

## ARE LIGHT TV VIEWERS REALLY WORTH TARGETING?

For years, advertisers have expressed concern about their television buys “oversaturating” heavy viewers while insufficiently targeting light viewers. Typically a 2,500 GRP schedule on network or spot TV will attain 5,000 GRPs against that 20% of the population (or target group) that watches the most TV, but only 400-500 GRPs are “delivered” to the lightest viewer quintile.

Media planners have explored many ways to single out TV shows that “appeal” to light viewers but have found such efforts to be fruitless or cost-prohibitive. And the obvious alternative—using magazines and/or newspapers to lift light viewer GRPs—is often rejected because of questions about their advertising effectiveness compared to TV, the promotability of the print media or other reservations.

This raises the question: is targeting light viewers really such a good idea?

To explore this issue, we turn to the only study we know of that measured consumers, product use and/or purchase behavior, their media consumption patterns *plus* their interest in advertising for specific categories and their awareness of brand ad campaigns. The study in question is Next Generation Research, LLC’s (NGR) 2003 Advertising Receptivity Index, which is described more fully elsewhere in this edition.

Taking the study’s 15,000+ adult respondent database, we segregated each person by the number of nationally aired TV shows (hundreds of broadcast network, syndicated and cable shows across all dayparts were measured) that they had seen in the past week. The respondents were then grouped into approximate fifths, based on their TV consumption as follows:

- I. Heaviest Quintile: Saw 38+ Shows
- II. Next Quintile: Saw 26-37 Shows
- III. Next Quintile: Saw 18-25 Shows
- IV. Next Quintile: Saw 10-17 Shows
- V. Lightest Quintile: Saw 0-9 Shows

When these quintiles were profiled demographically, the customary patterns were evident. As shown in the first table, heavy viewers (Quintile I) were more likely to be women, lower in income and were heavily represented among black respondents. Light viewers, in contrast, included higher proportions of men, upscale homes and white respondents, compared to the total population.

Another point of departure were the mindsets of the two segments. At the outset of the questionnaire, NGR’s researchers asked each respondent to what extent s/he agreed with a number of self-descriptive statements. A number of these findings are summarized in the second table, including the responses to three statements about advertising. What the data indicate is fairly

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obvious. Heavy viewers—perhaps acclimated to accept TV ads by the huge doses of TV commercials they are exposed to—are far more positively inclined toward advertising than their light viewing counterparts. As shown in the second table, TV's heaviest viewers (Quintile I) were *55% more likely* than all adults to agree strongly with the statement that “ads often prompt my buying decisions” (155 index), while the lightest viewers (Quintile V) were *36% less likely* than the total population to respond in this manner (64 index). The answers to the other two statements about ads paralleled this pattern, indicating that light TV viewers are less favorably disposed to advertising as a mode of communication and/or persuasion.

But do these generalized findings apply to specific product categories or ad campaigns?

NGR's Advertising Receptivity Index explored this question in two ways. First, it asked each respondent about his/her usage, purchase or intent to buy for 189 product/service categories. Once a respondent indicated consumer involvement with a category, a question was posed about the likelihood of attentiveness to ads for that specific product/service whenever such ads were encountered. Those who indicated that they were “very likely to be attentive” (about 20-25% of product user/buyers for an average category) were classified as “ad receptive.”

The third table takes a selection of product or service categories and indicates their contrasts in ad receptivity between heavy, moderate and light viewers. Bear in mind that the base for this table is product category users/buyers *within* each viewer quintile. As the table reveals, light viewing product/service category users were much less interested in seeing or hearing ads for those categories than heavy viewers—often by margins as high as 5-1 or 10-1. This systematic distinction prevailed throughout the huge array of categories studied, not just the sampling shown in this table.

Finally, NGR provided its respondents with a list of over 500 brand names drawn from the same product categories and asked whether any ads for each brand had been seen or heard in the past 30 days. Those who responded that this was the case were credited as being “ad aware.”

In view of the previous findings, it might be assumed that light viewers would perform very poorly in an ad awareness study of this sort. Curiously, however, the difference in claimed ad awareness between heavy and light viewers, while still significant, were usually on the order of 2-1 and, in many cases, heavy viewers led by an even narrower gap.

What does this tell us?

First and foremost, it confirms the fact that light viewers are not a particularly ad-friendly bunch, which should not be surprising. After all, if they are averse to TV itself, doesn't it follow that they are less susceptible to mass media advertising as well? That said, the NGR study does show that ad campaigns for many brands, including those heavily reliant on TV, are getting through to light viewers to a greater extent than might be expected. For example, a brand may pour out 5,000 TV GRPs against heavy viewing product users, to attain a 50% ad awareness in this segment of its consumer base. At the same time, light viewing product

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users, who get only a tenth as many GRPs may come in at a 30% awareness level. What's more, because all of the brands in the same category advertise in the same way, light viewers are infrequently exposed to competitive brand campaigns as well.

So is there really a problem with light viewers? Should a brand sacrifice huge amounts of TV exposure weight among heavy viewers to up its light viewer GRPs by a modest margin?

Media planners would do well to sort out their product user base by TV viewing quintiles and then evaluate each segment in terms of usage volumetrics and, most importantly, your brand's share of market. Sources such as MRI or Simmons have all of this data for most product categories. It's just waiting to be scrutinized.

Suppose your analysis reveals that light viewers are no more or less inclined to be heavy product users (volumetrics) and that your brand is doing just fine in terms of share-of-market, among light viewers. Why target them? Couldn't the advertiser's media dollars be better spent adjusting exposure weight in the middle- to upper-end of the TV viewer spectrum, where audiences tend to be more ad receptive and the competition for "share-of-voice" is heaviest?

It's also a simple matter for an advertiser—prodded by its agency—to fund a study of, say, 1,000 product users, defined by viewing quintiles. These segments could be probed about ad recall/awareness and sales responsiveness to the brand's campaign and those of rival marketers to determine whether light viewers represent a significant and unique marketing opportunity. In some cases the indicators might be positive; in others, negative. But why not look before leaping into targeting light viewers without a solid reason to do so? Most advertisers' media budgets might be better spent on other, more ROI-focused ventures.

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## DEMOGRAPHIC PROFILE OF HEAVIEST-LIGHTEST ADULT TV VIEWING QUINTILES

	TV VIEWING QUINTILES					TOTAL U.S. POP.
	HEAVIEST I	II	III	IV	LIGHTEST V	
<b>All Adults</b>	100%	100%	100%	100%	100%	100%
<b>Sex</b>						
Men	43	46	47	52	53	48
Women	57	54	53	48	47	52
<b>Age</b>						
18-24	15	13	12	12	14	13
25-34	19	20	19	17	17	19
35-54	39	36	40	42	43	40
55+	27	31	29	29	26	28
<b>H.H. Income</b>						
<\$30,000	39	29	24	21	22	27
\$30,000-49,999	25	23	23	21	22	23
\$50,000-74,999	18	22	21	23	21	21
\$75,000-99,999	9	14	15	16	15	14
\$100,000+	9	12	17	19	20	15
<b>Race/Ethnicity</b>						
White	71	82	87	88	88	83
Black	24	13	9	7	5	12
Other	5	5	4	5	7	5

Source: Next Generation Research, LLC., Advertising Receptivity Index, 2003.

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## RELATIVE INCLINATION OF HEAVY, MODERATE AND LIGHT TV VIEWERS TO AGREE WITH SELF-DESCRIPTIVE STATEMENTS<sup>1</sup>

	STRONGLY AGREE			STRONGLY DISAGREE		
	QUINTILE I	QUINTILE III	QUINTILE V	QUINTILE I	QUINTILE III	QUINTILE V
I Am Very Interested In New Technology	125	94	88	49	84	167
I Often Like To Try New Products	138	94	74	50	85	202
I Am Very Price Conscious	109	96	97	127	84	95
I Avoid Products That Pollute The Environment	141	86	75	88	121	106
I Am More Likely To Purchase A Product Of A Brand Name That I Know And Trust	127	96	77	102	66	156
In General Advertising Presents A True Picture	213	70	49	139	89	71
Ads Often Prompt My Buying Decisions	155	88	64	72	87	146
I Tend To Ignore Most Advertising	75	89	147	163	82	67

<sup>1</sup>Total adult population answer rate=100.

Source: Next Generation Research, LLC., Advertising Receptivity Index, 2003.

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## RELATIVE INDICES OF AD RECEPTIVITY AMONG PRODUCT USERS/BUYERS BY TV VIEWING QUINTILES<sup>1</sup>

	HEAVIEST				LIGHTEST
	I	II	III	IV	V
DVD Player	185	107	81	73	52
Digital Camera	138	100	104	87	71
PC	168	104	90	76	60
Domestic Luxury Car	189	110	91	64	43
Full Size SUV <sup>2</sup>	177	95	106	75	46
Full Service Broker	143	129	97	73	55
Cruise Line Vacation	138	107	99	86	69
Frequent Moviegoers	146	115	99	80	57
Fast Food Restaurants	173	115	86	71	53
Discount Store	146	116	94	82	60
Upscale Dept. Store	150	112	90	80	66
Athletic Shoes	196	109	80	66	47
OTC Hemorrhoid Aid	274	98	48	51	28
RX Anxiety Medication	196	123	67	66	45
Nasal Spray	218	115	68	59	38
Shampoo/Conditioner	178	117	84	67	51
Cold Cereal	178	120	79	66	54
Yogurt	186	120	71	67	54
Bleach	203	122	76	58	39
Cold Cuts	211	113	74	61	40
Mayonnaise	203	114	76	63	42

<sup>1</sup>Ad receptivity rate for all product users=100.

<sup>2</sup>Domestic makes.

Source: Next Generation Research, LLC., Advertising Receptivity Index, 2003.

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## RELATIVE INDICES OF BRAND AD AWARENESS AMONG PRODUCTS USERS/ BUYERS BY TV VIEWING QUINTILES<sup>1</sup>

	HEAVIEST				LIGHTEST
	I	II	III	IV	V
Lincoln Town Car	131	120	97	85	65
Pontiac Grand Prix	134	117	100	85	62
BMW 3 Series	115	108	104	95	76
Dodge Ram Truck	113	110	104	96	76
Apple PCs	127	110	97	88	75
E-LOAN	114	105	99	101	80
MerrillLynch	124	111	98	92	74
Visa	114	109	100	94	82
T-Mobile	117	112	101	92	76
Charmin	130	114	99	88	67
Dove	156	116	93	74	58
Glad Bags	127	114	100	90	67
Tide	125	114	101	91	67
Calvin Klein (Men's)	156	117	91	76	59
Nike	138	113	96	85	66
Neiman Marcus	168	104	82	78	67
Kmart	118	109	100	92	81
Home Depot	108	105	103	97	85
Olive Garden	114	110	102	95	78
Taco Bell	118	111	101	94	75
Sam Adams	121	113	100	94	70
Cream Of Wheat	159	112	91	78	59
Campbell's Cond. Soup	134	112	99	84	69

<sup>1</sup>Ad receptivity rate for all product users=100.

Source: Next Generation Research, LLC., Advertising Receptivity Index, 2003.

