b4p best for planning.

ONE FOR ALL

best for planning
Outline

Publication on
17 September 2014

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The beginning: cooperation, not confrontation

4 media groups
1 common goal

axel springer

BAUER MEDIA GROUP

G+J

Hubert Burda Media

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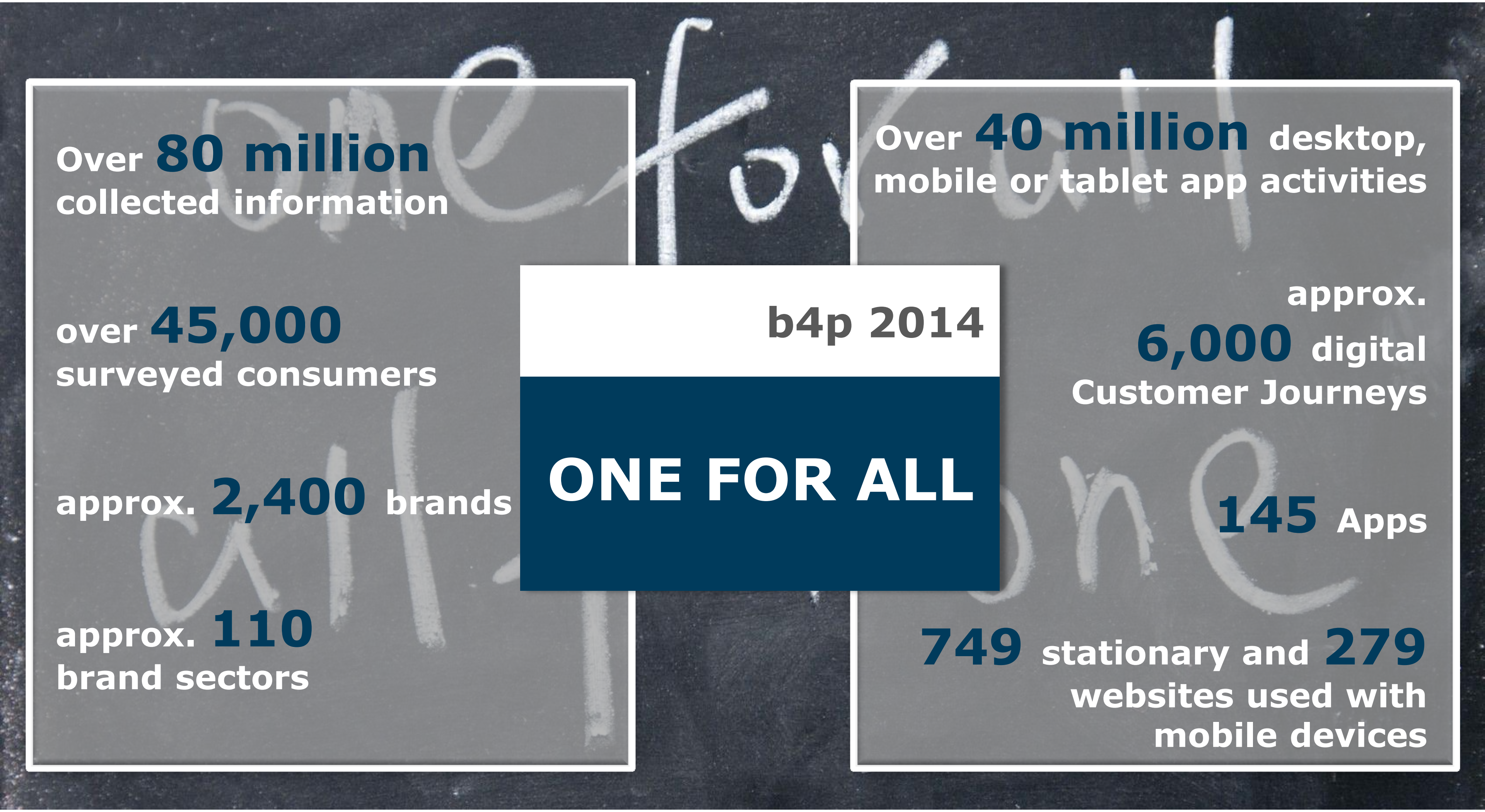
ALL People – ALL Media– ALL Markets



Over **80 million** collected information

over **45,000** surveyed consumers

approx. **2,400** brands

approx. **110** brand sectors

b4p 2014

ONE FOR ALL

Over **40 million** desktop, mobile or tablet app activities

approx. **6,000** digital Customer Journeys

145 Apps

749 stationary and **279** websites used with mobile devices

Good reasons for best for planning

b4p is the first market media study that allows to plan with **media convergence**

- b4p provides all necessary performance data and key figures to make efficient media investments.

b4p makes **media** transparent.

- b4p offers an even wider range of media for analyses.
- For the first time in the history of market media surveys, the use of online and mobile websites was determined not only by interviews but was also technically measured.
- Over 40 million desktop, mobile or tablet computer app activities were recorded.
- 145 apps, 749 stationary and 279 Websites used with mobile devices

b4p explains **markets** and reveals market trends.

- Apart from covering all advertising-relevant markets b4p also allows for detailed analyses in a number of sectors because of its especially high number of cases.
- approx. 2,400 brands from 110 market sectors

b4p converts **people** into target groups.

- The survey pinpoints everything that used to disappear behind the hard numbers of demographic data: interests, motivations, attitudes and needs.
- Over 80 million collected pieces of information of more than 45,000 consumers

Basics

Methodology	
Universe	German-speaking resident population over 14 years of age in Germany (70.52 million)
Sampling	ADM sampling, random address selection
Interviews	45,348 interviews
Institutes	IFAK, IPSOS, MMA, Marplan
Survey Period	October 2012 until April 2013 September 2013 until April 2014
Waves of Data Collection	12 October 2012 - 10 January 2013 14 January - 12 April 2013 16 September - 08 December 2013 13 January - 06 April 2014
Field model	30,000 cases from the first edition, following editions on a rolling basis, approx. 15,000 cases/year, summarization of two years outcome into one edition
Questionnaire	CAPI (Computer Assisted Personal Interview), Media CASI (Computer Assisted Self Interview), markets in written form (self-completion questionnaire), NEW: technical measurement (parallel wave)

NEW: Technical Measurement (Parallel wave)

- Regarding the use of websites, stationary as well as mobile, essential innovations have been introduced in b4p 2014.
- **Querying** selected sites and apps has been complemented with **technical measurement** by a parallel wave.

NEW: Technical Measurement (parallel wave)

- The technical measurement of internet usage was conducted in the GfK Media Efficiency Panel (MEP).
- In the course of a parallel wave, essential contents of the b4p questionnaire, among them coverage queries of classic media, were also sent to and queried among approx. 6,000 panel participants of the MEP.
- Subsequently online use of these participants was tracked for a time span of 3 months (1 January 2014 – 31 March 2014).
- In addition to that approx. 700 participants of the GfK panel were technically measured to collect mobile usage data, complemented by another approx. 600 panel participants of the GMI Online-Access-Panel.

People

People: Demographics

Household

- Household size
- Main income earner
- Household management
- Children/ grand children in household
- Net household income
- Real disposable income

Interviewee

- Age
- Sex
- Nationality
- Religious affiliation
- Marital status
- Body Mass Index, height, weight

Occupation

- School-leaving qualification/ occupational training
- Occupation
- Professional status
- Personal income
- Income earners
- NEW: commercial sector

Residential area

- Size of village, town or city
- Nielsen areas
- Nielsen metropolitan areas
- Government districts
- Federal states
- Urban/Administrative district

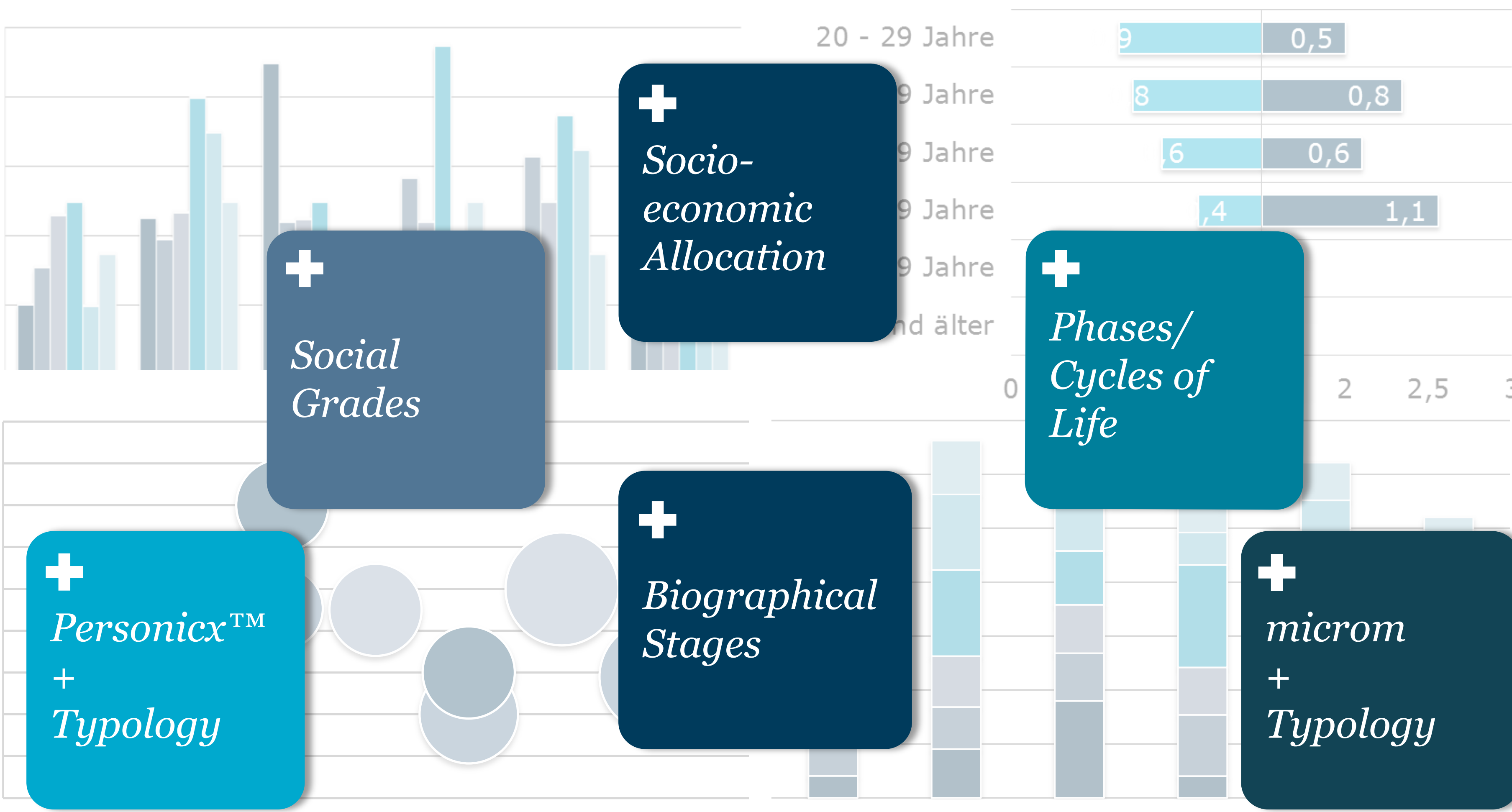
Mobility

- Mobility
- Use of transportation
- Public transport
- Commuting

Life situation

- Life situation
- Stages of life
- Life cycles

People: Demographic Target Groups



People

b4p offers a glimpse behind the demographic scenes

Motivations

Needs

Interests

New in b4p 2014

For example:

- Leisure
- Statements on food/ environmental issues
- Statements on financial investments, insurances
- Statements on general areas of life
- GfK Roper Consumer Styles
- Smart Shopper

People: Psychographic Characteristics

Leisure (65 Items)

- Spending time with my family
- Inviting guests
- Reading magazines
- Wellness
- NEW: Mountaineering, Rock Climbing

Statements on Change(10)

- I am about to change jobs
- I will become self-employed
- I will marry
- I will emigrate
- …

Spheres of Life (37)

- NEW: It is important for me to take care of my physical and emotional well-being
- I gladly take on responsibility
- Many of my decisions are gut-based, rather than rational
- …

Aspects of Life (18)

- Large circles of friends
- Professional success
- Sound environment
- Individuality
- Experience lots of things
- …

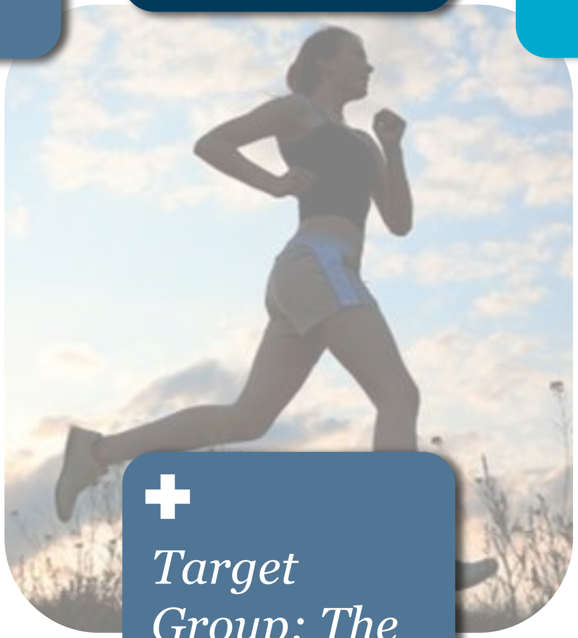
People: Psychographic Target Groups

Limbic®-Types (7)

Sigma-Milieus® (10)

Personality Factors (5)

GfK Roper Consumer Styles



Interest Horizons (4)

Sinus-Milieus® (10)

Target Group: The new Alphas

Target Group: Lohas

People: Market-Based Target Group Models

Gambling

Sector Typologies (12)

Brand Orientation

ADAC ASPIRIN adidas
CHANEL
NIVEA Exquisa 1&1

+ NEW

Brand Loyalty

+ NEW

Smart Shopper

Markets

Markets: Basics

b4p is designed to perform all media planning tasks:

- b4p represents all markets relevant for advertising
- Diversity and relevance for planning are the most important criteria for market descriptions.
- Brands were included depending on their size and relevance for advertising
  - All Big-Player of a market
  - Minimum basis (number of cases) for designation depending on the market generally 1% or 300 cases
  - Advertising brands preferred
  - Primarily umbrella brands, sub brands only if they are perceived as independent by the interviewee.

Markets: Outline

Consumer Goods

- Food
- Cosmetics
- Health

- *Frequency of Use*
- *Purchase*
- *Use of Brands*

Durable Goods

- Fashion
- Consumer Electronics
- Home and Living
- Car and Mobility

- *Available in Household/ Personal Ownership*
- *Purchase Intention*
- *Brand Ownership*
- *Brand Preference*

Services

- Travelling
- Finance and Insurance
- Retailing

- *Available in Household/ concluded*
- *Purchase Intention*
- *Provider Preference*
- *Places of Purchase*

Markets: Comprehensive Features

Role as Advisor(15)

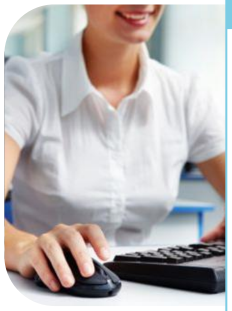
- Consumer Electronics
- Fashion
- Cosmetics
- Food
- …

Purchasing Decision (22)

- Fixed-line provider contract
- DVD/Blu-ray players and/or recorders
- Second car in the household
- Planning/Booking holiday trips
- Insurances
- …

Brand/Price Awareness (52)

- Non-alcoholic beverages
- Confectionery, snack items
- Perfumes/Scents/Eau de toilette/Aftershave
- Mobile phones, Smartphones
- Household appliances



Interest in Product Info (37)

- Body care products
- Bags, Travel bags, Leather goods
- Apps/Applications for mobile phones
- Gardening appliances, Garden products/plants
- Short trips
- …

Statements (83)

- I choose regional products as far as possible
- I attach importance to the brand when purchasing non-prescription products
- My car expresses a certain way of life
- …

Markets: What is new in 2014?

Basic

- Revision of all brand lists
- Supplementation with new brands
- Omission of brands with insufficient potential

New brands

in 9 market sectors, among them

- Food
- Body care/Wellness
- Health
- Consumer-Electronics
- Household/Living

in a total of 71 product sectors.

New Characteristics

e.g.:

- Brand triad in the sector furniture/living
- Role as advisor in the sector living
- Payment method for online shopping
- Current electricity/gas provider
- Number of holiday trips

New general information

- Statements in the food + finance sectors
- Brand loyalty
- 2 sector typologies (smartphone- and tablet computer users)

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Markets: Sector-Typologies

Food-Typology

Beauty-Typology Male / Female

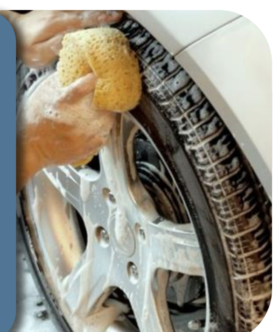
Fashion-Typology Male / Female

Health-Typology

Finance-Typology

Living-Typology

Car-Use-Typology



Travelling-Typology

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Brand loyalty

Enquiries:

- How many different brands does a target group use in a specific product sector?
- How many brands are used in a product sector on average?
- How many other brands do consumers use in the same product sector, i.e. how loyal are they to their brand?

Calculation of "brand loyalty":

- The number of brands used is calculated for every product sector and for every interviewee.

Presentation of "brand loyalty":

- Average number of brands used for the Universe (loyalty in total)
- Average number of brands used for every individual target group
- Analysis in categories for the use of brands (number of consumers who use 1-3 or 4-5 etc. other brands)

Smart Shopper

Definition:

- Hybrid consumers who attach importance to the brand as well as to the price
- No bargain hunters (looking for offers in the lowest price segment)

Compilation:

- Compilation with the help of 55 market related queries on price/brand orientation by a sum scale of the respective occurrence
  "I attach importance to the price as well as the brand"

Assessment:

- Top 10: upper 10 per cent of this scale (affirmation in at least 37 of 55 instances)
- Top 20: upper 20 per cent of this scale (affirmation in at least 30 of 55 instances)

Media

Media in b4p

- 180 Popular magazines and weekly newspapers, reader circle
- 5 Supra-regional daily newspapers
  42 Booking units of local daily newspapers
- 749 Websites (Big Screen)
  493 Subsites (Booking units)
- 279 Mobile Sites, MEWs, 145 Apps
- Posters
- Radio
- 10 TV stations, Cinema

Print representation is based on value determining studies

Representation requirements for print media

- Magazines suitable for ma (Mediaanalysis)
  - Registration and representation in the ma
  - Adjustment to ma
- Magazines not suitable for ma (such as Corporate Publishing)
  - Representation in the AWA and minimum number of cases
  - Adjustment to AWA
- Newspapers have to be in ma (Presse)
- License holder
- Relevance for the advertising market

Coverages are adjusted to established values wherever possible

"ma-World"

Adjustment to ma

- Print
- TV
- Radio
- Poster
- Websites included in ma Online
- Cinema

Not "ma-World"

Adjustment to AWA

- Free titles
- Title which are published less than once a month

No Adjustment

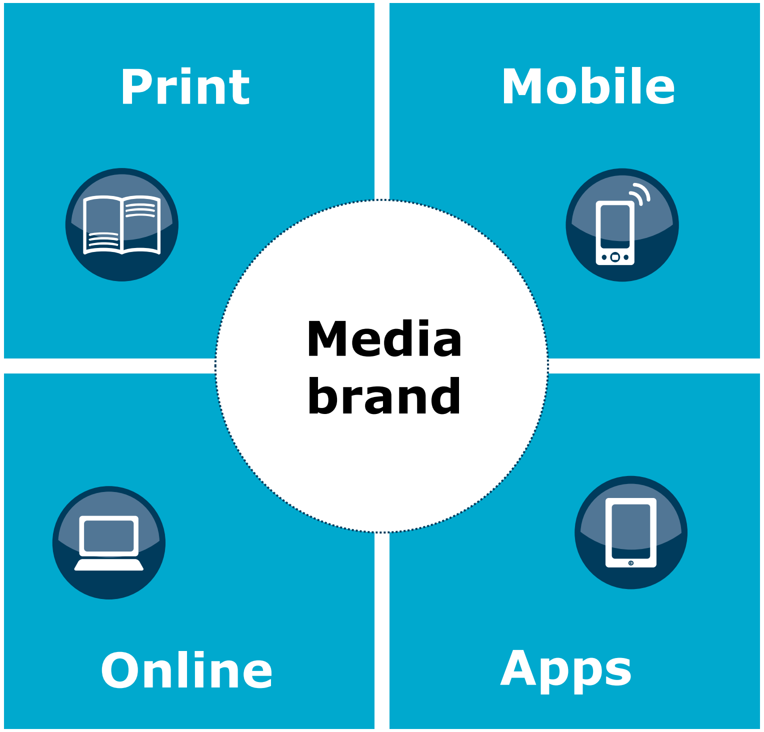
- Websites (not included in ma Online)
- Mobile use Smartphone, MEWs
- Apps

! Coverage adjustments are up-dated regularly.

Novelty: Cross-media media coverages

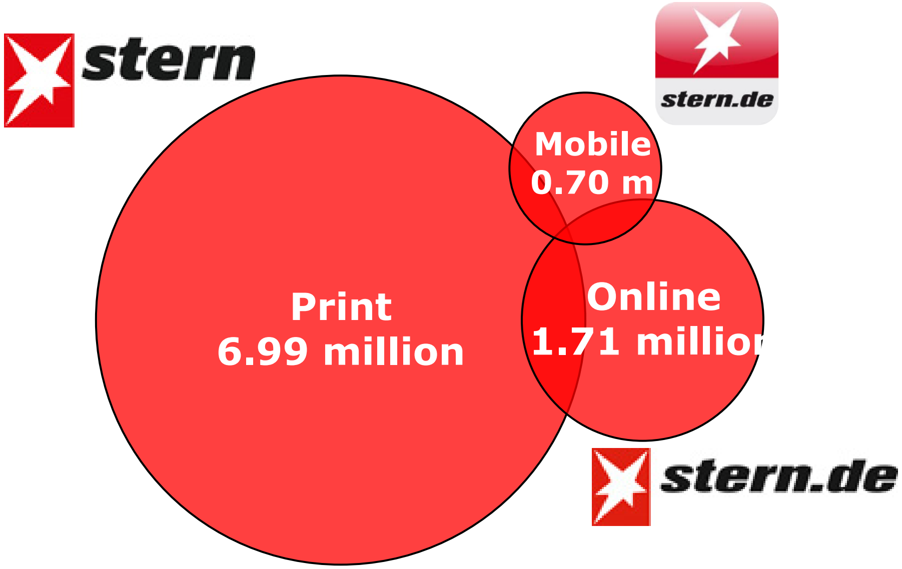
Representation of 86 cross-media brands

- Net coverage of a brand on all channels: print + online + mobile + apps
- Brands as seen from consumer perspective
- No booking units, but overall inventory of one media brand
- Users per week and/or users per month
- Publishing frequency of print media as benchmark for the smallest unit of time
- Coverage of published issues in the respective timeslot applies in case of print media



b4p facilitates the assessment of overlapping of media channels and overall coverages

Net coverage *stern*: 8.90 million – weekly coverage print, online, mobile



Overlapping
(on weekly basis)

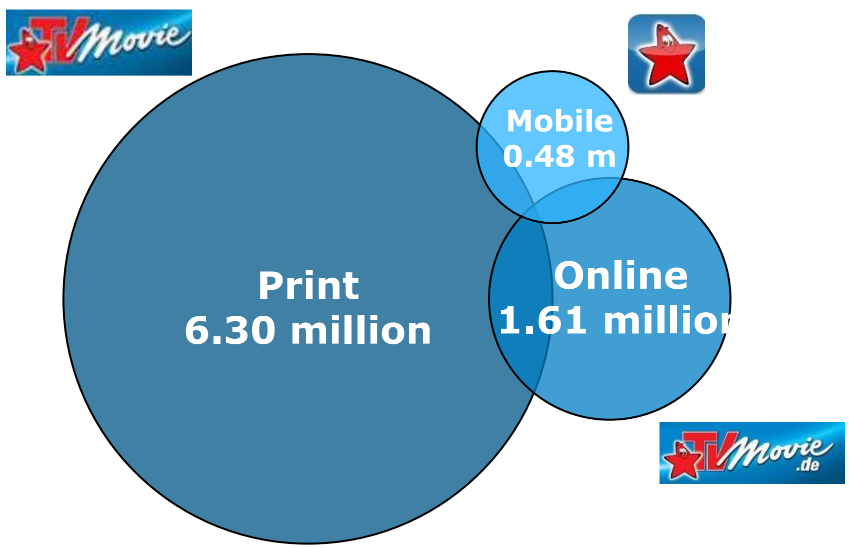
	in millions
• *stern* / stern.de	0.31
• *stern* / *stern* Mobile	0.11
• stern.de / *stern* Mobile	0.10
• *stern* / stern.de / *stern* Mobile	0.02

stern.de: online usage (big screen)
stern Mobile: Mobile usage of stern.de/MEW as well as via apps (smartphone or tablet computer)

4.4% of *stern* readers use stern.de
17.9% of stern.de users read *stern*

b4p facilitates the assessment of overlapping of media channels and overall coverages

Net coverage *TV Movie*: 7.84 million – weekly coverage print, online, mobile



Overlapping
(on monthly basis)

in millions

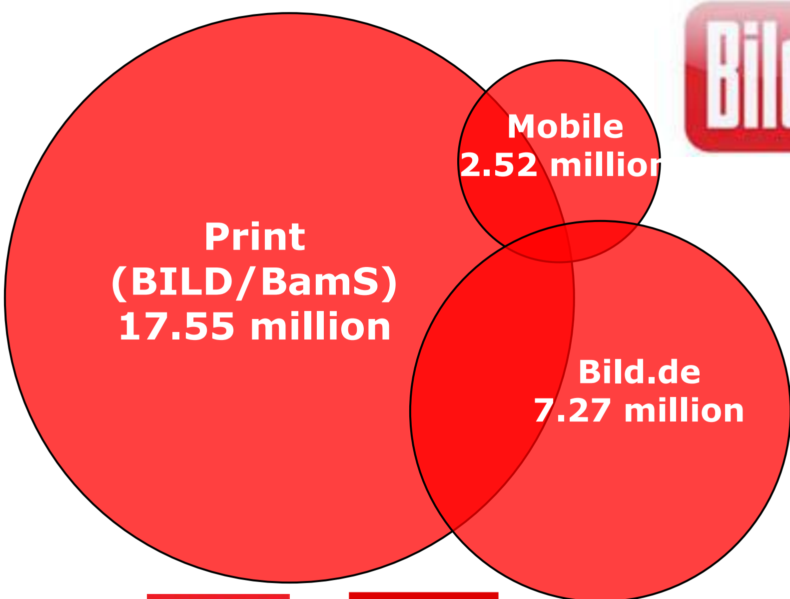
• *TV Movie* / tvmovie.de	0.41
• *TV Movie* / *tvmovie* Mobile	0.08
• tvmovie.de / *tvmovie* Mobile	0.09
• *TV Movie* / tvmovie.de / *tvmovie* Mobile	0.02

tvmovie.de: online usage (big screen)
tvmovie Mobile: Mobile usage of tvmovie.de/MEW as well as via apps(smartphone or tablet computer)

6.5% of *TV Movie readers* use tvmovie.de
25.4% of tvmovie.de users read TV Movie

b4p facilitates the assessment of overlapping of media channels and overall coverages

Net coverage BILD: 29.22 million
– weekly coverage print*, online, mobile



11.3% of BILD readers use bild.de
27.3% of bild.de users read BILD

Overlapping
(based on LpA Print + NpW)

	in millions
• BILD (Print) / bild.de	1.99
• BILD (Print) / bild Mobile	0.72
• bild.de / bild Mobile	1.28
• BILD (Print) / bild.de / bild Mobile	0.39

BILD(Print):	LpA BILD / BamS
bild.de:	online usage (big screen)
bild Mobile:	Mobile Nutzung von bild.de/MEW as well as via bild-apps

Print in brand coverage: 6 x BILD + 1 x BamS

Qualitative Media-Insights enough and to spare

Statements on Media Use (14)

- I use media primarily to obtain information
- It is important to me to have reliable sources of information
- I use media in particular to relax and unwind
- …

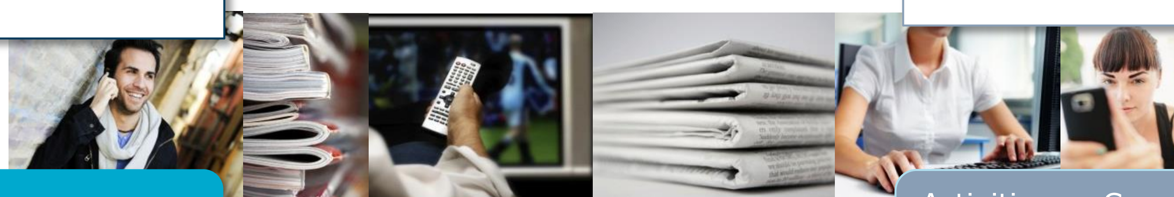
Statements (11) on Advertisements in media

Advertisements in … (PZ, TZ, TV, etc.) …

- … are informative
- … encourage to buy
- … are authentic
- … are entertaining
- …

Statements on Internet & Social networks (8)

- I use social networks when I need to contact someone immediately
- Since you never know who you are dealing with, I am very cautious on the internet
- …



Thematic interests Magazines (25)

- Food, Cooking, Recipes
- Partnership
- Stars, Celebrities
- Sports
- …

Popular TV Genres (62)

- Reality-Shows
- News
- Daily soaps
- Formula 1
- Crime
- …

Activities on Computer, Tablet Computer, Smartphone, Social Media (57)

- Sending emails
- Listening to music
- Online Shopping
- Route planning
- Maintaining job-related contacts
- …

New Media Typology

Smartphone User Typology

7 Types

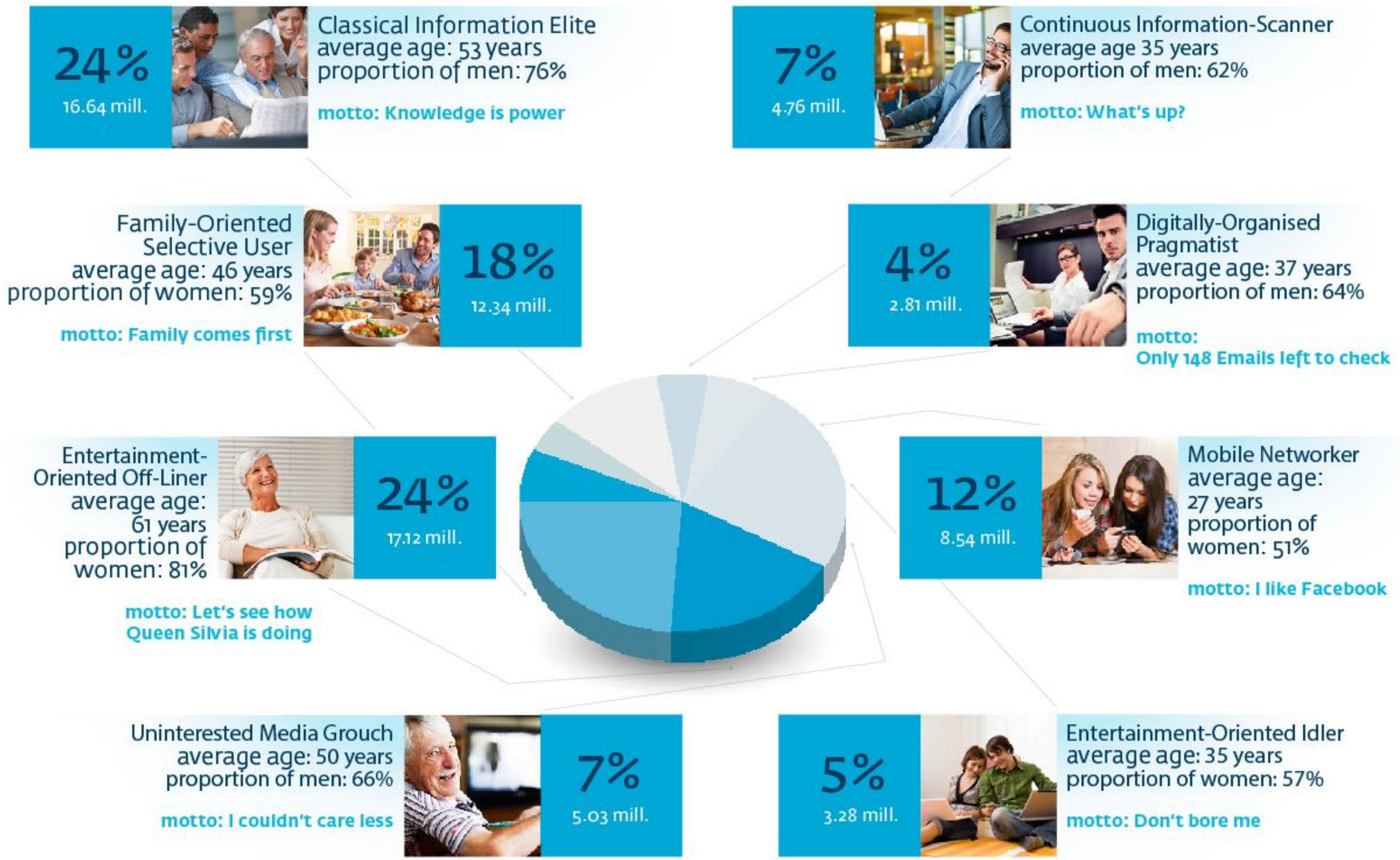
- Job-oriented frequent reader (6%)
- Mobile Communicator (12%)
- Busy Everyday-Life Organizer (15%)
- Young Self Stager (24%)
- Reader of Digital Newspapers and Magazines (8%)
- Nothing but Phone-Caller (32%)
- Digital-Native Smartphone User (4%)

Tablet Computer User Typology

8 Types

- Digital Photographer (9%)
- Mobile Communicator (6%)
- Tablet-Organized All-Rounder (4%)
- Game-loving Recreationist (12%)
- Digital Organizer (16%)
- Extensive Tablet-Co-User (27%)
- Communicative Frequent-User (7%)
- Digital Online-Shopper (20%)

Media User Typology



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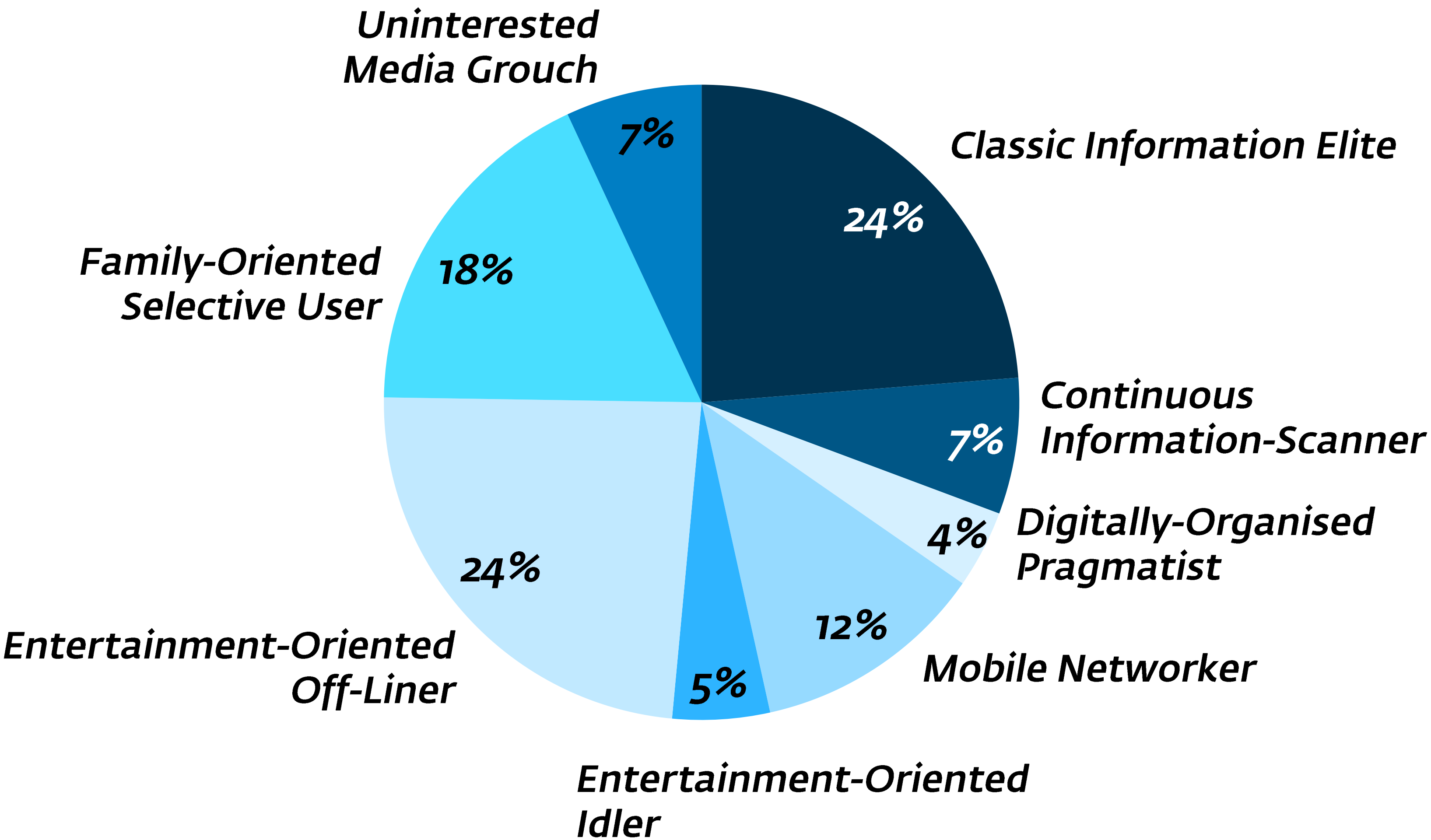
Media User Typology Pie Chart



Media User Typology Outline I

- **Type 1: Classical Information Elite**
  (total share : 24%, 16.64 million, average age: 53 years, proportion of men: 76%)
  This highly educated, high-income type attaches great importance to in-depth, reliable news from economy, politics and science and primarily relies on proven print publications respectively their online offers. Ownership of tablet computers and smartphones as well as usage of social networks are below average.

- **Type 2: Continuous Information-Scanner**
  (total share : 7%, 4.6 million, average age : 35 years, proportion of men: 62%)
  They have a high level of formal education and a net income far above average and they are permanently in contact with some type of media. They seek in-depth information, escape and inspiration several times a day, at anytime and anywhere. The Info-Scanners use digital media avidly, almost all of them have tablet computers and smartphones. App usage is far above average. They use social networks keenly and often in job-related context as well. Magazine reading is at an average, but they have a wide-ranging reading interest. They put a special focus on technologically related topics.

- **Type 3: Digitally-Organised Pragmatist**
  (total share : 4%, 2.81 million, average age : 37 years, proportion of men: 64%)
  This is the type with the highest income. He is searching for ways to get a quick overview and time-saving support in his perfectly timed everyday life. He knows how to take advantage of digital and mobile media in order to achieve this goal. Smartphones and tablet computer belong to his standard equipment and using apps is part of his daily routine. His usage of print media is above average. He has a wide range of interest with a focus on technologically related topics.

- **Type 4: Mobile Networker**
  (total share : 12%, 8.54 million, average age : 27 years, proportion of women: 51%)
  They are the youngest type and often still in training. Media provide them first and foremost with entertainment, but also with relaxation and escape and serves as a source of information. Social networks is their magic word and there is hardly one of them who does not have a facebook account. They are well-equipped with smartphones, but often do not have enough money to buy tablet computers. They use magazines and TV very selectively.

Media User Typology Outline II

- **Type 5: Entertainment-Oriented Idler**
  (total share: 5%, 3.28 million, average age : 35 years, proportion of women: 57%)
  They seek relaxation and like to be entertained. Their computers are indispensable for this purpose. You will not find a tablet computer in their households (yet). They prefer information to be brief and concise. They appreciate the widely used social networks for facilitating swift communication and being an uncomplicated way of getting to know new people.
- **Type 6: Entertainment-Oriented Off-Liner**
  (total share : 24%, 17.12 million, average age : 61 years, proportion of women: 81%)
  This is the oldest, mainly female type with low education and low income who favours primarily popular magazines and TV, above all seeking relaxation and entertainment. Online and mobile activities do not play a significant role. There is great interest in celebrities, stories about individual fates and needlework.
- **Type 7: Family-Oriented Selective User**
  (total share : 18%, 12.34 million, average age : 46 years, proportion of women: 59%)
  People of this type display a behaviour of media usage below average with the exception of listening to the radio. They are reserved towards the internet. They are especially interested in reading about creative design and family topics.
- **Type 8: Uninterested Media Grouch**
  (total share : 7%, 5.03 million, average age : 50 years, proportion of men: 66%
  The poorly educated and low-income media grouch is neither fond of classical nor digital media. Only an interesting football match will draw him towards the TV screen.

Media compass

The media compass is used to assess the media affinity of any kind of target groups. It shows in which media categories or sub-categories certain target groups concentrate and helps to effectively support strategic planning.

Target group definition	Target group selection	Calculation	Comparison	Inter-pretation
Definition of an arbitrary target group	Selection of the suitable or desired target group	Programme calculates compass key figure of the media in this target group	Comparison of compass key figures of the media or of target group with the compass key figures of the basic target group	Interpretation: Index >100: target group affine to medium; Index < 100: target group less affine. Coloured areas show the affinity at one glance.

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Media Planning Programmes

mds Mediaplanungs-Dialog-System

- A media planning programme for PCs developed by Axel Springer.
- The user guidance is based on the planning process and guarantees that an effective and fast tool is available to marketing and media experts.

- Contact:
  Axel Springer Marktforschung
  Telefon (040) 347 22507
  mds-service@axelspringer.de

medi MACH

- Universal analysis and planning programme for evaluation of market/media analyses.
- Network-compatible version of Windows for custom-made survey evaluation and more
- Intuitive operation with Drag & Drop.

- Contact:
  COMsulting
  Gerhard Faehling GmbH
  Telefon (04503) 35350
  info@medimach.com

m CLOUD

- A web-based. Platform-independent media planning evaluation software (Print, Radio, TV, Online, Cinema, Poster) to analysis market data and a monitoring tool for content analyses and resonance data.

- Contact:
  IMMEDIATE Software für
  Marketing und Media GmbH
  Telefon (0421) 20 71 500
  info@immediate.de

Continuous Up-date of Coverages

Next Steps

Mid-January 2014	End of February 2014	September 2014
✚ Adjustment to the new ma 2014 Intermedia PluS (Online + TV)	✚ Adjustment to ma 2015 Presse I	✚ b4p 2015

! b4p is intermedia plus markets!

For ALL people, ALL media, ALL markets:
best for planning 2014 – ONE FOR ALL.

ONE FOR ALL.

Thank you for your attention.

gik Gesellschaft für integrierte Kommunikationsforschung

Gesellschaft für integrierte Kommunikationsforschung mbH & Co. KG

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