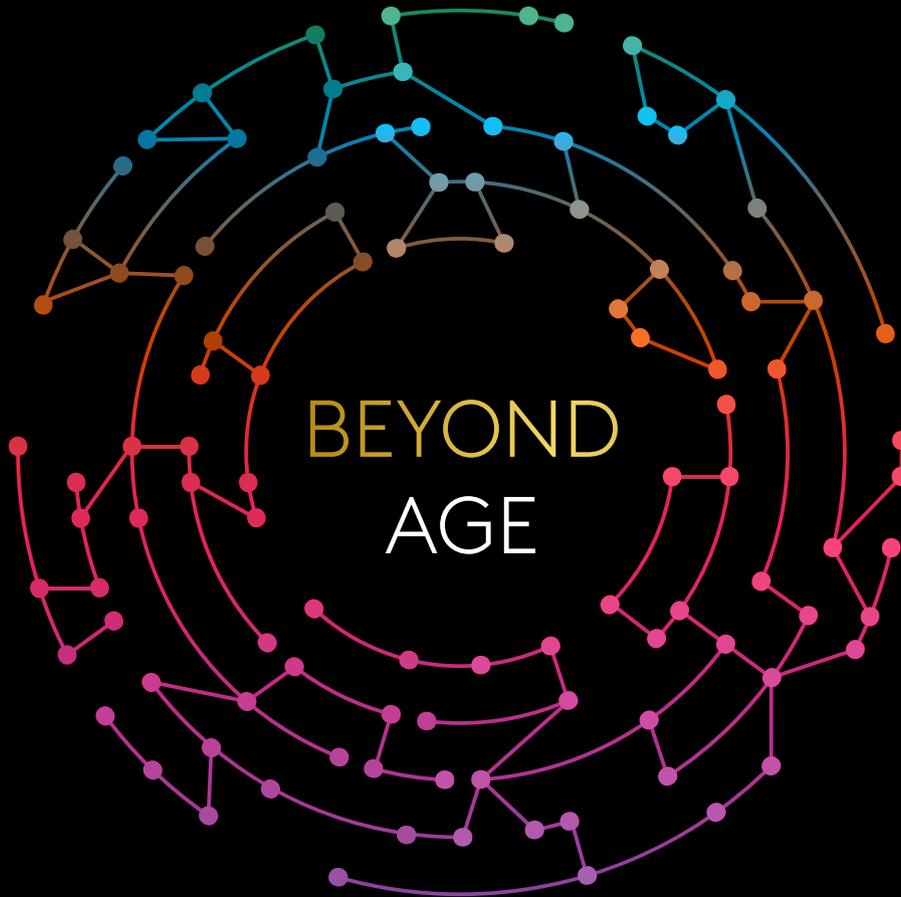


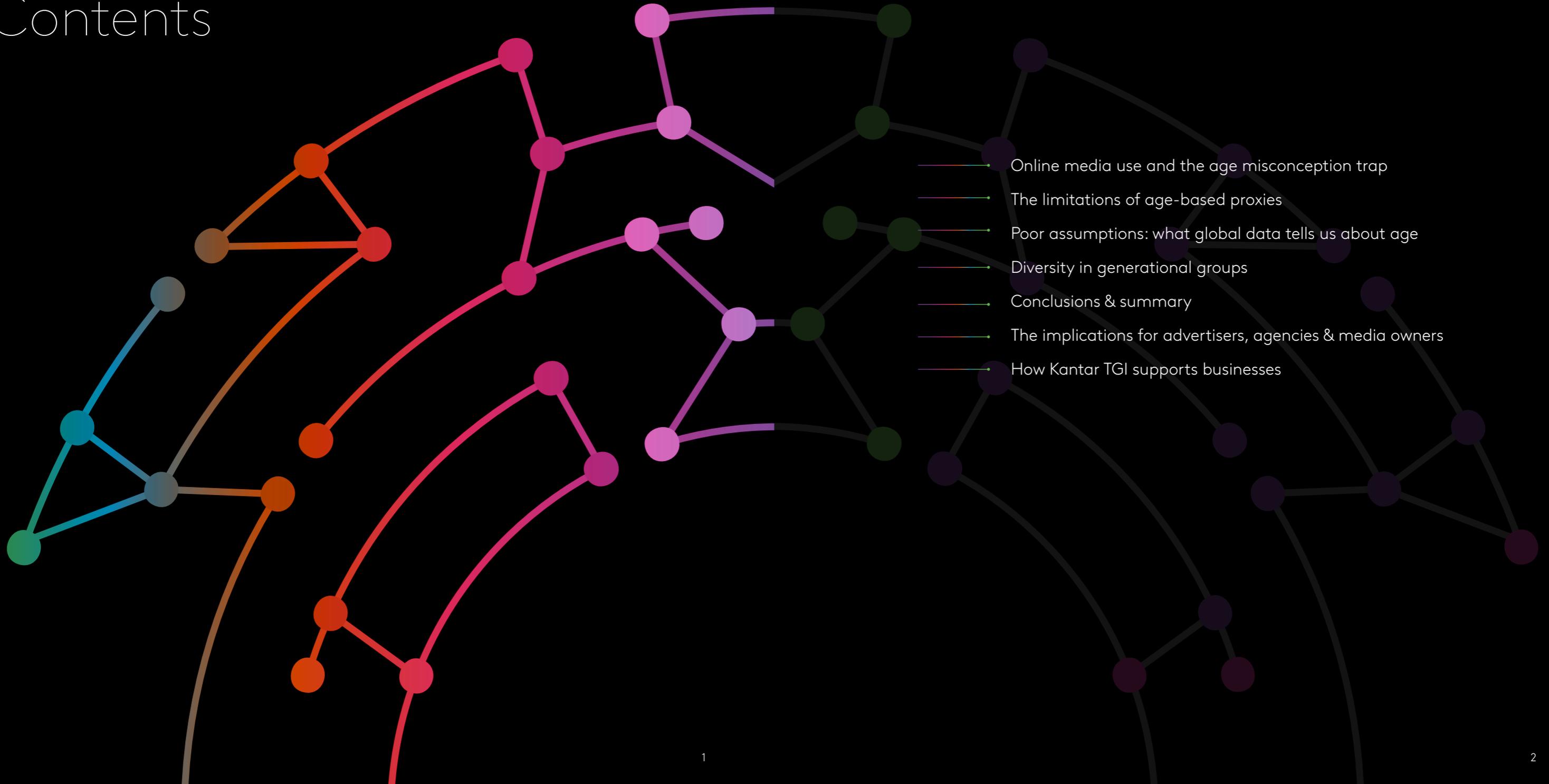
# KANTAR



Boosting marketing effectiveness with  
a new understanding of age-based profiling

POWERED BY TGI

# Contents



# Introduction

**Whether an advertiser briefing its agency, an agency planning a media campaign for its client, or a publisher valuing its inventory, age is often the key differentiator in building a target audience and is typically the most important way to measure the success of a campaign.**

However, given the advances in research methodologies and technologies, and significant leaps in our understanding of consumers, are age-based audiences still the most effective way to go to market?

Moreover, age-based audiences themselves - such as Gen X or Millennials - are often generalised by widely cited but often little-understood generational groups. In turn, they become shorthands for segmenting millions of consumers and often lead to one-dimensional, stereotypical analyses (think latte-loving millennials or property-rich boomers).

This study pushes beyond the limitations of using age-based target groups in marketing campaigns - to explore alternatives that will enable marketers to develop richer, more closely defined target audiences and ultimately build more successful campaigns.

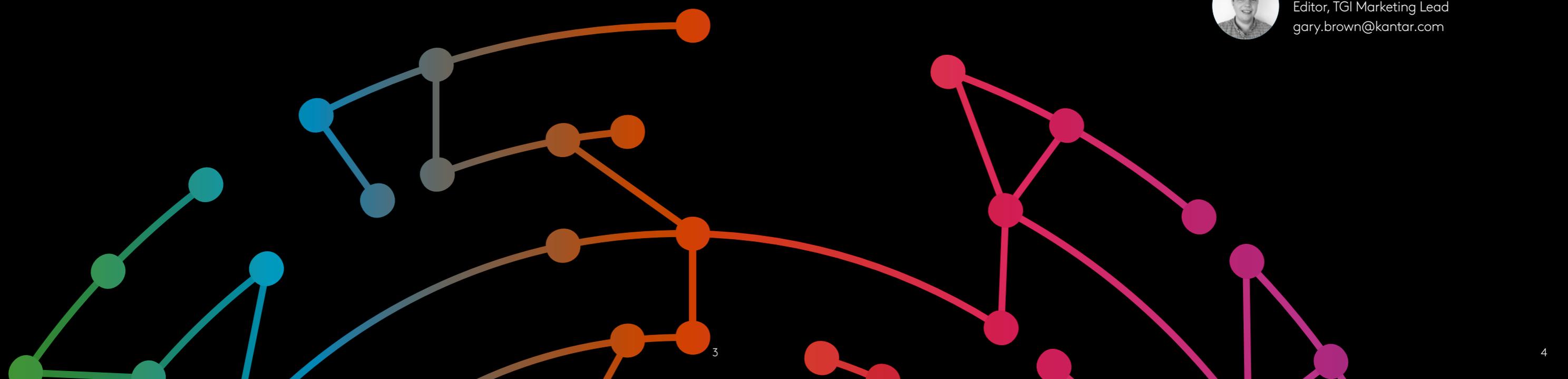
To do so, we will reveal insights from Kantar's TGI data - the syndicated survey used in forty-five markets worldwide, and a global currency for consumer audience and media intelligence. The unique breadth and depth of TGI will allow us to explore different facets of consumer life; from their values and attitudes, to their brand choices and media behaviours.

We look forward to continuing the conversation about how TGI can support you to make smarter decisions, power your marketing and unlock new growth for your business.

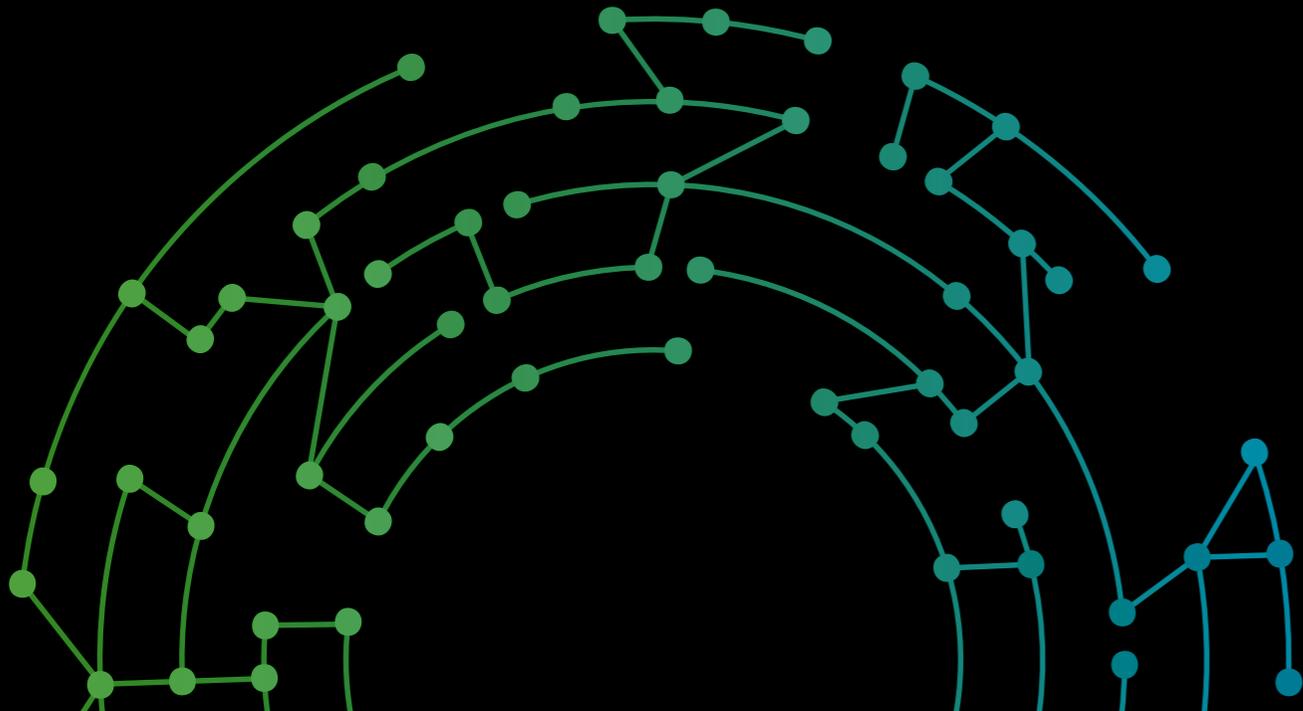


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## Online media use and the age misconception trap



Age-based stereotypes are often embedded in our psyches and, as a result, we can be slow to perceive the changes indicated by the data. This often happens if early adoption in an online platform is made by a cohort of a particular age, as this tends to define the platform, and our view of it, over the longer term.

Indeed, a digital platform might even seek to cement this perception if it wishes to associate its brand with a particular audience.

Yet over time online populations tend to recalibrate to become more reflective of the population at large. And despite such consistent evidence showing otherwise, age-based stereotypes often remain rigid and fail to evolve in line with reality.

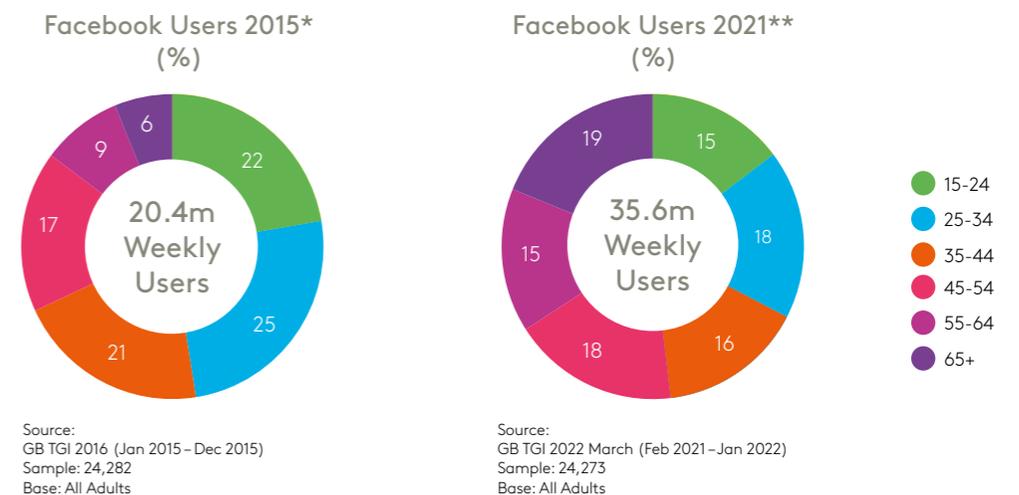
### Facebook's changing age profile

For instance, TGI data shows that older generations have rapidly become mainstream users of digital media, dispelling any assumptions showing otherwise. Facebook, for example, has witnessed a significant increase in the proportion of 65+ adults using its app each week - rising from 11% in 2015 to 67% in 2022. (Chart 1.1)

This has radically changed the age profile of the platform, taking Over 65s from a 6% minority to the largest single demographic cohort (19%) in 2021.

At the same time, the share of 15-24s has fallen from 22% to 15% over the same period. This should alarm any marketers who have failed to update their audience view of Facebook - as well as other digital platforms - and lead to a new consideration of older online audiences as part of the mainstream rather than a minority.

1.1 Changing Facebook User Profile



## Different platforms, different age profiles

There has been a notable change in the age profiles of digital audiences over recent years – although not all platforms are changing at the same rate.

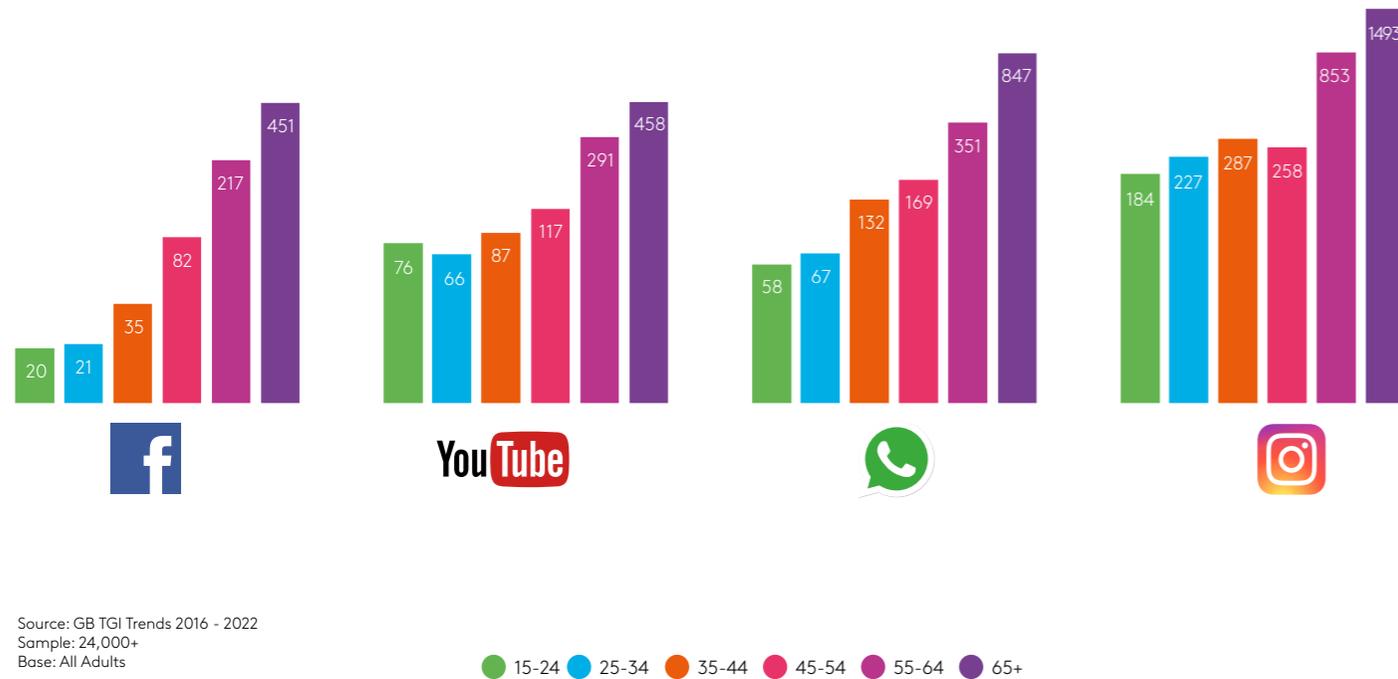
In the period 2015–2021, there was significant growth in the use of mobile apps with the growth-rates among older audiences out-pacing younger groups, as indicated in the chart 1.2.

We can see high growth rates among the over 65s for Facebook (451%), YouTube (458%), WhatsApp (847%) and Instagram (1493%).

To get a holistic understanding of the changing demographics of these platforms, however, we need to consider the relative size of the different age cohorts and how they have changed over the same period.

### 1.2 | Different platforms, different age profiles

% Increase in Weekly App Users from 2015–2021 (Log Scale)



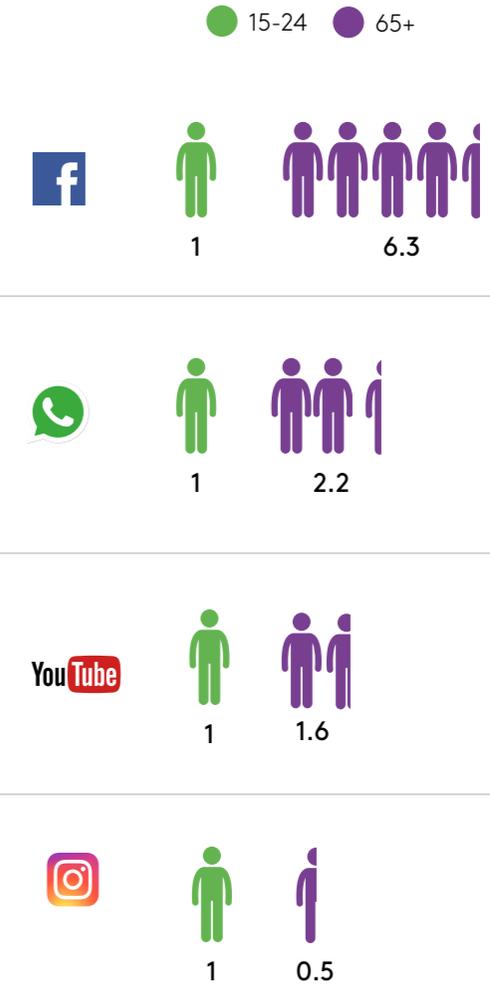
For instance, as shown in the chart 1.3, we can see that for every additional 15-24 user of Facebook’s app, there were more than six over 65 users as the platform evolves to reflect the population at large.

Other platforms also have ratios of audience acquisition that skew older, but to a lesser degree than Facebook – with WhatsApp (2.2 over 65s per 15-24 yr old) and YouTube (1.6 over 65s per 15-24 per yr old); while for Instagram the growth in its audience continues to be driven predominantly by younger users – with half as many over 65s joining the platform in the last 6 years as 15-24 yr olds.

These age dynamics suggest a need for marketers to have a better understanding of the evolving profiles of platforms and adjust their campaigns accordingly.

### 1.3 | Changing age profiles of apps

For every additional 15-24 weekly app user between 2015 and 2021, there were X additional users among 65+



Source: GB TGI Trends 2016 - 2022  
Sample: 24,000+  
Base: All Adults

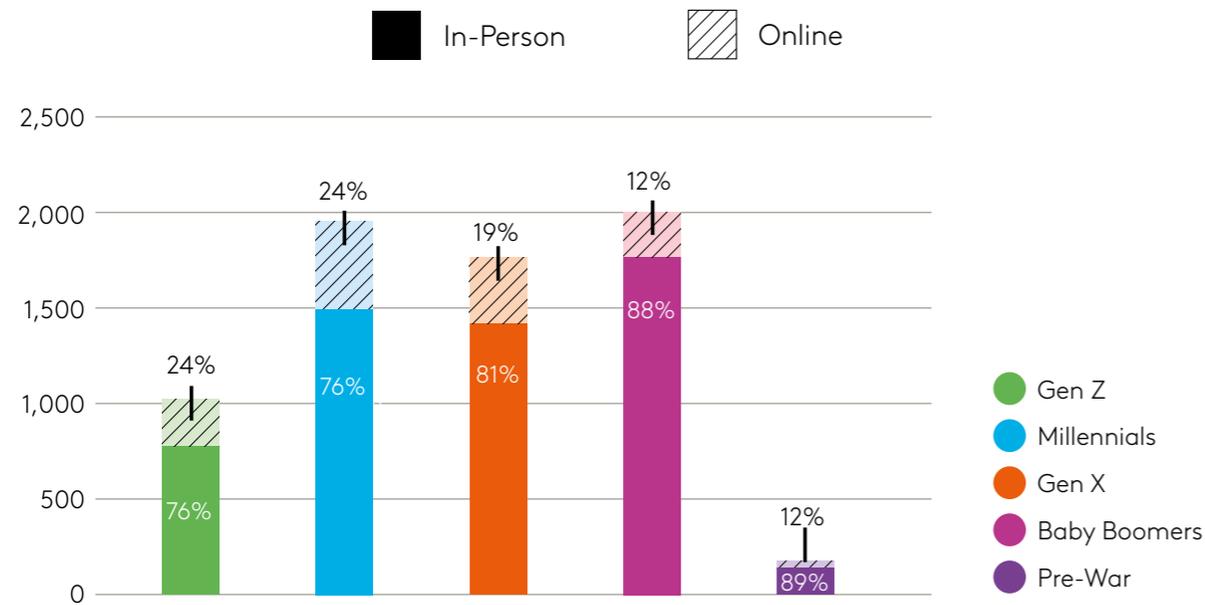
## Understanding early adopters to predict mainstream change

TGI data shows that despite major life purchases ordinarily being made offline, almost a quarter of millennials and Generation Z who bought a car in the last 12 months did so over the internet - compared to just 12% of Baby Boomers. This correlates with the likes of used-car disruptor brands

Cinch and Cazoo making significant investments in advertising and sponsorship across all platforms over the same period, suggesting there is an expectation that older generations will adopt the behaviours of younger cohorts at some stage. Judging by the data, this appears to be a sound bet. (Chart 1.4)

### 1.4 | Car Purchasing – Online vs. In-Person

Consumers (by Generational Group) who bought a car in last 12 months online or in-person



Source: GB TGI 2022 March (Apr 2021 – Jan 2022)  
Sample: 3,636  
Base: Bought a car in L12M



## The limitations of age-based proxies

Aged-based targeting is a long-standing marketing strategy, but without understanding it fully it risks becoming something of a blunt tool.

Age can, of course, be a useful determinant of differences between consumers, however. As we can see in the chart overleaf, a cross tabulation of age ranges can be charted neatly across typical life events.

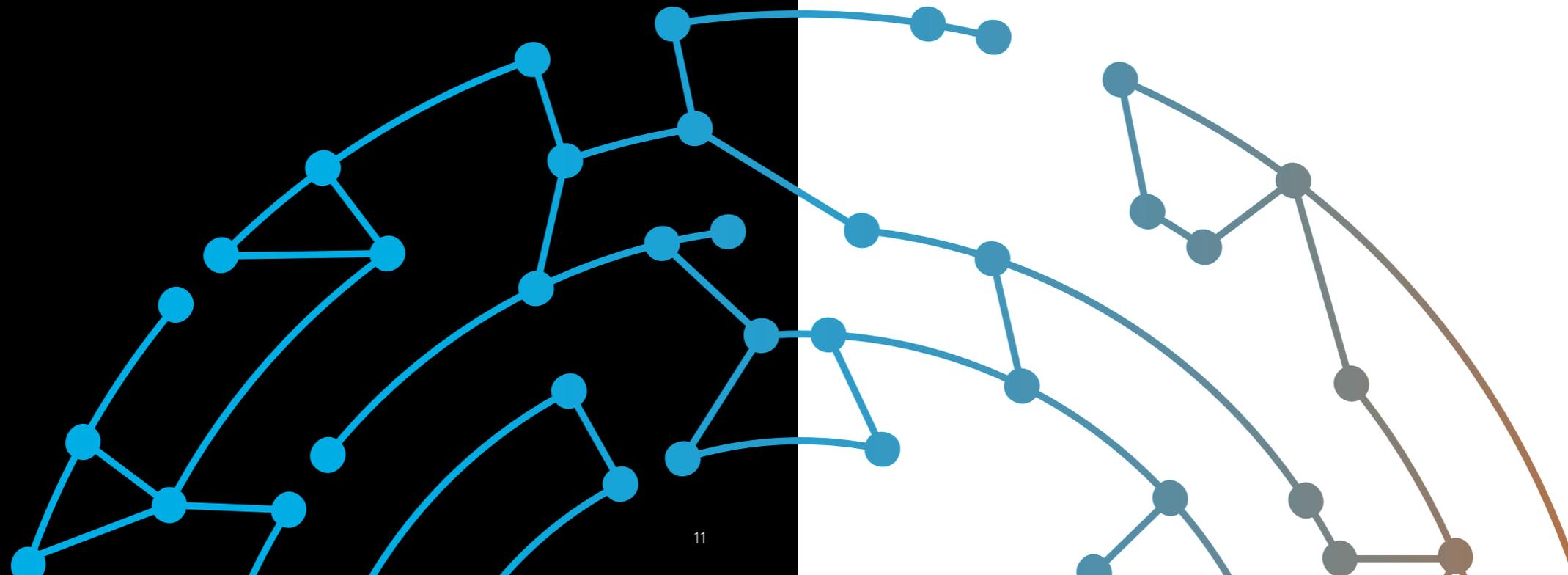
In this example (Chart 2.1), these are events experienced in the last 12 months by consumers, and when plotted on a correspondence map there is a clear correlation between events that are very likely to happen when a consumer is younger, such as move out of parental home or finish school; or very likely to happen when a consumer is older, such as finish mortgage repayments or retire.

This is known as the 'TGI Arc of Life' and we visualise it in this way to give marketers a template to show the typical events most consumers will go through as they age.

However useful this is, it is still only a generalised picture that groups together values that have the greatest affinity. In reality, everyone's arc will be different depending on the circumstances of their lives, with some events in a different order or skipped entirely.

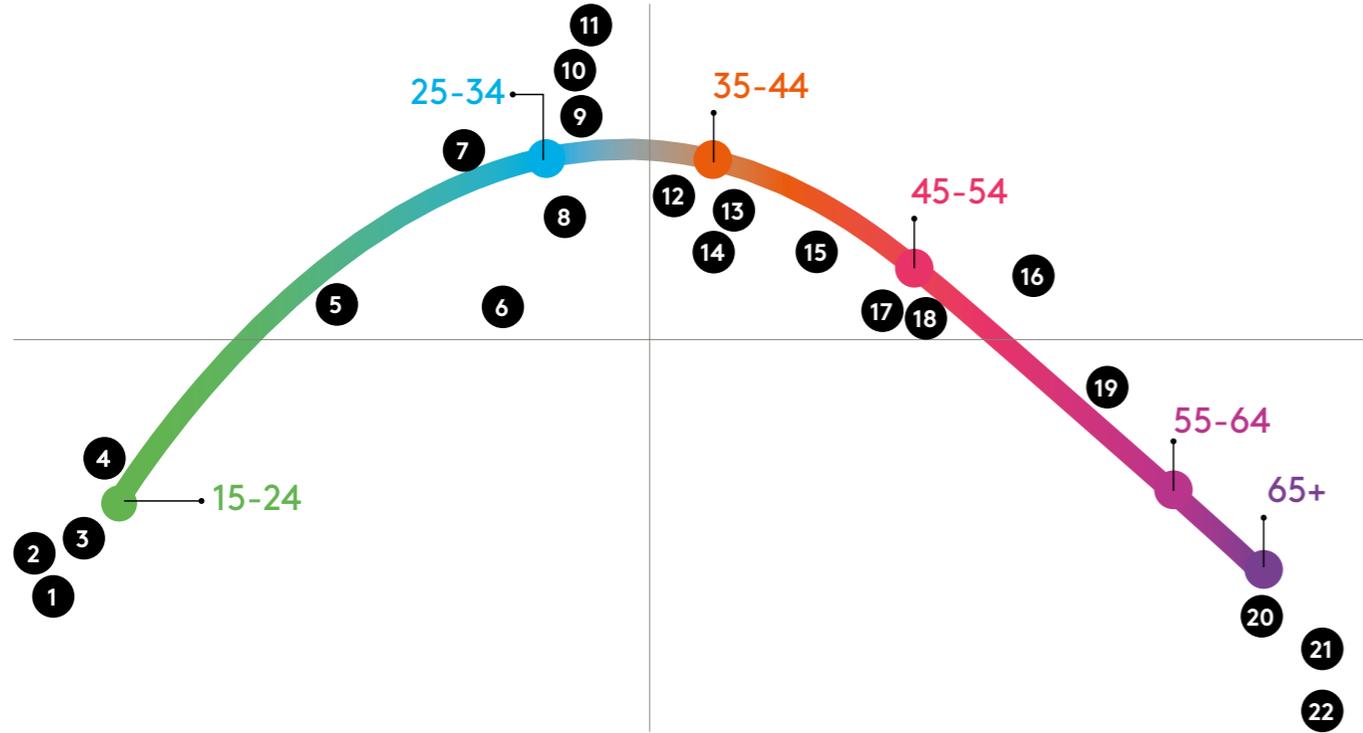


Get in touch to learn how to overlay your brand and competitive set to develop an overall picture of your target market.



## 2.1 | 'Arc of Life'

Correspondence map of Age Ranges vs. TGI Life Events



1. Finish school/college
2. Start university
3. Start first job
4. Moving out of parental home
5. Move in with partner
6. Start own business
7. Get engaged
8. Change job
9. Purchase first home
10. Birth of your first child
11. Birth of your second or subsequent child

12. Get married
13. Divorce/separate from long-term partner
14. Redundancy from work
15. Purchase/sell a house/flat
16. Child goes to university
17. Make major home improvements
18. Sell and purchase a house/flat
19. Finish mortgage repayment
20. Child gets married
21. Birth of grandchild
22. Enter retirement

Horizontal Axis: 63%  
Vertical Axis: 28% (Total Variance: 91%)

Source: Europa TGI R2 2021 (4 Country: GB, FR, ES & DE)  
Sample: 60,001  
Base: All Adults



TGI measures life events 'experienced in the last 12 months' and 'expect to experience in the next 12 months' – allowing marketers to anticipate and act on important lifestyle changes.

### Targeting by life experience

If we look at some of these life events in isolation the picture becomes more complex.

For example, the life event 'Birth of a Child' statistically will happen in all age groups, but a brand that took a 20-year age target group around the average of 25-34 and 35-44 would still be missing over a fifth of the potential target audience.

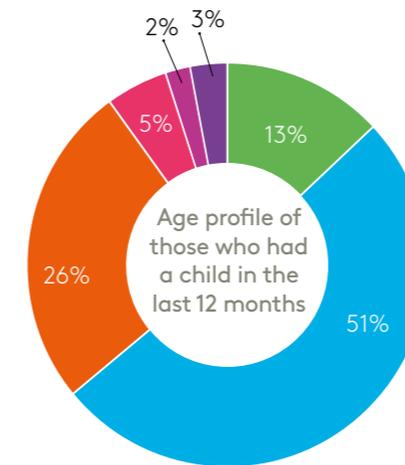
Looking deeper, the TGI database also reveals that with a category like nappies, for instance, we can see that while those in the 25-44 age category are two and half times more likely than the average to purchase them; the index is ten times for those who have experienced the birth of a child in the last 12 months. (Chart 2.2)

Consequently, being able to make targeting decisions based on real-life experiences will yield improvements in the impact of a campaign.

In another example, the life event 'Sell/Purchase a Home' occurs over a wide range of ages. However, a narrow focus on the average (mean) age of a home mover at 49 would ignore the 42% of under 45s who could be an important target for categories as diverse as financial services, energy, telecoms and DIY.

In this case, an age-based target audience will lead to significant missed opportunities to reach and engage potential customers, so marketers should look beyond age and incorporate behaviours, attitudes and life events.

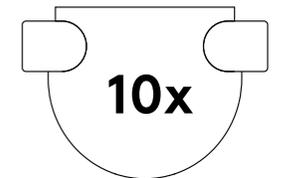
### 2.2 | Example: Recent Parents



Source: Europa TGI R2 2021 (4 Country: GB, FR, ES & DE)  
Sample: 60,001  
Base: All Adults



25-34s are 2.5x more likely than the average adult to have bought nappies in L12M



Those who have experienced birth of a child in L12M are 10x more likely than the average adult to have bought nappies

15-24 25-34 35-44 45-54 55-64 65+

## Modelling campaign improvements with TGI

In this example, we again look at the market for nappy buyers and compare how a premium TGI segment can produce improved results relative to an age-based proxy.

We can see from TGI that even if adults aged 25-44 have naturally the highest affinity with 'Nappy buyers', only 12% of those aged 25-44 actually do buy nappies and 30% of 'Nappy buyers' are not 25-44 years old.

Below, we have modelled and compared two digital campaigns with identical impressions but different target audiences:

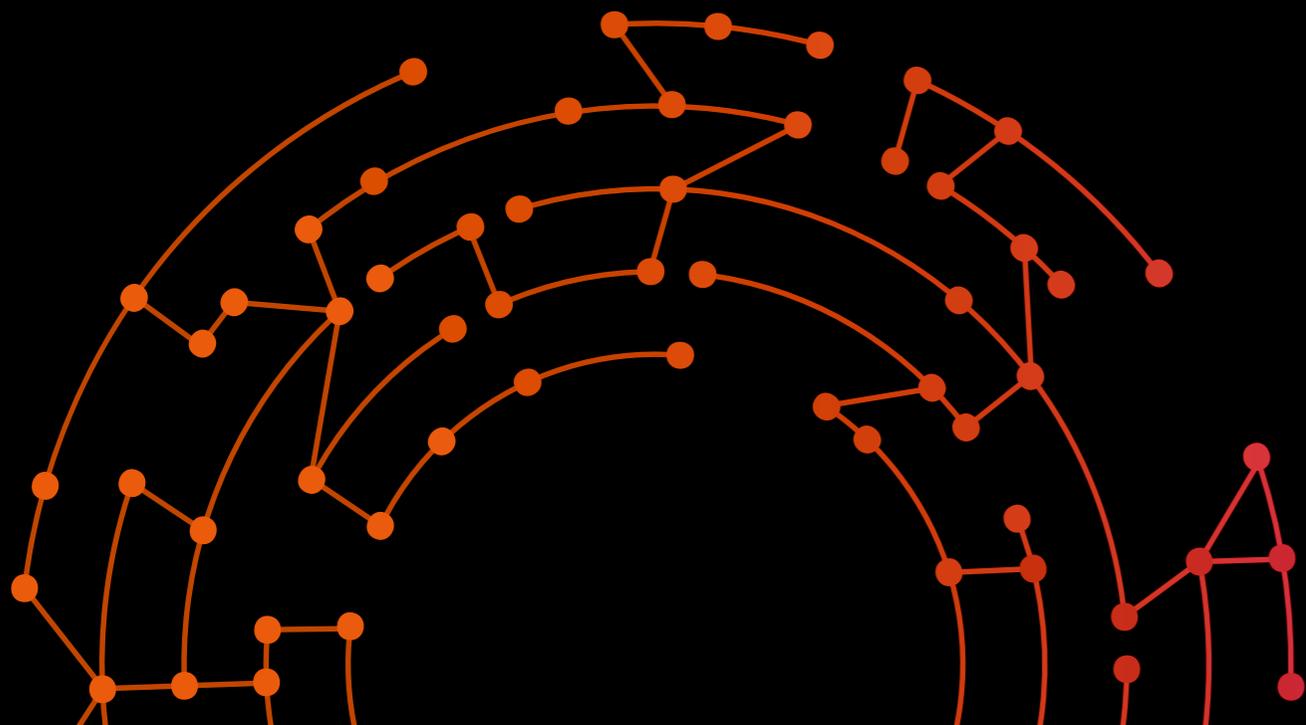
It is a common misconception that a cheaper CPM results in a cheaper campaign and an apparently lower-cost means of achieving specific KPIs. Here for example, we see that, despite the lower CPM, using the standard 3<sup>rd</sup> party demographic segment works out at more than double the cost of using the premium TGI audience target 'Nappy Buyers'. The total cost of a campaign for 25-44 y.o. is more than double the cost than using the premium target 'Nappies Buyers'.

The premium segment, 'nappy buyers', will convert at a much greater rate, resulting in a cost per acquisition (CPA) that is almost four times cheaper than the standard 25-44 y.o. audience segment. This illustrates how looking beyond age to specify campaign targets can yield improved return on investment.

	25-44 y.o. (\$0.50 CPM)	Nappy buyers (\$1.10 CPM)
Impressions (in mill)	10,000	10,000
Total Cost	\$5,000	\$11,000
Conversions(at 50%)	550	5,000
Cost per Acquisition (CPA)	\$9.09	\$2.20



## Poor assumptions: what global data tells us about age



Traditionally, age-based groups are used in the planning of global marketing campaigns as a short-hand 'common currency' that can be applied across markets.

Although this approach works to some degree, without a full understanding of its limitations, marketers risk mistargeting or producing campaigns below their maximum effectiveness or reach potential.

Demographics vary greatly between markets, where a host of cultural or even legal issues will produce some startling differences - and these differences are often more pronounced when it comes to media behaviours.

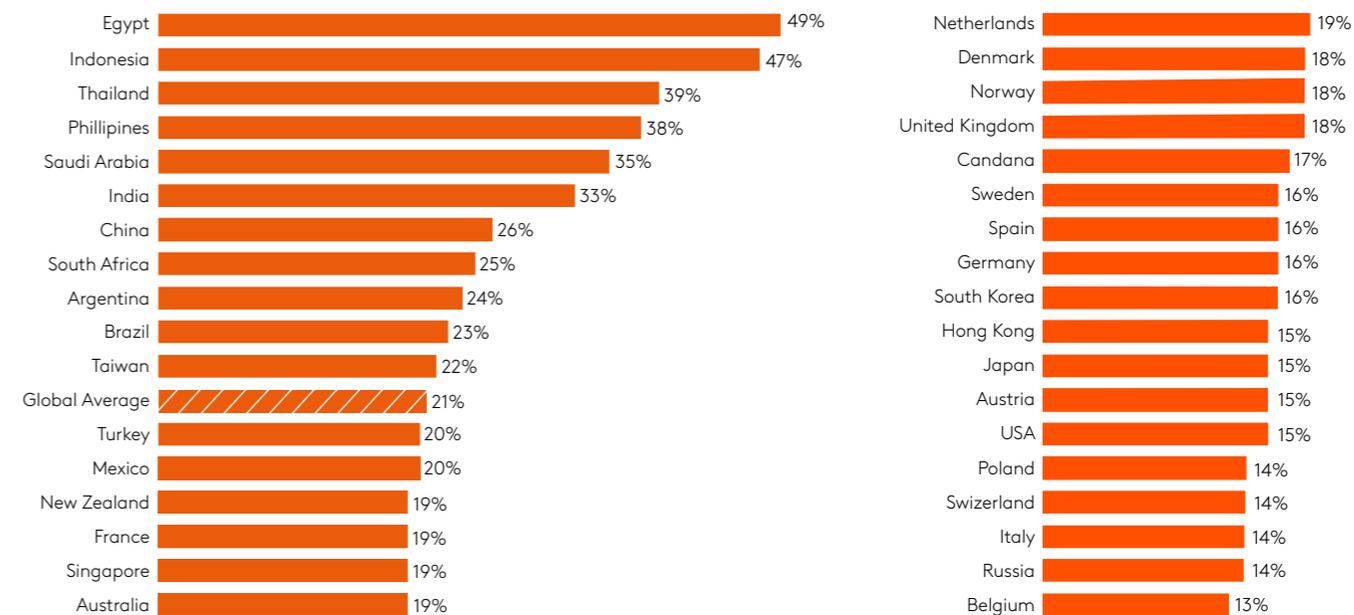
### Different market, different results

Examining Kantar's TGI Global Quick View study, it is possible to witness the significant differences in make-up of online populations across 35 major global markets.

In Egypt, for instance, 49% of weekly internet users are aged 16-24, compared to 26% in China and just 15% in the US.

These fundamental differences in access and usage of online media are important for marketers to take into consideration when planning campaigns - and using age bands as a 'common global currency' will yield very different results from market to market.

### 3.1 | Share of Online Population Aged 16-24 (%)



Source: TGI GQV 2021 | Sample: 85,987 | Base: All Adults



## Knowing where to use age as a differentiator of attitudes

Attitudinal data has been used in TGI for decades, giving us a clear idea of when age is either a good or bad differentiator of attitudes.

For example, in the following charts, we can see largely flat lines over a range of attitudes, signalling that, in these cases, age is a poor differentiator.

Examining further the statement 'How I spend my time is more important than the money I make', we see the same undifferentiated results by age cohort both globally at the market level. Looking beyond age, here (Chart 3.3) we find that income is a better differentiator for this statement, with those in the top tier.

Here (Chart 3.3) we can see that income is also a better indicator than age, with those in the top tier more likely to agree with the statement than those in the bottom, showing how wealth changes attitudes.

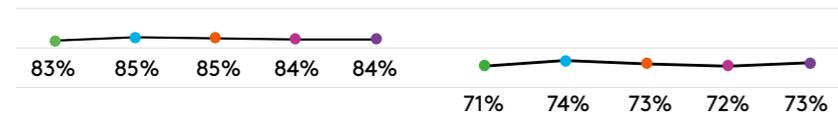
Age can still be a good predictor of attitudinal difference. For example, as we can see in the following charts, people become more risk averse over time, and prioritise fashion and career ambitions when they are younger.



As well as TGI Global Quick View's harmonised survey of internet users, TGI is available in 45 markets worldwide to reveal important nuances and leverage powerful local media channels to communicate with relevance

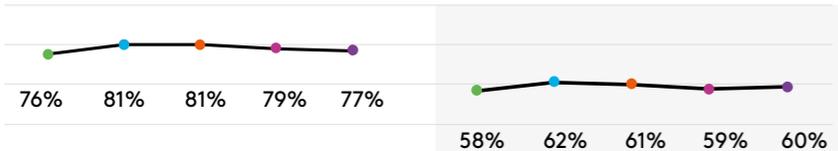
### Charts 3.2 | Examples where age is **not** a good differentiator of attitudinal differences

% of Online Population who agree with the following statements



"You should seize opportunities when they arise"

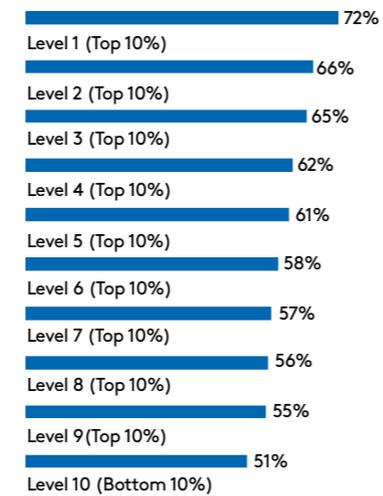
"It is important to respect traditional customs and beliefs"



"It is important to have a lasting relationship with one partner"

"How I spend my time is more important than the money I make"

### Chart 3.3 | Income cohorts of those who agree with statement: "How I spend my time is more important than the money I make"



Source: TGI GQV 2021  
Sample: 85,987  
Base: All Adults

● 15-24 ● 25-34 ● 35-44 ● 45-54 ● 55-64 ● 65+

### Examples where age is a **good** differentiator of attitudinal differences

% of Online Population who agree with the following statements



"I like to keep up with the latest fashions"

"It is important my family thinks I'm doing well"



"I like taking risks"

"I want to get to the very top in my career"

Source: TGI GQV 2021  
Sample: 85,987  
Base: All Adults

● 15-24 ● 25-34 ● 35-44 ● 45-54 ● 55-64 ● 65+

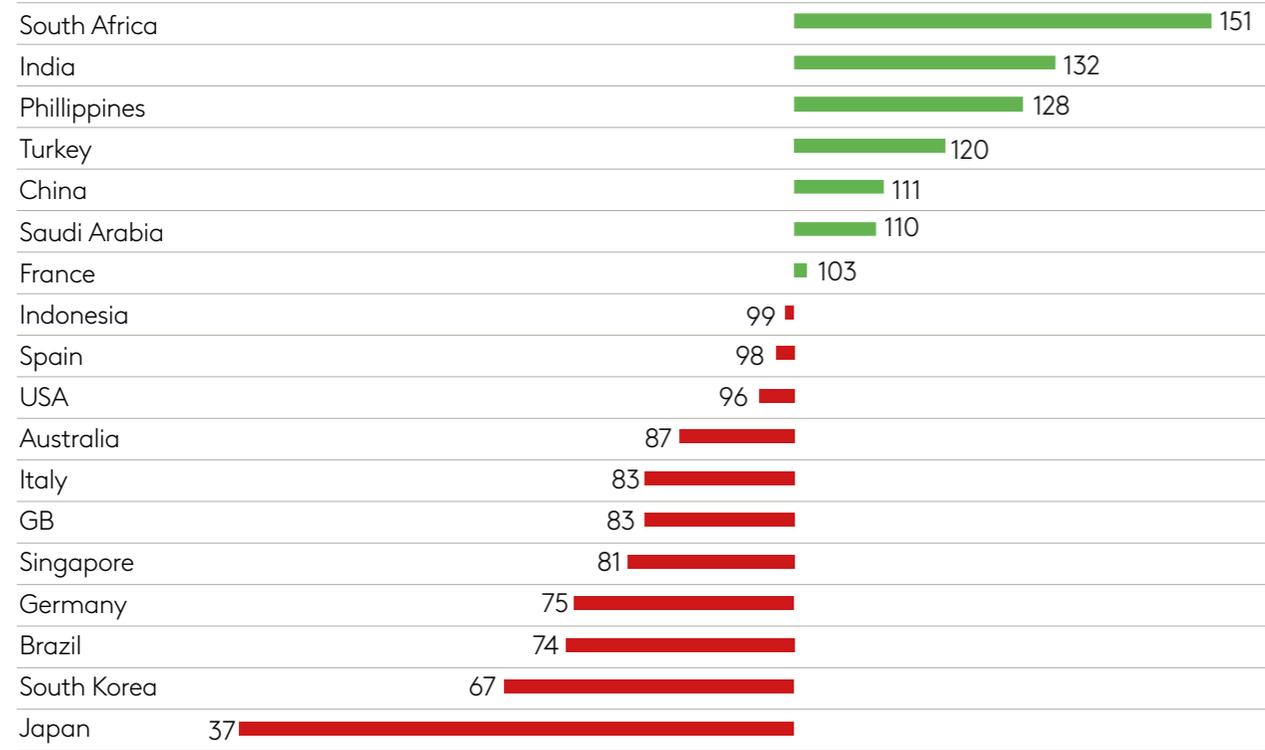
\* TGI Global Quick View 2021 has a sample of 85,987 weekly internet users aged 16-65 across 35 markets.



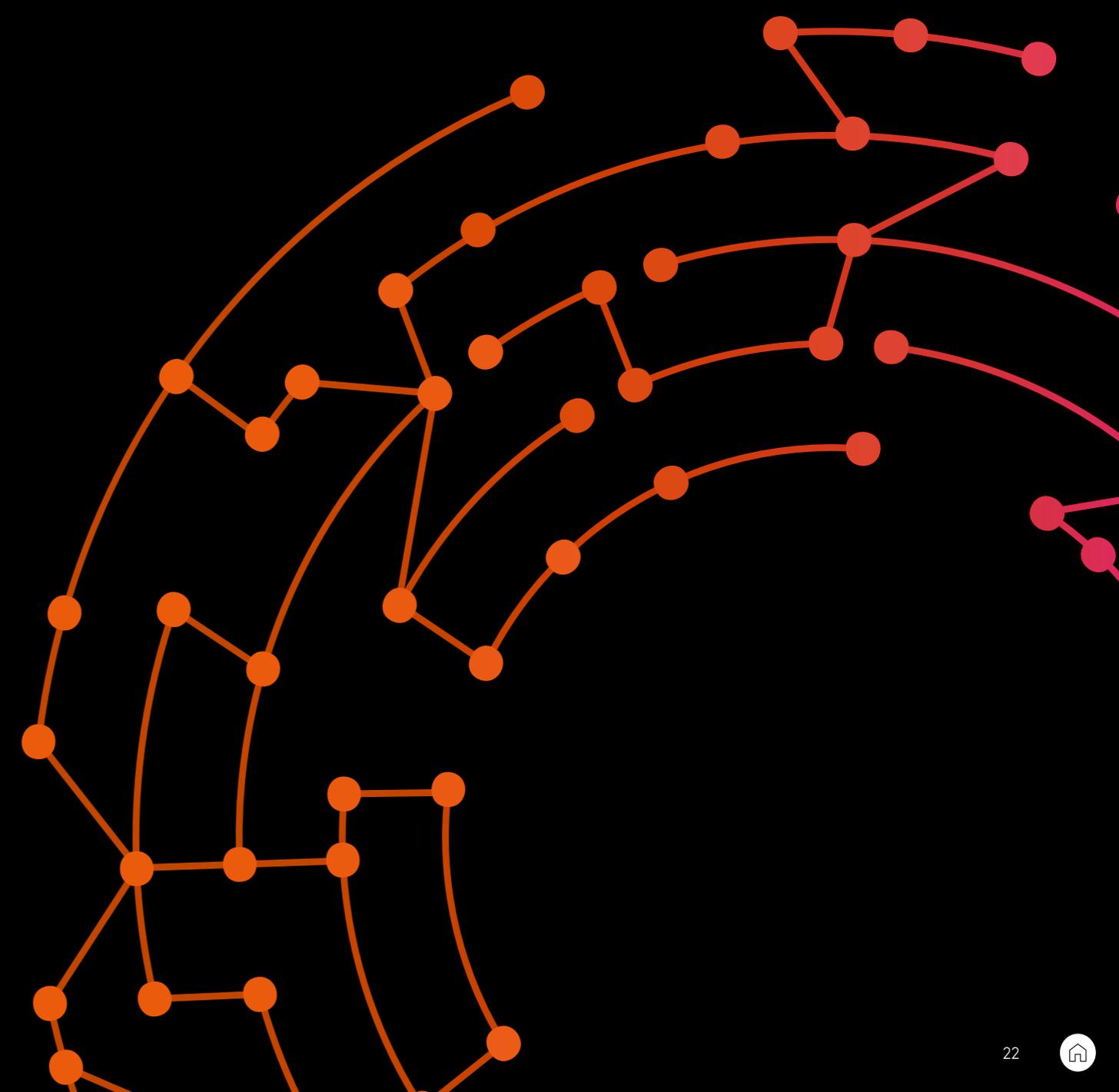
A closer look at country differences within the same age group shows just how valuable it is to understand market nuance. In chart 3.5 for example, there is a wide cultural disparity in appetite for risk in the 16-24 age group - with younger people in South Africa much less risk averse than those in Japan.

Indeed, the market differences are so stark, there is a higher proportion of 55-64s in France that like taking risks than 16-24s in Japan.

**Chart 3.5 | Index of 16-24s agreeing with statement "I like taking risks" across a selection of TGI GQV markets**

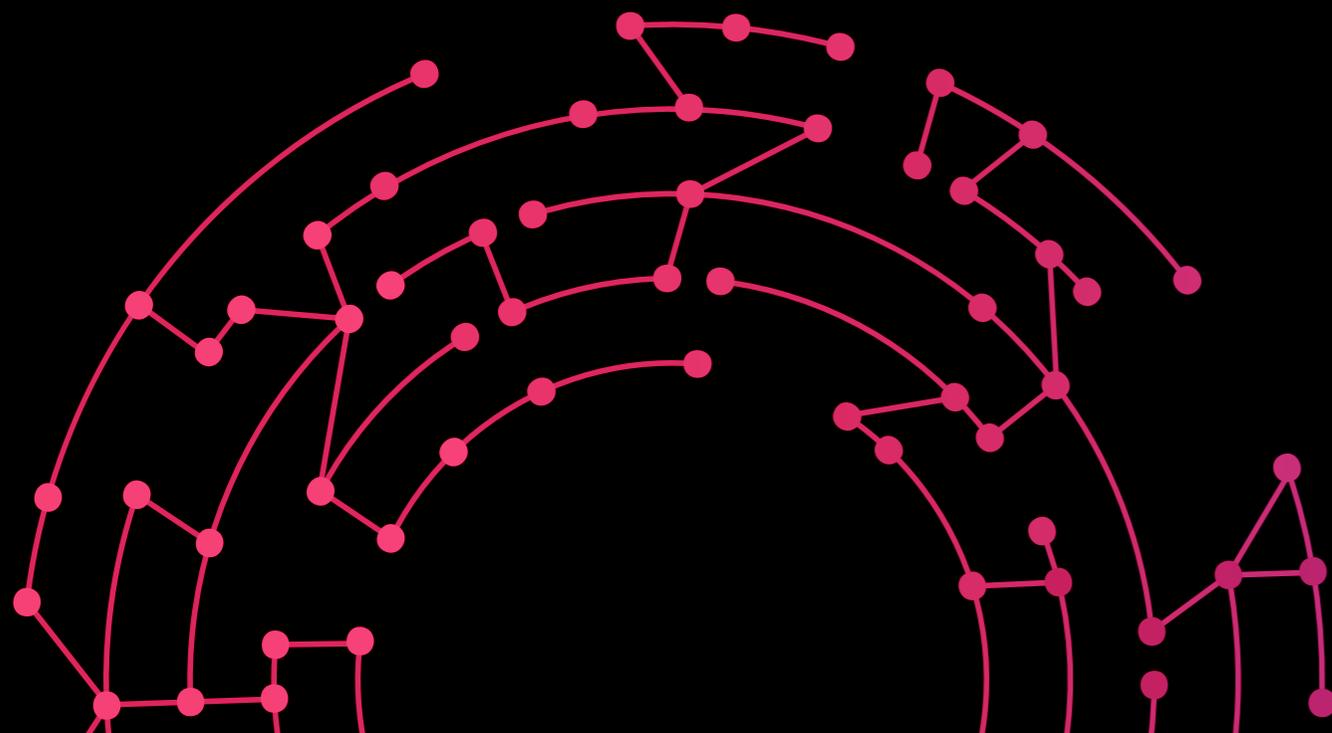


Source: TGI GQV 2021 | Sample: 16,176 | Base: 16-24s



# 4

## Diversity in generational groups



Marketers will be accustomed to the various ‘pen portraits’ that depict the five generations: **Pre-War** (Born before 1946), **Baby Boomers** (Born 1946–1964), **Generation X** (Born 1965–1980), **Millennials** (1981–1996), and **Generation Z** (1997 onwards).

Although generational groups are widely-used by marketers, they are often poorly understood and represent only a highly generalised view of consumers. It is also important to note, as per the chart below, they differ greatly in size. This can have a significant impact on marketing because although younger generations tend to over-index on emergent brands or media, they are often outsized by older groups and so to ignore the latter is to ignore their significant reach potential (typically in developed, Western markets - this may not be the case everywhere as we saw in the last chapter).

Here, we focus on data from our TGI survey in Great Britain to look at often the most under-reported cohort, Generation X, to understand the real limitations of drawing significant conclusions from such age-based groups.

### Above average spenders under pressure

In Great Britain, Generation X are among the highest earners in the UK, with an average personal income that is 13% higher than the average British adult. They represent 31% of all those with a family income above £50k (Index: 124)

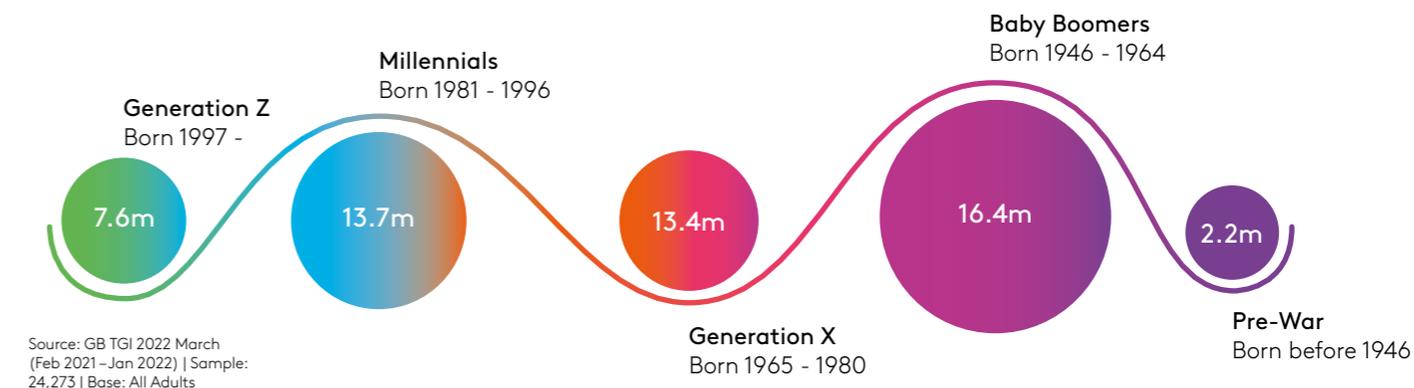
Despite this, Generation X are also 27% more likely to say that they are finding it ‘difficult’ or ‘very difficult’ to cope on present income levels.

Even without the impact of current macroeconomic factors, these pressures are often driven by lifestyle demands and consumer preferences.

For example, TGI measures spend levels on 120 different items - from cars and jeans, to coffee machines and groceries - and Generation X has above-average spend across 71 items; spending 37% more than the GB average on children’s clothes, 13% more on Christmas gifts, and 9% more on watches.

This financial pressure on incomes is also a likely factor in the close affinity between the ‘Bargain Hunters’ and ‘Prudent Purchasers’ segments in TGI’s Shopper Archetypes.

**Chart 4.1 | Generational Groups are, by their nature, very broad...**  
Standard generational segments available on TGI



## Attitudinal & behavioural mix

Taken together, this paints a picture of a generation that is feeling the impacts of the cost of living crisis alongside the twin pressures of keeping up with the demands of work and family life.

Indeed, we can even see this reflected in their attitudes and behaviours, noting that Generation X are among the most likely to agree that they often worry about failing their children (index 132); that work is solely for making money (index 122); and that it is difficult to say no to their kids (index 120).

Similarly, Generation X are 38% more likely to have three or more personal loans; 25% less in savings than the average UK adult; and 39% more likely to change credit cards because of a 0% balance transfer.

Yet despite these shared and generalised characteristics, targeting Generation X as a single, homogenous group will only offer a one-dimensional view. For instance, they may well be more family focused because of their age, but that is only part of a much more complex story that impacts how marketers should approach them.

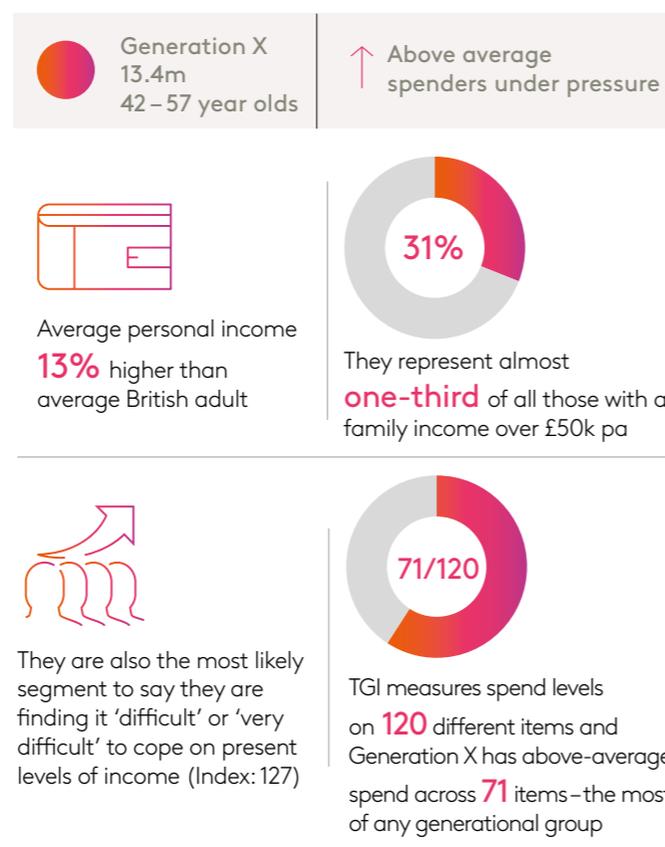
For starters, Generation X spans a wide age range, including those who are currently having new-borns, have children in school, and are new grandparents.

In many respects their family circumstances are much more instructive of their purchasing power, and thus attractiveness as a target audience, than their age alone.



Examine the thousands of brands and media vehicles covered by TGI and gain an in-depth view of how generational segments index against them.

## Chart 4.2 | Deep-Dive: Generation X



Source: GB TGI 2022 March (Feb 2021 - Jan 2022)  
Sample: 24,273  
Base: All Adults

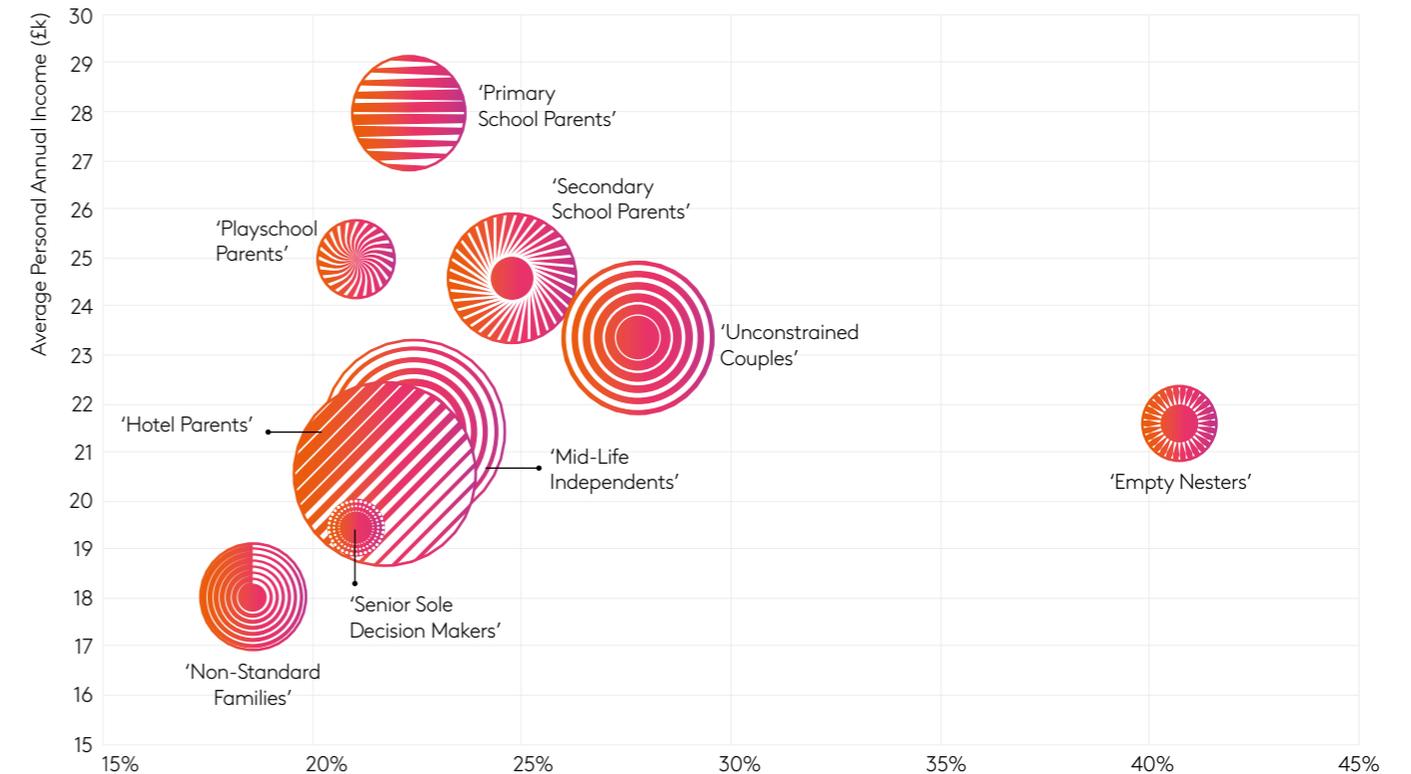
## Life-stage insights

Because of the wide variety in their family circumstances, Generation X can be segmented further to reveal the diversity of this age cohort, as shown in the chart below. Indeed, when viewed this way, the presence and age of children has a significant bearing on their disposable income and priorities, purchase decisions, brand choices and media behaviours.

For example, those within Generation X who are defined as 'Playschool Parents' may well have the highest income, but they are also among the least to agree they are comfortable with it as shown below.

Meanwhile, 'Unconstrained Couples' and 'Empty Nesters' rank in the middle when it comes to income, but both are likely to be comfortable with their money due to fewer familial pressures on their finances. This marks them out as a different prospect for marketers in terms of their leisure pursuits, product categories, brand choices and media behaviours.

**Chart 4.3 | Deep-Dive: Generation X**  
Understanding the 'value' of an audience as a combination of both income and comfort with financial circumstances



Source: GB TGI 2022 (Feb 2021 - Jan 2022) | Base: Gen X, Born 1965 - 1980 | Sample: 6,194

% who agree they are comfortable with current income



## Diverse media habits

Looking at how Generation X consumes media, we can discover more diversity and nuance that demonstrates why they should not be approached as a single group.

'Senior Sole Decision Makers', for example, spend the most time with media and are the top segment for both live TV and internet use - at least two hours more per day than 'Playschool Parents' and 'Empty Nesters'.

'Senior Sole Decision Makers' are also 81% more likely to be among the heaviest fifth of live TV viewers, while 'Playschool Parents' - tied up with childcare - watch the least live TV. And yet both 'Playschool Parents' and 'Empty Nesters' are above average readers of newspapers, relative to the average Gen X-er.

Meanwhile, 'Mid-life Independents' are most likely to be exposed to outdoor media (index 121 on MNQ 1\*), while 'Hotel Parents' are 41% more likely than the average Gen X-er to have a digital newspaper or magazine subscription and 'Primary School Parents' are the most likely to be heavy cinema goers.

## Life-stage and product preference

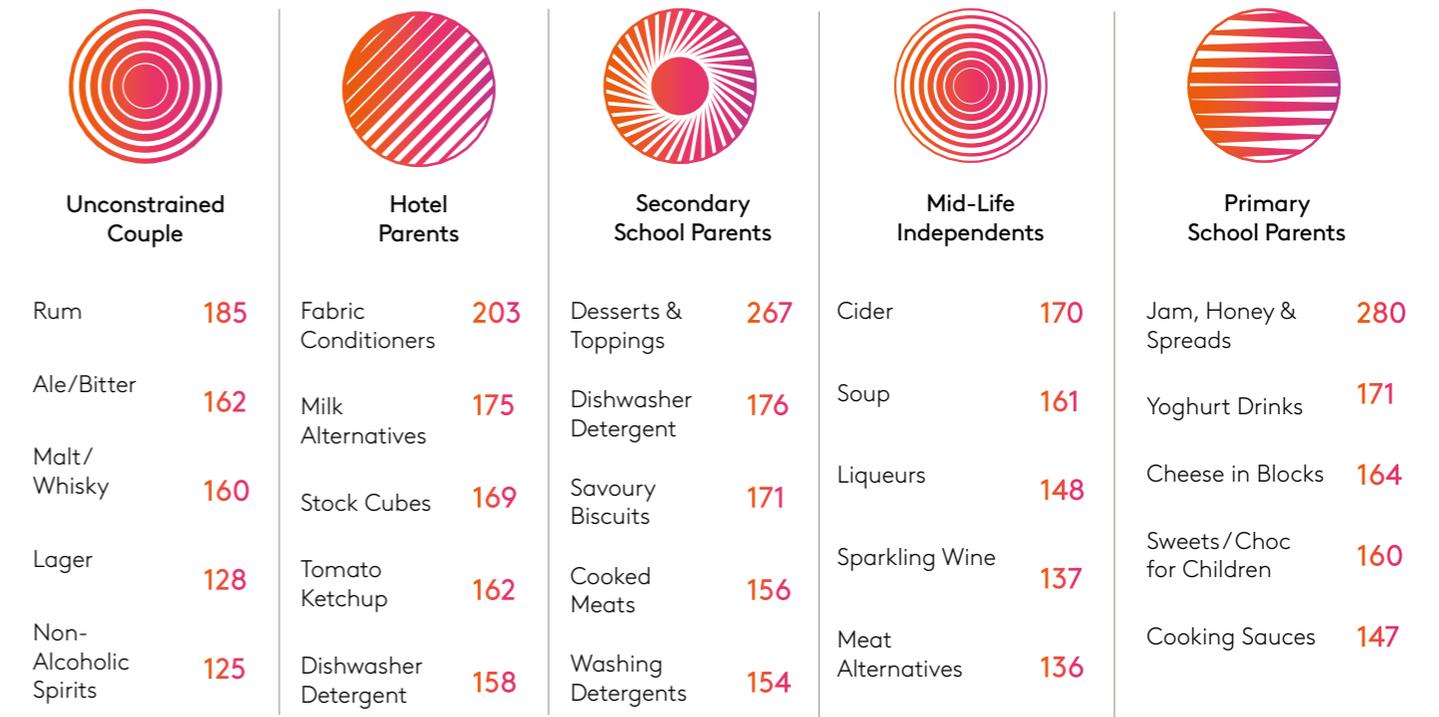
Segmenting by Generation X's life-stages can also reveal nuance in retailer preference, or, as shown in the chart 4.4, different supermarket product categories. Indeed, although some broad product choices might seem obvious, only a closer look at the data will reveal which distinct categories will index most strongly.

For example, it is logical that 'Unconstrained Couples' will drink more alcohol, but specifically they prefer rum, larger and whisky, while 'Mid-Life Independents' are the heaviest consumers of cider and sparkling wine.

Meanwhile, 'Hotel Parents' are the top users of fabric conditioners, but it is 'Secondary School Parents' that index most highly for dishwasher detergents.

We can see therefore that life circumstances can have a significant bearing on category, product, and brand choice - even within a defined age group. Marketers seeking to optimise their campaigns will be well served by looking beyond age to better understand the range of factors that influence their target audience.

Chart 4.4 | Deep-Dive: Generation X  
Understanding product preferences of Gen X by TGI Lifestage segment



\*Heaviest refers to index vs. media neutral quintile 1 (ie top fifth of consumers of a media channel)

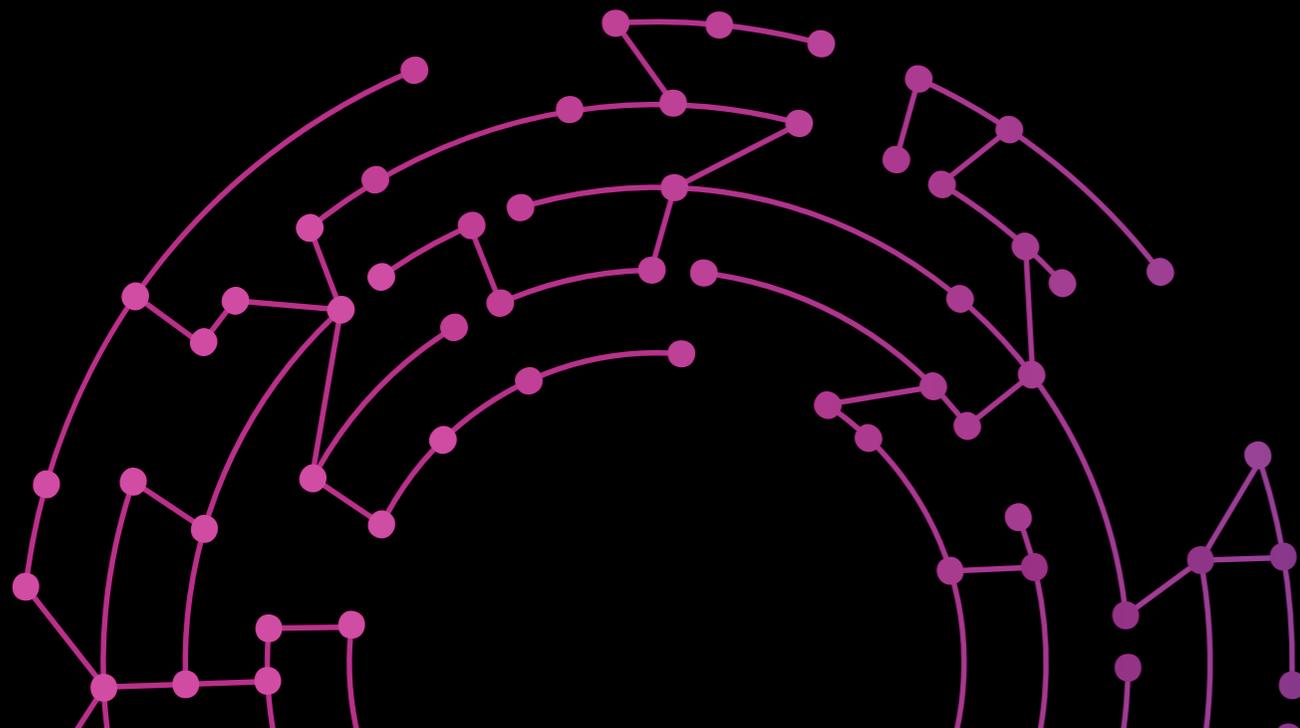
Source: GB TGI 2022 (Feb 2021 - Jan 2022)  
Base: Gen X, Born 1965 - 1980  
Sample: 6,194



TGI features a range of pre-coded segmentations designed to enable marketers to better understand the affinity of their brand to a range of consumer groups including TGI Shopper Archetypes, TGI Travel Archetypes, TGI Ecommerce Clusters and a TGI Green Values segmentation.



## Conclusions & Summary



## Key Takeaways

**An understanding of age will always have its place, but it is essential to test hypotheses and scrutinise assumptions by using trusted data sources:**

1. To give a deeper and unbiased view of a market
2. To highlight relative sizes of groups, thus enabling a better understanding of how to optimise both efficiency and reach
3. To forecast early adoption trends among younger groups that could become mainstream

**Where age has its limitations and needs to be explored further:**

1. *People dynamics* – understanding how life-stage or personal/family circumstances can have a much greater bearing on purchase decisions and consumer behaviours than age
2. *Platform dynamics* – improving our understanding of the shifts in media behaviours
3. *Country dynamics* – understanding how the cultural and social landscape of a market will shape the impact of global campaigns planned by age alone

**Beyond Age: the opportunities**

1. By using richer data, brands and media owners can stand out from the competition and improve their targeting efficiencies
2. The industry can benefit from pursuing a more nuanced path between microtargeting and demographic-based campaign planning, building audiences that are based on values, experiences and behaviours - all of which transcend age
3. Businesses can re-evaluate and recalibrate media choices and messaging - and consider buying different audiences based on improved insights



## The Implications

Looking beyond age requires a shift in thinking and approaches. Here, we outline some of the ways in which this might impact different parts of the media and marketing world.

### Advertisers

- Brands need to continually evolve their understanding of their customers - and potential customers - and check any historical assumptions against current data.
- While there are often inherent affinities between an age-based group and a brand, TGI shows there are likely to be sizable cohorts with shared attitudes, values or traits that can also make them worthwhile targets.
- Tools like the 'Arc of Life' can help show where a brand sits relative to its competitors and the challenges and opportunities that it brings.

### Agencies

- By revealing the people behind the numbers, TGI allows agencies to gain more meaningful insights to unlock a broader range of growth opportunities for clients.
- By showing that age-based groups are often highly diverse, agencies can use TGI to build affinity at a more targeted and granular level, or even identify brand opportunities in less obvious age-groups.
- Agencies can use TGI data to re-evaluate which media vehicles are going to be the most impactful at reaching their target audiences - avoiding the trap of making erroneous (and ultimately inefficient or costly) planning decisions.

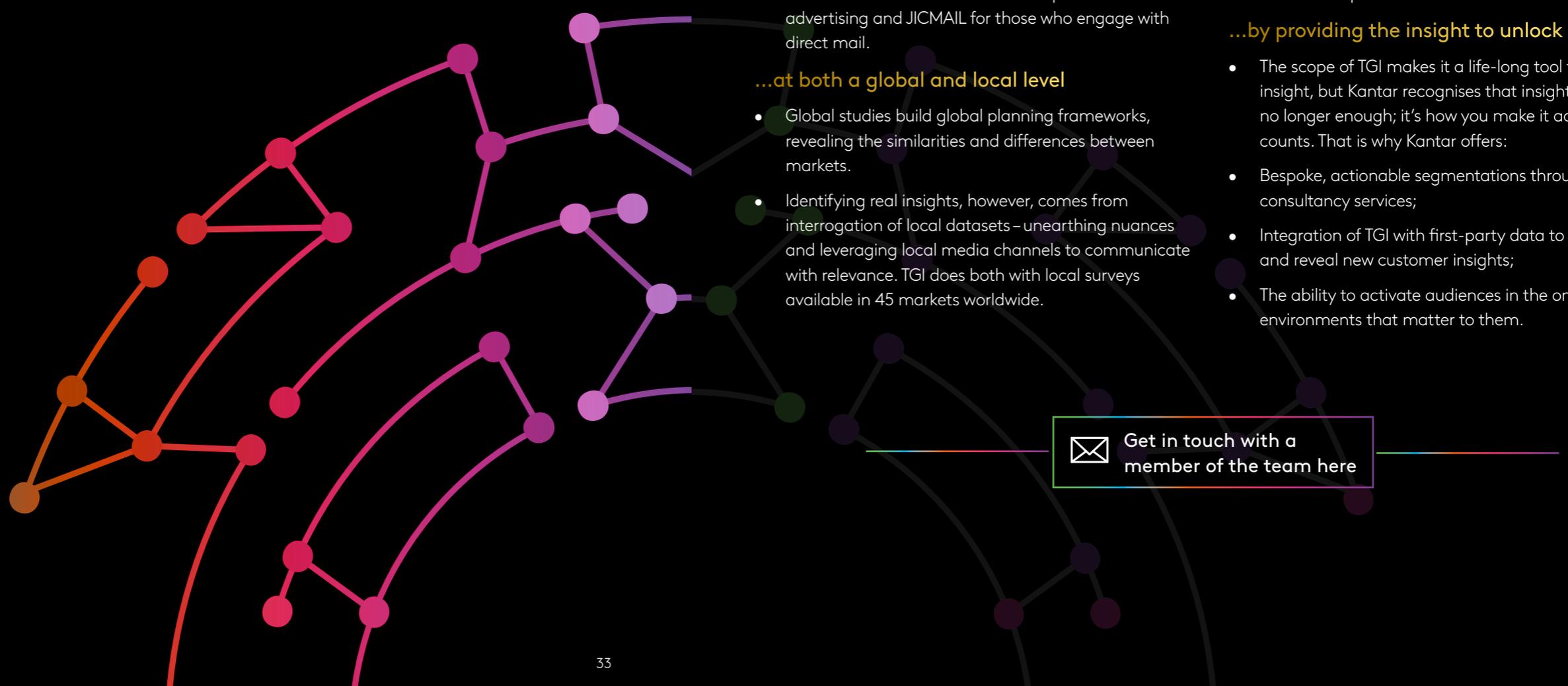
### Media Owners

- A deeper understanding can help sell audiences based on shared attitudes, values and behaviours, rather than age alone, and thus unlock more value.
- TGI Lifestage segments can be used to highlight the diversity and value of audiences and build sales arguments for brands and agencies.
- By offering a new perspective on diverse generational segments, media owners can better support advertisers with long-term growth ambitions and reach future consumers at more strategic phases.



# Kantar TGI

supports  
businesses...



## ...through the power of survey data

- The power of TGI comes from the sheer breadth and depth of data from our fully-consented respondents.
- TGI is the longest-running survey of its kind, and the ability to harness longitudinal data enables users to identify trends and place their current research or survey findings in a historical context.
- TGI acts as a hub for consumer insight and integrates with leading industry-currencies, including BARB for in-depth understanding of TV viewers, Route to better understand those who are exposed to outdoor advertising and JICMAIL for those who engage with direct mail.

## ...at both a global and local level

- Global studies build global planning frameworks, revealing the similarities and differences between markets.
- Identifying real insights, however, comes from interrogation of local datasets – unearthing nuances and leveraging local media channels to communicate with relevance. TGI does both with local surveys available in 45 markets worldwide.

## ...by offering true flexibility

- TGI supports clients across a wide spectrum of insight needs, including budget-focussed clients seeking to understand only a couple of sectors, as well as the core media and attitudinal coverage.
- With data released monthly, TGI is able to integrate bespoke questions specific to the needs of any organisation.
- Kantar also allows users to harness the power of TGI through their business API integrations, Choices Online, and TGI Snapshot.

## ...by providing the insight to unlock growth

- The scope of TGI makes it a life-long tool for consumer insight, but Kantar recognises that insight on its own is no longer enough; it's how you make it actionable that counts. That is why Kantar offers:
- Bespoke, actionable segmentations through dedicated consultancy services;
- Integration of TGI with first-party data to level-up CRM and reveal new customer insights;
- The ability to activate audiences in the online environments that matter to them.

✉ Get in touch with a member of the team here



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