

THE IMPACT OF DIGITAL ON CONSUMER ATTITUDES TO MEDIA

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Introduction

Over the past decade, new devices and platforms have created a huge shift in how consumers engage with media for information, entertainment and social connectivity. Despite this, we are still in the early days of the digital revolution, and consumer behaviour will continue to evolve rapidly with shifting needs and the development of new technologies.

These changes undoubtedly present advertisers and media companies with a huge challenge, but at the same time also significant new opportunities.

In order to better understand the impact that the development of digital platforms has had on consumer attitudes towards media, we have examined detailed TGI consumer trend data from over the last decade and across multiple markets. The findings from this analysis have enabled us to address some key questions: what place does digital now occupy in consumers' perceptions, in comparison with traditional media? How are the trends manifesting themselves within different demographic groups? With the proliferation of new platforms and advertising models, what are the most effective methods for engaging different target segments?

Macro-Economic Background

Furthermore we wanted to examine the trends in a broader economic context. To what extent are they impacted by different stages of economic development, and in particular by the variance in its speed in different markets?

The four countries on which we focus mainly in this paper – Brazil, India, Turkey and GB – were chosen for this reason. All four countries are among the G20 group of the largest nations. The basic statistics in Table 1 show their characteristics.

The UK is an example of a developed western economy, with high GDP and also high GDP per capita.

Brazil and India are (with Russia and China) commonly considered as two of the BRICs countries benefitting from fast development, high levels of natural resources and large populations. Their economic statistics differ however. Brazil has a GDP close to the UK, with Indian also not far short. However their levels of GDP per capita are quite different, due to their different population sizes – most specifically India's vastness, which also explains why India is considered as having such great growth potential.

Turkey has a lower level of overall GDP, but similar GDP per capita to Brazil. It has for some years been regarded as a development market, especially given its position bridging Europe and Asia at a time when European markets have experienced very slow economic growth.

Table 1

Macroeconomic Statistics

	National GDP (USD, 2012)	GDP Per Capita (USD, 2012)	Total Population	Urban Population
Brazil	2,253 bn	11,340	199 m	169 m
India	1,842 bn	1,489	1,237 m	392 m
Turkey	789 bn	10,666	74 m	54 m
United Kingdom	2,435 bn	38,514	63 m	50 m

Source: International Monetary Fund, World Bank

Table 2 shows the speed of economic growth in the four markets over the last 10 years. India is the fastest-growing of these markets, having seen its GDP more than double over this period. Turkey has seen growth of over 60%, and Brazil of over 40%. The UK has seen more moderate levels of growth, and even a relative decline in the last five years occasioned by the financial crisis. From the comparative figures also shown, we can see that the Euro area has experienced even more limited

GDP growth over this period. Both the UK and the Euro area have lagged behind the rest of the G20, where aggregate growth has been 40% across these ten years. Brazil's growth has matched that of the G20 quite closely.

Table 2

GDP Growth 2002 to 2012 (Index: 2002 = 100)

	2002	2007	2012
Brazil	100.0	121.7	142.1
India	100.0	151.7	210.5
Turkey	100.0	139.6	162.4
United Kingdom	100.0	117.7	114.0
Euro area	100.0	111.3	110.0
G20	100.0	123.8	140.3

Source: International Monetary Fund

So the context in which the development of digital platforms has taken place has varied in different markets. It may have had, and it may continue to have, its own effects.

Evolution in Attitudes towards Media

A substantial challenge for marketers is to understand how age impacts shifting behaviour and attitudes towards media. Up until now we have seen the existence of a digital generation divide, with younger generations such as the 'Millennials', who have grown up with the technology in their lives, strongly influencing the trends. While it is true that the highest levels of digital engagement can still be seen among the youngest consumers, TGI trend data shows that more dramatic changes in adoption over time are now occurring among older groups.

So while younger generations are the first to embrace new digital technologies, once these enter the mainstream the real driving force behind growth is adoption by older generations. These groups have the added appeal of higher levels of disposable income, and increasing size as life expectancy grows.

This trend can be evidenced simply by looking at the rate of internet adoption over recent years. Table 3 shows it especially clearly in India and Turkey, where in 2006 internet penetration was notably higher among those born in the 1980s (14% in India and 39% in Turkey) than by older cohorts. Since 2006 in both markets the level of internet penetration has grown most quickly among people who were born in the 1950s and 1960s, and to a slightly lesser extent the 1970s, while growth rates have been slowest among those born in the 1980s. In Brazil the speed at which the 1980s generation has gone online has continued to be fairly rapid, although it is still out-stripped by those born in the 1970s. In all three markets, there is still much room for growth in the numbers going online, especially still among the older groups.

By contrast in Britain, the vast majority of the population were already online by 2006, so the levels of growth have not varied between age cohorts as the 'laggards' have made their way online.

Table 3

Growth in internet usage across generations
 (% used in the last 12 months, and growth index from 2006 to 2012)

	Great Britain			India			Brazil			Turkey		
	2006	2012	Index	2006	2012	Index	2006	2012	Index	2006	2012	Index
Decade of birth: 1950s	73%	83%	114	7%	24%	343	28%	37%	132	8%	24%	300
Decade of birth: 1960s	82%	92%	112	6%	25%	417	33%	51%	155	11%	39%	355
Decade of birth: 1970s	85%	96%	113	9%	27%	300	38%	63%	166	19%	44%	232
Decade of birth: 1980s	86%	97%	113	14%	32%	229	53%	78%	147	39%	46%	118

Base: All Adults
 Source: Global TGI

As basic internet penetration has grown and grown, attitudes have evolved too. The internet is front of mind for more and more people as a default information source.

In all markets, there has been a significant upswing in the percentage of people who agree strongly with the statement 'when I need information, the first place I look is the internet' across all generations over the last six years. (See Table 4). The absolute levels of agreement to this statement are highest among the 1980s generation, although in India this is not by much.

As the index figures show, the differences in evolution between cohorts are small. In Britain, 41% of those born in the 1980s now agree strongly with this statement (up from 19% in 2006) and it's worthy of note that as many as 20% people born in the 1950s hold this attitude. When one considers the fears that were expressed by some that the development of digital might disenfranchise the older generation, this statistic could be considered as remarkable.

Also in India 17% of people born in the 1950s agree with this statement, a level which has remained much in line with younger generations. In Brazil too, the attitudes held by this older cohort are growing at an equivalent pace to younger generations.

Only in Turkey has this attitude not kept pace with the growth in internet usage.

Table 4

Agree strongly with statement 'When I need information, the first place I look is the internet'

	Great Britain			India			Brazil			Turkey		
	2006	2012	Index	2006	2012	Index	2006	2012	Index	2006	2012	Index
Decade of birth: 1950s	11%	20%	182	12%	17%	142	10%	20%	200	6%	5%	83
Decade of birth: 1960s	14%	23%	164	12%	16%	133	12%	23%	192	7%	8%	114
Decade of birth: 1970s	18%	33%	183	13%	17%	131	16%	28%	175	8%	9%	113
Decade of birth: 1980s	19%	41%	216	12%	19%	158	19%	35%	184	12%	12%	100

Base: All Adults
 Source: Global TGI

Trends in consumer attitudes towards media show that digital has the potential to displace but also enhance and complement traditional media channels. For example, publishers now have the opportunity to develop unique digital content for their readers and subscribers which can be used to supplement core editorial.

In many cases, traditional media remain important and trusted sources of information. In China for example, while the internet is increasingly being perceived as a reliable source of information, particularly among young consumers, for the most part newspapers have also retained this position. Indeed, for those aged 35+ there has been an increase over the past four years in the proportion who view newspapers as a trusted source of information (see Table 5).

Table 5

Trust in internet vs. newspapers as a reliable source of information in China

	Internet		Newspapers	
	2008	2012	2008	2012
Age 15-24	18%	26%	21%	19%
Age 25-34	14%	21%	24%	23%
Age 35-44	8%	15%	26%	27%
Age 45-54	4%	7%	25%	29%
Age 55+	2%	3%	26%	30%

Base: All Adults

Source: TGI China (CNRS)

Conversely, there are instances in which we do see traditional media channels losing ground to digital as a 'go-to' source. In Brazil, information and entertainment are seen as the key benefits of the internet, as also for other media. Notably though, the proportion who say that the internet serves as a source of information has more than doubled in the last 10 years from 19% to 45% (see Table 6). The percentage valuing it for entertainment has also trebled, from 10% to 30%.

Among the traditional media channels, TV is currently the most prominent source of information for Brazilians (71% agree it fulfils this function) but there has been a marked decline in the role that newspapers, magazines and radio play here. The internet almost matches newspapers for this (45% compared to 49%) and has overtaken magazines (35%) and radio (33%).

TV is also still regarded as the favourite source of entertainment in Brazil, but here too the internet is closing the gap. Furthermore it has passed newspapers and magazines in this function and almost caught up with radio.

For all vehicles there has been an increase in the percentage of Brazilian consumers who say that they use those channels because they like a specific section, program or web page. This may reflect of the continued fragmentation of the media landscape and its audience, and an indicator of the growing need for ever more personalised communication strategies.

Table 6

Trend in attitudes toward media functions in Brazil

	Internet		TV		Newspapers		Magazines		Radio	
	2002	2012	2002	2012	2002	2012	2002	2012	2002	2012
Information	19%	45%	61%	71%	64%	49%	49%	35%	39%	33%
Entertainment	10%	30%	39%	52%	10%	10%	16%	16%	33%	32%
Something specific	7%	27%	14%	35%	7%	10%	8%	13%	10%	22%
Distraction	5%	23%	28%	42%	7%	7%	11%	11%	29%	29%
Kill time	3%	9%	18%	18%	5%	3%	8%	8%	13%	10%
Keep myself company	2%	6%	9%	11%	2%	1%	2%	2%	12%	11%
Keep up with gossip	2%	6%	9%	9%	4%	4%	10%	8%	3%	2%

Base: All Adults

Source: Target Group Index Brazil

Trends in Digital Behaviour

So it's clear that engagement with digital media is growing across all generations. Analysis of specific behavioural trends underpins the importance of understanding consumer preferences concerning online content and activity. In some cases they are closely aligned, while in others we still see marked differences. As shown in Table 7, in Great Britain the figures reveal that as internet penetration nears saturation point, online shopping is progressing towards becoming a universally popular activity. Even among the 55+ age group, 50% are now comfortable with purchasing online.

Likewise in other markets, as an increasing percentage of consumers in all age groups engage in purchasing online, the flattening of indices indicates its gradual broadening of appeal.

Table 7

Trend in online purchasing (%)

	Great Britain		India		Brazil		Turkey	
	2006	2012	2006	2012	2006	2012	2010	2012
Age 15-24	59%	78%	2%	6%	6%	15%	5%	10%
Age 25-34	65%	87%	2%	5%	10%	20%	5%	9%
Age 35-44	60%	84%	2%	4%	6%	13%	3%	8%
Age 45-54	52%	78%	1%	4%	3%	12%	2%	6%
Age 55+	25%	50%	n/a	n/a	2%	5%	1%	2%

Trend in online purchasing (index vs. total population)

	Great Britain		India		Brazil		Turkey	
	2006	2012	2006	2012	2006	2012	2010	2012
Age 15-24	124	111	132	127	112	119	142	133
Age 25-34	136	123	111	103	169	157	142	128
Age 35-44	127	119	90	84	100	105	94	108
Age 45-54	109	110	34	74	60	93	77	78
Age 55+	53	71	n/a	n/a	41	37	16	32

Base: All Adults

Source: Global TGI

When it comes to other online activities and interests however, there is greater divergence across age groups. As we see from Table 8, for the time being social networking clearly remains the domain of younger consumers, peaking in popularity among those born in the 1990s – indexing from 159 in Turkey to 175 in Brazil against national adult populations. But this is not the story when we look at other common internet activities. For example, British people born in the 1960s and 1970s are the most likely to use online banking services. Furthermore, travel and holiday websites are most popular among those born in the 1950s - they are 24% more likely than average to visit such sites. In Brazil, people born in the 1970s and 1980s are most likely to use online banking and visit travel websites. This is also true of banking sites in Turkey.

This type of understanding can help to inform behavioural targeting, and should be leveraged by media owners and advertising networks to display content which is more relevant to the interests of the individual user.

Table 8

Online activities by generation (index vs. total population)

	Online Activity	Decade of birth: 1990s	Decade of birth: 1980s	Decade of birth: 1970s	Decade of birth: 1960s	Decade of birth: 1950s
Great Britain	<i>Travel/Holidays</i>	67	96	109	118	124
	<i>Banking</i>	71	117	123	121	111
	<i>Social Networking</i>	166	152	130	95	72
India	<i>Travel/Holidays</i>	129	114	90	64	75
	<i>Banking</i>	111	119	85	83	84
	<i>Social Networking</i>	165	111	71	58	51
Brazil	<i>Travel/Holidays</i>	43	165	127	104	90
	<i>Banking</i>	70	161	123	101	67
	<i>Social Networking</i>	175	132	90	59	34
Turkey	<i>Travel/Holidays</i>	125	166	79	67	54
	<i>Banking</i>	60	163	124	86	53
	<i>Social Networking</i>	159	138	90	72	40

Base: All Adults

Source: Global TGI

The rapid growth in ownership of smartphones and tablets has meant that more consumers than ever are able to access the internet while on the go. Consequently these versatile mobile devices are fast becoming the number one choice for email, news, web-browsing and targeted product research. As with internet usage in general, this is a trend that has been led by younger consumers but within which we are now seeing accelerated growth across older cohorts in more established markets. In Great Britain, 45% of the adult population is now equipped with smartphones. Over 60% of those aged 15-34 had smartphones in 2012; this has now grown to over 70%. However the take-up in mobile internet capability over the last two years has been fastest among those aged 55+, with 15% now equipped with smartphones (see Table 9a). In Brazil too, 15% of those in the 55+ age group have mobile phones with internet capability. We should expect to see a similar pattern in other markets, for even if growth levels to date have been somewhat slower among older consumers, the trend is likely to be replicated as mobile devices become more widely accessible.

Table 9a

Have mobile internet capability

	Great Britain		India		Brazil		Turkey	
	2010	2012	2010	2012	2010	2012	2010	2012
All Adults	38%	45%	10%	15%	26%	38%	12%	16%
Age 15-24	63%	72%	12%	18%	37%	55%	19%	25%
Age 25-34	63%	73%	9%	15%	31%	49%	15%	20%
Age 35-44	49%	61%	10%	14%	24%	35%	10%	15%
Age 45-54	36%	42%	8%	11%	19%	28%	8%	11%
Age 55+	9%	15%	n/a	n/a	11%	15%	4%	5%

Base: All Adults

Source: Global TGI

However, not all those equipped with mobile internet access actually use it, as we see from Table 9b. Even so, the percentages seen for GB illustrate the potential of the mobile internet platform. The other markets are very highly penetrated with mobile phones, and as users upgrade their devices, we can expect the numbers of those accessing the internet by mobile to increase rapidly and to potentially high levels. Indeed, in markets such as India, the technology infrastructure and the low cost of mobile

phones relative to PCs means that many consumers across economic classes will go straight to mobile for their internet access, bypassing more traditional online means altogether.

Table 9b

Access internet by mobile

	Great Britain		India		Brazil		Turkey	
	2010	2012	2010	2012	2010	2012	2010	2012
All Adults	15%	39%	3%	4%	5%	15%	3%	5%
Age 15-24	31%	69%	4%	7%	8%	25%	5%	10%
Age 25-34	30%	68%	3%	4%	6%	20%	3%	6%
Age 35-44	17%	50%	2%	4%	5%	12%	2%	5%
Age 45-54	10%	32%	2%	2%	3%	8%	1%	2%
Age 55+	2%	9%	n/a	n/a	2%	4%	1%	1%

Base: All Adults
Source: Global TGI

So there is some variance in the ratios of those who access the mobile internet compared to those who have the capability to do so. This gap between capability and actual usage is set out in Table 9c. Once again the ratios for GB illustrate the potential of the mobile internet platform: overall 87% of those equipped with mobile internet capability do access the platform. This compares with 40% in Brazil, 34% in Turkey and 29% in India at the moment.

The technological 'leadership' of younger adults is shown once again here: their ratio of access to capability in GB is 96%. Among the over 55s the equivalent ratio is 60%, but this will increase. Higher conversion ratios for younger adults and lower ones for older adults are also apparent in India, Brazil and Turkey, where the potential for further development is much greater.

Table 9c

Ratio: access to capability

	Great Britain		India		Brazil		Turkey	
	2010	2012	2010	2012	2010	2012	2010	2012
All Adults	0.39	0.87	0.28	0.29	0.20	0.40	0.22	0.34
Age 15-24	0.49	0.96	0.30	0.38	0.23	0.45	0.27	0.41
Age 25-34	0.48	0.93	0.31	0.28	0.20	0.41	0.21	0.33
Age 35-44	0.35	0.82	0.23	0.25	0.20	0.34	0.18	0.29
Age 45-54	0.28	0.76	0.25	0.19	0.18	0.30	0.15	0.23
Age 55+	0.22	0.60	n/a	n/a	0.17	0.28	0.25	0.27

Base: All Adults
Source: Global TGI

The rapid uptake of smartphones has had an effect on sales of the MP3 player. The iPod was launched in late 2003, but the days of a device being solely used for music storage and listening may be numbered as a consequence of technological convergence as well as the ability to stream. TGI figures for MP3 player ownership show a growth trend up to 2010 but subsequent tailing off. (Table 10). This illustrates how a digital technology can grow very quickly – MP3 player ownership doubled between 2006 and 2010 in GB, India and Turkey – but also how it can be supplanted when something new comes along.

We also once again see how younger adults are the early adopters, with older groups coming into the market in numbers afterwards.

Table 10

MP3 Ownership (%)

	Great Britain			India			Brazil			Turkey		
	2006	2010	2012	2005	2010	2012	2006	2010	2012	2006	2010	2012
All Adults	15%	34%	30%	5%	10%	9%	n/a	28%	18%	5%	10%	8%
Age 15-24	33%	64%	49%	6%	12%	9%	n/a	38%	31%	9%	19%	14%
Age 25-34	21%	49%	41%	5%	9%	9%	n/a	29%	23%	5%	10%	8%
Age 35-44	19%	43%	38%	5%	9%	9%	n/a	26%	14%	4%	8%	7%
Age 45-54	12%	25%	30%	4%	9%	9%	n/a	22%	11%	3%	7%	6%
Age 55+	2%	11%	12%	n/a	n/a	n/a	n/a	15%	7%	1%	4%	5%

MP3 Ownership (index vs. total population)

	Great Britain			India			Brazil			Turkey		
	2006	2010	2012	2005	2010	2012	2006	2010	2012	2006	2010	2012
Age 15-24	222	191	164	116	120	98	n/a	136	169	170	185	174
Age 25-34	143	145	138	102	92	101	n/a	104	125	92	93	92
Age 35-44	130	128	128	90	89	100	n/a	94	78	84	76	85
Age 45-54	81	75	99	80	96	100	n/a	78	61	58	68	74
Age 55+	16	34	41	n/a	n/a	n/a	n/a	55	37	22	43	57

Base: All Adults

Source: Global TGI

We can also anticipate that, as trends towards digital continue, the growth of mobile globally will continue to reshape technological and in particular media consumption habits.

Trends in Digital Media Consumption

Digital technology has had a growing impact on media consumption for around two decades now, which has gathered pace in the last 10 years. We looked at total broad-level internet access above; however everyday access is a measure better indicative of the internet playing a part in daily lives and thus effectively a media platform. Table 11 does this.

Once again we see a high level of this behaviour in the developed market of GB, and rapid growth from lower levels 10 years ago in the developing markets of India, Brazil and Turkey. Again too we see younger adults leading the trend, and reaching a point close to saturation in GB, with more rapid recent growth among the older groups, and yet still room for more particularly among those aged 55+.

Table 11

Access Internet every day

Great Britain				
	2002	2006	2010	2012
All Adults	18%	36%	52%	67%
Age 15-24	25%	47%	74%	86%
Age 25-34	28%	48%	70%	86%
Age 35-44	21%	45%	62%	81%
Age 45-54	21%	41%	51%	69%
Age 55+	6%	18%	29%	40%

Brazil				
	2002	2006	2010	2012
All Adults	9%	13%	30%	35%
Age 15-24	10%	17%	42%	51%
Age 25-34	11%	14%	34%	42%
Age 35-44	10%	14%	25%	30%
Age 45-54	9%	10%	22%	27%
Age 55+	3%	7%	15%	15%

India				
	2002	2006	2010	2012
All Adults	2%	2%	6%	7%
Age 15-24	3%	2%	8%	10%
Age 25-34	3%	3%	6%	8%
Age 35-44	2%	2%	4%	5%
Age 45-55	2%	1%	4%	5%

Turkey				
	2002	2006	2010	2012
All Adults	2%	6%	19%	19%
Age 15-24	3%	8%	27%	26%
Age 25-34	3%	7%	22%	21%
Age 35-44	1%	3%	20%	20%
Age 45-54	1%	3%	16%	15%
Age 55+	1%	2%	6%	7%

Note: definition for India is 5+ days per week

Base: All Adults

Source: Global TGI

Social networks are now widely regarded as a platform in their own right. Once again from Table 12 we see the familiar picture of a development taking root among younger adults, this time shaping a means of communication, with older groups joining the party later. It's striking that 61% of 15-24s in GB were active on social networks by 2010, and by 2012 this had increased only barely, to 65%. Participation in social networks in Brazil is even higher than in GB, with the young being particularly avid users but growth now coming more from older groups, even if those aged 55+ are still largely reluctant.

Table 12

Online Activity: Social Networking (%)

	Great Britain		India		Brazil		Turkey	
	2010	2012	2010	2012	2010	2012	2010	2012
All Adults	29%	39%	4%	5%	34%	45%	4%	5%
Age 15-24	61%	65%	6%	9%	62%	78%	6%	8%
Age 25-34	52%	58%	4%	5%	38%	57%	5%	6%
Age 35-44	34%	49%	3%	4%	22%	36%	2%	4%
Age 45-54	19%	34%	3%	3%	13%	24%	3%	3%
Age 55+	6%	16%	n/a	n/a	6%	10%	1%	1%

Online Activity: Social Networking (index vs. total population)

	Great Britain		India		Brazil		Turkey	
	2010	2012	2010	2012	2010	2012	2010	2012
Age 15-24	210	166	150	164	184	172	161	166
Age 25-34	178	149	97	94	113	125	138	120
Age 35-44	117	126	70	68	65	80	70	84
Age 45-54	65	86	66	53	39	53	79	72
Age 55+	20	42	n/a	n/a	19	23	18	32

Base: All
Adults

Source: Global TGI

A relatively recent – and fast-growing – category has been tablets. In their case there is a different story, shown in Table 13.

Measurement of their ownership only appears in recent releases of TGI studies, but unlike the other digital trends we have examined, their initial success has not been driven by younger groups. It's true that 15-24s have been in the vanguard of early adoption, but 25-34s and also 35-44s have been quick to acquire them. This is clear in GB, where penetration of tablets had reached 12% by 2012, but also in Brazil and Turkey.

Even more interesting is to examine tablet early adopters by TGI SEL (or Socio-Economic Level) group. The top 10% of the population – who generally will have the highest levels of disposable income – have been the key to the success of tablets. Against the 12% of all adults owning a tablet in GB, 36% of SEL Group 1 (the top 10%) and also 19% of SEL Group 2 (the next 20%) own one. Albeit at lower levels of penetration, we see the same phenomenon in Brazil and Turkey.

We might conclude from this that, after so much evolution, there is now a high general level of digital awareness. Against this background, where a product is launched that has clear and obvious benefits that enhance people's lives, adoption can be very quick. In this circumstance, it is those who can afford the price-point at launch who become the early adopters.

Table 13

Tablet Owners (%) - Age Group

	Great Britain	Brazil	Turkey
	<i>2012</i>	<i>2012</i>	<i>2012</i>
All Adults	12%	1%	1%
Age 15-24	13%	2%	1.0%
Age 25-34	18%	2%	0.7%
Age 35-44	17%	1.1%	0.7%
Age 45-54	11%	0.5%	1.2%
Age 55+	6%	0.4%	0.6%

Base: All Adults

Source: Global TGI

Tablet Owners (%) - Socio-Economic Level

	Great Britain	Brazil	Turkey
	<i>2012</i>	<i>2012</i>	<i>2012</i>
All Adults	12%	1%	1%
SEL Group 1: Top 10%	36%	5%	3.3%
SEL Group 2: Next 20%	19%	1.5%	1.5%
SEL Group 3: Next 30%	9%	0.8%	0.7%
SEL Group 4: Next 40%	4%	0.3%	0.0%

Base: All Adults

Source: Global TGI

When it comes to reading newspapers and magazines online – an activity which tablets can certainly now help to support – we can perhaps see the confluence of two factors. In general younger adults are still more active internet users overall, yet as we also know, older adults are more likely to read newspapers. Table 14a displays the behaviour of reading newspapers online in GB and Brazil. In 2006, in both markets, the age factor dominated. Older cohorts (1980s and earlier in Brazil, 1970s and earlier in GB) rather than the 1990s generation were predominant among online readers. By 2012 there was a much more even balance between the cohorts.

Table 14a

Online Newspaper Readership (%)

	Great Britain			Brazil		
	2006	2010	2012	2006	2010	2012
All Adults	10%	20%	22%	12%	15%	15%
Decade of birth: 1990s	6%	16%	23%	5%	11%	14%
Decade of birth: 1980s	9%	26%	28%	18%	21%	22%
Decade of birth: 1970s	17%	28%	26%	15%	16%	18%
Decade of birth: 1960s	16%	26%	24%	11%	14%	14%
Decade of birth: 1950s	12%	21%	21%	10%	10%	10%

Online Newspaper Readership (index vs. total population)

	Great Britain			Brazil		
	2006	2010	2012	2006	2010	2012
Decade of birth: 1990s	56	79	106	38	74	96
Decade of birth: 1980s	86	129	130	145	144	146
Decade of birth: 1970s	160	136	122	118	110	118
Decade of birth: 1960s	155	128	112	93	96	94
Decade of birth: 1950s	110	104	98	79	71	66

The comparative figures for magazines show a different picture, of a balance between cohort groups except for a slight dip among those born in the 1950s. (Table 14b).

Table 14b

Online Magazine Readership (%)

	Great Britain			Brazil		
	2006	2010	2012	2006	2010	2012
All Adults	4%	10%	10%	8%	7%	7%
Decade of birth: 1990s	n/a	14%	15%	7%	8%	11%
Decade of birth: 1980s	5%	13%	16%	11%	10%	10%
Decade of birth: 1970s	6%	15%	12%	8%	7%	8%
Decade of birth: 1960s	5%	12%	11%	7%	5%	5%
Decade of birth: 1950s	4%	9%	10%	5%	4%	3%

Online Magazine Readership (index vs. total population)

	Great Britain			Brazil		
	2006	2010	2012	2006	2010	2012
Decade of birth: 1990s	n/a	138	138	96	114	155
Decade of birth: 1980s	139	134	152	146	142	134
Decade of birth: 1970s	153	146	114	109	106	106
Decade of birth: 1960s	133	124	102	86	78	68
Decade of birth: 1950s	113	90	93	66	55	41

Base: All Adults

Source: Global TGI

It will be very interesting to see how this evolves in the coming years as more and more people use tablets, and they become (as publishers hope) a go-to device for accessing newspapers and magazines, be that on the or increasingly through digital editions.

Implications for Communications and Advertising

The emerging attitudes and behaviours that we see suggest that digital must become be a strong component in all media plans – not just those developed for reaching younger audiences. The trends also suggest that advertisers will have most success with highly targeted search and display ads that are linked to the preferred content or online activities of specific groups.

The evolution of consumer attitudes toward media with the advent of the digital age has also brought new challenges. The diversification of platforms has meant that it is increasingly difficult to engage consumers via traditional communication routes. As technological development makes it easier and easier to consume media through multiple platforms simultaneously, one might hypothesise that the levels of attention being paid to each medium individually will decline. Evidence from Latin America suggests that this is the case. Across the region, the percentage of people who say that they always or almost always pay attention to a specific medium has dwindled between 2006 and 2012 across all cohorts for all channels with one exception: the internet. Among those born in the 1990s, claimed levels of attention (always or almost always) to the internet at 28% are now second only to TV with 45%. Attention levels paid to the internet drop among those born in earlier decades, whereas the other media tend to hold firm across the cohorts. (Table 15).

Table 15

Trend in level of attention paid to media channels in Latin America
 (% who say that they always or almost always pay attention to each medium)

	Decade of birth: 1990s		Decade of birth: 1980s		Decade of birth: 1970s		Decade of birth: 1960s		Decade of birth: 1950s	
	2006	2012	2006	2012	2006	2012	2006	2012	2006	2012
Internet	20%	28%	16%	23%	11%	17%	7%	12%	6%	8%
Television	55%	45%	66%	47%	64%	47%	64%	46%	60%	43%
Magazines	21%	16%	27%	16%	25%	15%	23%	15%	20%	12%
Newspapers	22%	18%	29%	23%	35%	23%	36%	25%	35%	22%
Cinema	19%	20%	19%	17%	15%	12%	11%	9%	9%	6%
Outdoor	32%	25%	32%	27%	34%	26%	33%	23%	30%	21%
Radio	28%	20%	30%	23%	32%	25%	32%	25%	29%	23%

Base: All Adults

Source: TGI Latina (Argentina, Brazil, Chile, Colombia, Mexico, Peru and Venezuela)

Some of the indications are that consumers may be becoming less receptive and even more resistant towards advertising. In Great Britain, the proportion of people who agree that they 'generally like advertising' has reduced from approximately one third to one fifth of the population over the last 10 years.

However, there are also opportunities to connect with consumers in new and different ways. Shifts in attitudes and consumption patterns can be explained by the increasing availability of alternative competing devices, leading to more fragmented use of media. For example, current newspaper and news readership metrics show that people are now accessing content across a wide range of platforms, which should potentially help to extend reach and strengthen the appeal of traditional news brands, particularly among younger cohorts. As shown in Table 16, British consumers of all ages are accessing their news in a variety of formats, with those born in the 1970s and 1980s being most likely to use digital platforms. This group is also most likely to say that they would be 'willing to pay to access content on newspaper websites' (although at just 8% agreement, the opportunity remains somewhat limited).

Table 16

News readership across different platforms by generation in Great Britain

	Read printed newspapers	Visit newspaper websites	Visit news websites (excludes newspaper sites)	Use mobile internet to keep up to date with news	Use a news app on mobile phone or tablet
Decade of birth: 1950s	86%	21%	26%	13%	9%
Decade of birth: 1960s	82%	24%	31%	22%	15%
Decade of birth: 1970s	79%	28%	34%	37%	22%
Decade of birth: 1980s	78%	26%	37%	45%	26%
Decade of birth: 1990s	74%	23%	28%	39%	19%

Base: All Adults

Source: TGI GB 2012

There is good evidence of consumers' readiness to access newspaper content across more than one platform in the published NRS PADD data, which fuses the NRS with Comscore information. Table 17 sets out the monthly readership figures for each of the 11 main national publications for print and website editions combined (now being branded in the UK as 'newsbrands').

Many of the titles have built significant online audiences. In three cases – The Guardian, The Daily Telegraph and The Independent – these are larger than their print readership. The fourth column shows figures for the duplication of readers between the two platforms – for four titles this is over a million, and in the case of the Daily Mail almost three million.

The right-hand column expresses this duplication as a percentage – that is, the proportion of print edition readers who are also visiting the website at least once a month. The Guardian has been particularly successful in this regard: over 50% of its print readers are also visiting its website. The Daily Mail, the Daily Telegraph and The Independent all also attract over 20% of their hard copy readers to their websites.

The Financial Times and The Times operate pay-wall models, so the same comparison should not be used, although their figures are interesting in their own right.

Table 17

Monthly Print and Online Readership for Daily Newsbrands in Great Britain

	Print (000s)	Website (000s)	Net Print + Website Total (000s)	Both Print and Online (000s)	% Print also Online
Daily Mail	11,171	9,853	18,052	2,972	26.6%
The Sun	14,201	4,568	17,052	1,717	12.1%
The Guardian	4,121	10,376	12,388	2,110	51.2%
Daily Mirror	7,601	4,473	11,369	705	9.3%
The Daily Telegraph	4,147	7,655	10,502	1,300	31.4%
The Independent	2,668	4,390	6,464	594	22.2%
The Times	4,862	547	5,266	142	2.9%
Daily Express	3,374	963	4,274	62	1.9%
Daily Star	3,489	499	3,953	35	1.0%
Financial Times	1,626	907	2,402	131	8.1%
Daily Record	1,534	740	2,187	87	5.7%

Base: All Adults

Source: NRS PADD July 2012 - June 2013

Conclusion

Based on the consumer trends we have seen over recent years, it is clear that the overall digital generation divide is lessening. This pattern can already be seen in many markets and is predicted to follow in others where digital has a growing footprint in the new media landscape.

It is almost invariably younger generations, who have grown up with constantly evolving digital technologies in their lives, who are the early adopters of new platforms or technology. As a development becomes mainstream, subsequent growth is among older groups. We have observed this repeatedly. This is also how new forms of communication – social networks being the prime recent example – tend to develop.

After so much evolution, there is now a high general level of digital awareness. Against this background, rates of adoption are likely to become quicker and quicker once a technology has proved itself to have genuine product benefits that enhance peoples' lives. The rapid success of tablets has come from affluent groups quickly coming to appreciate their advantages, rather than being led by the young.

In general though, there is still much room for growth in digital uptake among older groups. With some technologies, younger groups are close to saturated. Recent growth among older groups has been more rapid, yet they still have some way to go to catch up. Thus they represent a big opportunity. This is of even greater significance due to their far greater numbers with the population, and in many cases their higher levels of disposable income.

We can make a similar observation about the lower SEL groups. The more affluent members of society are likely to be the initial target for providers of new technology, and without them it's unlikely that a development will get off the ground. However they are a minority, and the majority of consumers, whose adoption tend to follow later, are often where the long-term profitability of a technology will lie.

These observations hold true especially for developing markets, due to both their faster economic growth and to the sheer numbers within their populations, more and more of who are – thanks to the economic development – becoming able to indulge in expenditure previously out of their reach.

For content owners and marketers interested in long-term profitability, this is where to focus: on mainstream groups of older and 'middle class' consumers, not least in developing markets.

In summary, older generations and middle class groups should now represent a key "future development" target audience in the digital space, for content providers and advertisers alike. By identifying the delivery platforms and activities that hold most appeal for specific groups or communities, media companies and advertisers can tailor their content and communications accordingly. And creating a relevant and focused offer for consumers, regardless of the platform through which they are consuming media, will be pivotal in building brand engagement and loyalty.