

The first efforts were disappointing and did not result in any meaningful groupings. This was due primarily to the fact that most of the variables used to define the exposure to, and use of, various media differed widely from one form of media to another. Eventually, the data was reduced to a set of simple binary type variables - a person was exposed to a given type of media or they were not. Today from a list of 98 variables describing exposure to many different forms of media, we have developed 16 segments each with its own particular media preferences.

The balance of this paper is devoted to a presentation of the process used to develop the 16 segments, a description of the segments (using both their usage of various media and their demographics), and examples of how the segments have been used by both advertisers and media planners in Canada to learn more about their target consumers.

2.0 Methodology

As in many countries, media planners in Canada have a number of extensive data bases to which they can refer. One of the most comprehensive is that offered by PMB Print Measurement Bureau. This PMB data base now offers a two year rolling sample of 20,000 in-home interviews (10,000 per year). The interview is based on a one hour personal interview covering:

detailed demographics (including both personal and household);
readership of selected publications (including qualitative measures);
exposure to other media (including radio, television, and outdoor).

This is followed by the self-completion of booklet which covers the usage (both personal and household) of a wide variety of products and services. The average response rate to the personal interview is 65% (even after an extremely disproportionate sample weighted to major urban areas ... and then towards high income and professional and managerial occupations) and 80% to the self-completion booklet which contains more than 60 pages of detailed questions!!). The PMB study is generally considered to be the most comprehensive media data base in Canada. Other media data bases may be more comprehensive in terms of any one particular media ... such as the number of people watching a particular program in a 15 minute time slot. However these media data bases are unlikely to tell you what products and services these people use on a daily basis.

Because the PMB data base is rich not only in terms of the product data but also the exposure to other media, it was decided to use this as the source for the development of a possible *MediaGraphics* solution. The PMB data base now extends to more than 8,000 columns of data on each individual. Because of *rules of access*, not all of this data could be accessed for use in the development of the *MediaGraphics* segmentation. For example, the identification of readers of a specific publication such as Time, Canadian Business, Chatelaine, or Canadian Living, is prohibited for this type of analysis. Instead, it is necessary to group magazines into *types of publications* ... such as business, shelter magazines, women's service, travel, and outdoors and environment. After this first reduction in the data, a total of 98 variables were identified which dealt with exposure to media in one form or another.

The following list provides a sample of the types of variables first introduced to the *MediaGraphics* solution:

- listening to radio between 10:00 am and 3:00 pm
- listening to talk shows on radio
- travelling by bus or train to work
- reading a magazine targeted to health or fitness
- watching soap operas on television
- attendance at soccer games
- attendance at the ballet
- reaction to unaddressed mail or flyers.

These are but a few examples of the 98 variables extracted from the PMB data base.

Using factor analyses, these variables were reduced to a series of 31 factors each defining a particular media attribute. As might be expected, these factors tended to group similar media together. It is interesting to note that at this stage rather than bringing together media which were similar in *content*, the factor analysis tended to find common elements among the media *format*. For example, one factor groups the following magazine formats together,

fashion and beauty;
health and fitness;
shelter; and,
women's service.

It is interesting to note that comparable sections of daily newspapers are not included with this group. Instead the similar groups for newspapers are found within another one of the 31 factors which is defined primarily by their readership of the following sections of daily newspapers,

general news
fashion and lifestyle
food
entertainment
travel
editorial

Together the 31 factors account for approximately 75% of the variation. However, as in many multivariate solutions, there was also an *intuitive* feel as to whether or not a selected solution meets recognizable marketing solutions.

The 31 factors were then processed through the Galaxy cluster program from PTT (PulseTrain Technology). Thompson Lightstone has been using the Research Machine suite of programs from PTT for more than a decade. After a review of the cluster process, it was decided to select the 16 group solution. Normally, one would not look to select such a large number of groups ... one rule of thumb has always been to select only a reasonable number of groups, with *reasonable* defined as the number of different marketing plans one can afford. For this exercise however, we believed it necessary to maintain a distinction between any group which had meaningful characteristics. Also, because we were dealing with so many different products and services, it was felt a smaller solution may have become too limiting in future analysis.

The 16 groups are certainly different in their characteristics. Labelling groups is always one of the fun, if often difficult, exercises. For 1994, we have labelled the *MediaGraphics* groups as follows (with their associated proportion of the population):

| | | | |
|-------------------|-----|---------------|-----|
| Multi-cultural | 3% | Untouchables | 6% |
| Driving Jazz | 1% | Eco dudes | 4% |
| Bookish | 2% | Surf 'n Sport | 5% |
| Culture crowd | 6% | The Commuters | 6% |
| Country & Western | 12% | Weather | 6% |
| Soft Rockers | 8% | Edge of Day | 20% |
| VJ's | 6% | M'Elle | 3% |
| Rock 'n Rollers | 9% | la TV | 3% |

When this exercise was first conducted on the PMB'93 data base, a solution based on 14 groups was selected. Some of the groups have remained constant from one year to the next (eg. la TV, Edge of Day, Soft Rockers, Culture Crowd). However, the data from PMB'94 seem to favour the 16 group solution. As a result, we see some groups disappear (such as the Retro's ... old classics on radio ... a looking backwards group) and new groups emerge (such as Country & Western and the Eco Dudes).

Traditionally, demographic and psychographic segments tend to show much greater stability shifting only very slowly over time. Are media habits more volatile? We don't know the answer to that question yet. Meanwhile let us look at the 16 segments we are currently using. What do they look like? Can you identify friends, neighbours, or business acquaintances which would fit one of these 16 categories ... can you see the category which best fits you?

3.0 Media Segments - Their Characteristics And Demography

The following are thumbnail sketches of the 16 segments highlighting their media habits and significant demographics.

Multi-cultural

This group is distinguished by their very strong tendency towards multicultural programs on radio. While they are not necessarily heavy radio listeners, their preference towards this format is extremely strong. They are fairly heavy transit users and read the travel section of the daily newspaper. Their attendance at classical music concerts is also the strongest of any of the 16 segments.

They are fairly evenly split between male and female. They are more likely to be found in major urban areas and, after the *la TV* segment, the most likely to found in the French Canada. This segment is slightly older than average with higher indices in the 50 to 64 year old group (110) and 65 or older (123).

Driving Jazz

This group is also characterized by their radio listening habits. However unlike the *Multicultural* segment they are also one of the heavier radio listening segments ... at all hours of the day. As the name of the segment implies, there are not one but two radio formats which stand out with this group - jazz and traffic reports. In keeping with this finding, this segment has the highest index in automobile travel (153 for 51 miles or more per week). As a result, they are prime candidates not only for radio advertising but also outdoor media.

It is interesting to note that this segment is also one of the heaviest users of other selling media such as mail order, use of the telephone yellow pages, and use of 800 telephone numbers. In keeping with the name of the segment, they are also attend jazz concerts though this is not the limit of their live entertainment profile as they also show above average index levels for live theatre

There is slight skew in this group towards males. Their ages group in the 18 to 34 year range. They tend to be professionals, managers, or business owners. They are more likely to be found in larger urban areas and have higher than average household incomes.

Bookish

This group is driven by a very literate life style. They have the second highest index of magazine readership (*M'Elle* is slightly higher), but their readership extends to other forms of print such as newspaper, and books. This group has one of the highest ownerships of computers in the home coupled with their purchase of software for entertainment, business, and education.

They are not television watchers and relatively average in their radio listening habits. However you will find them at a wide variety of live entertainment from theatre to concerts to ballet. They don't avoid sports events. They score higher than average not only in their attendance at tennis events but also other sports as diverse as baseball, football, soccer, and horse racing. Don't be fooled by the name. These people are very much *out and about*.

They are more likely to be male and in the 25 to 49 age bracket. They have the highest average household income (index of 480 at the \$75,000 or more level) ... even more than the *Culture* segment ... and are composed mainly of professionals, senior managers, and business owners.

Surf 'N Sport

This is a very interesting group. They have one of the highest indices for watching television, but they are selective. Unlike the *Edge of Day* group which we shall review later, this segment logs very high indices across many different types of channels and program formats ... channels such as First Choice (a movie channel), Family Channel, and Arts & Entertainment. The *Surf* component of their segment name comes from their obvious viewing of many different channels during a viewing period. As might be expected, they are heavy users of entertainment type magazines (TV Guide for example).

The *Sport* component of the name comes not only from their heavy viewing of sports on television, but also through their high index on sports radio (148), and attendance at all types of sporting events.

This group is fairly evenly balanced between males and females, and single and married people. While a component of this segment is in the 12 to 17 year old group, there are also more than the average number in the 35 to 49 group. They tend to have higher than average incomes. However, unlike some of the other segments which skew towards the higher incomes, this segment is fairly evenly distributed across all types of occupation with the exception of technical and teaching jobs. While we would find a number of these people in Toronto, they also show up stronger than average in the mid-market size (100,000 to 1,000,000).

Commuters

This is very urban segment. They do not have a lot of disposable income, tend to be younger, and single. They are light television watchers and radio listeners. They don't drive taking public transit instead. They are the heaviest users of the subway system and buses. When they do listen to radio it tends to be classical music; their magazine readership tends to be heavier than average in the fashion and beauty categories, and when they do watch television, you are probably more likely to find them watching documentaries (though no formats in either radio or television stand out strongly from the average).

This group is relatively well educated. While not the highest, they have a higher than average index for holding a university degree (143). Many of the people in this segment will be found in clerical occupations.

Weather

This segment is identified by their extremely large index on the *weather* format in radio (1382). On other forms of media (other radio formats, television, and print), they are fairly average. There is a slight skew towards children's programs and cartoons on television and soap operas. These people do not go out very much even to movies.

These media habits are in keeping with the type of person found in this particular segment - females with children in the household under the age of 2. If they do work, it is usually part-time. They are more likely to be found in the Prairie or Atlantic provinces. As a result, they also show a higher than average index in smaller communities (less than 100,000). The families have lower than average incomes.

la TV

Most *MediaGraphics* segments have common propensities in both English and French Canada. However, this is one segment with a heavy affinity towards television viewing in the French language ... hence the *la TV* title. The segment shows both heavy television viewing (151 in the highest quintile) and heavy magazine readership (143 in the highest quintile). This is an unusual media combination not found in other segments. This group are also avid listeners of sports on the radio (183) and reading the sports pages of the daily newspaper (137).

As expected, the television viewing is strongest for those stations broadcasting in French. Similarly, the magazine profile for this group shows a definite skew towards those publications in French. However, they do not have the highest indices for reading French magazines. This is reserved for the next segment, *M'Elle*. Generally these people are not avid out-of-home event participants though they do like to attend hockey games and tennis events.

The most pronounced demographic tendency is the groups residency in French Canada and Montreal in particular. They tend to be younger in age (slight skew towards the 18 to 49 age group), have larger family sizes (4+) and therefore children at home. They have average personal and household incomes.

M'Elle

At first glance this group would appear to be similar to the *la TV* segment since the people in this group also show a strong tendency towards French language publications. This group has the highest index in the top magazine quintile as well as high indices in radio. However they differ markedly from the *la TV* segment in that they have much lower indices for television viewing ... even for those stations broadcasting in the French language. While the group is very heavy in the print media, particularly in shelter, fashion and beauty, and lifestyle publications, they can be found in other media such as daily newspapers and radio, and to a slightly lesser extent television.

Rather than being strong in one particular media type, this segment, perhaps more than any other, is defined more by the content. For example, their newspaper reading is dominated by the fashion and lifestyle sections. This group can also be reached by direct mail, through advertising at supermarkets and drug stores, and the use of cents-off coupons.

As might be expected the segment is dominated by females (age 18 to 34) with children. They tend to have high school education; if they work, it is probably part-time. As a result their personal income levels are low.

Untouchables

This group would represent a real challenge for any media planner. People in this group score low on virtually every media type analyzed. Their print readership is low, they watch less television and listen to less radio than other segments. There is not one of the original 98 media variables in which this group shows anything higher than average scores. They dominate the lightest radio quintile (142), the lightest television quintile (396), and the lightest magazine readership quintile (189).

From a demographic viewpoint, these people are older, single and earn average incomes. A good exercise for a young media planner would be to develop a plan which could reach these elusive segment!!

Soft Rockers

There are two media characteristics which drive the formation of this segment ... a very powerful affinity towards radio stations which feature soft rock music (597) and listening to radio on the weekends. This interest in soft rock however does not translate to attendance at soft rock concerts ... this is a stay-at-home group. This is probably due to the fact that they are the most likely to have children under the age of two at home (and as result have a high index for children's programming and cartoons on television). They can also be targeted through the print medium, particularly shelter magazines.

This is one of the most uncomplicated *MediaGraphics* segments. However, they should not be underestimated in their purchasing power. The group is concentrated in the 25 to 43 age group. As mentioned previously, they are more likely to have children. However, unlike some of the other segments with young children, this group has higher than average household incomes (index of 133 for \$75,000 or more). They tend to work full-time in professional or managerial occupations.

Eco Dudes

This group can be identified by their heavy index in the print media (193 in the top magazine quintile) and particularly in those magazines with content directed to the environment and news. This group are also avid sports fans. They watch TSN and RDS, listen to sports broadcasts on radio and read the sports sections of daily newspapers. In keeping with this trend, they also have relatively high indices for attendance at various sports events.

This group is young (18 to 24) with a tendency towards males (151). They tend to live in smaller communities and in households with average incomes.

VJ's

VJ's, which stands for "video jocks", love LP rock formatted radio stations (index of 1,081) and have an affinity for music video programming on television (253) and MuchMusic, a music specialty television channel (379). They exhibit heavy evening radio tuning and are far more avid weekend radio listeners than the *Rock 'N Rollers* (another segment defined primarily by their radio listening and format interest). The VJ's also exhibit strong sports radio listening trends (310, the highest index of any segment).

VJ's can also be reached on regular television, generally in the evening after 11:00 pm. or on Saturdays and Sundays. Their interests are directed towards programming such as situation comedies, children's shows, and cartoons. Video rentals are above average and VJ's seem to know how to program their VCR for recording off-air television programming.

The only magazines the VJ's spend time with are entertainment titles, no doubt in keeping with recording of programs with their VCR's. While they are light newspaper readers, three sections attract them - sports, entertainment, and the comics. These people own home computing systems and video game hardware. They have heavy attendance at live performances notably all forms of music (classical, rock, pop, and jazz) and theatre. In summary this group could be characterized by their fascination with music, art, and events.

The segment is skewed both to males (143) and the younger age group (12 to 24). In keeping with this finding, people in this group tend to be single with high school education (most are too young to have begun a university education). Part-time employment is common providing this group their own source of disposable income. Their families tend to be small with household incomes slightly above average.

Country & Western

Whether on radio or television, this segment has a strong affinity for everything *Country & Western*. On radio, it is their favourite format (529) and on television they are heavy viewers of TNN, the Nashville network (415). If they are not watching country and western on the television then you can probably catch them watching game shows or family dramas. This group shows the least interest in any print media, whether magazines or newspapers. They like baseball but are not heavy movie goers. For the matter, baseball seems to be their major activity outside of the home.

The group is composed of both males and females. They tend to be in the older age groups (50 or older) and retired. As a result their household income tends to be low. They are less educated than most other segments and tend to live in smaller communities.

Culture Crowd

Like the *Bookish* segment, members of this group are light television viewers and heavy magazine readers. When viewing television, they tend to watch documentaries; when reading daily newspapers, they tend to read the editorial section. They purchase both paperback and hardcover books, and have computers. Like the *Bookish* group, the *Culture* group stand out in the area of live entertainment events such as live theatre, ballet, and classical music. One of the ways to reach this group is through the pages of programs published and distributed at the events.

This group is composed of older age groups 35 to 49 with a slight tendency towards female consumers. People in the segment tend to have higher education (bachelor's or higher ... 170), work in professional and managerial positions, and have high personal and household incomes.

Edge of Day

This group is interesting because in many ways they appear to be very normal or average users of media ... average in terms of overall time spent with television, radio, and magazines. Their television viewing tends to be in the 6:00 am to 5:00 pm time segment. This viewing is directed towards commercial, basic television; they are not viewers of specialty or pay television channels. They have low usage of video rentals and limited use of VCR's for recording programs off-air.

They tend to be light radio tuners; however, when tuned to radio it is primarily to easy listening and "oldies" formats. This segment do not go out very much either to concerts, theatre, or sports events... except to attend easy listening concerts.

There is an even balance between male and females in this segment. Their age profile is directed to the 50 and older segment, and married but with children not likely living at home. Personal income levels are average though household incomes tend to be lower than average. People in this segment have a greater tendency to live in medium size communities - 100,000 to 1,000,000.

Rock & Rollers

Unlike the *VJ* segment which has an affinity for album rock music on radio, the *Rock & Rollers* segment have a primary music orientation towards Top 40 formatted radio stations (521). They tend to buy tapes, CD's, and videos by mail order. They can be found watching music oriented television stations such as MuchMusic. Given their younger age skew, it is also not surprising to see that they are more than average watchers of YTV, a youth oriented television station. Overall they are fairly average viewers of television in terms of the amount of television watched.

Like the *VJ*'s this group are also heavy renters of videos. This group are not heavy readers of print formats - magazines, newspaper, or books. The only type of magazine for which this group records higher than average levels is entertainment (television guides). While the group has a lower than average ownership of computers, they do have video games, both separate and as attachments. They show higher attendance at pop and soft rock concerts and movies. While not higher than average listeners to sports on radio, or watching sports on television, this group attends all types of sports events from baseball, football, and hockey to wrestling, soccer, and tennis.

The group is fairly evenly split between males and females. As mentioned previously, the group is skewed towards the younger age groups (12 to 17 and 18 to 24). As with the *VJ*'s, because of the younger age group, this segment has not yet had the opportunity to attend university and therefore shows higher indices at the high school education level. These people tend to reside in households with average personal and household incomes. In occupation, there is a skew towards part-time employment particularly in the clerical, and skilled and unskilled jobs.

4.0 Application Of Mediagraphics

We have been using *MediaGraphics* for the past year as an integral part of the media planning process here at HYPN. We have three examples of how this new targeting tool helps us better understand our target group and design new and more effective ways of using mass media to reach our consumer target groups.

The first example of *MediaGraphics* at work involved a manufacturer of Contact Lens cleaning solution. This is a case of *MediaGraphics* unearthing two, bi-polar target groups that appeared at first glance to be only one broad target when blended demographically. A second example of how we have used *MediaGraphics*, involves unravelling a particularly complex target group for the myriad of financial services being offered by a Bank client. Finally, we used *MediaGraphics* to describe the readers and potential buyers of one of Canada's largest consumer magazines... TV Guide. What better way to define the target group of a media vehicle than by using a targeting system based upon media usage habits?

The Contact Lens Case

Our client manufactures a solution used to clean contact lenses. The customer base here is obviously contact lens users. When we performed a simple demographic analysis of the PMB'94 study, against a base of all people 12+ in Canada, we ended up with a standard and somewhat limited, one-dimensional portrait.

has a 60 / 40 female / male sex skew,
is young (18-24 index = 167, 25-34 index = 166),
is well educated (BA degree index = 184),
has white collar occupation (teacher index = 170),
has above average household income (\$75M+ index = 161),
is a light TV viewer (Quintile V index = 140) and
is a heavy magazine reader (Quintile 1 index = 129)

At first blush... a standard justification for a magazine media recommendation.

We then cross-tabulated Contact Lens users against the 16 MediaGraphic segments that we had built right into the PMB data base, and we obtained surprisingly extra descriptive elements to the Contact Lens wearer profile.

The *MediaGraphics* analysis suggested that there were at least two, very different looking, target segments... a Bookish/Culture Crowd group and a VJ/Rock'n Roller segment. These two groups are older, well-off, individuals. Both segments lead very literate lifestyles. The Bookish segment (index = 195) is primarily driven by the habit of heavy magazine reading while the Culture Crowd group (index = 122) spends more time than normal attending high culture, entertainment events such as the ballet, opera, live theatre (best reached through the pages of event programs). This 40-something group is overdeveloped probably because they satisfy two criteria... older with failing eyesight and have the money to afford contact lenses.

The VJ/ Rock 'n Roller segments are youth oriented (18-24 year old), and their segments are driven by their love of youth oriented music forms such as LP oriented music in the case of VJ's and Top 40 music styling in the case of the Rock'n Rollers. VJ's have an index against contact lens usage of 133 and Rock'n Roller's have a usage index of 166. The VJ segment, in addition to music preference, is defined by love of music video formats... Much Music specialty channel as well as Music Video programming on regular TV stations.

Over development of Contact Lenses against these two groups is probably ego driven. Sight weakness is less prevalent amongst consumers in this age range yet a larger proportion of those who need help might choose Contact Lenses for cosmetic reasons. This youthful, cosmetic orientation, appears to exist in French Canada as well as English Canada. One group, the M'elle segment (index = 149) is youthful and tend to be French and are defined by their heavy fashion magazine reading habits.

This bi-directional target definition has important implications for targeting, media planning and creative development. When merged together, the two segments has the effect of "hiding" the true nature of both target groups... the average of a 40 year old and an 18 year old produces a 30 year old... 30 year old are not the target group here. The *MediaGraphics* analysis would suggest that two very different media and creative approaches should be taken on this account... one to reach the younger age segment by way of youth oriented TV/Specialty Channels with perhaps a very youth oriented print supplement in fashion/high style publications. Radio might also be recommended in this case. Another separate approach is needed to reach the Bookish/Culture Crowd segment...magazine/newspaper/high culture programs for example... to reach this older, literate, upscale segment.

The Banking Services Case

A very large proportion of Canada's population turn to one or more of Canada's five major banks for financial servicing... 60% of the population according to the PMB'94 study. Our bank client wanted to promote their financial services to potential customers. We therefore set out to understand what these potential customers look like. First step... a demographic analysis of bank users. Again, this was not an especially helpful step. Bank users look like the population as a whole. Second step... a MediaGraphic analysis of all bank users. Again, little useful information. We found flat indices across all 16 MediaGraphic segments.

When we looked into the demographic and MediaGraphic descriptions of people who use various Banking services, however, strong descriptions emerged. The MediaGraphic analysis suggested there are two kinds of bank customers...

- those who have money that the bank is trying to get their hands on; call these people the "deposit" based customers; and,

- those who do not have money and want to get some from the bank. We'll call these people the "loan" based customers.

According to demographics, there is one variable that differentiates between the "deposit" and "loan" based customer... income. But according to the *MediaGraphics* analysis, there were really many different kinds of "deposit" and "loan" based customers and income was not the only differentiating force. We found three kinds of "deposit" based customer.

- *Bookish* (218 index for Personal Banking Package), who are best reached via upscale TV programs and specialty channels as well as magazine and newspaper media.

- *Culture Crowd* (136 index for Personal Banking Package), who are best reached in the pages of high culture event programs as well as the printed media.

- *Soft Rockers* (135 index for Personal Banking Package), who can be well covered in regular TV buys but who tend not to be available through specialty TV channels. The best way to reach these people however, is on radio stations that play their music... soft rock formats and on stations that have live sports coverage. These people also put lots of mileage on their cars... candidates for an outdoor campaign.

The "loan" based customer was a very different kind of target group. Demographic description painted a very broad based, slightly down-scale picture while *MediaGraphics* provided a far richer description.

- *Driving Jazz* (137 index for "have car loan") This above average income, youthful segment, have a love of Jazz music and car driving that make them a natural segment for banks with car loan messages. We would look to drive-home radio, Jazz and Rock/Pop concert event promotions, as well as Specialty Channels for a focused media avenue to reach this segment.

- *Rock 'n Rollers* (127 index for "have car loan") love their cars and love to drive. They also love Top 40 music forms, watch lots of music video oriented TV programming and are well reached through these venues.

- *C+W* (129 index for "have car loan") segment is very different from the other MediaGraphic groups who have car loans with banks. These people are older and more down scale than the other groups but they are, nevertheless, a valid target group. Reach them in the music of their life which is C+W and in Canada, every market has at least one significant radio station zeroing in on these people.

- *Eco Dudes* (best reached in Environmentally oriented publications) and La TV segment (reached through regular TV fare as well as specialty channels) are the other two segments that have above average development in the Car Loan service product category.

So what initially seemed flat and uninteresting in terms of target definition, gained depth and shape when the *MediaGraphics* description work was performed. Again we found clues to the media plans to reach the target segments, inherent in the segment descriptions.

The TV Guide Case

The media themselves, advertise in media. TV stations and radio stations advertise for audience. Magazines advertise for readership and to generate subscription or newsstand sales. We employed *MediaGraphics* in order to understand who reads TV Guide and why these people spend money to buy the magazine when TV supplements are available free of charge in the weekend newspapers.

A demographic and media usage analysis suggested a youth skew amongst TV Guide readers. We found TV Guide readers were also heavier TV viewers than the norm... not surprising given the editorial content of TV Guide. This demographic analysis however generated more questions than answers. Young people are light TV viewers. We could not reconcile these opposing characteristics of youth and heavy TV viewing.

MediaGraphics explained the discrepancy. TV Guide readers have large proportions of readership in the *Surfn Sport* segment (192 index) who are heavy TV viewers, and in the *VJ* (155 index) segment who are young. These two very different groups of people have little in common apart from their interest in TV Guide.

- *Surfn Sport* segment's involvement in TV Guide is what created the heavy TV viewing skews we found in the demographic/media usage analysis. *Surfn Sport* is not the only heavy TV viewing group in the stable of 16 MediaGraphic segments but this group is eclectic in their TV viewing behaviour. They are experimenters with the TV medium and they need a guide. The *Edge of Day* MediaGraphic segment also exhibits heavy TV viewing habits but these people tend not to be TV Guide readers. The *Edge of Day* segment are far less likely to surf through channels. They are content to spend lots of time with a limited list of channel options. They do not need a guide.

- *VJ's* drive TV Guide's overall youth skew but these people are not particularly heavy TV viewers. They are interested however in what TV Guide has to say about the entertainment industry and the video industry... two of their favourite subjects. The video rental top 10 information in TV Guide is a particularly attractive feature for these people.

Both of these two MediaGraphic segments are very light newspaper readers. As a result, they tend not to come in contact with the freely available TV supplements and as a result, fork out the money each week to pick up a copy of TV Guide.

- TV Guide was well advised to reach their potential subscription and newsstand customer base by segmenting their customer message and turning to the specialty channels to reach Surf'n Sport and music video oriented channels/TV programs to reach VJs.

5.0 Conclusions And Future Development

Targeting is the most important step in the advertising and media planning process. The quantification of the target suggests market potential. The qualification of the target group drives the content and tonality of the creative message. The shape and function of the media plan is driven by the target definition. The success of the media budget investment is determined by the extent to which the media plan is designed around an accurately defined target group.

But targeting is never simple. Defining a target group by using a string of demographic variables is great as long as the target group is made up of one or at most two, homogeneous groups. But most target groups are not simple groupings of people with one common set of defining characteristics. Most target groups are collections of many subsections and each subsection can have different defining features and very different motives for being a potential customer.

Mix red with blue with green and yellow and black and brown and you have the colour of mud. Demographic analysis can have the effect of forcing many different hues of customer segments into one relatively non descriptive, mud-like blend. *MediaGraphics* helps to keep the target hues separate. Multi-directional targets justify multi-directional media plans and creative messaging. These are very significant issues.

MediaGraphics helps the media planner understand what makes the target group tick. Media habits are driven by a complex string of variables... demographics, environment, upbringing, social forces, peer pressure. We are what we watch and read and attend.

In the case of *MediaGraphics*, the target definition is the media plan. It certainly makes the task of selling the client on a recommended medium or media mix faster and easier. *MediaGraphics* is a relatively new tool for us here at HYPN. We have segmented both the PMB'93 and PMB'94 studies and although the MediaGraphic designations between the two studies have been similar they have not been exactly the same. In the PMB'93 segmentation work, there were 12 segments... in PMB'94 there are 16 segments. Many of the segments are virtually the same but we have seen a large PMB'93 segment splinter into at least two sub segments in the PMB'94 analysis. Considering the two PMB studies share one year of sample, this "morphing" of *MediaGraphics* segments concerns me. Perhaps people's media habits ebb and flow over as short a period of time as a year. But the changing MediaGraphic landscape might suggest a weakness in this targeting approach. Time will tell.

The targeting approach also has a few results which are sometimes difficult to work with. For example, the Untouchable segment is by definition, a group than can not be reached through any of the media avenues at our disposal. It would make for a short media plan presentation to the client. Fortunately, we have yet to find this segment appearing with any strength in a target definition.

One of the segments, the Edge of Day group, is very large compared to the other groupings. This causes an imbalance that makes us a bit uncomfortable... the segment accounts for 20% of the 12+ population in Canada. Future work on *MediaGraphics* will involve conducting separate segmentation analysis on the English and French PMB sample... creating in effect, two separate sets of MediaGraphic segmentation. This will mean more work, and more cost, but the step will help us determine the extent to which *MediaGraphics* can span the linguistic gap in our country.

Work has almost been completed on the PMB '95 database. The results from PMB '95 will be presented at the symposium in comparrison with the PMB '93 and PMB' 94 results.

DIFFERENCES IN READERSHIP AMONG IN-HOME AND OUT-OF-HOME READERS

Jane Friedenthal, Time Inc., U.S.A.

Summary

Questions are often raised as to the value of the magazine total audience concept. A number of U.S. advertising agencies have protocols for adjusting or discounting audience levels based on differential valuation of various readership components. One of the most frequently used criteria is place of reading. Readership occurring in the home is counted in full while that occurring outside the home is discounted by as much as 50%. The practice impacts on the magazine selection process.

To address this issue a study was undertaken comparing recognition of editorial and advertising content among both in-home and out-of-home readers. Using the Starch methodology 2,610 interviews were conducted across four magazine editorial segments comprising eleven titles. A total of 1,388 ads and 289 editorial items were evaluated. The results suggest that magazines differ by place of reading in terms of advertising and editorial read. Intensity of readership differs as well. The results strongly argue against a uniform "place of reading" discount policy as well as valuing out-of-home readers at half the worth of those reading in-home.

Background

The concept of total audience is one that has enjoyed little peace from the time of its inception. Almost from the time it was introduced total audience has been assailed on one front or another. And unlike today, many of the questions were raised by magazines themselves. Beginning more than thirty years ago questions were raised about the value of pass-along readers and those who read away from home. Many influential studies such as those done by Alfred Politz for *Reader's Digest* and Elmo Roper for *Woman's Day* supported the hypotheses that in-home and primary readers are more involved with the magazine than are their out-of-home and pass-along reading counterparts. These studies, along with others, form the legacy from which many current practices arose. Lost in much of this is the recognition that much has changed in 30 years. First, these studies measured a limited selection of magazines, predominantly women's service titles and magazines such as *Life* and *Look*, that are either very different than the versions around today or not around at all. Secondly, it is an understatement to say that the U.S. has undergone some rather dramatic sociological changes.

As we rapidly approach the fiftieth anniversary of the total audience concept it still often gets little respect and continues to be besieged on many fronts--from the underlying concept to the method of execution. Even at this advanced age it continues to be in a constant state of evolution and sometimes quite near revolution. Although many agencies and advertisers do accept total audience estimates as sound estimates of "opportunities to see" advertisements in the publication, and do not discount elements of this audience, a significant number of agencies have for many years discounted that element which is "out-of-home" reading: i.e. reading in other people's homes, at work, or in public places of all kinds. A common discount factor in these situations would be 50%.

The question this obviously raises is whether a standard discounting factor is appropriate: if indeed discounting is appropriate at all. Time Inc., as publishers of *People Weekly*, a personality journalism magazine which is edited and organized to be a quick and straightforward "read" in both in-home and out-of-home situations, had an obvious interest in gaining information about the differences between these elements of the audience not only for *People*, but for competing categories of publications such as newsweeklies, women's service books (all monthlies in this case), and women's fashion and beauty books (again, all monthlies).