

YOUNG AT HEART: UNDERSTANDING THE DYNAMICS OF YOUTH READERSHIP

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Today's children represent tomorrow's readers and as such they are vital to the publishing industry. The importance of bringing them to the brand early is recognised by many newspaper and magazine publishers. What's more they represent an attractive audience for many advertisers with their own purchasing power and future potential for many different brands.

In today's marketplace there is increasing focus on not just the teenagers but those in the younger age bands with terms such as "tweenagers" and "tweenies" springing up to describe those in the 7-12 year age group. In Britain and many other Western countries over the past decade the marketing industry has spent ever more attention on young people. Changes in social make-up, as parents become older and dual income households grow, mean that these kids have increased disposable income of their own as well as a significant influence on a range of items bought for them and their households. Just take a look at the growth of the mobile phone market as illustration.

At the same time there have been dramatic changes in the media marketplace for young people: the Internet, Interactive TV, the increase in mobile phone penetration and the continuing development of electronic gaming to name just a few. How has this affected young people's relationship with the print medium? How have individual titles and categories fared over this period and what might this tell us for the future?

In Britain the accepted currency for young people's readership is the Youth TGI. Since its inception in 1993 it has covered a comprehensive range of titles alongside attitudes, product and lifestyle. We can draw on 9 years' of data collected in a consistent way in order to understand youth readership and its dynamics. This paper focuses on the readership of 7 to 14 year olds in Britain from 1993 to 2001. Alongside Youth TGI we are also able to supplement information from our own Internet and readership attitude surveys. For the purposes of this written paper we have focused largely on magazines rather than newspaper readership.

1. Youth TGI: Some Background

The Youth TGI was launched back in 1993 and has run as an annual survey up to the present day. Its purpose is to complement the adult TGI for youth oriented markets. The universe covered is 7 to 19 year olds living in Great Britain. While the upper end of this overlaps with the adult study the product fields and publications covered are very different. For the purposes of this paper we have focused on the under 15's.

The survey instruments and methodology were the result of an extensive programme of development including a large scale pilot exercise in 1992. Since launch the method has been refined and retested over time. However, the basic approach and core questionnaire remains consistent.

Respondents are recruited by telephone from households who have previously participated in BMRB's representative Access survey (a random location, in-home survey). Children eligible for the study are selected and recruited to take part. As always in children's research explanation and permission is sought from the parent or guardian of the child. The advantage of this approach is that we can identify households containing children in advance and ensure a representative spread of age and sex. Response rates are higher than you might expect with alternative approaches as we have already interviewed an adult household member and thereby gained their trust (a vital issue in children's research).

The main data collection is via a self-completion questionnaire sent to the respondent's home. This is positioned as a task that the child or young person themselves completes, although the very youngest inevitably do so with adult help as necessary. In total we achieve 6000 interviews each year. This was initially run as one wave of fieldwork conducted in the Spring of each year. However, from 2001 this has been split into two waves per annum.

There are of course issues to bear in mind when researching young people, in particular those very youngest respondents. The key issues that we have addressed in our research design are:

- **The range in ability by age.** There is a significant difference in reading ability and understanding between a 7 year old and those respondents aged even one year older. With a study such as Youth TGI, which covers a full age range between 7 to 19, we need to tailor the questions to the relevant age group. To address this, without making data collection and analysis too cumbersome, we split the sample into three distinct age groups, each with their own questionnaire. At the youngest end the 7 to 10 year olds have a shorter questionnaire with a certain degree of question simplification. The task is split into colour coded sections and cartoon characters appear throughout to break up the task and offer encouragement. Whilst this works well for the youngest respondents a similar approach would alienate the 11-14's who are given a slightly longer and more detailed questionnaire without the cartoons. Finally the 15-19 year olds are given a rather more sophisticated book to complete although again the design is tailored to appeal to them specifically.

- **Response rates.** As in all readership research this is a key issue. Traditionally the return rates that we have experienced on Youth TGI are relatively high, as much as 90% in the early days of the survey. While the overall response rate remains higher than equivalent adult surveys it is worth noting that this has dropped over time (around 75-80% of acceptors currently return a booklet). Acceptance and return rates are helped by the fact that there is a member of the household who has already taken part in an interview with BMRB. In addition we place an incentive “up front” with the child themselves and use reminder cards to encourage them to return. We also believe that the questionnaire itself and the survey’s relevance to respondents helps co-operation. We continue to experiment with techniques to boost response including the use of online techniques as a possible alternative in future.
- **Questionnaire design.** In the early stages of development we spent a considerable amount of time and thought in designing a questionnaire that was appropriate to even the very youngest respondents. As well as overall appeal and questionnaire length there were specific issues which we needed to address. Long brand lists within a single question had to be reduced and we found that the subtleties of a five point agreement scale were lost on the under 10’s. However, after considerable testing, we did find that we could use the readership frequency scale and adapted the recency question to be easily understandable by even 7 year olds¹.

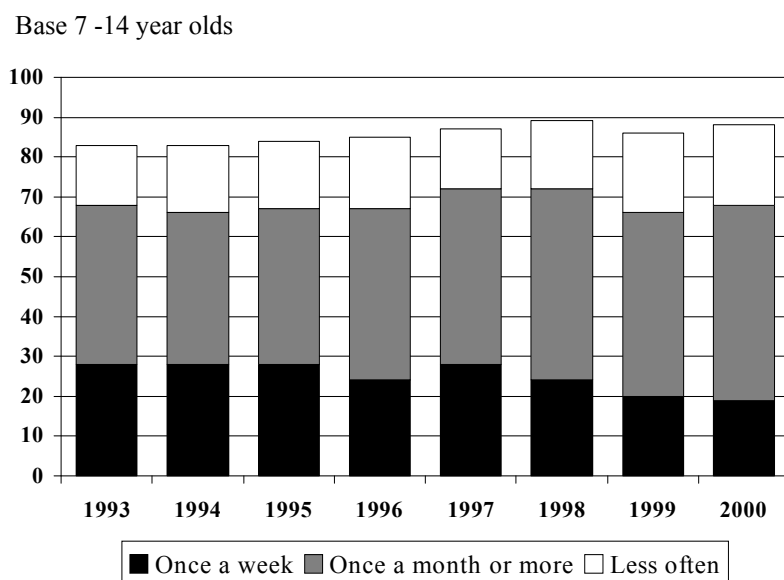
The data on which this paper has been based are drawn from 1993 through to the first wave of the 2001 study.

2. The Relationship With Print

In Britain youth magazine circulation figures released this August paint a gloomy picture. Almost all titles record a loss in circulation with few successes and new launches to offset the decline. However, our data show that magazines and, to a lesser extent, newspapers continue to be widely read and enjoyed across the age range. In 2001 9 out of 10 seven to fourteen year olds claim to read magazines these days and as many as one in three claim to ever read or look at daily newspapers.

However, if we look more closely at magazine purchase figures over time we can see that there are worrying signs that magazines are losing ground. Although the proportion of 7 to 14 year olds who claim to *ever* buy magazines continues to be almost universal, there has been a decline in those buying at least once a week – from 28% in 1997 to 19% in 2000.

Figure 1: Magazine Purchase Among 7 to 14 year olds



Source: Youth TGI

In today’s teen magazine market there is increasing competition from a range of sources. British kids are under increasing time pressures with both growing school work and a range of leisure activities occupying much of their Examples

¹ For detail see article S, Abel (1995) Can Young Readers Take the Frequency Quiz? MRS Research Magazine

time. In the last decade we've seen a massive explosion in the technology available to all. The growth of the Internet, availability of PC's at home, the extension of digital and Interactive TV, the phenomenal growth in mobile phone ownership and the continuing development of computer gaming are all affecting the amount of time kids have available to spend with print. Faced with increasing choice it seems inevitable that reading may suffer.

To give us an idea of the relative importance of magazines in this ever-increasing world of choice we placed a question on our youth omnibus survey this August.

Figure 2: Relative importance of different media activities to 7 –14 year olds

Question: If you had to give up one of these activities which would it be?

Base: All 7 –14 year olds (131)	
	%
Listening to the radio	32
Reading magazines	26
Going on the Internet	12
Texting on mobile phone	12
Watching TV	11
Talking on the phone	4

Source: BMRB questions on Access to Youth, August 01

Clearly mobile phones and the new electronic media are playing an important role in youngsters' lives these days. Very few would be prepared to give them up in preference to magazines or radio. TV too continues to play a dominant role in their lives. What is interesting is the strong relationship that British kids have with their mobile phones and the widespread use of text. Over the past few years the proportion of young people with their own mobile phone has grown significantly to over half of all 7 to 19 year olds in 2001 (Youth TGI Interim report). Indeed among teenagers penetration rises to well over 80%. To a degree mobile phones are consumed in a very similar way to magazines and present a real threat for the future.

The Internet itself, in whichever form it is accessed, presents both a threat and an opportunity for print brands. Over the last five years new ways of reaching the Internet via mobile phones, pocket PC's and even the television have launched in the UK. In the early days the Internet was the preserve of the 15 to 34 year old age bracket. Very few younger children used it at all. However, this has changed more recently with the growth of Internet use at school and an associated rise at home. Our recent Youth Internet research found that 84% of 7 to 14's have used the Internet in the last month. Although this is heavily driven by school-use a significant proportion (42%) have used it at home.

The Internet is therefore competing for youngsters' share of time. It can be an absorbing and time consuming activity. Of our 7-14 year old Internet users, two thirds log on at least once a week and 18% most or every day. When they do log on at home an average session is around 45 minutes which is a significant amount of time, especially given that many will be sharing a PC with other household members.

It is also clear that the Internet itself fulfils many of the roles that magazines have traditionally played. When asked about the uses to which users access the Internet at home sourcing information, browsing for fun and competitions all feature strongly.

Figure 3: Activities used the Internet at home for in the last month

Base: all 7-14 year old Home Internet users (181)	
	%
Using email	42
Playing games	42
Study/homework	36
To browse for fun	31
To get information on an activity/interest	23
Doing competitions/quizzes	19
Listen to/download music	18
To get information on a particular TV programme	17
To visit a chat room	14
To look at things before buying in shops	14

Source: BMRB's Youth Internet Monitor (June 2001)

It is clear that print consumption will inevitably suffer as young people are faced with increased leisure and media choice. However, as with the adult market, print and electronic media can comfortably co-exist with each other. Many magazines have their own web sites and increasingly both newspaper and magazine publishers are using the Internet to offer tailor-made services targeted at kids. The relationship between the two works both ways. Many young people visit web sites having been directed there by magazines or newspapers. After TV programmes and word of mouth, magazines are the most commonly used source of information on sites to visit (38% of 7-14 year old site visitors claim to do so as a result of reading about it in a magazine).

3. Youth Readership: Findings

So we have established that print still plays an important role in young peoples lives but, with increasing competition from several different directions, how can different titles survive in this competitive world? Youth TGI itself reveals that young people have very different readership patterns to the adult market. Publishers in the youth sector have very specific challenges to face in targeting youth.

In summary we have made four broad observations:

- Precise targeting by age
- Clear gender differences
- Volatility and rapidly changing product lifecycles
- Many titles related to specific brands and marketing phenomenon

The rest of the paper focuses on each of these in turn.

3.1 Targeting by Age

Titles in the youth market are targeted at very precise age groups. As observed earlier, kids change rapidly at this age and there can be big differences in attitudes and interest over a relatively small age span.

To give an example:

Figure 4: “Girl Talk” Average Issue Readership by Year Group



Base: Girls aged 7 - 19

Source: Youth TGI 2001

“Girl Talk” is clearly targeted at a core age group of 8 to 10 year old girls. What is interesting is the dramatic decline in readership at age 11. Once at this stage girls are moving into secondary education, it is a time of great change in their lives and they leave behind the interests they had before.

Many of these magazines are precisely targeted at their core ages and, as we’ll see later, by sex. As children progress in age so they move to titles more appropriate for their needs. Of course this presents some major challenges for publishers, with such a tight target market they are exposed to any competitive activity or new launches. What’s more they need to fight constantly to find new readers as a proportion will always be moving on as they outgrow the magazine.

3.2 Gender Differences

In a similar fashion, youth titles are heavily gender biased. By the age of seven boys and girls are reading very different titles indeed and this continues throughout the teenage years.

Figure 5 shows the top five titles for 7 to 14 year olds, along with their readership levels, by sex. Clearly boys and girls read very different titles at this age. Not one title appears in both lists. For the boys the top five consists of two very traditional comics (Beano and Dandy) alongside computer games titles. For the girls the top titles are dominated by music (TOTP, Smash Hits and Live & Kicking) together with targeted girl magazines.

Figure 5: Top 5 Titles by Sex

Boys 7 to 14		Girls 7 to 14	
Top Five Titles	% AIR	Top Five Titles	% AIR
Beano	21	Top of the Pops	34
Computer and Video Games	18	Smash Hits	29
Whats on TV	12	Girl Talk	24
Dandy	12	Sugar	18
The Official Playstation Magazine	12	Live & Kicking	17

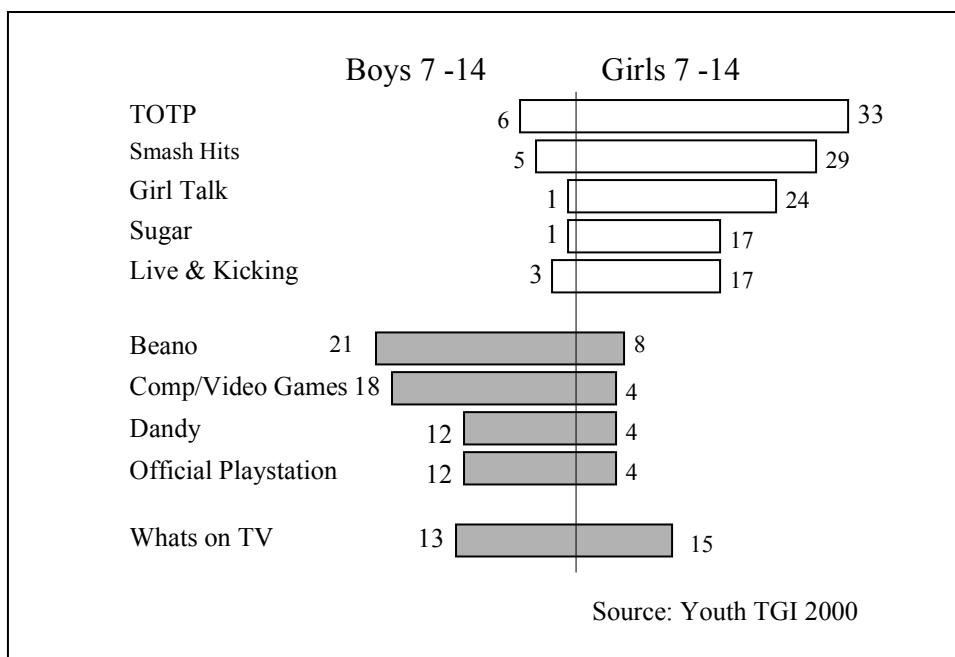
Source: Youth TGI 2000

Its also interesting to see the much higher readership that the top girls titles achieve (34% of 7 to 14 year old girls reading TOTP vs just 21% of boys for Beano). This partially reflects the very fragmented nature of the titles appealing to boys. Key genres include computer games and sports magazines alongside other interest driven categories. By their very nature there are many different titles each with relatively small readerships.

Figure 6 illustrates even more clearly the gender split in readership. Top titles for each sex have a strong gender bias. The only exception to this is the TV magazines (aimed interestingly at adults) where the top title, “What’s On TV” attracts equal numbers of boys and girls.

Figure 6: Sex: The Great Divide

Average Issue Readership Boy and Girls Top Titles

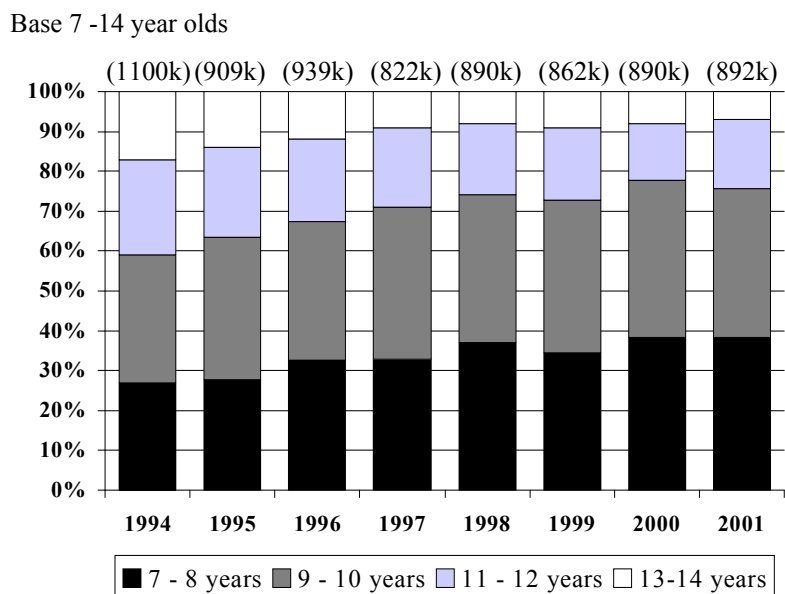


3.3 Changing Profiles

With the benefit of 9 years’ of data to analyse, we can also identify changes in readership profile over time. As we’ll see later, the very nature of the youth readership market means that very few titles have been in existence over the entire period. The lifecycle of the typical youth magazine is relatively short. However, there are some which have survived and even thrived over this period. What is interesting is that for many they have had to adapt their appeal and change their audience profile.

A classic example of a long-established brand is that of the “Beano” which has been in existence for many years and, as we have seen, remains a firm favourite with British boys.

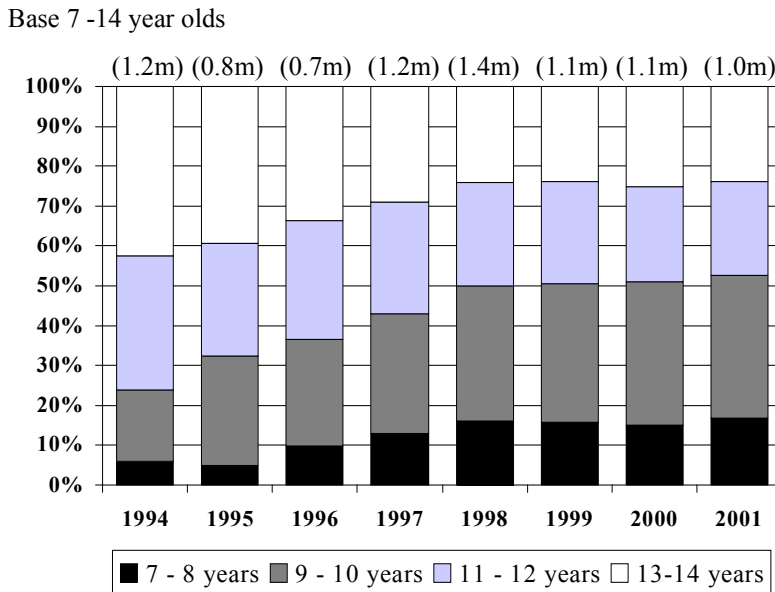
Figure 7: The Readership Profile of “The Beano” Over Time



Source: Youth TGI

Although readership figures remain strong, at just under a million, the age profile of those readers has moved to a much younger audience over time. Back in 1994 seven to ten year olds represented 59% of the readership, in the latest data they comprise 75% of the total.

Another well-established title is that of “Smash Hits”, a music magazine which focuses strongly on music celebrities. Again it has moved to a significantly younger audience over time. As Figure 8 illustrates it has moved from a position where less than a quarter of its readers were under 11 in 1994 to the situation today where over half are within this youngest age group.

Figure 8: The Readership Profile of “Smash Hits” Over Time

Source: Youth TGI

Whilst the Beano's younger age profile has evolved over a period of 9 years, Smash Hits underwent significant change in 1996. In 1996 readership dropped to just 700,000 but showed a dramatic recovery by 1997 to 1.2 million readers. It was at this time that the Spice Girls launched and stimulated enormous interest, particularly among 7 to 10 year old girls. Its clear in this case that the Spice Girls and the associated renewed interest in the music industry helped to revive the readership of Smash Hits and pull in the very youngest readers. This observation is another we see again and again in the youth market. Many titles are related strongly to specific brands and developments in the marketplace and their fortunes will reflect overall market trends.

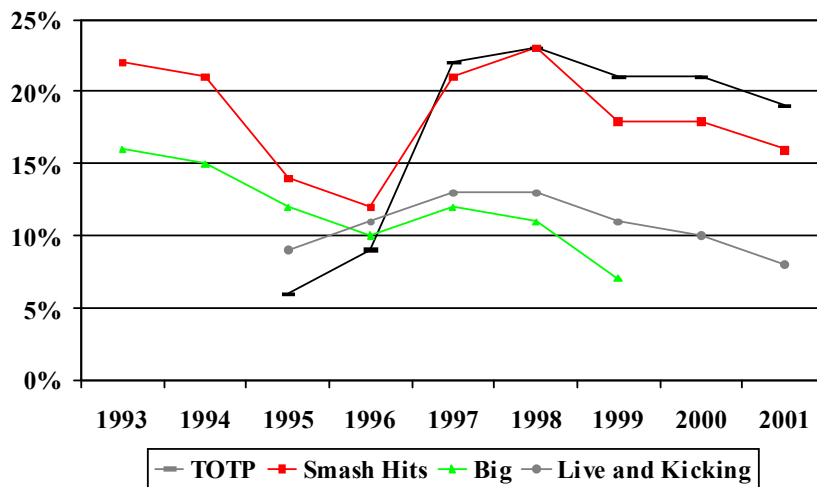
3.4 Product Lifecycles

The youth magazine market is volatile – many successful titles have virtually disappeared “overnight”. We have already seen that titles are strongly susceptible to churn. With tight age targeting those readers are highly susceptible to poaching from new titles in the marketplace. The young are notoriously fickle and often highly influenced by an attractive gift with a new magazine. What is more, a typical youth title can expect to lose a significant proportion of its readership each year as they grow older and move onto new interests.

In analysing readership trends over time it became clear that many titles have come and gone since the survey began. Of all the titles measured since 1993 only a minority have stayed on the survey during its entirety.

Of course any magazine does not exist in isolation and none more so than those operating in the youth market. A survey of the titles available quickly reveals strong relationships with social and leisure trends among young people. For example the computer gaming titles, music magazines and the recent rise in celebrity titles (including “Star” which was launched specifically as a celebrity title for young teenage girls). This in itself leads to titles being dependent on external trends. A clear illustration of this is the music category, one which has had a strong appeal to young girls over the past decade.

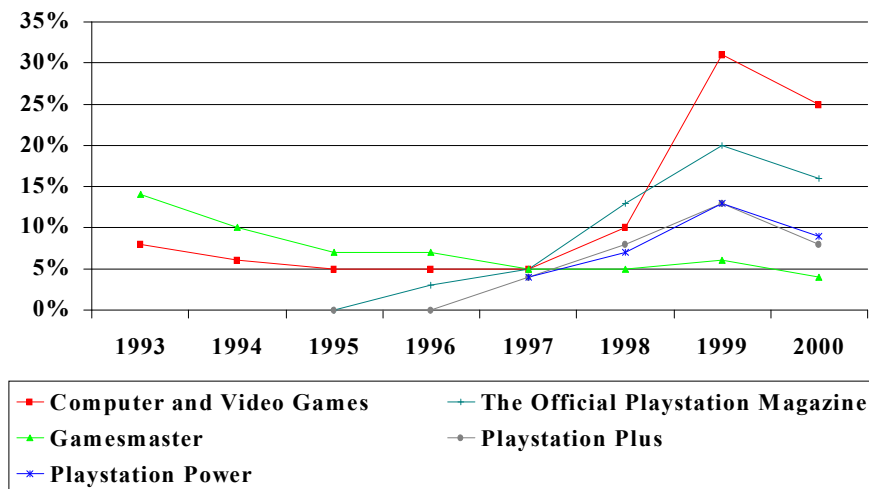
Figure 9: Readership of General Music and Music Celebrity Titles Over Time



Source: Youth TGI

In common with the revived interest we saw for “Smash Hits” many titles increased their readerships after the launch of the Spice Girls in 1996 and 1997. Since that time interest in music and music celebrities has remained high among this age group. However, since the peak in 1998 readership is now on the decline and the most recent data shows a worrying drop over the past year. There is no single band or star with sufficient appeal to rekindle interest in the magazines reflecting in turn the situation in the music market.

Many titles are related not just to particular interests but to brands themselves. Nowhere is this clearer than in the computer and gaming genre where magazines are related to specific gaming brands. In some cases as the brands and technology moves on so magazines fade away to be replaced. Some titles have survived over time as they have adapted their content and focus to the latest technology. A good example of this is Computer and Video Games which although relatively strong for the genre between 1993 to 1998 did not rise above an average issue readership penetration of 10% for the 11- 14 age group. In 1999 readership trebled on the previous year, reaching a phenomenal 31% of this age range. This clearly relates to the release of more advanced computer consoles and coincides with the equally dramatic rise in readership of the “Official Playstation Magazine”.

Figure 10: Readership of Computer Gaming Titles Over Time

Base: 11-14 year olds

Source: Youth TGI

So magazines that are related to specific brands can benefit strongly from those brands but unless the magazines are broad and flexible enough to evolve with the market they will last only as long as the brand itself. As illustration we need only turn back to computer titles on the original survey such as Amiga Format to see how long the lifecycle may be.

This characteristic affects not just the computer genre. For example in the music category “Live & Kicking” thrived while the associated TV programme enjoyed good ratings but as its popularity has waned so the magazine has suffered. Meantime character comics with a focus on Power Rangers, Pokemon and the like can only hope to last as long as the latest trend does.

4. Summary and Conclusions

Despite the obvious attractions the youth market is a difficult one in which to operate. We’ve seen from our analysis of Youth TGI that it can be a volatile market, highly susceptible to outside trends and the success of associated brands. Publishers operating in this sector have to cope with constant churn as their audience moves onto different titles.

We have seen that despite these hurdles many publishers have been able to manage their brands effectively, either replacing old titles with new or adapting their appeal as times change. The greatest threat now comes from other media and leisure pursuits. With the growth of the Internet and electronic media youth today have many different ways in which to use their time. Over the last 2 years the growth in mobile phone penetration and its multifaceted use for texting, surfing and even playing games presents a very real threat to print. But still the print medium is very much alive for the kids of today. Although the frequency with which children buy their magazines and perhaps the time they can devote to them is on the decline, magazines remain widely read. Their role in entertaining and informing children is unlikely to disappear overnight. What is more the magazine brands themselves can co-exist with online and presence on TV presence. In many cases, as we have seen, the most successful youth titles have long operated in this way as brands across different media.

References

- Wicken, G. “Keeping Young Readers”, ESOMAR seminar 1995
 Abel, S. “Can Young Readers Take the Frequency Quiz?” MRS Research Magazine, 1995

