

The Demographic Composition and Consumer Goods Buying Behaviour of Light TV Viewers

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Abstract

This paper analyses the demographic composition and consumer goods purchasing behaviour of light viewers, to establish whether they are a desirable target for advertisers. We find that light viewers are slightly more likely to have a higher socio-economic status and education than heavier viewers but, importantly, light viewers are unlikely to drive sales for consumer goods brands because they purchase fewer consumer goods than heavier TV viewers. Light viewers make up approximately a third of the viewing audience so should not be excluded from consumer goods advertising efforts, but they are expensive to reach and there is no strong evidence to support specifically targeting them because of particularly desirable demographic characteristics or purchasing behaviour.

Keywords: light-viewers, media planning, consumer goods, television, demographics, targeting

Introduction

While the amount of TV consumed has not greatly changed in recent decades, the number of channels competing for the same audience has dramatically increased (Collins, Beal, & Barwise, 2003; Leckenby & Kim, 1994). This fragmentation and decline in reach has led advertisers to seek alternative ways of advertising to light viewers, and media planners are under pressure to find more cost effective ways to reach more specific audiences (Friend & Engel, 1998). Even though television is still the main media with which advertisers communicate with potential buyers, light viewers represent a challenge for advertisers, as they have to spend more to ensure their campaigns reach them (Brook, 2005). There is a widespread belief that light television viewers have some more desirable characteristics – a claim that advertisers use to justify the added expense associated with reaching them. They are said to enjoy high disposable incomes, to be better educated and to have higher levels of job status (Baron, 2003; Mulligan, 1998; Read, 1996; Wild, 1999) and this suggests that they also have stronger buying power. Here we explore the demographics of these viewers to determine whether they do indeed display such characteristics. We also compare their buying behaviour to that of heavier TV viewers to determine whether they really should be considered more desirable to advertisers of consumer goods products.

Background and Research Questions

A light TV viewer is simply a person or household who does not watch a great deal of TV, but there is no standard measure of what constitutes a light TV viewer. Definitions range from someone who watches 40 minutes of commercial TV a day (see for eg Brook, 2005) to someone who watches up to an average of two hours a day (instead of the three and a half hour population average) (Barwise & Ehrenberg, 1988). Barwise and Ehrenberg (1988) note that, given this definition, between a quarter and a third of TV viewers should be classified as having light viewing behaviour. Another method of defining light viewers is by quintile analysis where the lightest 20% or 40% of viewers are considered light viewers. Katz (1981) defines light TV viewers as the bottom two quintiles of viewing (i.e. the lightest 40% of the viewing population). With this definition he finds that, in Canada, light TV viewers watched less than half the hours of an average TV viewer.

The definition of light viewing used affects not only the number of viewers that are classified in this way, but also the likelihood that light viewers will seem different. If a very narrow definition is used there will be very few light viewers and those people may appear to hold very different characteristics from heavier viewers simply because there are so few of them and they are the most extreme examples. The number of viewers classified as having light viewing behaviour should therefore be examined in any study that aims to describe them.

Demographic and behavioural characteristics

Light TV viewers are often referred to as an 'elusive' or 'coveted' target market. They are said to be desirable to advertisers because they: have upscale demographics (Baron, 2003; Wild, 1999) are young and up-market (Byfield, 2000; Safier & Stott, 1996) and are wealthy (Read, 1996). A study by Brook (2005), also finds that light TV viewers are highly prized because of their luxury goods buying behaviour. They are found to be 15% more likely than average to shop online, 43% more likely to be the main driver of a luxury car and 18% more likely to spend more than £100 on CDs. Beyond this study, there is little empirical research to support the benefit of targeting light viewers because of their purchasing behaviour.

Light viewers may in fact be expected to purchasing fewer consumer goods than heavy-viewers, in line with the theory of purchase-viewing bias. Purchase-viewing bias is either the positive or negative association of purchasing for a brand with the propensity to watch television (McDonald, 1997). The assumption is often that higher media consumption (and subsequently high advertising viewing) is related to a higher level of influence of advertising, and subsequently greater propensity to purchase a brand from heavier rather than light viewers, though the relationship between viewing weight and purchase propensity may differ between brands, and the effect of any purchase-viewing bias modest (Broadbent, 1999; Hansen & Hansen, 2000).

While there is much interest amongst industry practitioners about light TV viewers, and much conjecture about positive demographic attributes, there is very little empirical research that supports the idea that light TV viewers are in fact sufficiently desirable to advertisers to be worth the extra cost of reaching them (due to the added media weight required), or the conditions under which it is appropriate to do so. So, this paper addresses the question: are light viewers behaviourally and demographically attractive enough for consumer goods advertisers to justify the added cost and effort associated with reaching them?

Research Methodology

This paper describes the demographic characteristics of light TV viewers and their purchasing behaviour across four consumer goods categories. We use two data sets. The first is data collected by Roy Morgan Research. The demographic characteristics of respondents and their use of television are drawn from the 2006 Establishment Survey, a weekly survey that involved over 55,000 face-to-face interviews in all. This data is the accepted industry currency for press readership in Australia. TV viewing is based on a self-reported question that asks about 'typical' weekday viewing of commercial television. Respondents are then classified within the data set based on their level of viewing. Any person who claims to view 2 or less hours per day is deemed to be a light viewer (approximately 34%), consistent with the definition used by Barwise and Ehrenberg (1988).

The other data set, used to analyse the purchasing behaviour of light TV viewers, is drawn from TNS single-source panel data that was collected in the U.K from 750 households at a time, from 2000-2003. The household viewing in this panel data is divided into viewing quintiles—subsequently this analysis refers to the two bottom quintiles (40%) as light TV viewers. This study compares the lightest two viewing quintiles with the heaviest two viewing quintiles. While the small difference in categorization of light viewers between the Roy Morgan and TNS data is noted as a limitation in direct comparison between the two data sets, the difference in categorization is small and unlikely to make a substantive difference. In order to see the differences between the viewer groups, the demographic results are presented as deviations from the population average. Any deviation greater than or equal to 6 percentage points (pp) is presented as a 'notable' deviation and has been **bolded** for light TV viewers. While there is no definitive point at which a deviation is notable, prior research suggests that anything less than a 6pp deviation is small (Barwise & Ehrenberg, 1988; Hammond, Ehrenberg, & Goodhardt, 1996; Kennedy, Ehrenberg, & Long, 2000).

Results

Table 1 shows the demographics for the TV viewer groups. It can be seen that light TV viewers are above average in the upscale demographics. Two notable deviations are found for socio-economic quintile and education: light viewers are notably more likely to be in the highest socio-economic quintile, AB (6pp difference), and to have a degree or diploma (7 pp difference).

Table 1: Demographics of TV viewer segments

Demographics		Deviations from population average for TV				Total Pop' n (%)
		Heavy	Medium	Light	Non-	
Gender	Male	-8	-1	4	6	49
	Female	8	1	-4	-5	51
Age	14-24	-1	0	0	-4	19
	25-34	-3	1	0	0	17
	35-49	-4	0	2	1	27
	50+	8	-2	-3	2	38
Income	Less than 10,000	3	0	0	1	6
	10,000 – 19,999	10	-1	-4	-1	16
	20,000 – 29,999	2	0	-2	-1	14
	30,000 – 49,999	-3	1	0	-2	28
	50,000 – 69,999	-5	1	2	-1	18
	70,000 or more	-9	-1	4	4	19
Discretionary Spending	Light spenders	15	-2	-5	1	33
	Medium spenders	-2	1	1	-2	33
	Heavy spenders	-12	2	5	2	33
Socio-Economic Quintile	FG	14	-1	-6	-5	20
	E	5	0	-2	-3	20
	D	-2	1	0	0	20
	C	-6	1	2	1	20
	AB	-11	-1	6	7	20
Education Level	Primary	2	0	-1	-1	3
	Some secondary	14	1	-7	-8	39
	Completed Year 12	1	1	-2	-4	19
	Some/Now at Uni	-3	0	2	1	9
	Have Diploma/Degree	-15	-2	7	11	31
Employment Variables*	Other (incl. semi/unskilled)	-1	0	0	-1	15
	Skilled workers	-3	0	0	0	8
	White Collar	-6	2	3	1	20
	Professional/Manager	-10	-1	5	4	17

*includes full-time and part-time workers which totals 60% of the population

Light viewers are not notably different from the rest of the population in most criteria

While the differences in earning, education and job status of light viewers found in prior research are found in this research, the magnitude of difference in demographic characteristics is often small (less than 6pp). Given that only two notable deviations are found in the education and socio-economic groups, these results suggest that light TV viewers are very much like everyone else. Non-viewers also appear to be quite normal and should be considered like ultra-light viewers.

Of interest is the demographic unattractiveness of heavy viewers. In every demographic characteristic there is a notable deviation above 6pp for heavy viewers; in some cases the deviations are as much as 15pp, as is the case for both discretionary spending and education. The profile of a heavy viewer is most likely to be a female, over 50, not in employment, with

little discretionary spend. These results suggest that heavy viewers are the most unattractive viewers to advertisers as they are more likely to be low income earners and light discretionary spenders.

But, when we analyse the consumer goods purchasing behaviour of light viewers and heavy-viewers we see that demographics do not tell the whole story. Examining the actual versus expected purchasing behaviour of light viewers across four consumer goods product categories we find that light viewers purchase less than may be expected. The lightest 40% of viewers can be expected to make 40% of purchases and the heaviest 40% of viewers also 40%. Table 2, drawn from TNS panel data, highlights the deviations from the expected 40% of purchasing.

Table 2: Deviations from expected purchasing for heavy and light TV viewers

Product Category	PP deviations from expected 40%	
	Heaviest 40% of viewing	Lightest 40% of viewing
Yellow Fats	3	-4
Toilet Tissue	4	-7
Bread	2	-4
Crisps	3	-5
Average	4	-5

Light viewers buy less than their heavy viewing counterparts.

One notable deviation of 7pp can be found for Toilet Tissue but all of the deviations for light viewers are negative. This demonstrates that, if anything, light viewers buy less consumer goods than heavier viewers. This is not a desirable characteristic to advertisers. Conversely, the heaviest 40% of viewers purchase slightly more than expected, although there are no notable deviations. So, even though the demographics for heavy viewers suggest they may be somewhat undesirable to advertisers their purchasing suggests otherwise for consumer goods advertisers.

We also investigate the possibility that household size impacts the results seen in Table 2. If household size is not controlled for it is possible that any relationship we observe between viewing and purchasing is an artefact of small households simply buying less and viewing less than big households because they do not need as many consumer goods. In Table 3, where we examine the actual versus expected purchasing behaviour for *each household size* in the crisps category, we find that the pattern in Table 2 holds — light viewers buy less of these consumer goods than heavy viewers, regardless of household size.

Table 3: Deviations for Crisps category by household size

Household size	PP deviations from expected 40% average for Crisps purchasers	
	Heaviest 40% of viewing	Lightest 40% of viewing
1	3	-1
2	3	-6
3	8	-7
4	0	-5
5	6	-7
Average	4	-6

Household size does not change the pattern—light viewers buy fewer consumer goods

Discussion and Limitations

This research demonstrates that while light viewers have a slightly more attractive demographic profile than the average viewer, they purchase fewer consumer goods. They are not only harder, and consequently more expensive, to reach than heavy viewers, they tend to purchase fewer consumer goods products than heavy viewers, regardless of household size. It should be noted that no assumption is made that this finding extends to luxury goods, but it provides an important finding for consumer goods brands— even if a brand is ‘premium’ and likely to appeal to upscale consumers, targeting light viewers may not deliver either notably more upscale consumer who are inclined to buy the brand, or lead to higher sales driven by this group.

As the first data set is based on a self-reported measure of ‘typical viewing’, it is important to recognize that some reporting errors can occur. These include telescoping, projecting and omission, as detailed by Woodside and Wilson (2002). Furthermore, this study looks at commercial television and weekday viewing only, thus not taking into consideration weekend viewing and subscription TV. This can pose problems when trying to compare these results to other studies. However, it is important to note that the majority of viewing occurs during the week on commercial television, so it is still useful data as one phase in a project that investigates light viewers from a range of data sources.

It should also be noted that the results presented in Tables 2 and 3 (TNS single-source panel data) are for consumer goods products only, and describe purchasing within product categories, not results for individual brands. Some brands may skew slightly toward light viewers, with light viewers purchasing more of their brand than is average—but the results presented here, across four categories, highlight that light viewers purchase slightly fewer, rather than more, consumer goods. So, this is likely to apply to most consumer goods brands.

Conclusion and Future Research

Light viewers show few notably different demographic characteristics and do not show a high level of consumer goods purchasing; while light viewers are slightly more likely than average to be in a high socio economic group it does not mean they are buying more consumer goods. This research suggests that careful consideration should be taken when paying a premium to reach the elusive light viewers, for consumer goods brands—otherwise brands may be paying more to reach those slightly less likely to purchase. Future research in this area should focus on heavy and light viewers purchasing of luxury items such as cars, clothing and wine, with the aim of supporting or debunking the limited research that supports targeting light viewers for these goods.

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