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Understanding societal change in Britain and its implications for targeting the 21st century consumer

Rob Haslingden

Winner 2003

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The Changing Face of Mosaic



12 Groups

52 Types

4 Super Groups

11 Groups

61 Types





mosaic

United Kingdom

The only UK consumer segmentation system to be deployed
both household and postcode

Why are we rebuilding Mosaic?

"British society has changed in terms of household structure, affluence, employment, ethnicity and cultural influences.

The Census data allow us to reclassify UK consumers using the latest and best information on the structure of society in 2003"



Key Societal Trends

- More dimensions of affluence
- Changing social structure of the countryside
- Growth of child free city centres, apartment lifestyles
- Expanding student enclaves
- New Asian 'middle class' suburbs
- Pattern of council housing increasingly complex
- Polarisation of the 'Grey Market'



Data Selection

- Candidate data for Mosaic UK had to meet the following criteria:
 - ◆ Describe social formations and discriminate between actual consumer behaviours
 - ◆ Be compliant, accurate, universal and sustainable

Mosaic UK : Four Key Data Components

- ◆ Experian person and household data - demographics & lifestyles for every person and household in UK
- ◆ 2001 Census (ONS /GROS /NISRA) and other official statistics - 300 variables
- ◆ Experian local area economic data and geographic characteristics
- ◆ Descriptive market research

UK Household Characteristics

Individual

Gender

Age

Marital Status

Family Name Origin

Length of Residency

Head of Household

Family

Household Composition

Households with Children

Decision Maker Type

Lifestage

Property

Property Type

Residence Type

Tenure

Council Taxation

Market Value

Financial

Income

Company Directorships

Shareholdings

Personal Debt (CCJ's)

Credit activity (PC)

Small or Home Office

Consumption

FMCG

White /brown goods

Cars

Media

Leisure

The case for Census V non-Census data

Census

Household
Composition

Long Term
Illness

Employment

Household
Tenure

Unpaid Care

Disability

Non-Census

Electoral Roll

Consumer Credit

Post Office
Address File

Directors

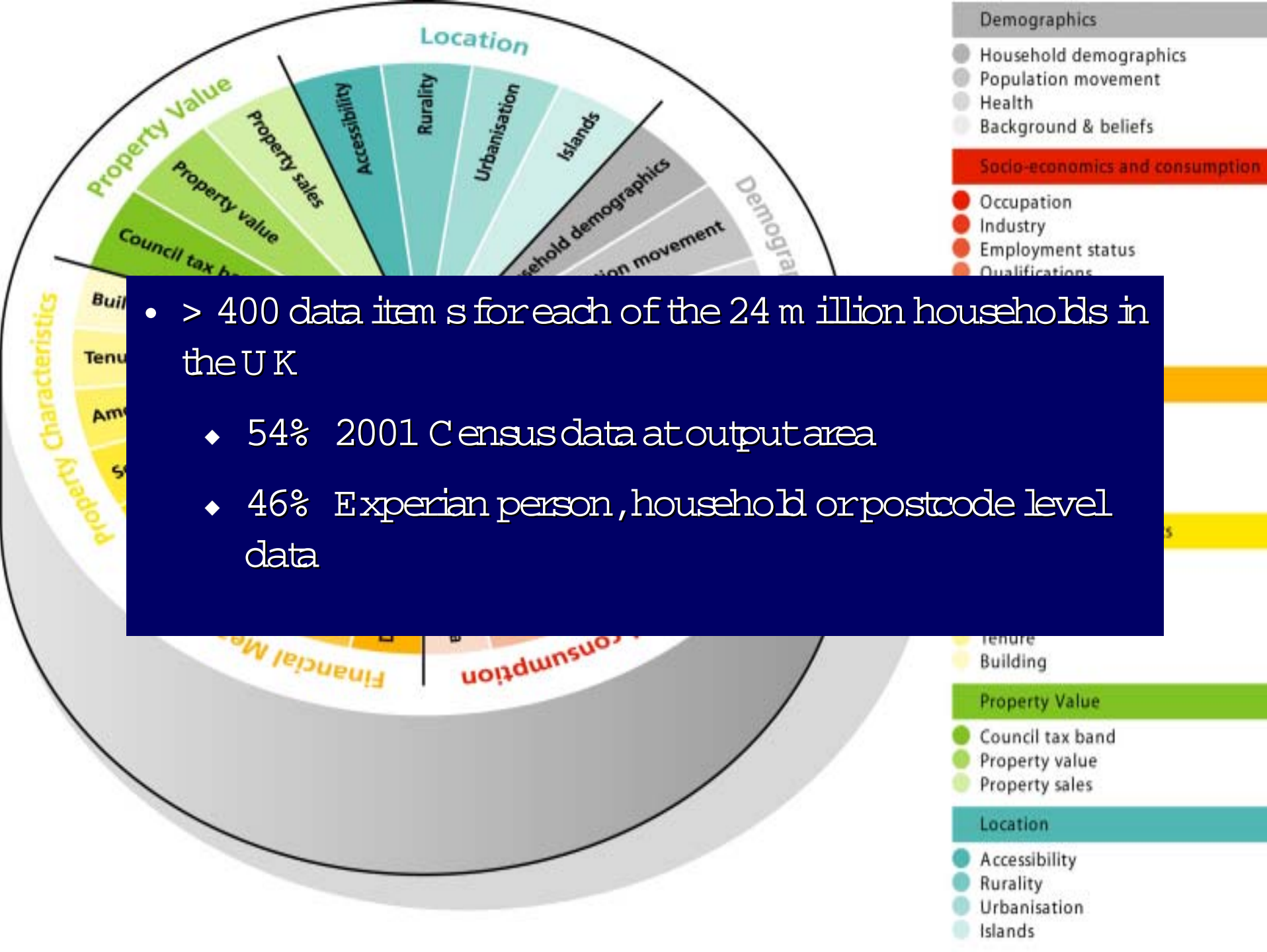
Shareholders

Council Tax

House Prices

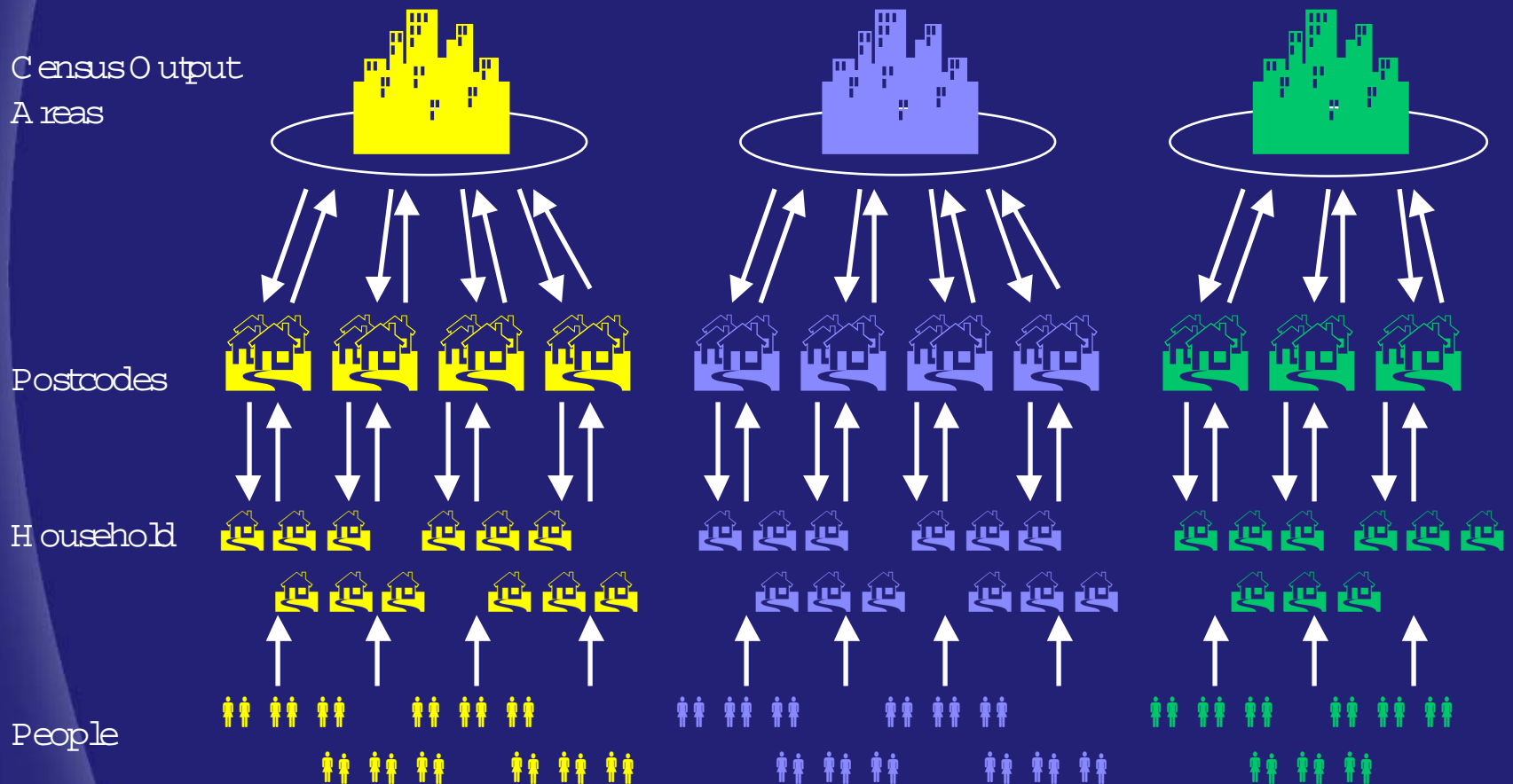
Accessibility

Time Spent Commuting

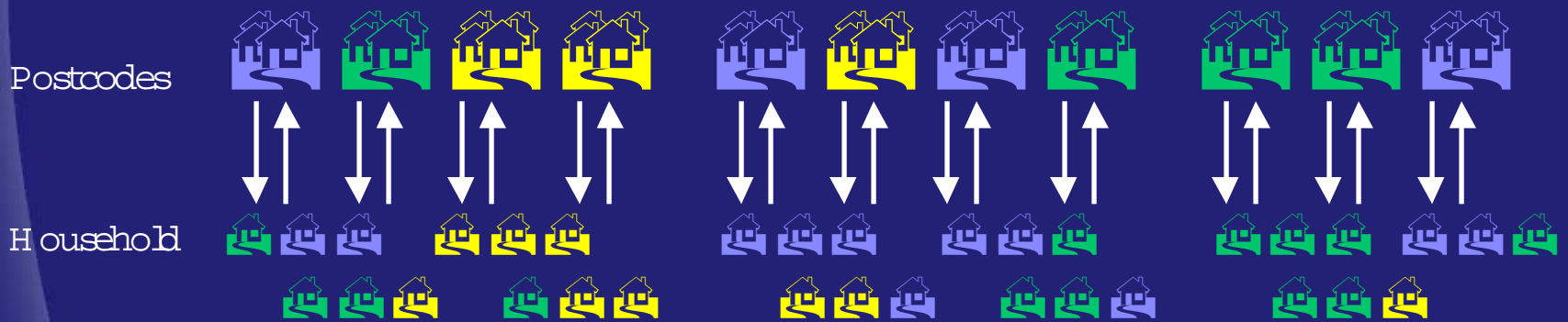


- > 400 data items for each of the 24 million households in the UK
 - ◆ 54% 2001 Census data at output area
 - ◆ 46% Experian person, household or postcode level data

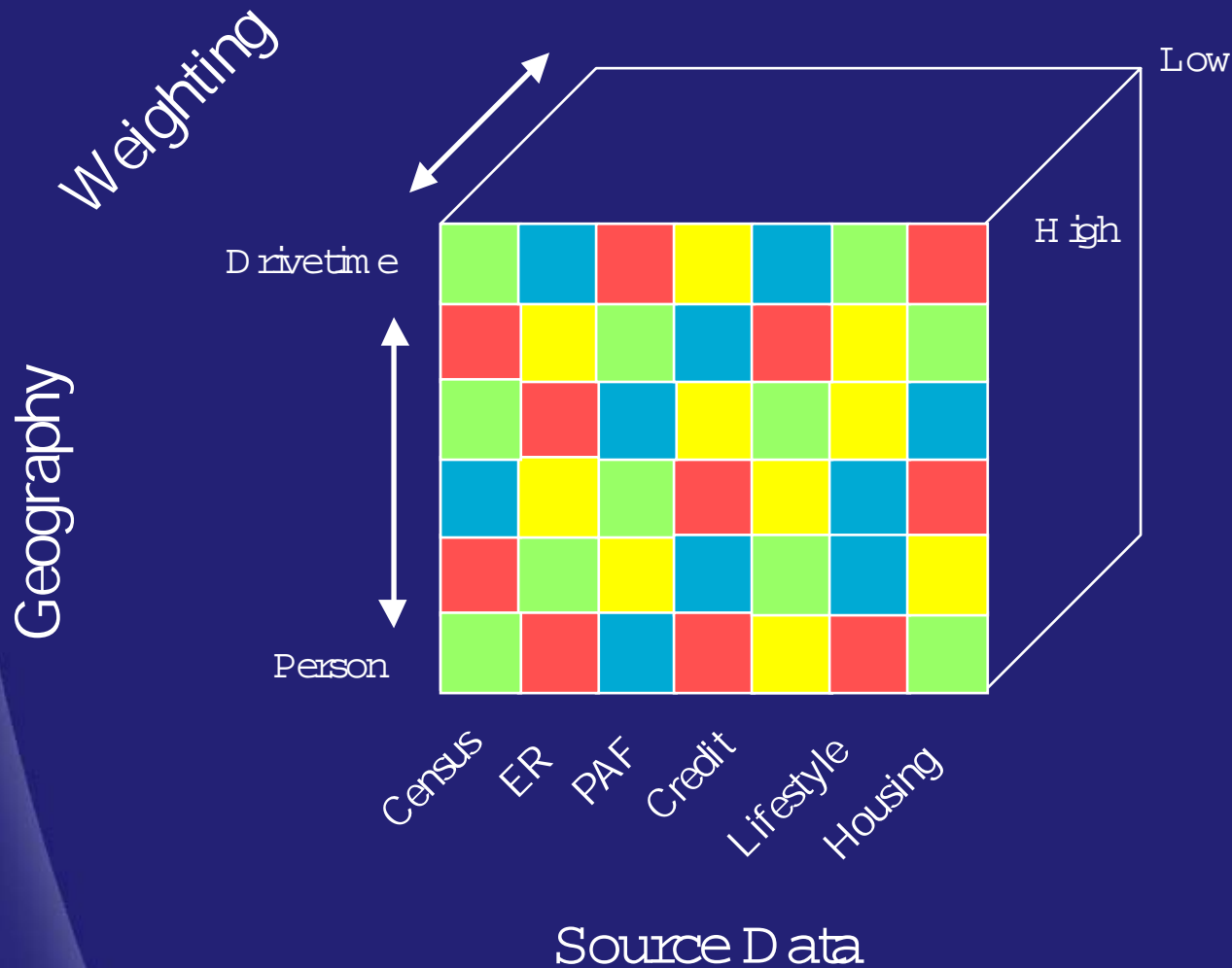
Bottom Up Clustering Methodology



Bottom Up Clustering Methodology



3D Approach to Clustering



Validating Mosaic



Interpreting Mosaic

- Consumer behaviour research data for products, attitudes / social values, technology, media, leisure sourced from :
 - ◆ Experian Lifestyle Surveys
 - ◆ Experian Consumer Futures Research
 - ◆ BMRB – Target Group Index / Attitudes
 - ◆ MORI – Financial Services
 - ◆ Hitwise – UK website actual consumer profiles
 - ◆ Forrester – Technographics and Internet User Monitor
 - ◆ ONS Family Expenditure Survey
 - ◆ Home Office British Crime Survey
 - ◆ ONS Time Use Survey
 - ◆ DETR Measures of Deprivation

Group A – Symbols of Success



More Dimensions of Status

Type A 1 Global Connections



Type A 2 Cultural Leadership



Type A 3 Corporate Chieftains



Type A 4 Golden Empty Nesters



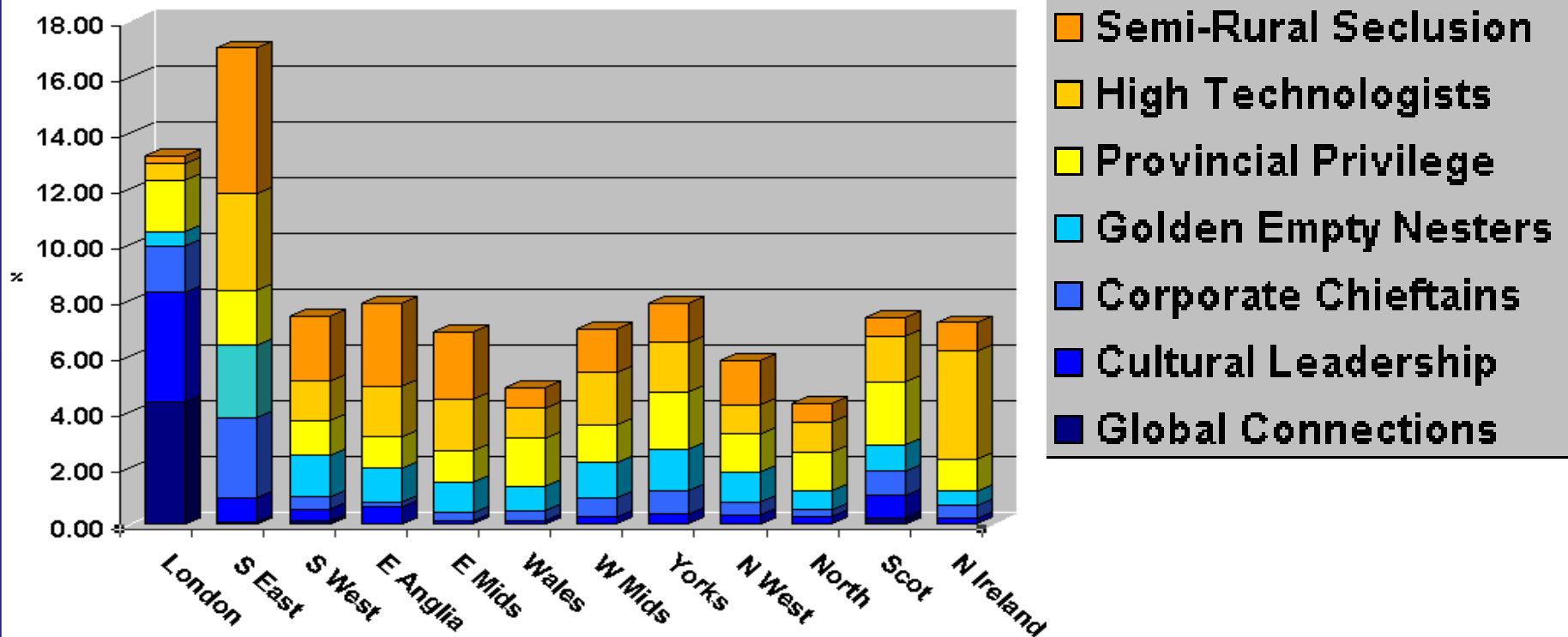
More Dimensions of Status



	Chieftains of Industry	Golden Empty Nesters	Global Connection	Cultural Leadership
Degree	199	179	300	251
Detached house	332	338	10	85
Higher Managerial	253	209	294	224
Higher Professional	240	198	318	298
Director (Large Cpany)	1098	525	655	617
High Value Shares	1073	1072	484	698
House Value	212	156	355	212
Council Tax (Band G)	1641	830	889	1084

Concentration of Affluence in London and the South East

High status neighbourhoods



Group C – Suburban Comfort



BRITISH
MEAT
Bacon

GARDENERS' World
Daltons
WEEKLY
Leisure reflection of
technology

DAILY EXPRESS
EXCLUSIVE
Daily Mail
MONEY TODAY
SEE PAGES
Could a £1 tape
destroy the

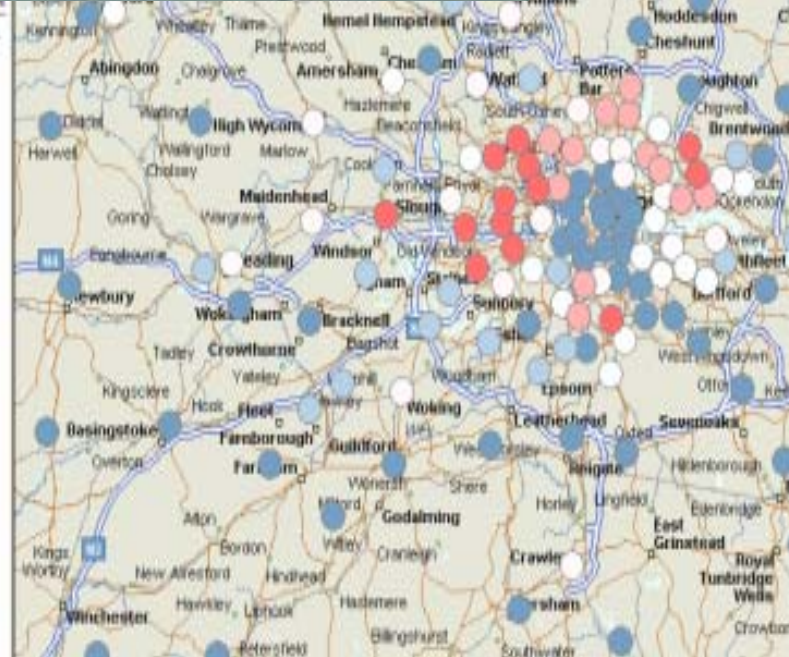
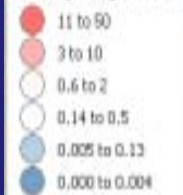
BARCLAYCARD
VISA

THE NATIONAL TRUST

New Asian Middle Classes



Enterprising Asians...



Group E – Urban Intelligence

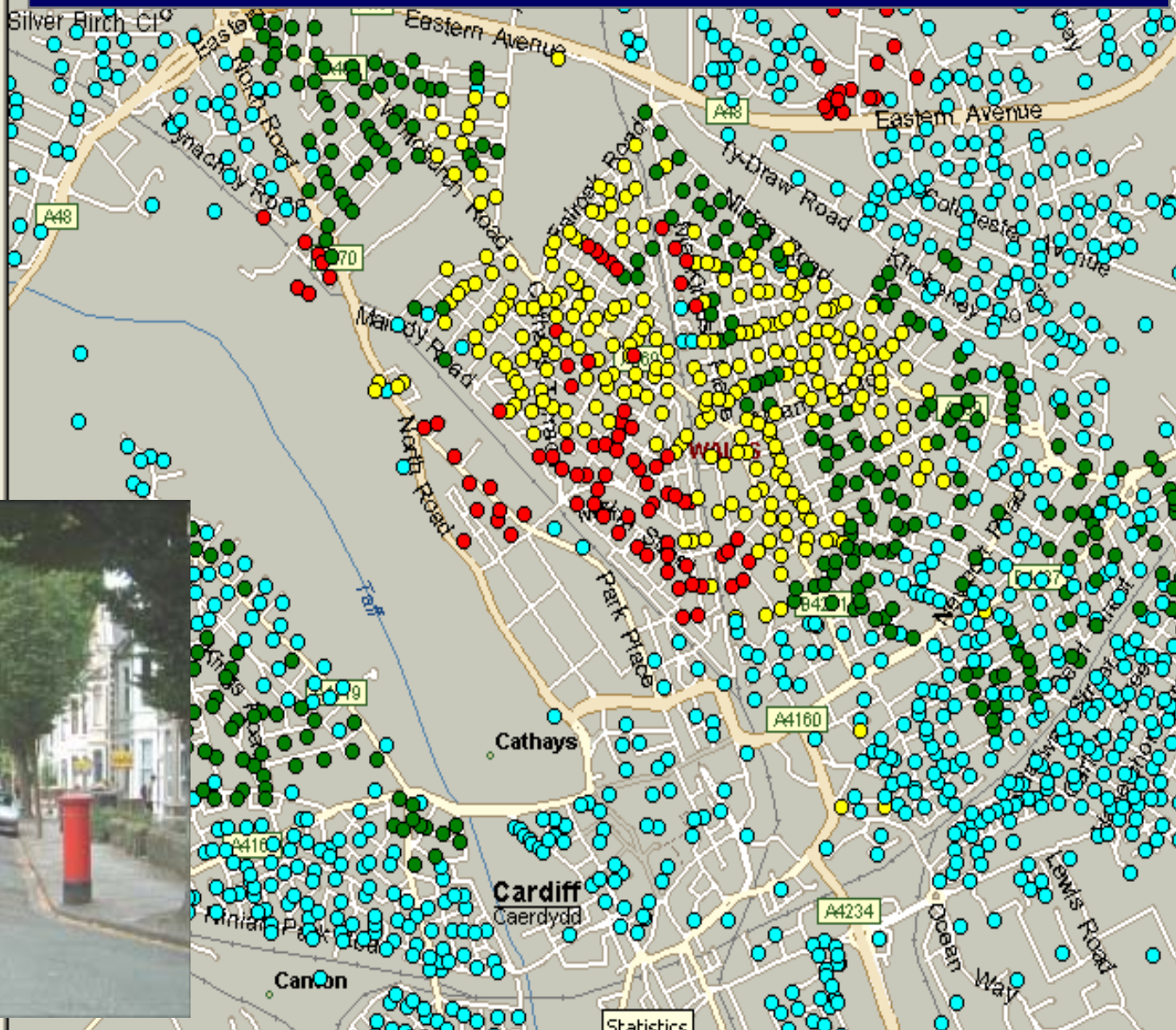




The 'Studentification' of InnerC ities

Proposed by Postcode

- others
- University Challenge
- Town/Gown Transition
- Caring Professionals
- others



Increased Polarity Amongst the Elderly

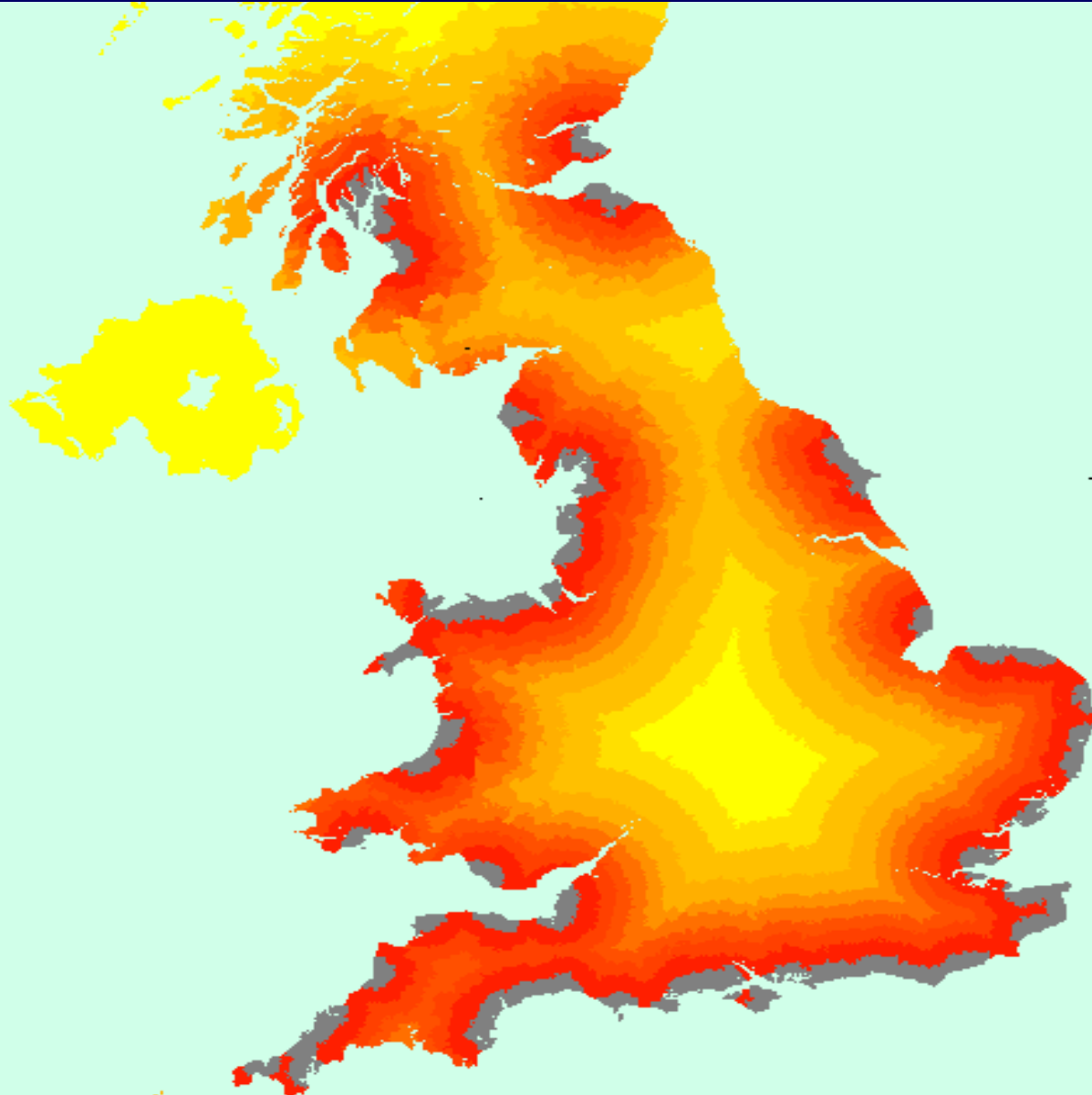
Group I – Twilight Subsistence



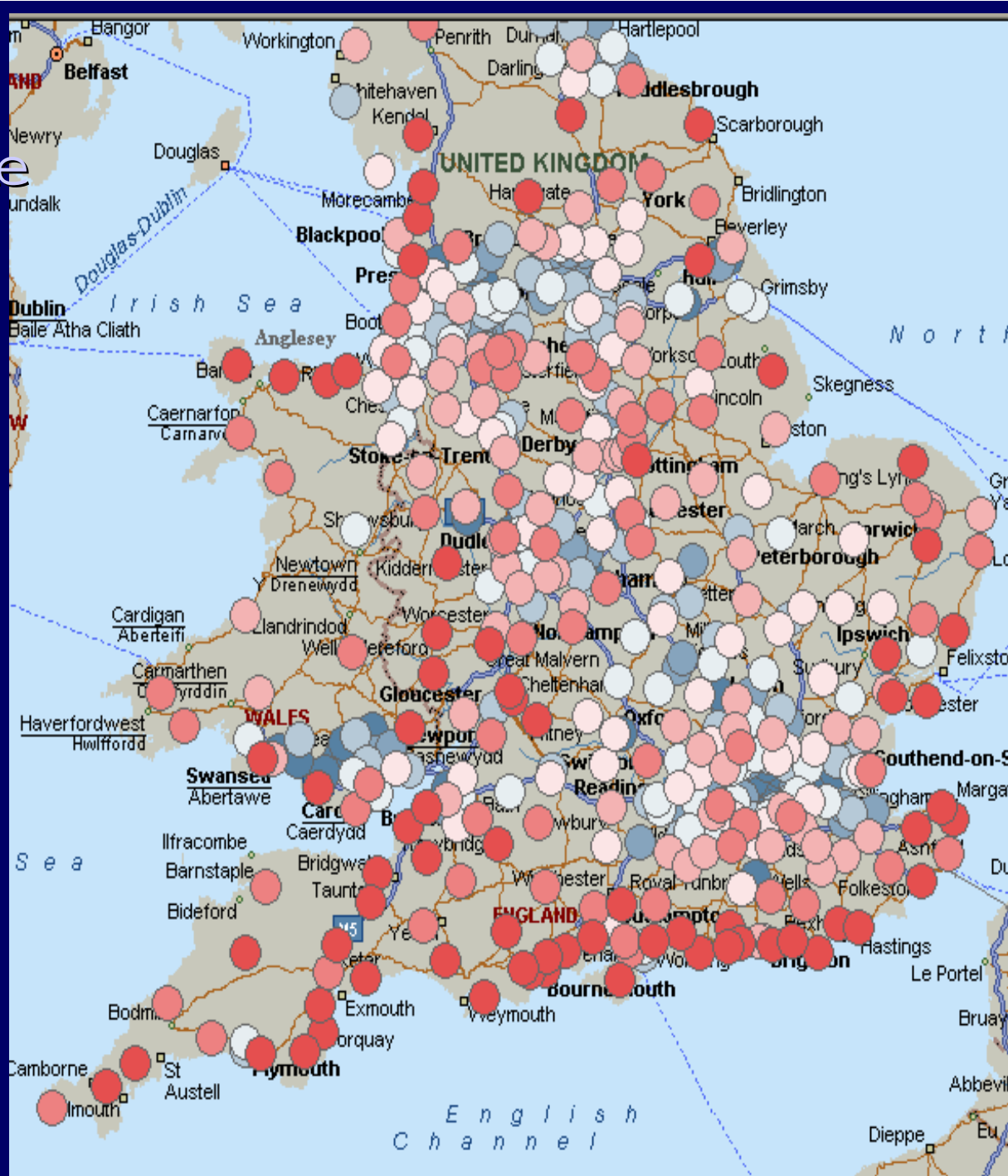
Group J – Grey Perspectives



Distance from the Coast



Increased Polarity of the Elderly



Group K - Rural Isolation

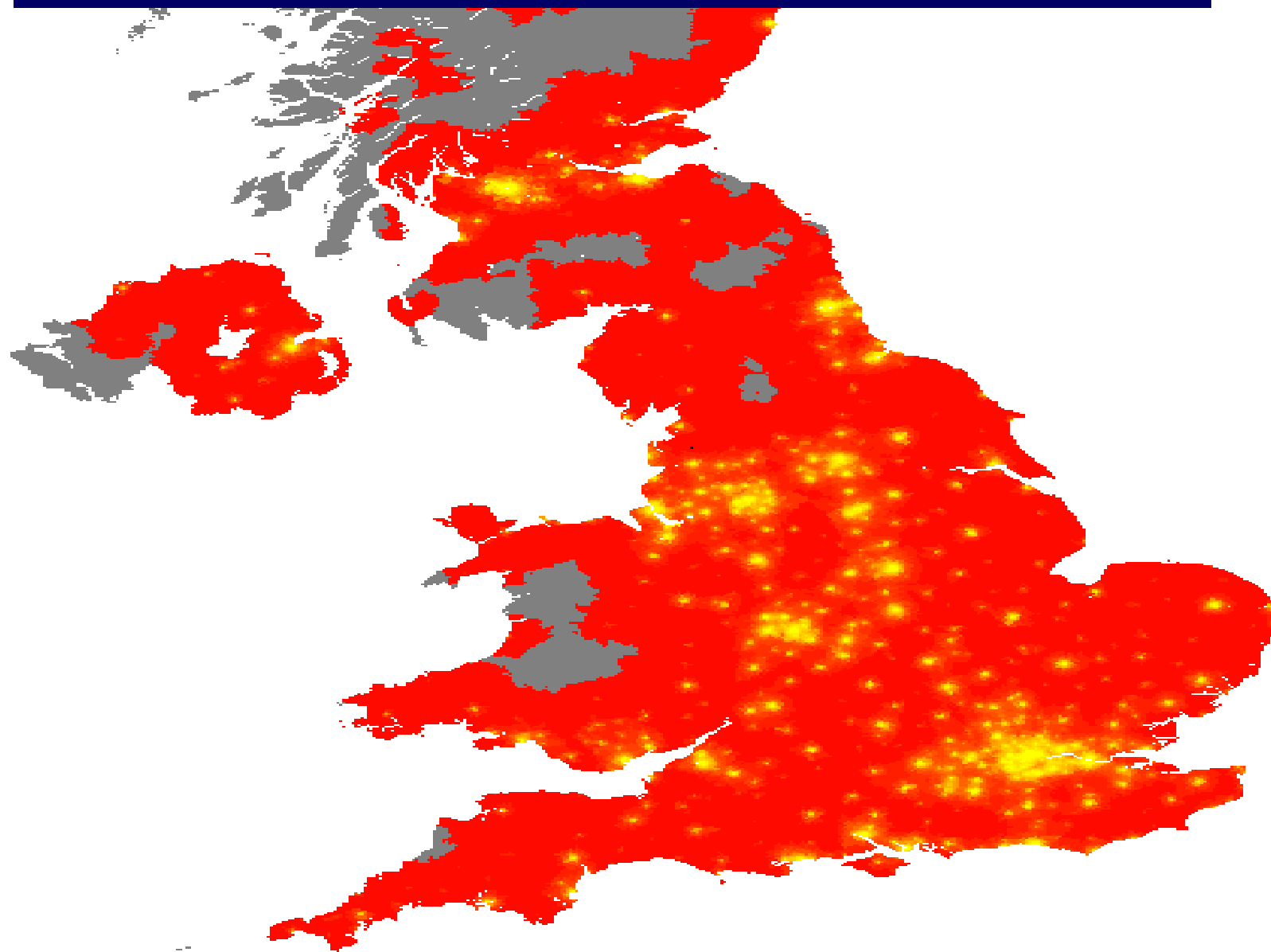


Growth of Rural Second Homes



Parliamentary Constituencies	57 Summer Playgrounds	56 Tourist Attendants
Argyll & Bute	14.84	3.55
Ross Skye & Inverness West	14.30	1.75
Totnes	11.41	11.35
Western Isles	11.35	0.56
North Cornwall	10.38	5.31
Caernarfon	10.18	5.41
Westmorland and Lonsdale	9.47	12.54
Inverness East Nairn & Lochaber	8.94	2.83
Meirionnydd Nant Conwy	8.65	9.68
St. Ives	8.24	11.09

Measures of Rurality



Accessibility & Visualisation

Online accessibility

Data Cleansing and Data Marketing Service - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History

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Panic

Registered Users

Savings Calculator

Free Data Audit

Buy Lists Online

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Media visualisation

Mosaic Guide to Mosaic

mosaic

Search Print Help Exit

A 3 New Influentials

Rank Order: A 1-2, B 4-9, C 10-12, D 13-16, E 16-24, F 25-28, G 30-32, H 33-36, I 37-40, J 41-44

Key Information
A 3 New Influentials

Key Descriptions
Affluent families with detached houses in the suburban high value urban streets with younger professionals

Typical Forenames
"Graeme & Katherine"

Key Points
Tornado or semi-detached
Mixed with school age children
Professionals
Substantial Mortgage
New technologies

Mosaic Lookup
Enter Postcode

Rank Order: 3 (100)

Profile: MOSAIC Rank Order

Mosaic UK Movement & Migration

- An analysis of patterns of movement between Mosaic UK types and groups.
- For each Group and Type:
 - ◆ Rates of movement over a year
 - ◆ What Type is a household most likely to have come from ?
 - ◆ What Type is a household most likely to move to next?

Mosaic UK Movement & Migration

Top 3 Mosaic Types

Annual% Change



B 8	Just Moving In	0.26
I50	Cared for Pensioners	3.40
I48	Old People in Flats	3.86

Bottom 3 Mosaic Types




E 32	Dinky Developments	19.48
I50	City Adventurers	20.38
I48	In Military Quarters	39.67

Our conclusions...

- Impact of non-Census sourced data to identify new consumer segments significant
- Weighting of different data for different geographies important element
- A ve 3 different Mosaic household types within a postcode, maximum 18 types
- Average 20% improvement in discrimination
- Movement and migration provides a view of change to neighbourhoods over time
- Facilitating annual updates
- Delivered through a variety of different media,

Geodemographics.. a cautionary note!

- Commoditisation does not necessarily lead to quality
- All the systems are not the same
- Understanding the performance of each system is does not have to be difficult
- You don't have to a specialist to understand the data
- Commercially built systems are just as relevant to the public sector as to the private
- Does it provide a RETURN ON INVESTMENT!

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