

**University of South Australia
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**Light TV Viewers:
who they are and how they can be reached**

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Abstract

TV has been around for over 50 years and despite the wide array of choices for entertainment and news, TV continues to deliver extraordinary reach (Sharp, Beal and Collins 2009). However, while practically everyone watches TV, not everyone watches the same amount. So some viewers are easy to reach and some are more difficult, and it is difficult to reach light TV viewers with a single advertising exposure without reaching heavier viewers many times over. Advertisers and media planners have long had this challenge, and it has been made increasingly difficult by fragmentation (Friend and Engel 1998). While the amount of TV that is consumed has not changed much in recent decades, the number of channels that are competing for the same audience has increased dramatically. So reaching light viewers is increasingly expensive. However, there is some compensation in the widespread belief that light television viewers are desirable due to their high disposable incomes, education and job status.

This thesis investigates the profile of the light TV viewer to determine if they are worth the extra expense of reaching and if there are any patterns to their viewing that allow them to be targeted more cost-efficiently. Light TV viewers are defined as viewers who watch on average less than 2hrs of commercial TV per day (whereas the average viewer watches more than 3 hours per day).

Research Objectives

A data reduction approach (Ehrenberg 1975, 2000) was used to analyse over 55,000 face-to-face interviews and minute-by-minute ratings data from a sample of 2,700 households (7,300 individuals) to meet the following research objectives:

1. To describe the profile of light TV viewers.
2. To determine if light TV viewers stay light viewers over time.
3. To investigate how light TV viewers can be reached – with TV and other media. Specifically:
 - A. When do light TV viewers watch TV?
 - B. What are light TV viewers watching on TV?
 - C. Are light TV viewers more or less likely than the population to appointment view?

D. What other media do light TV viewers consume?

Findings

Light viewers are desirable advertising targets. Even if defined in a manner where they represent approximately 40% of the population, they are still concentrated in the upscale demographics, thus supporting the main point made in the literature on light TV viewers. However, the light TV viewer profile is only *slightly* more attractive than that of the total population. Therefore the main reason that light TV viewers should be targeted is because most viewers watch less than average. The analysis also reveals that it is the heavy viewers who are the most different from the total population and are found to be concentrated in the lower socio-economics.

The findings reveal that any week of any month will be made up of 40% light viewers, but it is not the same viewers who are consistently light. A 6-week stability analysis revealed that only 30% of light viewers were consistently light week-to-week and only 4% were consistently light for each day of the week. However, when light viewers average daily viewing consumption was analysed across an entire year, their viewing was consistently *lighter* than that of the total population. While their average daily viewing rises (in a regression to the mean) above the 2hr threshold for light viewing (2hrs:24min), light viewers watch on average nearly half as much TV per day than the total population (3hrs51min).

The following is a summary of how light TV viewers can best be reached by TV and other media:

- Advertising during prime-time (especially between 8:30-9:30) from Sunday-Wednesday can reach up to 55% of light viewers compared to only 29% who can be reached throughout the day (6:00-17:59).
- Light viewers devote most of their viewing to the three big free-to-air commercial networks in Australia (7, 9 & Network TEN). However, they devote slightly more of their viewing to Network TEN and nearly double the amount of viewing to SBS (a much smaller channel) when compared to the population.
- No particular program genre was found to have the highest proportion of light viewers as well as the highest reach amongst light viewers. Documentaries have the highest proportion of light viewers (28%) but reach the least amount overall whereas infotainment/lifestyle programs reach the most light viewers compared to other genres but they have a lower proportion of light viewers (20%).

- High-rated programs attracted the highest proportion and reached the most light viewers. However, light viewer reach amongst the top 20 programs varied from 6% to 28%, suggesting reach needs to be individually analysed for each program. Sunday night movies and certain Network TEN programs were found to skew towards light viewers.
- Light viewers are on average less likely to appointment view as they have a lower repeat-rate than total individuals (33% vs. 38%). Overall, high-rated programs have higher repeat-rates for both total individuals as well as light viewers. However, SBS programs (low-rated) can attract the same if not higher repeat-rates for light viewers as they do for total individuals.
- Light TV viewers consume other media in a very similar way to the population where 40% of light TV viewers are heavy Internet users and approximately 30% are heavy users of newspapers, magazines, cinema and outdoor advertising. Radio is the only media where light TV viewers are also light. The analysis reveals that light viewers are almost twice as likely to be heavy outdoor users (29%) when compared to the heavy TV viewers (18%). Heavy viewers are also less likely to be heavy Internet and cinema users.

Conclusions

Primarily, advertisers should think carefully about light TV viewers because they are more difficult to reach. Secondly, because there are so many of them - their attractive demographics are an added bonus, though the difference between the light viewer and the average viewer is relatively small. This latter finding may come as a surprise to those advertisers who have been paying premium prices for time slots based on upscale demographics. A program's audience that consists of a high proportion of elusive light viewers, does not necessarily guarantee the highest reach. This research therefore strengthens the importance of buying time slots that deliver the greatest reach for all types of viewers especially since the greatest response from advertising is achieved from the first exposure. Advertising during the day will do little to add reach amongst the light viewers and is more likely to increase frequency amongst the heavy viewers. Prime-time, on the other hand, delivers the greatest number of light viewers overall not just because it has the highest ratings. SBS programs, Network TEN programs and Sunday night movies are potentially cost-effective reach spots that should be used in conjunction with other top-rated programs. Complimenting TV with outdoor, cinema and online advertising will maximize reach amongst the light viewers. This research has provided valuable guidelines that media planners and

advertisers can follow which can maximise reach amongst light viewers on TV and with other media. TV continues to be the most dominant media in people's lives, therefore reaching the light viewer will continue to be of much importance as fragmentation continues to increase.