

TI Media



# Heart of Britain

The driving force behind our communities & our high street





Late last year we decided to undertake new research on one of our core audiences. They might be called 'mass-market women', but what our research demonstrates is why that slightly cold and assumptive name does nothing to encapsulate who they are, what they do and how hugely important they are, not only to the majority of consumer brands in the UK, but to the nation as a whole.

We talk to (and listen to) this group every day - in their millions - but nonetheless some of the findings surprised (and delighted) even us. We partnered with Differentology to find a new way to gather insights, and they summed it up brilliantly when they came back to us and said "We've never worked with a demographic we've liked so much!"

They are the 14m people who make the household decisions, buy your products and bind our nation together. It is literally true that if it weren't for these people, there'd be no NHS, no customer service, schools would close, and our economy would be £350m a year lighter.

This booklet summarises the findings. In it, we hope to draw a picture not just of who they are, but of what motivates them, what they hold dear and (dare we say) even how they can be influenced.

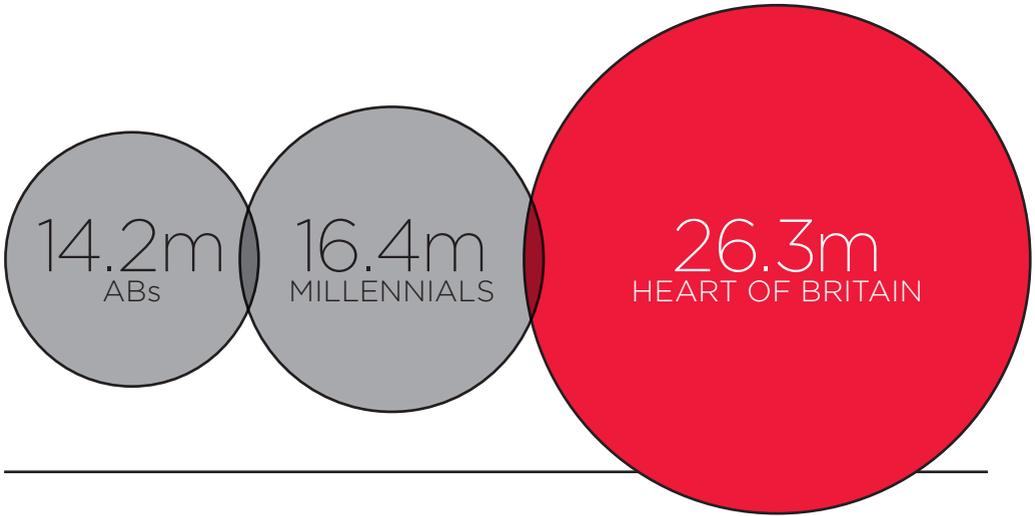
The logo consists of a solid red square with a white speech bubble shape at the bottom left corner. Inside the white shape, the text 'TI Media' is written in a white, bold, sans-serif font.

**TI Media**

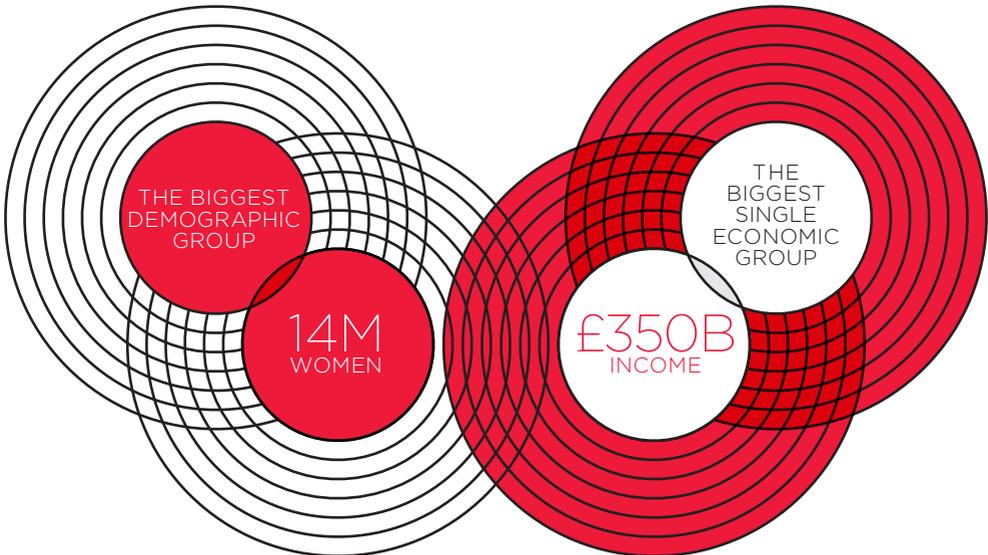
**d.fferentology**

# The most important demographic?

The Heart of Britain group (defined as 35+ C2DE) is significantly bigger than either Millennials or ABs. And whilst they may not have the wealth of the latter, their spending power is disproportionately larger, partly because of family size.



The millions of mainstream households who are the country's sometimes forgotten economic powerhouse

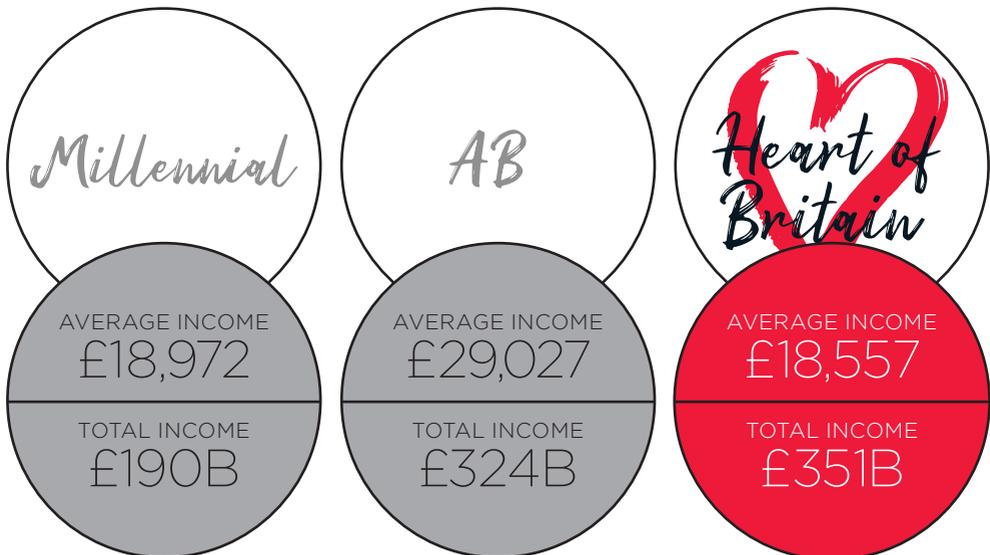


# Holding the purse strings

Heart of Britains are more likely to be the sole decision maker compared to AB women, and those we speak to even more so. Why? We would suggest it's because our readers have a thirst for knowledge and inspiration.

SOLE DECISION MAKER ON PURCHASING THESE ITEMS	AB WOMEN	HEART OF BRITAIN	TI MEDIA HOB
COSMETICS	79%	80%	86%
CLOTHES/SHOES	71%	75%	83%
PERS. FINANCE	46%	51%	54%
HOUSEHOLD	44%	52%	59%
TECH	40%	46%	54%
HOLIDAYS/TRAVEL	38%	42%	50%
CARS	35%	39%	40%

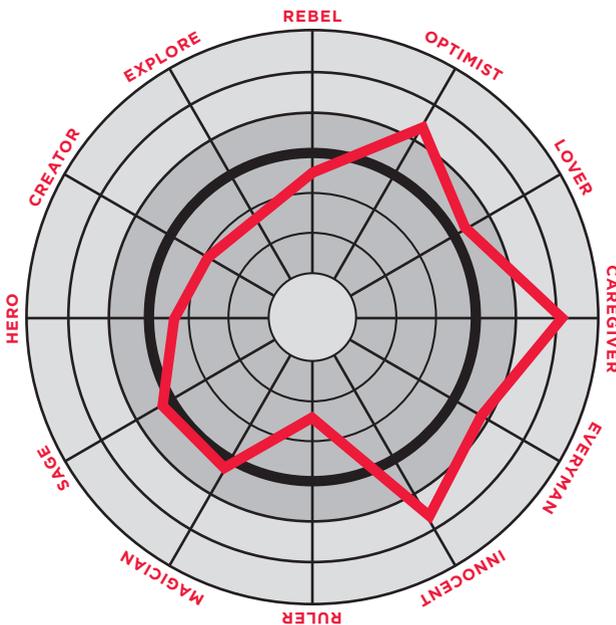
Individual income is lower as an average compared to ABs, as you would expect, but higher in total because of the sheer size of the group.



# STRENGTH

## The Nation's Caregivers

This is a quietly powerful group. They work in responsible jobs, like the NHS, schools and customer service. They hold caring positions in the home. They value authenticity and honesty. Much of what they do is unpaid and unmeasured, but it's widely recognised they're of significant value. Canada's statistics agency took a stab at figuring out the value of uncompensated care alone and came up with roughly one-third of the country's annual G.D.P. In the UK this would be £680 billion, or nearly 6 times the economic value of the entire financial sector. The fact that this audience may 'feel' undervalued is not surprising. Raising children, organising weekend activities for the school, bringing a community together, nursing an elderly relative... these things are an unpaid part of her life.



AI monitored their language whilst they spoke to us, with the mission of classifying them into the classic Jungian archetypes. They index high when it comes to being 'caregivers'. The language they use often revolves around helping others and being naturally caring and compassionate. They are also generally optimistic, and they fit the archetype of 'Everyman'. This means they have a generally positive outlook, and makes them really value authenticity and honesty. It makes them build bonds and communities. In contrast to this, they don't feel the pull to be ambitious leaders. They don't feel they have the power to stand up to authority (and indeed often feel a little helpless and voiceless on bigger issues).

### WHAT THEY ARE

#### CAREGIVERS (INDEX 150)

- Full of empathy, compassion & generosity
- Seek to help and look after others
- Centred on family and relationships

#### OPTIMIST (INDEX 130)

- Naturally more positive outlook, reflected through being fun
- See the funny side of things
- Seek to make others happy

#### EVERYMAN (INDEX 120)

- They like & value the feeling of belonging & build community bonds
- Unpretentious and generally tolerant
- Embrace authenticity & honesty

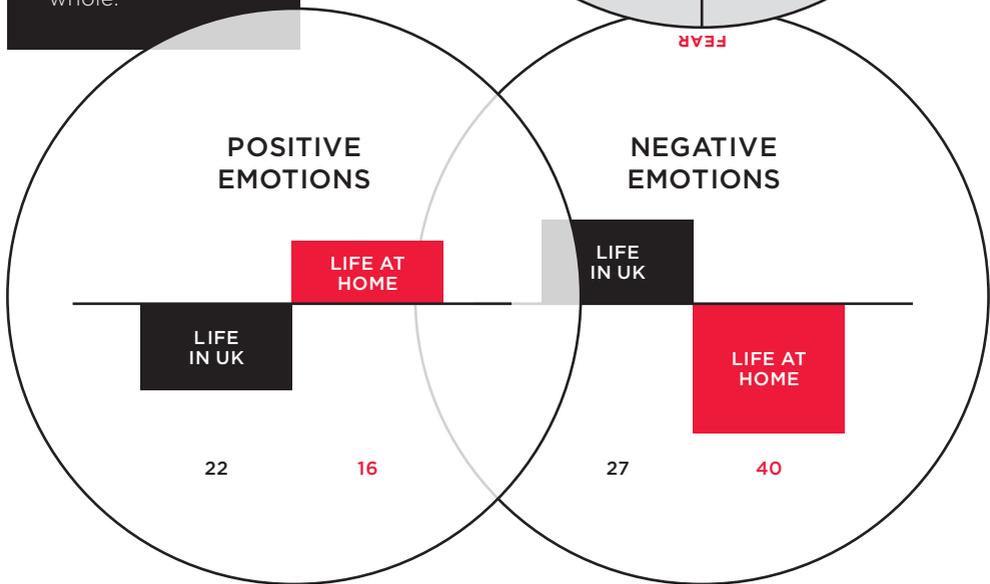
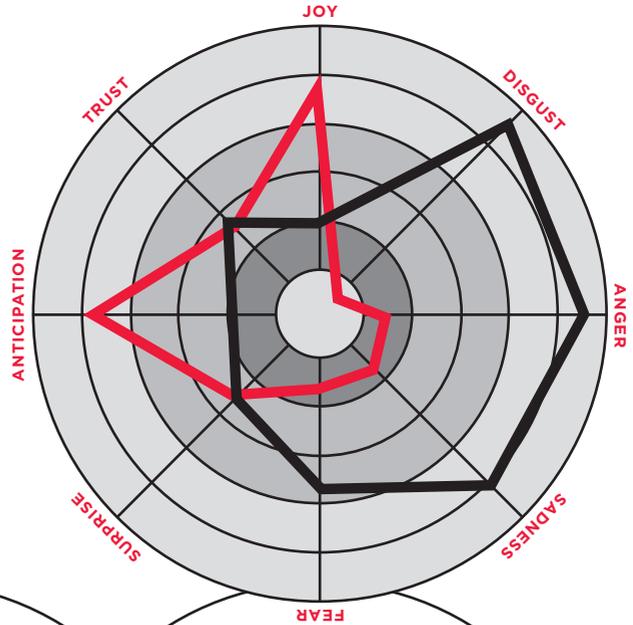
### WHAT THEY ARE NOT

#### RULER (INDEX 65)

- Seeks to be in control & believe they know what's best

## CONTRASTING FEELINGS FOR WHAT THEY CAN CONTROL & CAN'T

Also using AI sentiment tracking, this diagram shows the contrasting feelings towards that centre of care (and what she 'controls') - the home - compared to feelings towards the wider topic of the UK as a whole.



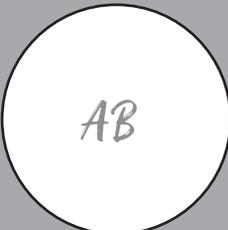
## WHAT ELSE WE FOUND

- She is self-reliant, positive and very much a 'doer'
- She may be selfless, but she's not a martyr
- She indulges herself; she finds real joy in her purchases

# ECONOMIC POWER

## Size and spending power of the group and how decisions are made

In short, they are the biggest demographic in number, and the biggest single economic group. They get through a lot of products doing what they do! When it's all added up, they spend more across a number of categories.

		INDIVIDUAL INCOME	GROCERIES SPEND
	AVERAGE	£18,972	£76
	TOTAL	£190B	£1.176B
	AVERAGE	£29,027	£84
	TOTAL	£324B	£1.15B
	AVERAGE	£18,557	£77
	TOTAL	£351B	£1.97B



### CHRISTMAS SPEND

### HOLIDAY SPEND

### MOTORS SPEND

### SAVINGS

£272

£1,821

£3,505

£15,485

£4.46B

£29.86B

£69B

£189B

£356

£3,093

£14,077

£40,579

£5.07B

£44.12B

£146B

£485B

£349

£2,397

£10,408

£24,815

£9.16B

£62.94B

£177B

£490B

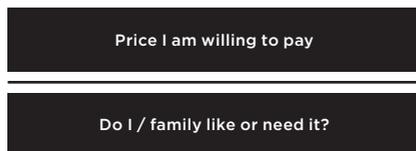
### WHAT ELSE WE FOUND

- 75% are sole decision maker on clothes & shoes (compared to 71% of AB women)
- 51% are sole decision maker on personal finance products (compared to 46% of AB)
- 46% are sole decision maker for tech purchases (compared to 40% of AB women)

# SAVVINESS

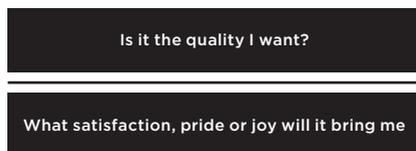
Importantly, it's not about being cheap! The skill of being spend-wise is a real asset for this audience. Searching out deals and the thrill of getting a bargain isn't a chore; it's an entertainment more akin to a hobby. They are not afraid to put the leg-work in and shop around for the best price available, whether it's groceries, fashion or personal finance.





The typical first definition of 'cheap' isn't really what it's about. 'Value' has other facets to it. Equation 1 here is about need, and its relationship to cost.

"I usually buy my fruit from Morrisons, stuff like pink apples, they taste different to what they do at ALDI & Lidl, I don't know what it is, but I'd rather pay that bit extra and buy it from Morrisons"  
(Leeds)



Value is also about what joy it might bring. And it's about quality too - for this audience the two are often inextricably bound together. Whether a branded product or certain retailer is better than another often came up in the research. That's equation 2.

"If I'm spending money on jeans they would be Levi's because they last, but if it was just fashion like ripped knees and stuff, it would be Primark"  
(Newcastle)



And equation 3 is about pitching yourself against the retailer. They are understandably wise to whether a deal is a deal and where it might be found cheaper.

"I no longer do the weekly shop online, because I know I can pick up bargains by shopping around"  
(Leeds)

## WHAT ELSE WE FOUND

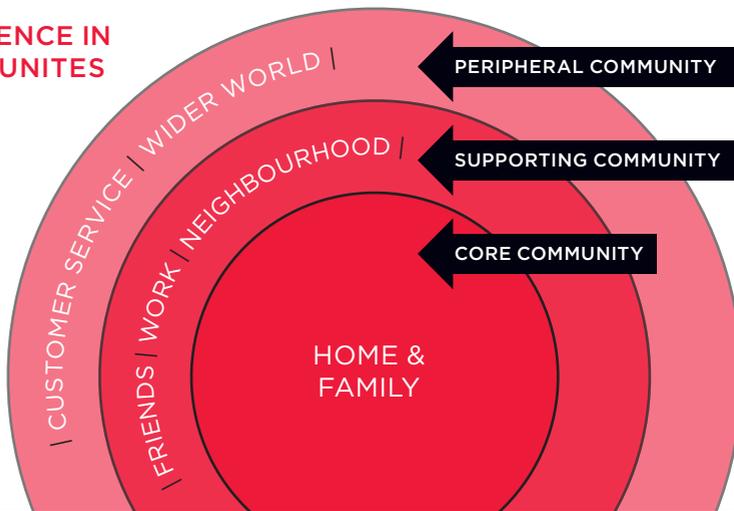
- The family holiday is the biggest saving fund, and they prefer multiple trips
- A lot of time is spent researching them
- When it comes to staying up to date, magazines rank first for shopping, recipes, health and gossip

# THE ORIGINAL INFLUENCERS

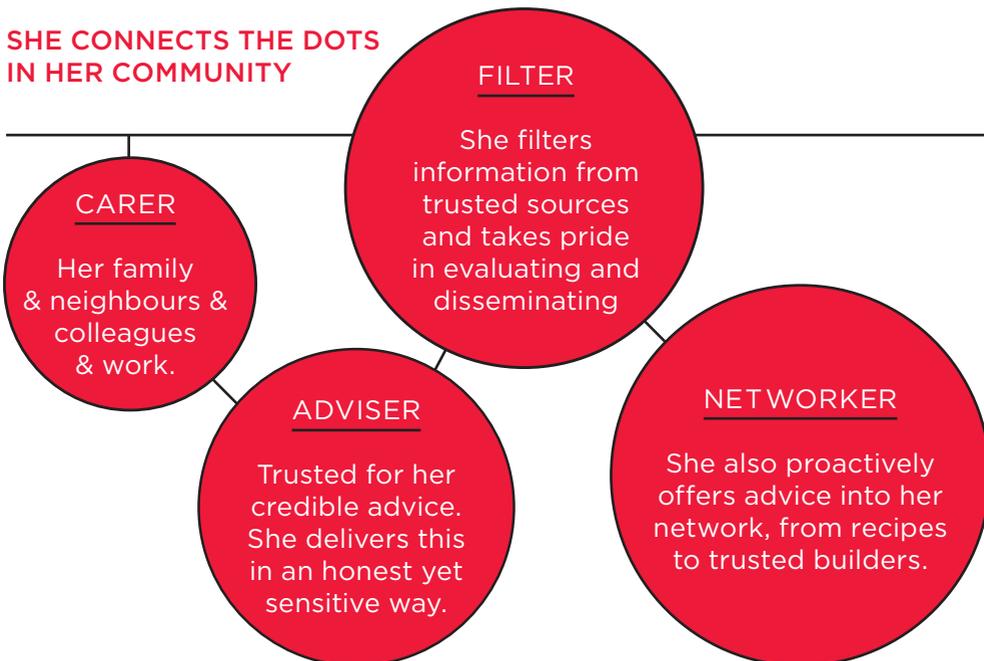
In a world obsessed with 'influencer', these are the real ones.

## SHE HAS A PRESENCE IN MULTIPLE COMMUNITIES

Their informed savviness, their position at the heart of both the family and the community, and their huge economic footprint; all this results in them being very powerful influencers and advocates.



## SHE CONNECTS THE DOTS IN HER COMMUNITY



## CONVERSATION HAPPENS AROUND PURCHASES

43%

Of their friends and family ask their advice before making a purchase.

49%

Of their friends and family come to them for advice.

58%

Say when they find a product they really like they have to tell their friends about it.

## HOW SOCIAL IS SHE?

Here we see her social-media behaviour. Where they are and where they're not (and therefore where ad money is potentially wasted). Whatsapp is their preference for active 2-way comms. On Facebook they tend to be watchers, but certainly do use it, following brands and sharing snaps and news.



## WHAT ELSE WE FOUND

- When it comes to other networks, 45% say Instagram is of no importance whatsoever. 49% say that of Pinterest and 51% say that of Twitter.
- They love magazine brands. Aside from these, when it comes to media choices this group indexes highly for ITV (i164) for Channel 5 (i130) and for red-tops (i123)
- They index low for Instagram (i59) and out-of-home (i75)

The linchpin of the family unit,  
the one person with the vast  
majority of retail decisions, and  
one whose daily discourse is  
often around purchase choices  
and brand experiences.

For many brands this  
is the most important  
demographic in Britain.

Via our core 9 Heart of  
Britain media brands we  
speak to 3.1m every month.



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