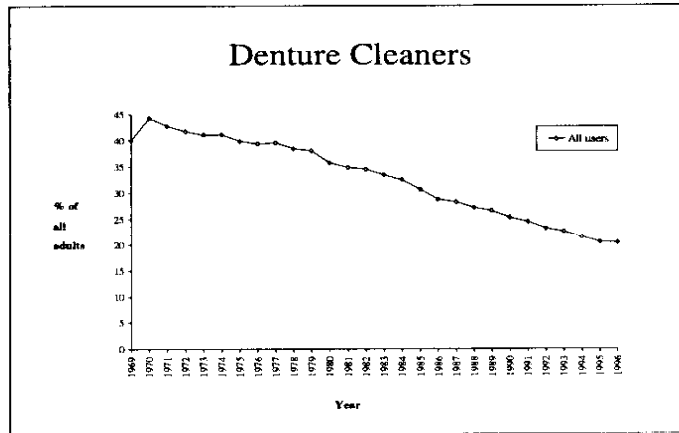
It is not simply product usage or ownership that can be investigated using TGI. Chart 10 shows that the percentage of people in Britain claiming to suffer from hayfever, which remained stable throughout the 1970s, has doubled from around 8% to 16% between 1983 and 1996. Does this indicate, as some would claim, people suffering from poor air quality, or are the British becoming a nation of hypochondriacs?

Chart 10



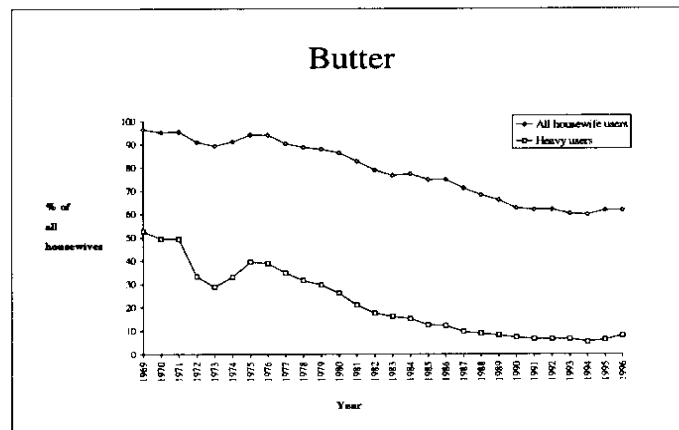
One market which has seen decline is that of denture cleaners - from which one can make an excellent assumption about how many people wear false teeth - which has fallen by more than half: from well over 40% in the early 1970s to around 20% today. (Chart 11).

Chart 11



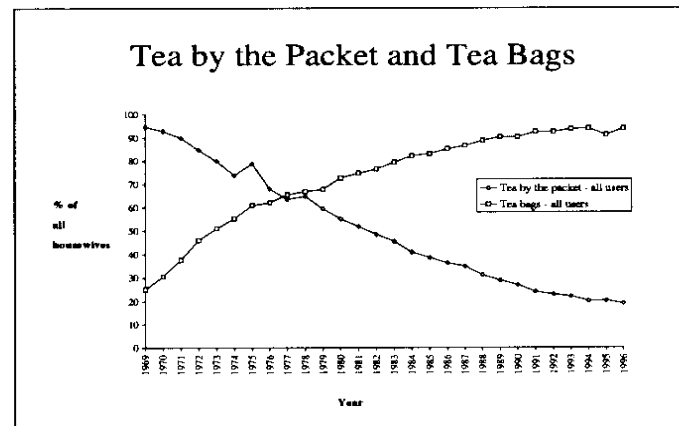
The trend in the butter market is a very interesting one (Chart 12). In 1969 this was a product consumed in virtually all households, but with scares about healthy eating and the growth of low fat spreads having an effect from the late 1970s, usage fell to around 60% of housewives by 1990. However, the decline seems to have stopped at this point. What is also noteworthy is that those who are eating butter are eating less. The proportion of heavy users (defined as those who use at least three 250g packs per week) has dropped from 50% to below 10% of all users.

Chart 12



In some cases it is possible to observe the interaction of related markets. Chart 13 shows the inverse relationship over time between households using packet tea and those using tea bags. The convenience of teabags has won the day.

Chart 13



Looking back over the data, relatively few markets have changed direction over time. One that has done so is the vermouth market (represented by brands such as Martini and Cinzano). This market grew from 1969 to a peak in 1981 (at the time of a famous advertising campaign for Cinzano starring Joan Collins and Leonard Rossiter) but has been in decline since. (Chart 14).

Chart 14

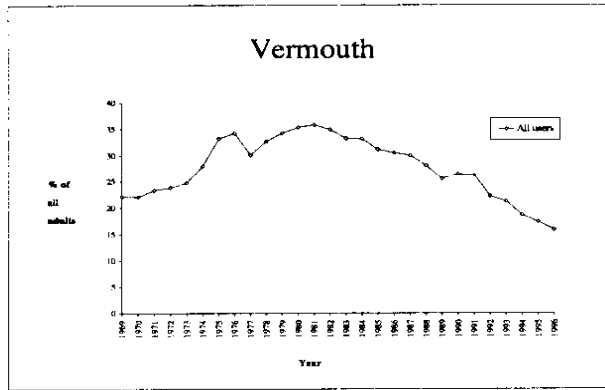
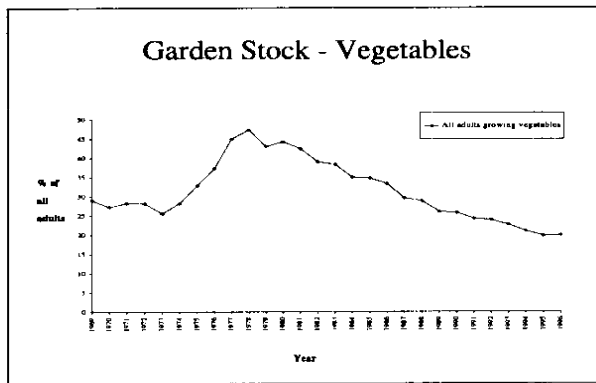


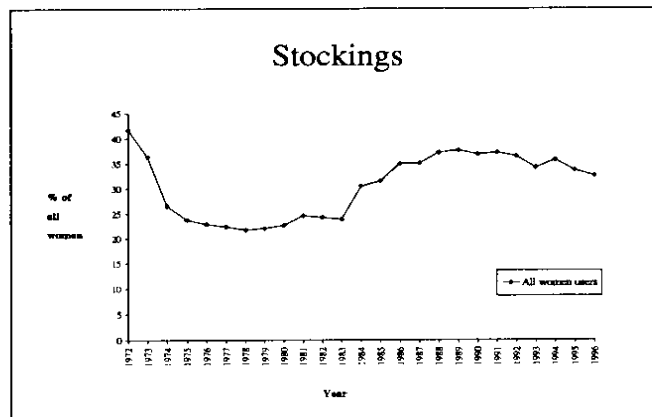
Chart 15 shows a rather more bizarre example, that of people growing vegetables in their own gardens. This activity almost doubled between 1973 and 1978. One can only put this down to the popularity of the television programme "The Good Life" in which the leading characters opted out of the business world for a life of self-sufficiency. After the programme ceased its run, levels declined back to their previous mark.

Chart 15



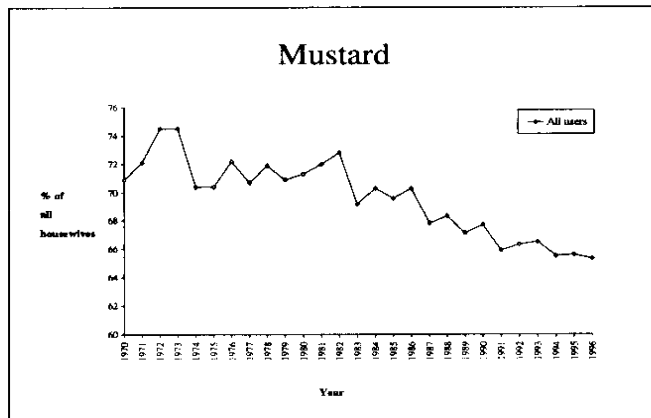
The only example I could find of a market taking two twists is that of stockings. With tights becoming universally worn by women during the 1970s, the market for stockings collapsed very quickly to less than a quarter of all women. At this point, most users were aged 65 and over. During the mid to late-1980s, however, stockings made a comeback as a fashion item for younger women. Usership rose to over 35% of women, and the profile was strongly biased to women in their 20s and 30s. But 38% usership in 1989 has become 33% in 1996, as trends in clothing, and more particularly in hosiery, have moved on once again. (Chart 16).

Chart 16



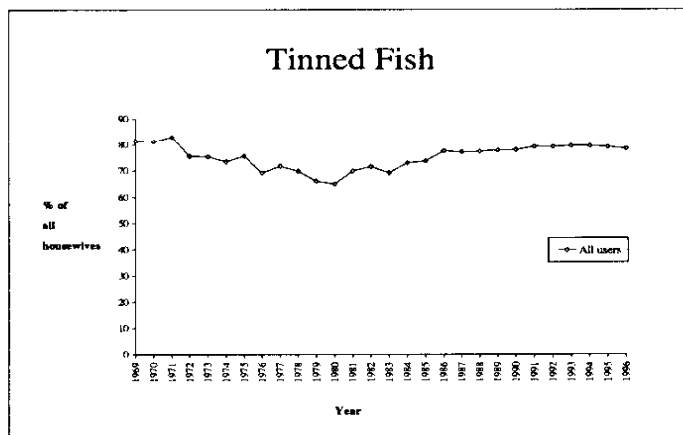
Some markets have seen very little movement. In particular this can be said for certain high-usage food product fields, such as mustard (Chart 17), usership of which has remained between 65 % and 75 % of housewives throughout the period since 1970.

Chart 17



Another example of a flat market (notably so over the last ten years in particular) is that of tinned fish. This is another of the food product fields which might be described as 'staples' and which have seen little movement. (Chart 18).

Chart 18



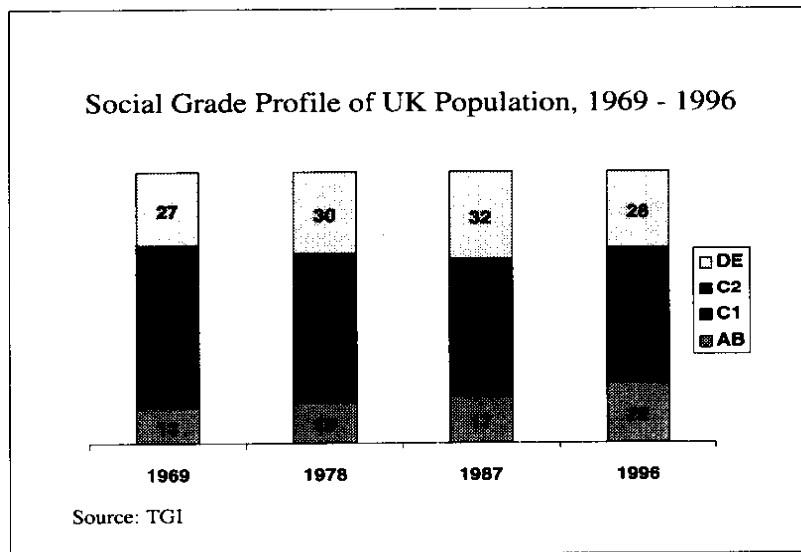
Of course, if one looks at brands rather than overall market sizes, there is much more dynamism to be seen. Launches, new product formulations, distribution changes, advertising - all have their effect. That said, an academic analysis of TGI data a few years ago found that of 150 brand leaders measured by TGI in 1969, the majority (53%) remained the brand leaders in their respective markets according to 1989 TGI data. This finding sets a very large question mark against the concept of the Product Life Cycle, but that is another story.

Demography

It is also the case that demographic changes within the population will have had an effect on targeting selectivity. Overall the UK adult population has grown by around 12% between 1969 and 1996. Trends in the age profile are of course cyclical, so the current bulge in the proportion of 25-34 year-olds will continue moving through the population. The growth in the number of older adults, in Britain classified as 65 and over, is permanent.

There has been a significant movement in the social grade profile over the period. Compared to 1969, by 1996 the population had become much more upmarket: 49% are now classified as ABC1 as against just 34% in 1969. This trend - which has been a constant one across the period, as the figures from 1978 and 1987 show - has come at the expense of the skilled worker class of C2s, as Britain has become more of a service economy. (Chart 19)

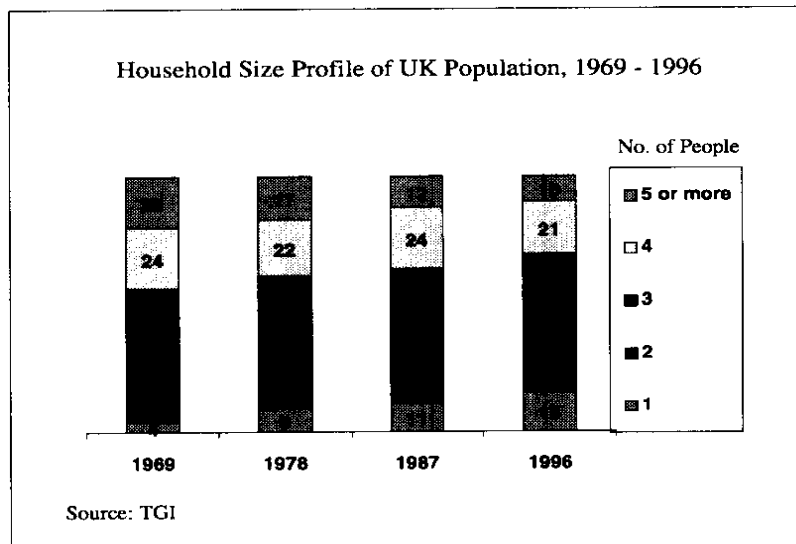
Chart 19



Other changes are that many more people now stay on in full-time education: the 15% of adults educated to the age of 17 or over in 1969 have become 38% by 1996. Also many more Britons have become home owners: 73% own, or are in the process of buying, their home in 1996, compared with 45% in 1969.

A further demographic factor, which will have particular pertinence to many product categories, is the change in the picture of household size. By 1996, one person households made up 16% of all homes, as against just 4% in 1969. With people tending to have children later and live longer, the number of two person households has also grown. Larger household sizes are less common, especially those of five or more individuals which have shrunk from 20% to 10% of households. All in all, the number of shoppers has grown by more than the number of adults. (Chart 20).

Chart 20



Targeting

Concerning the selectivity of markets over time, one might hypothesise that in growing markets user biases will reduce, in declining markets user biases will increase, and in static markets user biases will remain much the same. Let us explore three alcohol product fields to test this.

Firstly, Table Wine - a major growth market, with usership rising from 13.1m (32.4% of adults) more than twofold to 30.5m (69.9%) in 1996. When the market was smaller, in 1969, certain demographic groups discriminated well (Chart 21). AB adults, the highest income group, better educated adults and ABC1 16 - 34's all indexed at around 200. By 1996 the top indexing

demographic group stood at around 120. But this is hardly a surprise: the maximum possible index, against a base of 69.9%, is 143 - much lower than the peaks in 1969.

Chart 21 - Table Wine: Target Selectivity, 1969 and 1996

| <i>1969</i> | <i>Index</i> | <i>1996</i> | <i>Index</i> |
|-------------|--------------|-------------|--------------|
| AB | 207 | ABC1 35-54 | 124 |
| Top Income | 196 | Top Income | 123 |
| T.E.A. 18+ | 194 | AB | 121 |
| ABC1 16-34 | 190 | T.E.A. 19+ | 119 |
| London | 135 | South | 111 |

Source: TGI 1969, 1996

Similarly selectivity within media, if one examines the profiles and indices of titles read by Table Wine drinkers, has decreased too. Again, in 1969 indices of around 200 were achieved by several titles, whereas in 1996 the highest index achieved by any title was 130. That said, by 1996 somewhere around 90% of the readers of several titles were wine drinkers - thus allowing media planners on wine accounts a form of no-risk planning. (Chart 22).

Chart 22 - Table Wine: Press Targets, 1969 and 1996
Profile and Index: Adults

| <i>1969</i> | <i>Profile %</i> | <i>Index</i> | <i>1996</i> | <i>Profile %</i> | <i>Index</i> |
|-----------------|------------------|--------------|-------------------|------------------|--------------|
| All users | 32.4 | 100 | All Users | 69.9 | 100 |
| Queen | 68.5 | 211 | High Life | 90.7 | 130 |
| Financial Times | 66.6 | 205 | M&S Magazine | 88.5 | 127 |
| Sunday Times | 66.3 | 205 | BBC Good Food | 88.0 | 126 |
| Harpers Bazaar | 65.7 | 203 | Options | 87.7 | 126 |
| Punch | 65.1 | 201 | Good Housekeeping | 87.3 | 125 |

Source: TGI 1969, 1996

If one was targeting by reach rather than by profile, the top titles in 1996 reached around half the percentage number of wine drinkers as their equivalents in 1969 - although the actual numbers reached were much the same. This is of course a function of the market more than doubling in size. (Chart 23).

Chart 23 - Table Wine: Press Targets, 1969 and 1996
Reach: Adults

| <i>1969</i> | <i>000</i> | <i>%</i> | <i>1996</i> | <i>000</i> | <i>%</i> |
|-----------------|------------|----------|-------------------|------------|----------|
| Sunday Express | 5,133 | 39.2 | News of the World | 7,114 | 23.4 |
| Radio Times | 4,840 | 37.0 | The Sun | 5,844 | 19.2 |
| Daily Express | 4,241 | 32.4 | Sunday Mirror | 4,691 | 15.4 |
| Reader's Digest | 4,003 | 30.6 | Mail on Sunday | 4,572 | 15.0 |
| Woman | 3,908 | 29.8 | Reader's Digest | 4,232 | 13.9 |
| All Users | 13,096 | 100 | All Users | 30,450 | 100 |

Source: TGI 1969, 1996

In a declining market, that of Sherry, many of the converse trends are true. Looking first at the targeting selectivity (Chart 24), we can see that in a market which has declined by almost half (from 26.9m or 66.7% of adults to 15.5m or 35.5% of adults), the targeting selectivity is now greater. The indices achieved for certain demographic groups are much stronger. Incidentally, it is interesting to note the cohort effect in action here. In 1969, ABC1 adults aged 35 and over were a high-indexing group; in 1996 the highest-indexing group are ABC1 adults aged 55 and over - effectively the same group of people 20 or more years further on.

Chart 24 - Sherry: Target Selectivity, 1969 and 1996

| <i>1969</i> | <i>Index</i> | <i>1996</i> | <i>Index</i> |
|-------------|--------------|-------------|--------------|
| AB | 126 | ABC1 55+ | 175 |
| ABC1 35+ | 122 | 55+ | 151 |
| T.E.A. 17+ | 119 | AB | 142 |
| Top Income | 117 | T.E.A. 19+ | 126 |
| 45 - 54 | 110 | South West | 124 |

Source: TGI 1969, 1996

Equally, as Chart 25 shows, with the Sherry market in decline, the media selectivity increases. In 1969 the highest index achieved was 125; in 1996 a number of titles achieved over 150. Again, just as one would expect.

Chart 25 - Sherry: Press Targets, 1969 and 1996
Profile and Index: Adults

| 1969 | Profile % | Index | 1996 | Profile % | Index |
|----------------------|------------------|--------------|-----------------|------------------|--------------|
| All users | 66.7 | 100 | All users | 35.5 | 100 |
| Queen | 83.7 | 125 | Woman & Home | 60.2 | 169 |
| Woman's Home Journal | 83.6 | 125 | Birds (RSPB) | 59.8 | 168 |
| Financial Times | 82.7 | 124 | High Life (BA) | 57.2 | 161 |
| Homes & Gardens | 82.4 | 124 | Country Living | 56.4 | 159 |
| Sunday Telegraph | 81.9 | 123 | Daily Telegraph | 55.8 | 157 |

Source: TGI 1969, 1996

It is when looking at the comparative lists of top titles by reach that an interesting point emerges. (Chart 26). The best titles by reach in 1996 achieve around half the levels of the best titles in 1969, when looked at in percentage terms. This particular finding is exactly the same as in the growth market of Table Wine.

In terms of actual numbers, the market has approximately halved and the number of Sherry drinkers available in one hit by booking an advertisement into one of the top publications has dropped by three-quarters. This finding - that the percentage of the target market reachable in one hit has halved both in a growing market (Table Wine) and a declining market (Sherry) - points us to the conclusion that it is the size of the readership of the titles that is the key factor here. Whatever the market is doing, the fact that title readership figures are much smaller today than 27 years ago means that the same product-based audiences can simply not be achieved.

Chart 26 - Sherry: Press Targets, 1969 and 1996
Reach: Adults

| 1969 | 000 | % | 1996 | 000 | % |
|-------------------|------------|----------|-------------------|------------|----------|
| Daily Mirror | 8,980 | 33.3 | Reader's Digest | 2,596 | 16.8 |
| The People | 8,962 | 33.3 | News of the World | 2,566 | 16.6 |
| Sunday Express | 8,630 | 32.0 | Mail on Sunday | 2,325 | 15.0 |
| News of the World | 8,502 | 31.6 | The Sun | 2,210 | 13.6 |
| Daily Express | 8,318 | 30.9 | Radio Times | 2,102 | 13.6 |
| All Users | 26,939 | 100 | All Users | 15,480 | 100 |

Source: TGI 1969, 1996

The alcohol product field which seems to have shown least volatility between 1969 and 1996 is Brandy. That said, it experienced a decline of around 20% from 13.4m adults (33.2%) in 1969 to 11.2m adults (25.7%) in 1996. Given that this market experienced this relatively small decline (compared to Sherry at least) one is not surprised to see the top indices for demographic target groups being a little higher in 1996 than they were in 1969. The cohort effect amongst the ABC1 adults who were 35 and above in 1969 and 55 and above in 1996 is again visible here.

Chart 27 - Brandy: Target Selectivity, 1969 and 1996

| 1969 | Index | 1996 | Index |
|-------------|--------------|-------------|--------------|
| AB | 133 | ABC1 55+ | 142 |
| Top Income | 130 | Men 45+ | 135 |
| ABC1 35+ | 130 | 55 - 64 | 133 |
| T.E.A. 18+ | 129 | AB | 131 |
| Men 45+ | 120 | Top Income | 128 |

Source: TGI 1969, 1996

Looking at the top titles for media selectivity by profile and index, we see little difference in the overall levels between the two points, with the top publications tending to score in the region of 150. (Chart 28).

Chart 28 - Brandy: Press Targets, 1969 and 1996
Profile and Index: Adults

| 1969 | Profile % | Index | 1996 | Profile % | Index |
|-----------------|-----------|-------|--------------------|-----------|-------|
| All Users | 33.2 | 100 | All Users | 25.7 | 100 |
| Financial Times | 54.2 | 163 | High Life (BA) | 45.4 | 177 |
| In Britain | 52.7 | 159 | BBC Good Food | 40.4 | 157 |
| Country Life | 52.4 | 158 | Woman's Journal | 38.6 | 150 |
| The Field | 50.5 | 152 | Sainsbury's M'zine | 37.8 | 147 |
| House & Garden | 50.2 | 151 | Sunday Telegraph | 37.5 | 146 |

Source: TGI 1969, 1996

And in this reasonably static, albeit slightly declining market, Chart 29 shows us that, once again, the percentage reach levels have approximately halved in 1996 compared to 1969.

Chart 29 - Brandy: Press Targets, 1969 and 1996
Reach: Adults

| 1969 | 000 | % | 1996 | 000 | % |
|-------------------|--------|------|-------------------|--------|------|
| The People | 4,708 | 35.1 | News of the World | 2,668 | 23.8 |
| News of the World | 4,549 | 33.9 | The Sun | 2,127 | 19.0 |
| Daily Mirror | 4,440 | 33.1 | Sunday Mirror | 1,802 | 16.1 |
| Sunday Express | 4,389 | 32.7 | Reader's Digest | 1,781 | 15.9 |
| Daily Express | 4,352 | 32.4 | Mail on Sunday | 1,731 | 15.5 |
| All Users | 13,418 | 100 | All Users | 11,200 | 100 |

Source: TGI 1969, 1996

Individual Publications

Let us look in more detail at two case studies which take as a starting point press titles rather than markets.

Firstly, the case of the Times. In the early 1980s the Times was in the doldrums. Not long before, it had suspended publication for almost a whole year due to a labour dispute. As reported by 1982 TGI, its readership stood at 864,000 adults. Subsequently, through a series of marketing, promotional and pricing initiatives, its publishers News International have managed to double the readership level - 1996 TGI reports it at 1,721,000 adults. Even though this latter figure still only represents 3.7% of all adults, one would still expect the Times' selectivity for specific products to have decreased. Chart 30 takes eight different product fields at random and shows that this is precisely what has happened: reduced selectivity in all 8 cases.

Chart 30 - Selectivity of the Times: 1982 and 1996

| Adult AIR | 1982 Index | 1996 Index |
|---------------------------|------------|------------|
| Purchased Paperback Books | 155 | 148 |
| Holiday in Spain | 110 | 96 |
| Own Stocks & Shares | 326 | 169 |
| Drink Table Wine | 145 | 119 |
| Shop at Tesco (HW) | 130 | 123 |
| Use Ground Coffee (HW) | 227 | 178 |
| Use Fresh Cream (HW) | 135 | 115 |
| Use Yoghurt (HW) | 134 | 108 |

Source: TGI 1982, 1996

The second press example shows that one's hypotheses do not always hold true. Let us examine the case of the Daily Express and the Daily Mail, which today compete head-on in the middle market. Back in 1969 things were different: then the Express had twice as many readers as the Mail. The social grade profiles were very flat for the Express and somewhat biased towards ABC1 adults for the Mail. By 1996 the Express had lost 9,000,000 readers - three quarters of its readership - and the Mail, although it had lost more than 1,000,000 readers, now had a readership 50% higher than the Express. Its social grade profile was unchanged, although its readership had become distinctly older in profile. By this time the readership profile for the Express matched that for the Mail very closely. (Chart 31).

Chart 31 - Daily Express and Daily Mail: 1969 and 1996

| | | 1969 | 1969 | 1996 | 1996 |
|------------------|----------|---------------|------------|---------------|------------|
| | | Daily Express | Daily Mail | Daily Express | Daily Mail |
| Adults | | | | | |
| AIR (000) | | 12,043 | 5,888 | 3,032 | 4,618 |
| Index | AB | 96 | 135 | 124 | 134 |
| | C1 | 110 | 126 | 130 | 118 |
| | C2 | 99 | 90 | 93 | 93 |
| | DE | 95 | 76 | 59 | 62 |
| Index | under 24 | 91 | 92 | 87 | 75 |
| | 25-34 | 99 | 85 | 69 | 64 |
| | 35-44 | 100 | 95 | 81 | 90 |
| | 45-54 | 104 | 107 | 110 | 117 |
| | 55-64 | 108 | 112 | 134 | 131 |
| | 65+ | 98 | 110 | 128 | 132 |

Source: TGI 1969, 1996

Chart 32 takes the same eight product fields as examined for the Times in the example above, and shows that in 1969, for seven of the eight product fields, (the exception being Holiday-Taking in Spain) the Mail achieved a higher index of selectivity than the Express. This is scarcely a surprise, given that its readership was half the size, giving it greater opportunities for selectivity, and in those days it was more upmarket in profile.

The TGI data of course allowed both titles to make their sales pitch: the Express could sell on numbers whilst the Mail could sell on profile.

By 1996, with very similar demographic profiles and higher readership for the Daily Mail, one would expect the Daily Express to achieve the higher indices. And yet this does not happen. The Express holds the lead in only two of the eight categories - one significant and one marginal. The Mail leads in five categories, even if it is marginal in all but one case. So, in 1996 the Mail wins both ways - both on the absolute numbers and on the profiles.

Chart 32 - Selectivity of the Daily Express and Daily Mail: 1969 and 1996

| | 1969 | 1969 | 1996 | 1996 |
|----------------------------------|---------------|------------|---------------|------------|
| | Index | Index | Index | Index |
| Adult AIR | Daily Express | Daily Mail | Daily Express | Daily Mail |
| Purchased Paperback Books | 104 | 117 | 110 | 115 |
| Holiday in Spain | 132 | 112 | 149 | 121 |
| Own Stocks and Shares | 100 | 120 | 150 | 156 |
| Drink Table Wine | 109 | 120 | 116 | 113 |
| Shop at Tesco (HW) | 96 | 112 | 110 | 114 |
| Use Ground Coffee (HW) | 103 | 139 | 109 | 122 |
| Use Fresh Cream (HW) | 109 | 118 | 112 | 115 |
| Use Yoghurt (HW) | 103 | 113 | 103 | 103 |

Source: TGI 1969, 1996

So the hypothesis of lower absolute numbers bringing higher indices and higher numbers bringing lower indices does not always hold true. And I must say I am rather glad. Things are not always that rigid or remorselessly logical, and publishers trying to find a sales case for their titles can continue to explore TGI data in the hope or expectation of finding something to shout about.

Conclusion

In the first part of this paper we hypothesised that the effectiveness of targeting will have been affected by the interaction of three factors: market trends, demography and press readership. One is drawn to the conclusion that, at the broad level, it is the trends in press readership which have had the greatest effect.

Certainly at the level of individual markets, specific trends are extremely important. It is however inevitable that some markets will grow and others will decline over a period of time, and equally inevitable that the selectivity of media will either decrease or increase accordingly within individual markets.

Demographic trends - although they have not been analysed in great detail in this paper - will also have had an effect. A more affluent, better educated and more mobile population will gravitate towards or away from particular products, brands and also particular media. More adults, living in smaller households, means many more shoppers.

But it is the change in shape and dynamic of the press market which has done most to bring about the changes that we have observed. Over this period of almost 30 years, the newspaper medium has experienced substantial general decline. Individual titles have by and large gone the same way. (Exceptions, such as the Sun, are rare).

Magazines have held up much better overall. If anything, net readership levels are higher now than they were in 1969. As with newspapers, there are fewer mass market magazines, but publishers have dealt with trends much more effectively through launches, closures and repositionings.

The trend has certainly moved away from market dominance by a relatively small number of big titles - a factor which generated some common reading experiences amongst large numbers of people - towards smaller, more specialist titles aimed at particular interests.

In 1969, as Chart 33 shows, 102 titles were measured and published on TGI. 11 of these had individual Average Issue Readership figures of more than 20% of adults each, and the gross readership to these 11 publications was 42% of the gross readership of all publications measured. The other 91 titles mustered only 58% of the gross readership between them.

Chart 33 - Publications Reported on TGI: 1969 and 1996

| Adult AIR | 1969 | | | 1996 | | |
|--------------------|--------------|--------------|----------------|--------------|--------------|----------------|
| | No of titles | Gross AIR | % of Gross AIR | No of titles | Gross AIR | % of Gross AIR |
| 20% or more | 11 | 318.0 | 42 | 3 | 74.7 | 11 |
| 10% - 20% | 12 | 145.0 | 19 | 12 | 150.9 | 23 |
| 5% - 10% | 23 | 159.0 | 21 | 22 | 159.3 | 24 |
| 2% - 5% | 36 | 109.9 | 15 | 52 | 165.5 | 25 |
| under 2% | 20 | 23.6 | 3 | 109 | 116.2 | 17 |
| Total | 102 | 755.5 | 100 | 198 | 666.6 | 100 |

Source: TGI 1969, 1996

By 1996 the number of titles reported on computer tapes was 198. With newspaper supplements this time included in the analysis, still just three had adult AIR figures of above 20%. Only 11% of the gross readership for all 198 titles goes to these three publications. The gross readership is spread much more evenly overall.

But perhaps the most significant figure on this chart is the simple number of titles measured in 1996 with an adult AIR of under 2%: no fewer than 109. True, they have accounted for all of the expansion in the number of titles carried on TGI, but this is merely a reflection of trends in British publishing.

With press production techniques much more flexible nowadays, magazines are being launched which target smaller readerships by design. They are produced for more tightly targeted groups in order to appeal to specific editorial interests, but the fact that appropriate advertising will also fit in is also part of the strategy. Thus lovers of good wines may well be tempted to read magazines specialising in food and wine, and will see appropriate advertising there, rather than happening across it in mass market titles. The consequent synergy between editorial and advertising should work to the benefit of all parties: reader, publisher and advertiser.

To return to the initial question, with so many more smaller magazines being published and measured now than in 1969, it is clear that media selectivity is heightened.

In this context, TGI perhaps serves its function better than ever. For newspapers, with smaller readership levels nowadays, it gives greater opportunity to show discrimination in selectivity. Magazines benefit for the same reason, as well as from the extension of the TGI questionnaire into measuring more contemporary, smaller titles. For planners of media, the market trends reflected by TGI may make life more complex, but they also make it more interesting.

